Consumer market Study on the functioning of voluntary food labelling schemes for consumers in the European Union EAHC/FWC/2012 86 04

Final report by the Ipsos and London Economics Consortium

Funded by
the European Union

Prepared by

London Economics

December 2013

This report was produced under the Consumer Programme (2007-2013) in the frame of a specific contract with the Executive Agency for Health and Consumers (EAHC) acting on behalf of the European Commission. The content of this report represents the views of Ipsos and London Economics and is its sole responsibility; it can in no way be taken to reflect the views of the European Commission and/or EAHC or any other body of the European Union. The European Commission and/or EAHC do not guarantee the accuracy of the data included in this report, nor do they accept responsibility for any use made by third parties thereof.

Tables, Figures & Boxes

Page

Tables, Figures & Boxes

Page

Tables, Figures & Boxes

Page

Tables, Figures & Boxes

Page

Tables, Figures & Boxes

Page

Tables, Figures & Boxes

Page

Abstract

This study provides an overview of the functioning of food labelling schemes in Europe and explores consumers' perception of food labelling schemes and the impact the schemes have on their purchase decisions.

Over 900 food labelling schemes were identified across Europe but the number of schemes and the way schemes are managed vary greatly by country. The majority of schemes found are certification schemes. Awareness of the 2010 Commission guidelines for voluntary certification schemes for agricultural food products and foodstuffs among scheme operators is currently not very high. The study shows that certification schemes adhere to the guidelines more often than self-declaration ones, in particular as regards provision and clarity of information. Improved transparency is a key driver for the adherence, whereas administrative burden and cost were identified as key obstacles.

Results show also that consumers are aware of food labelling schemes, they buy products affiliated to food labelling schemes, believe there are benefits to these products and to some extent are willing to pay a premium price for products with a logo or a claim. But consumer trust in the information shown on scheme labels and the level of understanding of this information are relatively low. Consumers lack knowledge about food labelling schemes and they would like to get more information, mainly on the packaging of the products.

Glossary

Member State abbreviations

BE	Belgium	LT	Lithuania
BG	Bulgaria	LU	Luxembourg
CZ	Czech Republic	HU	Hungary
DK	Denmark	MT	Malta
DE	Germany	NL	Netherlands
EE	Estonia	AT	Austria
EL	Greece	PL	Poland
ES	Spain	PT	Portugal
FR	France	RO	Romania
IE	Ireland	SI	Slovenia
IT	Italy	SK	Slovakia
CY	Cyprus	FI	Finland
LV	Latvia	SE	Sweden
HR	Croatia	UK	United Kingdom

Definition of Food labelling schemes

For the needs of the study, food labelling schemes are defined as those managed by various private or public organisations (such as groups of producers, retailers, NGOs, public authorities) to provide information to consumers about certain aspects of the food they buy or its production method. This is often in the form of a logo and / or a statement on the product that tells the consumer the food meets the standard of that scheme e.g. the food is produced in a certain geographic region, is organically produced, is good for the heart or has been produced in accordance to additional requirements relating to animal welfare. Food labelling schemes do not cover nutritional values, lists of ingredients, use by dates and should be distinguished from mandatory information about the country of production on certain products.

(This definition was provided to respondents in the consumer questionnaire)

Certification schemes: Schemes that rely on third-third party attestation procedure for its members. For the purposes of this study a third-party is a certification body that issues the certificate or statement on the fulfilment of the schemes requirements.

Self-declaration schemes: Schemes that do not have third party attestation. Adherence to these schemes is done by either a) the scheme operator (in the case where the operator is not a certification body), or b) declaration by the producer or retailer.

Umbrella food labelling scheme: A collection of food labelling schemes with similar characteristics.

Public food labelling schemes: Schemes that clearly state they are owned or managed by a public body.

Other abbreviations:

PDO: Protected Designation of Origin is a European Union scheme covering names of products that owe their characteristics exclusively or essentially to their place of production and the savoir faire of local producers. The agricultural product or foodstuff must have been produced, processed and prepared in a given geographical area using recognised know-how.

PGI: Protected Geographical Indication is a European Union scheme that covers names of products whose reputation or characteristics are linked to production in the geographical area. Agricultural products and foodstuffs closely linked to the geographical area. At least one of the stages of production, processing or preparation takes place in the area.

TSG: Traditional Specialty Guaranteed is a European Union scheme that covers product names that guarantee the traditional character, either in the composition or means of production. TSGs are not linked to any particular origin, they can be produced anywhere if the specification is followed..

VPF: Viande de Porc Française is an Origin labelling scheme indicating French pork meat.

AOC: Appellation d'Origine Controlée is a French scheme indicating a Protected Designation of Origin.

WTP: Willingness To Pay The amount of money someone is willing to give up in order to own a given product. It reflects the value (or utility) a consumer derives from consumption of a certain good. In the context of this study willingness to pay assesses how much more consumers would be willing to pay for products affiliated with food labelling schemes.

EU 27 + NO: In general the study covers all the countries except in the online survey and behavioural experiment where the 26 surveyed countries include all 27 EU Member States except Malta and Cyprus, plus Norway.

EU 27: Includes all 27 EU Member States except in the online survey and behavioural experiment where Malta and Cyprus are not included. The results for the sample with Norway (EU27+ NO) and without Norway (EU27) do not differ significantly.

EU15: The 'EU15' group refers to countries which joined the European Union before 1st May 2004. This includes Austria, Belgium, Denmark, Finland, France, Germany, Greece, Ireland, Italy, Luxembourg, Netherlands, Portugal, Spain, Sweden and the United Kingdom.

EU12: The 'EU12' group refers to countries which have joined the European Union after 1st May 2004. This includes Bulgaria, Czech Republic, Cyprus, Estonia, Hungary, Latvia, Lithuania, Malta, Poland, Romania, Slovakia, and Slovenia. The research was conducted before Croatia joined the European Union. In general the study covers all the countries except in the online survey and behavioural experiment where Malta and Cyprus are not included.

Executive summary

Introduction

This study aims at exploring to what extent food labelling schemes are present on food products, are complying with relevant provisions of the Unfair Commercial Practices Directive (UCPD)[1], are in line with the guidelines for voluntary certification schemes for agricultural food products and foodstuffs issued by the European Commission in 2010 [2] and provide consumers with transparent and reliable information. The study also aims at providing a better understanding of the way consumers perceive food labelling schemes and the impact the schemes have on their purchase decisions.

Different methodologies were used to gather the necessary information to achieve the study objectives:

- **A websweep**: The websweep consisted of putting together a database listing all the food labelling schemes in the EU 27 countries, Norway and Iceland, which could be found online. Each scheme was assessed against a list of criteria based on the 2010 Commission guidelines and UCPD requirements.
- **Indices of compliance** have been created based on the results of the websweep to better analyse how the identified schemes perform relative to the 2010 Commission guidelines. Schemes were scored according to how many recommendations of the guidelines they fulfil from the ones that were checked.
- **Stakeholder interviews** were conducted with consumer watchdogs, consumer protection authorities, farmer associations, food producer organisations, retailer organisations and certification and accreditation bodies.
- **Scheme operator survey** was sent to each scheme identified in the websweep to gather additional information on the scheme and to better assess their performance against the 2010 Commission guidelines and the UCPD.
- **An online consumer survey** was conducted among EU27 countries (except Malta and Cyprus) plus Norway to assess consumer awareness and perceptions of food labelling schemes.
- **A behavioural experiment** was included in the consumer survey to measure willingness to pay for products affiliated to food labelling schemes.
- **A virtual online shopping exercise** involved shoppers visiting online grocery shops to check the food labelling schemes that were included on certain products.This was conducted in five countries (France, Germany, Denmark, Czech Republic and Poland). It supplemented the websweep in identifying schemes and helped evaluate market shares of products

[1] Unfair Commercial Practices Directive http://ec.europa.eu/justice/consumer-marketing/unfair-trade/index_en.htm

[2] EU best practice guidelines for voluntary certification schemes for agricultural products and foodstuffs; see http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=CELEX:52010XC1216(02):en:NOT

(Stock Keeping Units, SKUs) with different food labelling schemes for 15 product categories.

- **A web listening exercise** consisted of gathering comments and conversations from consumers taking place naturally online (in social media, forums etc..). It helped bringing context to some of the consumer survey results.

The consumer perspective has been applied throughout the study, and the data collection techniques used reflect this perspective.

Overview of food labelling schemes in Europe The websweep identified 901 voluntary food labelling schemes across the EU27 plus Iceland and Norway, and schemes that operate across the EU as a whole. The largest number of schemes identified in the websweep were in Spain (20% of all schemes were found in Spain), with Germany second (12.5%), and Italy, the Czech Republic, France, and Portugal having the next largest number of schemes (5.9% to 7.8% respectively). The majority of schemes identified were certification schemes (78%) whereas 18% were identified as self-declaration. For 3% of schemes identified it was not possible to determine which type of scheme they were.

The majority of voluntary food labelling schemes that we were able to identify using the websweep were found to be private schemes (65%).[3] However, there are large cross-country variations. In Bulgaria, Malta, and Romania all schemes found are public (there are eight schemes in total across these three countries), as are the majority of food labelling schemes in Spain, Hungary, Norway and Lithuania. The countries with the largest proportion of private schemes are Austria, Cyprus, Iceland, Latvia, the UK and Sweden. [4]

The products found to be most widely covered by voluntary food labelling schemes in Europe are meat and fruit and vegetables. Ten per cent of schemes identified in this study provided no information on products covered. Product and food processing, crop production and animal production were found to be the most common production processes covered by voluntary food labelling schemes assessed. Origin schemes were found to be most common policy area. A large number of regional origin schemes in countries such as Spain, Portugal and Germany have been identified. The most common combinations of schemes found are origin schemes covering meat products, followed by origin schemes for fruit and vegetables and wine and spirits.

Overall the websweep shows that there is a wide variety of voluntary food labelling schemes across Europe. The websweep provides an overall picture of voluntary food labelling schemes in Europe that are focused on consumers and would be considered a scheme from the consumer perspective. We believe that the websweep has successfully identified the majority of voluntary food labelling schemes in the EU. We recognise, however, that it is possible some schemes may not have been identified using this approach. This may have arisen because, for example, the scheme does not have a website, it did not appear using the search terms systematically applied within each country or it did not clearly meet the definition of a voluntary food labelling scheme used for the purpose of this study.

[3] The websweep was complimented by the virtual online shopping exercise and a desk based review of literature to identify food labelling schemes operating in Europe.

[4] Only one scheme was identified in Cyprus. Iceland there were 5 schemes identified and in Latvia 4 schemes were identified.

Assessment against EU 2010 Guidelines

As part of the websweep surveyors completed a checklist that assessed the identified schemes against the 2010 Commission guidelines. In addition the scheme operator survey also included specific questions that were used to assess the relevant aspects of the schemes' performance. Four indices have been generated:

- A combined index that brings together assessments completed by the websweep surveyors and the scheme operators. This index assessed all schemes whose operators responded to the scheme operator survey against all requirements of the guidelines that could be tested using the websweep and survey methods;
- A websweep index that assessed all schemes against those guidelines that could be assessed using the websweep methodology;
- A websweep consumer index that assessed all schemes against those guidelines that could be assessed using the websweep plus additional questions regarding issues important to consumers;
- A combined index that again brings together assessments completed by the websweep surveyors and the scheme operators, but in this case only applies those requirements of the guidelines that could be reasonably met by self-declaration schemes.

The criteria for each of the indices is provided in Annex 6.

The average scores across all schemes assessed using the different indices shows that for the combined index, schemes score on average 58%, indicating that schemes meet over 50% of the requirements for this index. For the websweep index, schemes on average receive a score of 48%, and for the websweep consumer index and the combined self-declaration index average scores (in both) is 54%.

Bulgaria, the Czech Republic and the Netherlands consistently scored well on all country level indices. There is an overall pattern across all indices that self-declaration schemes perform worse than certification schemes. There is no difference in performance across the EU 12 and EU 15 country groupings.

Consumer understanding and perception of food labelling schemes

Awareness of different types of labelling schemes: The majority of the surveyed respondents are aware of at least one type of food labelling scheme. The most often known schemes are organic labels, health benefits and allergen free labelling schemes. On average they have seen over 6 types of food labelling scheme from the 15 they were presented. However, consumer bodies and the majority of producer, farmer and retailer associations who responded to the stakeholders' survey think that consumers in general know less than 25% of the food labelling schemes in their countries. Most of the surveyed stakeholders also strongly believe that consumers do not distinguish between public and private schemes. Additionally, in the consumer survey, 14% of respondents answered 'don't know' when asked whether they trusted self-declared schemes and 13% when asked about 3rd party certified schemes, showing some unfamiliarity with these concepts.

Understanding of scheme labels: There are some issues with understanding of labels showing affiliation to a scheme. Four in ten respondents say they have difficulty understanding these labels and a third say they find logos and symbols on scheme labels confusing. Half of respondents think there is not enough information on scheme labels but about the same proportion think that the text on these labels is already too small to read which can look somewhat contradictory. Some confusion and uncertainty on the interpretation of the meaning of labels showing affiliation to a scheme can also be observed, especially for the label showing affiliation to a health scheme, which is given various meanings across Europe and which is the label the most likely to be seen as for advertising purpose only.

Knowledge about food labelling schemes: Lack of knowledge about food labelling schemes is also an important issue. More than two thirds of respondents recognise they do not know enough about food labelling schemes. Additionally, when looking at actual knowledge about scheme certifications and scheme requirements, the level of 'don't know' responses is high. Those who give an answer seem more familiar with issues related to requirements of schemes rather than certification of schemes. However consumers tend to believe that, in general, regulations and requirements for all food labelling schemes are stricter than in reality, whereas only certain areas are highly regulated, such as organic farming[5] or nutrition and health claims[6].

Information on food labelling schemes: The lack of knowledge can be partly explained by the difficultly respondents say they have in finding information about food labelling schemes (over half think it is not easy). The vast majority would like to obtain information about food labelling schemes on the packaging itself. In terms of media, internet is their preferred way to look for information. Additionally, about one in ten respondents would be interested in using an app on their smart phone to obtain information about food labelling while shopping.

Perceptions of scheme labels: Consumer trust in food labelling schemes is mixed. Just over half of surveyed consumers say they trust information on scheme labels. However, a third say that they do not. Declared trust in third party certified schemes is much higher than trust in self-declaration schemes. However, as mentioned above, actual knowledge of the different types of schemes is limited and there are some limitations on consumer ability to distinguish between certification and self-declaration schemes. It is also worth noting that respondents who do not trust food labelling schemes are more likely to find scheme labels hard to understand, to think logos or symbols on these labels are confusing, that the size of the print or text are too small to read and to think these labels showing affiliation to schemes do not give enough information.

In line with trust, a third of respondents tend to think labels showing affiliation to a scheme are misleading while only a quarter believe information on these labels is truthful. Opinion is also divided on whether schemes help people make informed choices. While 29% think scheme labels help people make informed choice, 21% think they do not.

---

[5]Council Regulation (EC) No 834/2007 of 28 June 2007 on organic production and labelling of organic prodcust and repealing Regulation (EEC) No 2092/91; http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:L:2007:189:0001:0023:EN:PDF

[6] Regulation (EC) No1924/2006 on nutrition and health claims made on foods; http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=CONSLEG:2006R1924:20080304:EN:PDF

However while some consumers doubt the usefulness and truthfulness of information they find on scheme labels, there are more respondents who think scheme labels provide important information rather than being just a means of advertising.

Similarly, consumers tend to perceive products affiliated to a food labelling scheme as being of better quality, healthier and safer to eat. Views on whether products affiliated to food labelling schemes taste better are more mixed.

Purchasing behaviour: Overall, four in ten respondents say they buy products affiliated to a food labelling scheme most of the time or often. Only 3% say they never buy these types of products. Of the six products assessed, eggs have the highest proportion of respondents saying they take food labels into account when buying it, followed by minced beef and chicken. In comparison with other factors influencing food purchases, food labels lie in forth position for beef, eggs and chicken after use by date, price and country of origin. For cheese, it is the seventh most commonly mentioned factor but for margarine and yoghurts it seems least important.

While a third of respondents think products affiliated to labelling schemes are expensive around the same proportion feel they are good value for money. Many respondents are neutral on this point.

Willingness to pay for food labelling schemes

A behavioural experiment was used to determine how much more the average consumer is willing to pay for food products with a logo or text showing affiliation to a food labelling scheme and to examine what socio-economic characteristics are most closely associated with purchasing products affiliated with a food labelling scheme. In particular, three types of food scheme labels were analysed:

- Animal welfare scheme labels were tested on chicken fillets and eggs;
- Origin scheme labels were tested on minced beef and cheese; and
- Health scheme labels were tested on yoghurt and margarine

The experiment showed that on average consumers are willing to pay the highest price premiums for origin and animal welfare scheme labelled products.

Results from the behavioural experiment, indicate that respondents are more likely to pay a premium price for minced beef and cheese with an origin scheme label and for chicken and eggs with an animal welfare scheme label than they are for margarine and yoghurt with a health scheme label.

Considering average willingness to pay for products affiliated with a food labelling scheme across all countries included in the behavioural experiment, for minced beef the average willingness to pay a premium for the origin scheme label, as a percentage of the base price, was 30% and for cheese it was 24%. Chicken and animal welfare scheme logos commanded a 23% premium and for eggs it was 26%. Health scheme labels on margarine on the other hand only commanded a premium of 19% and on yoghurt only 19%.

The table below presents average willingness to pay for each of the countries included in the behavioural experiment as a percentage of base price.

Table 1: Willingness to pay - overview (combined average for logo and text scheme labels), as a percentage of base price

	Health		Origin		Animal welfare	
Country	**Yoghurt**	**Margarine**	**Minced beef**	**Cheese**	**Chicken**	**Eggs**
Austria	0%	5%	32%	28%	22%	28%
Belgium	10%	14%	23%	17%	22%	25%
Bulgaria	81%	49%	36%	47%	26%	32%
Czech Republic	15%	17%	33%	19%	17%	21%
Denmark	9%	0%	22%	17%	22%	29%
Estonia	15%	15%	22%	20%	9%	8%
Finland	21%	24%	24%	18%	18%	24%
France	0%	7%	38%	27%	24%	28%
Germany	0%	0%	30%	11%	25%	29%
Greece	27%	26%	36%	25%	27%	25%
Hungary	19%	23%	23%	21%	17%	18%
Ireland	17%	17%	28%	16%	20%	24%
Italy	16%	21%	43%	44%	34%	41%
Latvia	21%	23%	30%	23%	15%	15%
Lithuania	13%	15%	31%	21%	17%	18%
Luxembourg	0%	0%	45%	38%	37%	48%
Netherlands	17%	16%	13%	12%	17%	20%
Norway	16%	22%	18%	16%	14%	18%
Poland	29%	30%	30%	23%	26%	30%
Portugal	26%	25%	26%	29%	23%	21%
Romania	43%	37%	44%	41%	42%	49%
Slovakia	29%	31%	32%	25%	25%	27%
Slovenia	20%	27%	24%	25%	20%	23%
Spain	18%	28%	34%	22%	27%	30%
Sweden	13%	13%	36%	22%	32%	33%
UK	14%	14%	23%	15%	26%	25%
Total	19%	19%	30%	24%	23%	26%

Note: Where highlighted the willingness to pay is not statistically significant at the 10% level.
Source: Consumer survey

In terms of socio-economic characteristics, it emerged that women were more likely to pay a premium for any of the three types of food scheme labels tested. Respondents with higher incomes and older respondents were more likely to pay a premium for products affiliated with an origin and animal welfare food labelling scheme, however not for health scheme labelled products. Vegetarians were more likely to pay a premium for animal welfare scheme labelled products, however not for the other types of scheme labels considered.

Differences by country and socio demographic groups

Throughout the survey, differences can be observed between countries from the EU15 and the EU12 group. Respondents from EU15 countries are generally aware of more schemes than those from the EU12 countries and tend to find labelling schemes more difficult to understand and more confusing. Perhaps this can be explained by a larger number of existing schemes in the EU15 countries. Consumers surveyed in EU12 countries tend to trust more information shown on scheme labels, are more likely to believe products affiliated to food labelling schemes are better quality, healthier, safer to eat and taste better. They are much more likely to think labelling scheme help people make informed choice. Beyond EU12 and EU15 differences, the study often observes significant differences between individual countries.

Some socio-demographic differences are also clearly observable. For example, age influences respondents' perceptions and attitudes toward food labelling schemes. The middle age group (35-64 year olds) are aware of fewer schemes than both younger people (18-34) and those aged 65 or over. They also tend to be less sceptical than the youngest and the oldest age groups when interpreting scheme labels or in their perception of scheme regulations. Respondents with lower education and those finding it 'difficult' or 'very difficult' to live on their current income are less likely than those 'living comfortably' to be suspicious about the role of the food labelling schemes and to say they are for advertising only. Households including a vegetarian or someone with a food allergy tend to be aware of more food labelling schemes. Households with a food allergy sufferer are more likely to take labelling schemes into account in the food they buy. Households with vegetarians are also much more likely to say they buy products affiliated to a scheme frequently.

Considering that the proportion of older respondents and the proportion of consumers 'living comfortably' are much higher in the EU15 group than in the EU12 group, the socio-demographic differences observed in the results can partly explain the differences seen between countries.

Conclusions and recommendations

Functioning of labelling schemes:

The study has identified a large number of food labelling schemes across the EU Member States, Iceland and Norway but with important country variations. The study identified Spain, Germany, Italy and Portugal as the countries with the highest number of schemes while Romania, Cyprus and Malta were found to have a very limited number of food labelling schemes.

The study also found large variations in the way schemes are managed. Awareness of the 2010 Commission guidelines among scheme operators seems currently low and when assessed against the 2010 Commission guidelines, certification schemes tend to meet more guideline requirements than self-declaration schemes. Increasing transparency and minimising consumer confusion seem to be the key drivers for schemes to follow the guidelines while lack of awareness, administrative burden and cost of compliance were identified as key obstacles for compliance.

The guideline criteria most often met by food labelling schemes that were identified in the websweep were provision of contact information and/or feedback mechanisms on scheme websites (guideline 4.8) for which 100% of schemes met this criterion. Clarity and transparency of scheme requirements and claims made was also met by a large number of food labelling schemes (guideline 5.1, and constituent parts). Here we observe that between 91% and 82% of schemes clearly state their objectives; between 79% and 73% have claims and requirements which are clearly linked to their stated objectives, and similarly the scope of the scheme in regard to the products and process it covers are clear. However, when seeking more detailed information on scheme requirements and specifications this is not always available for free on the website. Only 59% of schemes met this criterion (guideline 5.1(4)) in the websweep index. Further, when these specifications are available they can often be difficult to understand from the point of view of a consumer (guideline 5.1(6)).

Other criteria that received a low score on the index include guideline 5.2, which relates to the evidence base of scheme claims and their requirements. Here we find scores between 16% and 21% (guideline 5.2(1)) indicating that it is not always clear to the consumer if the scheme is based on objective and verifiable evidence; and, where these claims may be made, the documents are not always available on the websites for the consumer to download and review. Similarly guideline 5.2(2) returned low scores at 40% for the combined index indicating that where schemes operate in more than one country, few schemes specifically adapt to the local conditions. Further, for guideline 5.2(3) compliance scores range between 27% to 24% which indicates that schemes do not always clearly indicated whether, where and to what extent their specifications go beyond the relevant legal requirements.

In regard to guideline 6, recommendations regarding certification and inspections we also observe some low compliance scores. In particular, low scores arise for guideline 6.2(1) indicating that scheme websites do not always provide clear and documented procedures for inspections of scheme participants. However, of course these may be available upon request from the scheme (the guideline does not require that these documents are available on the website necessarily). We also observe low compliance (between 23% and 35%) for guideline 6.2(5) indicating that guidelines, checklists and plans for scheme inspections are not always publically available. Likewise low compliance scores are observed for guideline 6.3(1) in regard to publically available membership fees and fees for certification (21%). Guideline 6.5 relates to small scale producers and here we find that few schemes have specific provisions for enabling and promoting the participation of small scale producers (35%).

These guidelines are of a voluntary nature and were developed in cooperation with stakeholders, in particular the DG AGRI Advisory group on the quality of agricultural production. Raising awareness of the 2010 Commission guidelines as well as applicable legislation amongst consumer organisations and industry associations for producers, farmers and retailers would potentially increase compliance with the guidelines, and promote the benefits of compliance amongst stakeholders. Promotion of the guidelines could be done initially at the EU level through the European Food Information Council (EUFIC), EU-level farmer, producer and retailer associations, and the BEUC (the umbrella organisation for national consumer associations).

An important recommendation would be to encourage schemes to provide information on their websites about their requirements, their specifications and their membership fees, and fees for certification, in a form that is easy to understand for all relevant actors, including consumers. This would help improve compliance of schemes against the 2010 Commission guidelines.

In addition, encouraging schemes to provide information on the evidence used to make any claims about scheme requirements easily available on their websites, (again) in a form that is easy to understand for all relevant actors, including consumers is recommended. To improve transparency, a recommendation would be to encourage schemes to clearly state whether, where and to what extent their specifications go beyond the relevant legal requirements.

Provisions for enabling and promoting the participation of small scale producers could also be explored as this was met by a low proportion (35%) of schemes that responded to the scheme operator survey.

Further, clearly stating that the scheme is public or private and whether it is certified or self-declared would be useful for consumers as this information is often hard to find on scheme websites. While not specifically addressed in the assessment of schemes, the provision of a web address on the scheme label affixed to the product may also help consumers as they could then easily find additional information on the scheme if they want.

Methods to minimise the administrative burden and costs for producers and scheme operators in complying with the guidelines could also be explored.

Consumer understanding and behaviour towards schemes:

Overall, results of the consumer survey show that consumers are aware of food labelling schemes, they buy products affiliated to food labelling schemes, believe there are benefits to these products and to some extent are willing to pay a premium price for labelled products. But consumer trust in the information shown on scheme labels and the level of understanding of this information is not always high. The lack of knowledge about food labelling schemes is a key issue and consumers would like to get more information about food labelling schemes, especially on the packaging of the products.

EU15 respondents are more sceptical toward food labelling schemes than EU12 respondents who may be particularly trusting. EU15 countries are quite mature markets with an abundance of food labelling schemes on products which can perhaps lead to some confusion. Labels showing affiliation to schemes have been introduced decades ago and a number of food scandals (for example the recent horse meat scandal), may have also increased caution towards these labels among the general population.

However, the high level of trust and low level of knowledge of labelling schemes observed among the EU12 respondents, may make them more likely to be misled by food labelling schemes. Considering that it was also found that Southern and Mediterranean countries (including many of the EU12 countries) tend to be more willing to pay extra for products with a scheme logo or text, they could be particularly vulnerable to deceptive labelling schemes. The low number of schemes in some of these countries for the moment is probably limiting the issue but if the number of schemes should increase in the future in these countries, this could become a more important risk.

Providing consumers with more and better accessible information on the different types of labelling schemes and the meaning of the most common ones, as well as educating them through, for example, an information campaign would be a good way of reducing this risk.

Improved information provision, information campaigns or educational initiatives could help consumers distinguish between the different types of schemes, in particular between certified and self-declared or between public and private. This could also increase their knowledge of regulations for schemes and help them make more informed choice. A database that is easily accessible or other internet-based tools could also help consumers to quickly inform themselves about the key characteristics of a specific scheme. This database could include a description of a scheme considered as best practice which could be a benchmark to check whether other schemes fulfil the same key requirements of the 2010 Commission guidelines and other relevant rules.

The existing scepticism toward food labelling schemes and the problems with understanding what they mean (especially among the older respondents) seem to call for more transparency from the labelling schemes and more clarity on the scheme labels.

Most respondents would like to see more information on the scheme labels themselves and think adding information on the packaging of products is the best way of communicating information to them. This would help consumer understanding of schemes and reduce the proportion of those thinking they are misleading. However it is important to consider the size of the text/print on the scheme labels which appear to be problematic currently, especially for the older respondents. One way to give access to more information on the scheme labels themselves, and limit too much small print, could be to include the web address of the scheme on the scheme label presented of the product. A clear indication on the scheme label about whether the scheme is public or private (where it is possible to qualify clearly), certified or self-declared could also be an easy way of increasing scheme transparency without adding a lot of text on the label.

To improve understanding and access to information about food labelling schemes for all interested parties, a model scheme could include the following key elements.

- Clear statement of the scheme name and website address on the label affixed to the product.
- Website with scheme contact details.
- Statement of the scheme objectives and the types of products and process it covers.
- Clear statement of the organisations or bodies that own and manage the scheme, including their contact information.
- If the scheme is endorsed by third parties, the names and contact details of the parties should be provided.
- Clear statement of whether the scheme is public or private, and certified or self-declared.
- If a certified scheme, the name of the certification body should be provided and clear and transparent information on the key certification processes and requirements for non-technical readers should be available.
- If the scheme covers areas where there are specific legal requirements, such as organic farming or animal welfare this should be clearly stated, and the extent to which the scheme goes beyond the relevant legal requirements should be understandable to non-technical audiences.
- Provision of clear guidance on how to meet the scheme main requirements for parties interested in joining the scheme. Contact details, question forms or other mechanisms to access assistance with understanding and meeting the requirements for membership should be available.

1 Introduction and background

1.1 Objectives of the study

The objective of the study is to explore to what extent voluntary certification schemes and self-declaration schemes are present on food products, are compliant with the Unfair Commercial Practices Directive 2005/29/EC[7], and in line with the Commission best practice guidelines for voluntary certification schemes for agricultural products and foodstuffs[8] and provide consumers with transparent and reliable information. The study aims to also provide a better understanding of the way consumers perceive such schemes and the impact these have on their purchasing decisions.

In particular, the study uses as a benchmark the requirements set out in the Commission guidelines for voluntary certification schemes from 2010. These requirements, although voluntary in nature and developed specifically for schemes that employ third-party certification, contain criteria that could be generally applied to any type of scheme that markets food products including self-declarations schemes. The performance of the labelling schemes will also be assessed against relevant requirements of the Unfair Commercial Practices Directive.

Two broad areas are addressed by the study:

- I. Provision of an overview of the functioning of labelling schemes including the generation of a database of identified existing certified and self-declared voluntary food labelling schemes, assess the performance of these schemes and identification of the main drivers and obstacles for food scheme operators to comply with the voluntary guidelines, and the identification of schemes that can serve as best practice.
- II. Consumer understanding and behaviour towards schemes including consumer trust of food labels, the impact of schemes on consumers' perception of products and consumers' behaviour and willingness to pay for products belonging to a scheme.

Twenty nine European countries are included in the study, Austria, Belgium, Bulgaria, Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Iceland, Ireland, Italy, Latvia, Lithuania, Luxembourg, Malta, Norway, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, Sweden, the Netherlands and the United Kingdom.

1.2 Methodology

1.2.1 Consumer survey

The consumer opinion survey was an online survey including a consumer questionnaire and a behavioural experiment. The main objectives of this survey were to understand how consumers

Unfair Commercial Practices Directive http://ec.europa.eu/justice/consumer-marketing/unfair-trade/index_en.htm

[8] EU best practice guidelines for voluntary certification schemes for agricultural products and foodstuffs; see http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=CELEX:52010XC1216(02):en:NOT

perceive food labelling schemes and the impact of these schemes on their purchasing decisions. The survey was run in 26 European countries and 19,260 interviews were completed.

Fieldwork took place between the 8th and the 29th May 2013. The survey was conducted among household main grocery shoppers. The same questionnaire and experiment were used across the 26 countries and data was weighted to ensure each country was proportionally represented among the total population of the surveyed countries.

Country coverage

The consumer opinion survey was conducted in 26 Countries using online panels. EU27 countries except Malta and Cyprus, plus Norway were included in the survey. Iceland was not included.

Malta, Cyprus and Iceland were not included because the population size in each of these countries is too small to support an online panel without serious bias. For example in Malta around 1 in 30 of the target population would need to be on the panel in order to make this viable given normal response rates. A telephone approach was considered in these countries but it was decided not to pursue this as it would not allow the experiment to be conducted.

Pilot

A pilot study was conducted to test the length of questionnaire and to identify if respondents had any difficulties completing the experiment. The pilot was run in the UK as the master documents were designed in English. Additional questions were added to the end of the survey to gather respondents' feedback on whether they had any difficulty responding to any part of the survey/experiment and whether they found the survey interesting and relevant to complete.

A total of 50 pilot interviews were completed between the 22nd and the 25th March 2013 using the Ipsos online panel in the UK. Quotas were set on age, gender and region (based on the main shopper population aged 18 years old or over) to ensure a range of respondents took part in the survey.

The average length of the pilot questionnaire was 17 minutes; two minutes longer than had been budgeted for. However, as this included the three feedback questions it was agreed that only two questions needed to be deleted from the draft questionnaire. One asking respondents whether they had any particular religious or spiritual beliefs that influence their food choices (e.g. halal, kosher) was removed as this was likely that the base size in this subgroup would have been too small for analysis. The statement 'Third party organisations that certify schemes have to be independent' was also removed as its pattern of response was similar to another statement in the same question and it was agreed that these two items had a similar meaning for respondents and therefore only one statement was required.

Two modifications were made on the experiment after the pilot:

- For the main survey the prices for minced beef, cheese and yoghurt were revised to reduce the intervals.
- The only other modification that was decided was to rotate the combinations on the left and right of the screen so the higher price was not always shown to respondents on the same side of the screen.

The feedback from the pilot respondents was positive. No-one reported any question to be particularly difficult to answer and respondents tended to find the survey interesting and enjoyable.

Translation

After changes from the pilot were agreed and all the materials from the survey were signed off, the questionnaire and experiment were translated in the local language(s) of each country.

Unique 'country and language' versions were produced. Below is the list of countries with their corresponding language(s):

Table 2: Country and language

Country	Language
Austria	German (Austrian)
Belgium	French (Belgium)
Belgium	Dutch (Belgium)
Bulgaria	Bulgarian
Czech Republic	Czech
Denmark	Danish
Estonia	Estonian
Finland	Finnish
France	French (France)
Germany	German (Germany)
Greece	Greek
Hungary	Hungarian
Ireland	English
Italy	Italian
Latvia	Latvian
Lithuania	Lithuanian
Luxembourg	Luxembourgish
Luxembourg	French (LUX)
Netherlands	Dutch (NL)
Norway	Norwegian
Poland	Polish
Portugal	Portuguese
Romania	Romanian
Slovakia	Slovakian
Slovenia	Slovenian
Spain	Spanish
Sweden	Swedish
UK	English

Panels

The main stage fieldwork was conducted online in all countries using Ipsos' online panels. In some countries Ipsos' panels were supplemented with partner panels, either due to Ipsos not currently having a panel in that country or where the Ipsos panel was too small to achieve the target number of interviews. The management of the online fieldwork was centralised within the Ipsos Interactive Service Bureau (IIS). All the work conducted by IIS is managed centrally, with one scripting, data collection and data delivery process.

All panel partners were chosen based on the availability and quality of their panels, and their ability to implement the survey according to the quality principles and guidance from Ipsos. All selected polling institutes are well known for the quality of their network and are involved in numerous multilingual and multinational surveys. All are ESOMAR members. The same script is used by all panel partners. The table below shows the countries where we used external panel(s):

Table 3: Country and panels

Country	Panels
Austria	1 external panel
Bulgaria	1 external panel
Czech Republic	Ipsos Panel + 1 external panel
Denmark	Ipsos Panel + 2 external panels
Estonia	1 external panel
Finland	Ipsos Panel + 2 external panels
Greece	1 external panel
Ireland	1 external panel
Latvia	1 external panel
Lithuania	1 external panel
Luxembourg	1 external panel
Norway	Ipsos Panel + 2 external panels
Portugal	Ipsos Panel + 1 external panel
Romania	Ipsos Panel + 1 external panel
Slovakia	1 external panel
Slovenia	1 external panel

Sample

The target audience was adults aged 18 or over who are the main grocery shopper in their households. To ensure the sample in each country was representative of this group we set quotas on age, gender and region.

In 10 countries, quotas for main grocery shoppers were generated. A nationally representative sample was drawn and demographic information about main shoppers was recorded. This was possible for countries where the panels included demographic information as well as whether respondents were main shoppers.

For the other countries, as no official statistics exist and the information was not already available from the panels, main grocery shoppers were identified from initial launch to all panellists (around

20% of the total target sample) and the profile of these used to set quotas for the remainder of the sample.

Although the target was respondents aged 18 or over, in some countries the online panel could not guarantee to achieve quotas on respondents aged over 50, 55, 60 or 65 because the number of panellists in these groups were limited. This was mainly the case in countries where the online penetration is still low with older people. In these countries, we first set up quota on age, gender and region based on the feasible population and we then included the number of interviews possible to complete with the older age group. So, for example, in Romania the panel could only guarantee quota on 18-55 years old. So we first set up quota on 18-55 and then we looked at how many interviews were feasible to achieve with people aged over 55 in Romania. Based on the number of panellists available it was estimated that we could achieve 60 interviews with people aged over 55 in Romania so this is the target we set up in this country. Invitations were sent to all available sample aged 55 or over. The other age group quotas were re-adjusted so we could include at least some people aged over 55.

In some countries quotas were only set on age and gender because quotas on regions could not be guaranteed by the panel. However the proportion of respondents from each region was monitored against the national statistics to ensure a representative sample was achieved.

As is normal in the majority of quota based sampling 'soft' quotas rather than hard quotas were set. That is, some flexibility was permitted in order to be able to achieve the defined sample size in a reasonable amount of time and within budget. This means some small differences can be found between the target quota and the achieved sample. For example, in Norway and Ireland the quotas on age and gender were relaxed at the end of fieldwork in order to achieve the overall sample size. However, in the majority of countries the sample achieved was very close to the targets.

The quotas set and the sample profile achieved in each country can be found in annex 9.

The minimum sample size per country was 500. In more populated countries this was increased to 800 and 1000 so the proportion of the population in Europe wide analysis is more representative of the size of the country.

The table below presents the targeted sample size and the number of achieved interviews per country.

Table 4: Sample size		
	Targeted	Achieved
Austria	800	801
Belgium	800	803
Bulgaria	800	801
Czech Republic	800	801
Denmark	500	500
Estonia	500	500
Finland	500	502
France	1000	1001
Germany	1000	1000
Greece	800	800
Hungary	800	803
Ireland	500	517
Italy	1000	1004
Latvia	500	500
Lithuania	500	501
Luxembourg	500	502
Netherlands	800	802
Norway	500	504
Poland	1000	1002
Portugal	800	806
Romania	1000	1002
Slovakia	500	501
Slovenia	500	498
Spain	1000	1004
Sweden	800	802
United Kingdom	1000	1003

Fieldwork

Fieldwork was completed between the 8th and the 22nd May, except Portugal where it finished on the 29th May. Countries were launched in batches (of 4-6 countries). The estimated time needed in field for each country varied depending on the panel capacity, the number of completed interviews to achieve in the country and expected response rates. Countries that needed longer in field were launched first to give them maximum time in field without delaying the project.

In the main fieldwork the average survey length was 20 minutes. This ranges from a high of 23 minutes in Bulgaria, 22 minutes in France, Luxembourg and Slovenia to 17 minutes in Norway. The table below shows interview length per country.

Below is a table showing fieldwork dates and interview length per country:

Table 5: Fieldwork dates and average survey time

	Fieldwork dates		Average interview length in minutes
	Start date	End date	
Austria	10-May	21-May	19
Belgium	14-May	22-May	20
Bulgaria	8-May	20-May	23
Czech Republic	9-May	22-May	21
Denmark	10-May	20-May	18
Estonia	9-May	22-May	20
Finland	13-May	21-May	20
France	13-May	20-May	22
Germany	13-May	20-May	20
Greece	8-May	16-May	21
Hungary	14-May	21-May	21
Ireland	10-May	22-May	19
Italy	13-May	22-May	21
Latvia	9-May	20-May	21
Lithuania	9-May	17-May	21
Luxembourg	15-May	22-May	22
Netherlands	13-May	22-May	19
Norway	13-May	22-May	17
Poland	14-May	22-May	21
Portugal	10-May	29-May	19
Romania	10-May	20-May	22
Slovakia	9-May	20-May	20
Slovenia	8-May	20-May	18
Spain	13-May	22-May	22
Sweden	13-May	21-May	21
United Kingdom	10-May	22-May	18

Weighting and outputs

Data was weighted to ensure each country was proportionally represented in the European population of the surveyed countries in the total results. A table showing the weights applied for each country can be found in Annex 8 of this report.

Data were not weighted by demographic variables within country for two reasons:

- In the majority of countries the sample achieved was very close to the targets that were set.
- No official statistics on main household shoppers existed to generate the weights.

As explained in the sampling section, quotas were set based on information from the panels or based on respondent profiles from the soft launch. While these quotas provided an indication of the sample profile they were not exact statistics and could not be used for weighting.

Two sets of tables were provided:

- One set with crossbreaks including all the countries and
- One set with socio-demographic crossbreaks at total level

A fully labelled SPSS file with all the variables of the survey and experiment was also provided to the contracting authority.

1.2.2 Behavioural experiment

The behavioural experiment was run in conjunction with the online consumer survey.

Participants were asked to choose one of two products offered to them. Choices varied by type of product, whether or not the product carried a label affiliated with a food labelling scheme[9] and by price. By observing participants' choices across different product/food scheme label/price combinations, it is possible to estimate their willingness to pay for various food scheme labels and how the design of the food scheme label affects consumer choice in the various product categories.

Types of food scheme labels and products tested

The following scheme label/product combinations were used in the experiment:

- Health scheme labels on yoghurt and margarine
- Animal welfare scheme labels on chicken fillets and eggs
- Place of origin scheme labels on minced beef and cheese

[9] The food scheme labels used in the experiment were generic, and did not represent a specific operating scheme. This was done to remove respondents' pre-conceptions of operating schemes which could not be known. Using generic food scheme labels allowed us to test the impact of including a food scheme label on a product and how it is presented on consumer decision making.

Each scheme label was tested in two different formats: one entirely text based and another in the form of a logo. The design of each of these logos along with the products on which they were tested is outlined in detail below.

In addition to the individual scheme labels, we also assessed the effects of including the following combined logos on eggs:

- Origin + health + animal welfare
- Origin + health
- Origin + animal welfare
- Health + animal welfare

Logo designs

The following logo designs were used

Animal welfare | **Health** | **Place of origin (example)**

The place of origin logo was adapted for each country included in the experiment, but was always a map of the country together with the flag of the country and the text “Produced in [COUNTRY]”. All text used in the above logos was translated into the local language.

The text based format of each scheme consisted only of the text itself, without the accompanying visuals. The text based scheme labels were therefore “Animal welfare approved”, “Good for your heart” and “Produced in [COUNTRY]”.

Food scheme label and product combinations

Table 6 below summarises all the individual logo and text combinations and Table 7 summarises the combinations of the combined logos used in the experiment.

Table 6: Individual scheme logo and product combinations

	Product	Policy area	Format to be tested
1	Minced beef	Origin	text vs no label
2	Minced beef	Origin	logo vs no label
3	Minced beef	Origin	text vs logo
4	Cheese	Origin	text vs no label
5	Cheese	Origin	logo vs no label
6	Cheese	Origin	text vs logo
7	Margarine	Health	text vs no label
8	Margarine	Health	logo vs no label
9	Margarine	Health	text vs logo
10	Yoghurt	Health	text vs no label
11	Yoghurt	Health	logo vs no label
12	Yoghurt	Health	text vs logo
13	Eggs	Animal welfare	text vs no label
14	Eggs	Animal welfare	logo vs no label
15	Eggs	Animal welfare	text vs logo
16	Chicken	Animal welfare	text vs no label
17	Chicken	Animal welfare	logo vs no label
18	Chicken	Animal welfare	text vs logo

Source: London Economics

Table 7: Multiple scheme logo and product combinations

	Product	Policy area	Format to be tested
19	Eggs	Origin+Health+Animal welfare	logos vs no label
20	Eggs	Origin+Health	logos vs no label
21	Eggs	Origin+Animal welfare	logos vs no label
22	Eggs	Health+Animal welfare	logos vs no label

Source: London Economics

Overall, there were 22 different product/scheme label combinations considered in the experiment. Each respondent was randomly allocated to 12 of these 22 different combinations so that overall the number of choices per product/scheme label combination was equalised. Vegetarians were not shown any chicken or minced beef products.

Prices

The price of the product carrying the food scheme label was randomly assigned one of five levels relative to the price of the product not carrying a food scheme label.

For meat products (minced beef and chicken) origin and animal welfare certified products are on average almost 20% more expensive than products not carrying these scheme labels.[10] Similarly, a

[10] Outcomes of the study of the functioning of the meat market for consumers in the EU. http://www.llkc.lv/upload_file/401466/Paulina%20Gbur_Outcomes_Kaunas%20[Read-Only]%20[Compatibility%20Mode].pdf

DG SANCO report from 2003 estimated the cost increase of moving from a cage system to a free range system is approximately 20%.[11] As a result, the price ranges in the experiment exceeded this threshold in order to elicit the maximum willingness to pay.

For origin scheme labelled products, the following price levels were used:

1) same price 2) 7% higher 3) 14% higher 4) 21% higher and 5) 28% higher.

However, after the initial pilot exercise it was decided to use different price levels for animal welfare scheme labelled products and products with a health claim as pilot respondents exhibited a higher willingness to pay for these scheme labels in the pilot. The price levels used for animal welfare and health scheme labelled products were:

1) same price 2) 10% higher 3) 20% higher 4) 30% higher and 5) 40% higher.

In those product/scheme label combinations where two types of food scheme labels were compared to each other (such as combinations 3, 6, 9 etc.), the higher price was allocated to the logo scheme labelled product. During the pilot exercise the higher price was randomly allocated to either the logo or the text scheme labelled product, but the findings demonstrated that consumers have a clear preference for logo scheme labelled products over text scheme labelled products. As a result, the experiment tested how much more willing respondents would be to pay for logo as opposed to text scheme labelled products.

Prices for food vary significantly throughout Europe[12] and it was therefore crucial to adapt the prices accordingly in each country. Table 8 below summarises the prices used as base prices for the various products in the experiment. These prices were taken from the Eurostat publication[13]. For chicken and minced beef, prices from the mystery shopping exercise of the meat market study were also used.[14] Not all prices were available for all countries; hence missing prices were interpolated using Eurostat data on relative price level indices of food products.

For Norway no Eurostat data was available. Therefore, prices in Norway were set to be 25% higher than prices in Sweden.[15]

[11] http://ec.europa.eu/food/animal/welfare/farm/socio_economic_study_revised_en.pdf

[12] http://epp.eurostat.ec.europa.eu/cache/ITY_OFFPUB/KS-SF-10-030/EN/KS-SF-10-030-EN.PDF.

[13] http://epp.eurostat.ec.europa.eu/portal/page/portal/hicp/documents_meth/PDMM/Consumer_prices_research_2012.pdf

[14] http://ec.europa.eu/consumers/consumer_research/market_studies/docs/mms_follow-up_study_2012_en.pdf

[15] This decisions was made on conjunction with EC DG SANCO and drawing from available information on the relative cost of living for example, http://www.numbeo.com/cost-of-living/compare_countries_result.jsp?

Table 8: Base prices in Euros for products in the experiment

	Minced beef (500 gr)	Chicken (500 gr)	Yoghurt (150 gr)	Margarine (250gr)	Eggs (10)	Cheese (250 gr)
Austria	3.17	5.60	**0.30**	1.05	2.58	2.05
Belgium	4.67	5.61	0.41	***0.96***	2.15	2.02
Bulgaria	***2.41***	2.55	0.16	***0.83***	1.17	***1.83***
Czech Republic	1.68	2.85	0.27	0.94	0.92	1.87
Denmark	***5.17***	***5.57***	**0.34**	***1.34***	***2.03***	***2.35***
Estonia	2.67	3.02	**0.26**	***0.99***	***1.57***	***1.81***
Finland	4.34	6.36	**0.34**	0.89	***2.01***	***2.32***
France	***4.42***	***4.76***	**0.29**	***0.84***	***1.73***	***2.00***
Germany	***4.64***	***4.99***	**0.27**	***0.84***	***1.61***	***1.86***
Greece	***3.47***	4.10	0.49	1.06	2.72	***2.64***
Hungary	***2.84***	2.63	0.27	1.08	1.12	***1.85***
Ireland	***4.24***	***4.56***	**0.35**	***0.87***	***2.07***	***2.39***
Italy	4.84	4.64	0.67	0.89	2.23	2.41
Latvia	***2.98***	***3.21***	**0.29**	0.75	1.17	***1.95***
Lithuania	2.29	2.47	0.39	0.73	1.09	***1.85***
Netherlands	2.27	3.62	0.12	0.73	1.69	1.74
Norway	***5.68***	***6.11***	**0.31**	***0.72***	***1.86***	***2.16***
Poland	1.52	2.00	0.24	0.61	1.11	1.18
Portugal	2.94	3.13	**0.31**	0.85	1.22	2.10
Romania	2.05	2.34	0.23	0.67	1.20	***1.91***
Slovakia	***2.92***	2.84	0.24	0.72	1.42	2.09
Slovenia	***3.45***	4.04	0.35	0.81	1.57	2.17
Spain	***3.12***	***3.35***	**0.28**	***0.72***	1.28	***1.90***
Sweden	***4.54***	***4.89***	**0.31**	***0.94***	***1.86***	***2.16***
United Kingdom	3.42	***3.68***	**0.29**	***0.85***	3.03	***2.01***

Note: Prices are taken from http://epp.eurostat.ec.europa.eu/portal/page/portal/hicp/documents_meth/PDMM/Consumer_prices_research_2012.pdf, the forthcoming Commission 'Consumer market study on the functioning of the meat market for consumers in the EU' 2012, and where prices were not available for countries these were Interpolated using Eurostat relative price indices of food products 2011. The interpolated prices are shown in bold.

Source: London Economics

1.2.3 Websweep

The purpose of the websweep was to provide an overview of voluntary food labelling schemes for consumers in the EU27 plus Iceland and Norway. The overview includes a database (provided a separate excel file to this study), that identifies the total number of schemes managed in each country and categorised these identified schemes according to key characteristics. These characteristics are:

- Certification or self-declaration schemes;
- Public or private;
- Types of products covered;
- Types of production processes covered;
- Policy areas covered;
- Number of umbrella schemes; and
- The type of owner or operator of the scheme.

In addition to the identification and catagorisation of schemes, the websweep was used to assess the compliance of identified schemes with the *EU best practice guidelines for voluntary certification schemes for agricultural products and foodstuffs*[16]*; and, the Unfair Commercial Practices Directive*[17]*.*

The websweep was completed by surveyors who are native speakers of the respective country language.[18] All surveyors were educated to university level. Each surveyor followed detailed instructions to complete the websweep. Instructions used by the websweepers can be found in Annex 3. All surveyors used the same search terms and all search terms were translated into the national languages. The websweep used the inventory done for the European Commission in 2010 as the starting point[19], however there are some important differences between the two inventories. Namely, the inventory included in this study covers only business to consumer schemes and not business to business schemes as the 2010 inventory did. This inventory adopts a consumer perspective, such that the schemes included are those that a reasonable consumer would perceive as a food labelling scheme. In this regard, the inventory includes PDO, PGI and TSG schemes that were identified by the surveyors. These schemes appear within the 'origin' and/or the 'traditional products or methods' policy areas[20] as consumers would perceive them as these types of schemes.[21] As such the two databases are not directly comparable.

The strength of the approach is that in using highly educated websweepers, we assess the schemes from an educated consumer perspective. As such, our websweepers place a higher degree of scrutiny to each scheme than the general consumer population may.

While detailed instructions were provided, and a sense check and audit were conducted of the results from the websweep, it is prudent to recognise the limits of such an approach. A websweep is an efficient way to identify and assess food labelling schemes across the 29 countries, the method is, however, open to subjective interpretation by the different websweepers, in cases where judgement calls must be made, where it was not clear if the scheme was focused on consumers, and it also identifies only the schemes that are present online.[22]

In addition to the websweep a virtual shop was completed in a set of countries The virtual online shopping exercise involved shoppers visiting online grocery shops to check food labelling schemes that were included on certain products. The exercise was conducted in France, Germany,

---

[16] http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:C:2010:341:0005:0011:EN:PDF

[17] http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:L:2005:149:0022:0039:EN:PDF

[18] Level V surveyors have a specific category definition within the Consumer Market Studies Framework: 'Member of personnel directly carrying out the fieldwork or coding/processing data obtained in the course of the study, including experimenters, interviewers, and surveyors'.

[19] See http://ec.europa.eu/agriculture/quality/certification/index_en.htm . This inventory identified 441 different schemes.

[20] The definition for origin schemes used in this study is the following: *There is an objective and exclusive link between the features of the product and its geographical origin. Further all stages of the production process must take place in the defined region. For example, ensure that the meat comes from the specified country and has not travelled around the world, or ensure that cheese come from a particular region and, because of that, possesses particular qualities*. The definition of traditional products or methods used in this study is: *The product has been made following a traditional procedure respecting some regional traditions for instance.* As such the definition used for traditional methods and procedures is broader than the Council Regulation (EC) No 509/2006 definition of Traditional Speciality Guaranteed.

[21] For example, http://www.totallytraditionalturkeys.com/tsg-mark/?ecd_opt_in_checkbox=on&ecd_opt_in_submit=Continue

[22] The websweep was however complimented with the virtual online shop and desk-based review of literature. As such there are a small number of schemes included in the database that in fact do not have a website.

Denmark, Czech Republic and Poland. France and Germany were included because of a large number of schemes. Poland and the Czech Republic were included to represent eastern and central European countries and countries which joined the EU recently. Denmark was included to represent Northern Europe. Romania was initially suggested as a country for this exercise but considering the very small number of existing food labelling schemes in Romania it was agreed to replace it with the Czech Republic.[23]

Amongst other objectives, the virtual shop was used to check if the websweep was systematically missing schemes. The virtual shop confirmed that the websweep methodology was not systematically missing schemes as all identified in the virtual shopping exercise were included using the websweep method. Five countries were included in the websweep: France, Germany, Denmark, Czech Republic and Poland.

France and Germany were included because of a large number of schemes. Poland and the Czech Republic were included to represent eastern and central European countries and countries which joined the EU recently. Denmark was included to represent Northern Europe. Romania was initially suggested as a country for this exercise but considering the very small number of existing food labelling schemes in Romania it was agreed to replace it with the Czech Republic. The virtual online shop is explained in further detail below in this section. The websweep was conducted between January and July 2013. The sense checking and audit was conducted during August 2013. During the auditing process we identified that some schemes had ceased to operate since the websweep and in other cases the schemes' websites had been moved, changed or merged with other schemes. The assessment of these schemes has not been changed as the assessment had been completed correctly against the websites in operation during the period January to July 2013. Where changes have occurred since the assessment this has been clearly documented in the accompanying database which has been produced as part of this study.

Websweep checklist

The checklist that was used to create the database and to assess compliance of voluntary food labelling schemes with the Unfair Commercial Practices Directive and fulfilment of the European Commission Guidelines is presented in Annex 4.

1.2.4 Stakeholder surveys

The objective of the stakeholder surveys was to gather stakeholder opinions on compliance of voluntary food labelling schemes with the Commission 2010 guidelines and the UCPD; the drivers and obstacles for scheme operators to comply with the guidelines; and, their overall views of the guidelines in terms of improving scheme transparency, avoiding consumer confusion, reducing the financial and administrative burden on farmers and producers, providing guidance on how to ensure compliance with EU internal market rules and principles of certification and the most important elements of the guidelines.

[23] The selection was also based on the number of online grocery shops available in the country. We made sure the exercise was conducted in countries were at least three online stores where available.

An online survey was conducted with following national stakeholders in each country:

- Consumer watchdogs
- Consumer protection authorities
- Farmer associations
- Food producer organisations
- Retailer organisations
- Certification and accreditation bodies

The questionnaires for the different stakeholders can be found in the Annex 13.

The number of completed questionnaires for each stakeholder type is shown in the table below. The figures in brackets show the number of questionnaires distributed in each country. The stakeholders were identified using a desk based review of relevant associations, bodies, government ministries and consumer protection authorities. The stakeholder list was also complimented with contacts provided by EC DG SANCO. In cases where the organisation contacted represented a number of individual organisations we requested the lead organisation to distribute the questionnaire to its members.

Table 9: Completed questionnaires to the stakeholder survey, by type of stakeholder			
	Accreditation and certification bodies	Consumer bodies	Producer farmer and retailer associations
Austria	(9)	1 (2)	2 (3)
Belgium	1(5)	(5)	4 (8)
Bulgaria	(11)	1 (5)	(6)
Cyprus	(3)	3 (7)	(5)
Czech Republic	3(4)	2 (7)	1 (4)
Denmark	(5)	1 (3)	(3)
Estonia	(3)	4 (9)	2(4)
Finland	1(4)	1 (4)	(4)
France	(7)	2 (5)	1(7)
Germany	2(24)	1 (2)	2(14)
Greece	(9)	1 (5)	(5)
Hungary	(3)	4 (7)	1(6)
Iceland	(1)	1 (2)	(3)
Ireland	(6)	1 (2)	1(3)
Italy	1(16)	1 (12)	1(7)
Latvia	(3)	(2)	1(5)
Lithuania	(2)	1 (6)	(6)
Luxembourg	1(5)	(2)	(7)
Malta	1(3)	1 (2)	1(2)
Netherlands	1(2)	(2)	1(5)
Norway	1(1)	1 (3)	(4)
Poland	1(12)	1 (3)	1(8)
Slovakia	2(2)	(4)	(3)
Slovenia	2(4)	(3)	(3)
Portugal	(8)	1 (5)	(4)
Romania	(18)	2 (5)	(7)
Spain	1(29)	(9)	(7)
Sweden	(5)	1 (3)	1(3)
UK	1(10)	2 (2)	6(6)
Total	**19 (214)**	**34 (128)**	**26 (149)**

In addition to these online surveys, three face-to- face consultations were conducted with the following EU level organisations:

- BEUC
- Eurocommerce
- European Food Information Council

1.2.5 Scheme operator survey

In addition to the stakeholder consultations and surveys, bodies owning, managing or operating schemes (referred to in the study as 'scheme operators') identified in the websweep were invited to complete an online questionnaire. The purpose of the scheme operator survey was to assess the drivers and obstacles for scheme operators to comply with the guidelines; and, their overall views of the guidelines in terms of improving scheme transparency, avoiding consumer confusion, reducing the financial and administrative burden on farmers and producers, providing guidance on how to ensure compliance with EU internal market rules and principles of certification and the most important elements of the guidelines.

In order to boost the response rate, telephone calls were made to all scheme operators in their native language reminding them of the survey and offering the opportunity to complete the questionnaire on the telephone in their national language. Where requested the questionnaire was translated into the respective national language and the operators had the option to complete a written questionnaire in their national language.

Table 10 shows the number of completed questionnaires in each country. A participation rate of just over 14% was achieved. 92 scheme operators provided responses. Two of these scheme operators operate more than one food labelling scheme.

Table 10: Number of responses to the scheme operator survey

Country	Number of responses
Austria	5 (36)
Belgium	10 (31)
Bulgaria	1(11)
Cyprus	0 (1)
Czech Republic	1 (23)
Denmark	2 (19)
Estonia	1 (9)
Finland	1 (12)
France	5 (25)
Germany	6 (72)
Greece	0 (14)
Hungary	0 (14)
Iceland	2 (3)
Ireland	1 (7)
Italy	5 (66)
Latvia	0 (4)
Lithuania	4 (8)
Luxemburg	0 (4)
Malta	0 (1)
Netherlands	3 (16)
Norway	1 (5)
Poland	5 (34)
Portugal	7 (54)
Romania	0 (0)
Slovakia	2 (13)
Slovenia	2 (9)
Spain	19 (120)
Sweden	2 (12)
UK	6(31)
TOTAL	92 (654)

Note: The figures in brackets show the number of invitations sent. The number of invitations often differs from the total number of schemes identified in the country. This is because in some countries such as the Czech Republic and Spain a large number of individual schemes are sub-schemes within umbrella schemes and there is only one contact address. In some cases schemes identified have no contact address. In others there is no website for the scheme.

1.2.6 Web listening

The web listening was conducted to provide some qualitative context to the study by identifying views of consumers that are not specifically prompted by a survey and occur naturally online. The exercise helped understand the importance of food labelling schemes for consumers. It also identified some of the main issues/concerns consumers have with food labelling schemes and the level of their possible confusion with regard to food labelling schemes.

A list of relevant words and phrases associated with food labelling schemes was compiled. A third party social media monitoring tool (Brandwatch) was used to search for online conversations including these terms. In each country of the sample surveyed, about 500 tweets, forum threads and blog posts were read.

This exercise was conducted in a sample of countries representative of the different geographical areas of the EU to ensure views of different populations and different cultures across the EU were covered.

The following countries were selected to represent the western, the southern, the eastern and the northern Europe: the UK, Spain, Poland and Sweden.

The monitoring covered six months of conversations from November 2012 to May 2013 except in the UK where only three months were covered. Due to limited content returned based on the search terms, this exercise should be viewed as primarily qualitative in nature.

1.2.7 Virtual online shopping

The virtual online shopping exercise involved shoppers visiting online grocery shops to check the food labelling schemes that were included on certain products.

- The objective of the online shop was to list the food labelling schemes appearing for a particular product category and to check whether any were more commonly present than others. This was used to help identify schemes that could have been missed in the web sweep and to contribute to evaluating the market share of different food labelling schemes. This includes the proportion of products with labels among all products available in a specific product category and the proportion of products with a specific label among all products with a label in that category (as identified as part of the online shopping exercise).

Country selection

The exercise was conducted in five countries: France, Germany, Denmark, Czech Republic and Poland.

France and Germany were included because of a large number of schemes. Poland and the Czech Republic were included to represent eastern and central European countries and countries which joined the EU recently. Denmark was included to represent Northern Europe. Romania was initially suggested as a country for this exercise but considering the very small number of existing food labelling schemes in Romania it was agreed to replace it with the Czech Republic.

The selection was also based on the number of online grocery shops available in the country. We made sure the exercise was conducted in countries were at least three online stores where available.

Online grocery stores selection

Three online shops were covered per country. This was to ensure the exercise covered as much as possible the range of products that could be found in real stores in the country. In some selected countries the number of grocery shops available online was also limited to three. All three online grocery stores in each of Germany, Czech Republic and Denmark were included in the exercise. In France and Poland, where there are more than three online grocery stores, three were selected for inclusion. Wherever possible different types of store were included; discount, mainstream, and premium stores.

The websites used in each country are presented below.

Country	websites
Denmark	www.SuperBest.dk (mainstream) ,www. Irmatorvet.dk (Premium) , www.Nemlig.com (mainstream
Germany	www.lebensmittel.de (mainstream), www.edeka24.de (mainstream/premium), www.bringmeister.de (mainstream)
France	www.ooshop.com Carrefour (Mainstream), monoprix (premium), leaderprice (discount)
Poland	www.auchandirect.pl (mainstream), www.e-piotripawel.pl (premium), ezakupy.tesco.pl (mainstream)
CZ	www.potravinydomu.cz (mainstream online only), http://nakuptesi.cz (mainstream online only), iTesco (mainstream)

Product selection

The selection of product categories was based on the following criteria:

- products that could be found in all countries
- the same products as in the online behavioural experiment for consistency
- products which have a large enough selection available on online grocery websites

The fifteen product categories selected were defined in detail to ensure consistency in the searches that the shoppers made:

- Chicken (excluding processed chicken): *including any fresh products such as whole chicken, chicken thighs, wings etc. but not cooked chicken or chicken prepared in ready meals*
- Ham: *including all sorts of ham Italia/parma ham, raw, cooked etc., but no other cured meat like chorizo, coppa, bacon and no other type of meat so no turkey ham or chicken ham*
- Hard cheese: *any hard cheese like cheddar, gouda, gruyere, parmesan etc. but no soft cheese like brie, blue cheese, mozzarella etc. nor spreadable cheese such as Philadelphia.*
- Eggs: *whole fresh eggs only*
- Fish fillet: including *any type of fish sold as fillets (salmon, cod, tuna etc.) but no whole fish or processed fish.*

- Apple: *any type of fresh apple but no processed apples in cans, jars etc.*
- Tomatoes: *any type of fresh tomato but no processed tomato in cans, jars etc.*
- Spaghetti pasta: *spaghetti only , no other type of pasta*
- Muesli breakfast cereals: *muesli only, no other breakfast cereals*
- Margarine: *any type*
- Butter: *any type*
- Biscuits*: any type of sweet biscuits including chocolate biscuits, cookies, shortbread etc. but no cereals bars, crackers (salted biscuits), cakes or chocolates.*
- Red wine: *any type and any size of red wine (no white nor rosé)*
- Pizza: *including any fresh or frozen readymade pizzas, no pizza flour, pizza dough or pizza base*
- Coffee: *any form of coffee - instant, ground, beans, decaffeinated, machine pods, but no coffee syrups, flavour etc.*

Each of the fifteen product categories was searched for on each of the three selected websites (online grocery store) in each country and the information from each website was recorded separately.

Data collection

Mystery shoppers received detailed instructions including the project background, the definition of the products, the definition of a food labelling scheme, specific examples of labels for their countries, some instructions about how to search the online grocery websites and on how to record the logos or texts. The exercise was carried out by a researcher from each country and each of them was briefed individually over the phone by the research team in Belgium.

Mystery shoppers logged the following information in an Excel file:

- Name of shop
- Website
- Product
- Picture of scheme label found
- Name of the labelling scheme
- Number of labels showing affiliation to a scheme on the product
- Number of products affiliated to a specific labelling scheme
- Number of products available in that category on the website
- Number of different labelling schemes available in that category of product on the website

Information was recorded for each website separately and then combined per product category and per country to ensure the exercise provided an overview of food labelling scheme s in the country.

Limitations

As the exercise was completed online, there are a number of limitations to be aware of when looking at the results:

- It should be recognised that in some cases the text on the scheme logos could not be read. Food labelling schemes recorded were only those that could be seen on the picture of the products.
    - Often the pictures only showed the front of the product which means logos of food labelling schemes on the back or side of a product could not be recorded.
    - Sometimes pictures were too blurry to distinguish if a scheme logo was included or which one it was.

- In some countries and on some websites, some products were not available:
    - Some websites have a limited number of products available in a category. For example, in Germany, www.edeka24.de, only sold one type of hard cheese.
    - Some websites do not sell certain products. For example, in Germany, www.edeka24.de, does not sell fresh products (chicken, eggs, fish, tomatoes, apples, pizza) and in Poland, Tesco does not sell alcohol online.
    - Some products were sold unpackaged and no label could be seen on the website. For example, in Poland chicken are sold in the butchery section of supermarkets and on the websites only unpackaged chicken was shown. In Czech Republic, the same applied to chicken, ham, apples and tomatoes.

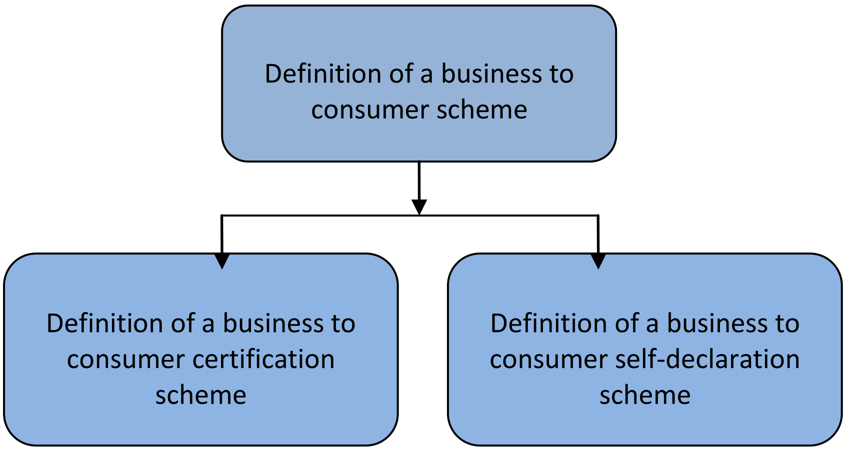
An excel file was provided to the contracting authority with detailed results at country and product levels. A summary of the results are also included in section I, chapter 2.10 of this report.

1.3 Definitions

Definition of food labelling schemes

The focus of this study is voluntary food labelling schemes which are available to the final consumer at the end of the food supply chain (at the retailer). The study includes *certification schemes* and *self-declaration schemes*. In order to develop a workable inventory and to complete the performance and compliance assessment it is important to have a pragmatic approach to defining the elements. This approach is shown in the figure below.

Figure 1: Scope of the inventory and performance and compliance assessment



Source: London Economics

The first element to determine is the definition of a *business to consumer scheme* for the purpose of the inventory and the assessment. A scheme has to meet the criteria below but does not necessarily have to meet all of them.

- It has a name and is identifiable
- There is a standardised format (text or logo), other than a brand, presented on products that are part of the scheme at the end of the supply chain
- There is a scheme operator behind the scheme (a business or a public body, or an NGO, or other entity)
- It has a website, postal address, e-mail address or phone number
- There are specifications such that consumers can understand that there are requirements that need to be met for a product to be part of the scheme
- Dietary information such as "percentage of recommended daily requirements", salt and fat content are not included but schemes that refer to health such as healthy hearts are included

A scheme can then be divided into two main types, certification schemes and self-declaration schemes.

Definition of certification schemes

As stated in the Commission guidelines 2010, the main defining feature of certification schemes is that they rely on a *third-party attestation procedure*.

Attestation is defined in the guidelines as, *issue of a statement based on a decision following review that fulfilment of specified requirements has been demonstrated*.

For the purposes of this definition a third-party is a *certification body* that issues the certificate or statement on the fulfilment of the scheme's specified requirements. The certification body does not, however, need to be an independent body that conforms to harmonized accreditation requirements. A third party cannot be the producer or retailer. However, the scheme operator can be accredited to certify a scheme. Therefore the scheme operator can certify that members of the scheme have fulfilled the specific requirements of the scheme.

Definition of self-declaration schemes

Self-declaration schemes do not have third party attestation. Adherence to these schemes is done by either a) the scheme operator (in the case where the operator is not a certification body), or b) declaration by the producer or retailer.

Definition of a scheme operator

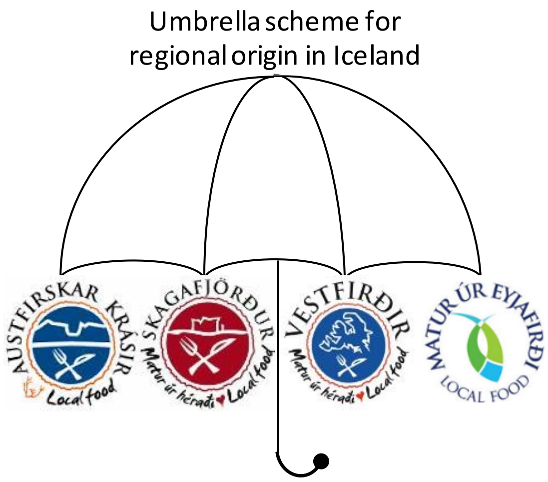
A scheme operator may include:

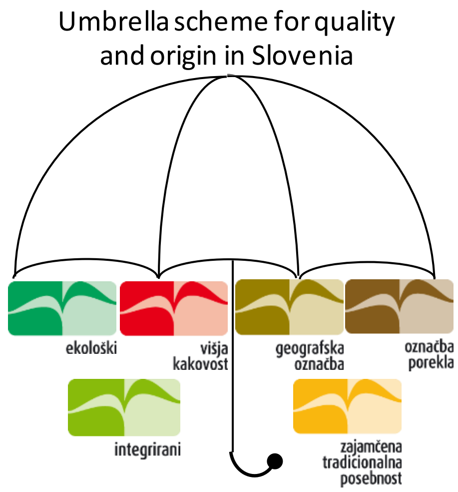
a) The scheme manager which is the organisation responsible for the day-to-day implementation of the scheme in accordance with the rules defined/developed by the scheme developer.
b) The scheme developer which is the body responsible for making the rules to be followed by the scheme participants.

Definition of an umbrella scheme

The websweep checklist did not include a specific code for identification of umbrella schemes. However, following completion of the websweep schemes that were part of an umbrella were identified.

An umbrella scheme is a collection of food labelling schemes with similar characteristics. The umbrella scheme itself is at the top of the umbrella, with the individual schemes at the tips of the umbrella. We have identified two different types of umbrella schemes in the study. The first group contains schemes that are organised spatially (i.e. the same scheme operates in several countries or regions within countries). For example, the Icelandic origin schemes shown below on the left hand side. The second group contains schemes that have the same administrative body but have a somewhat different focus either in terms of policy area, production process or products covered, but crucially, the labels look similar. For example, quality and origin schemes in Slovenia, where ecology, integrated production, taste and smell, geographic origin, and traditional production methods have similar labels in different colours.





Definition of a public or private scheme

For a scheme to be considered public within the context of the websweep it must explicitly state on its website that it is operated by a public body. Otherwise it is considered to be a private scheme.

SECTION I: OVERVIEW OF THE FUNCTIONING OF FOOD LABELLING SCHEMES IN EUROPE

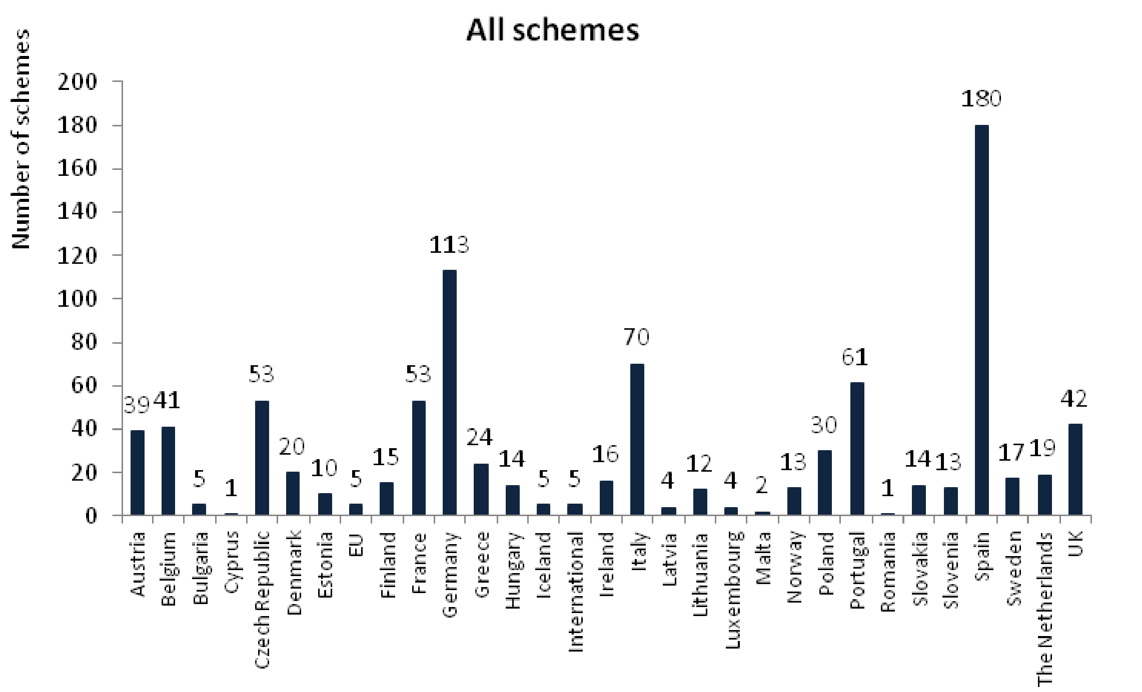
The overview of labelling schemes presents the food labelling schemes identified in this study by their different characteristics. These include breakdowns of food labelling schemes by the following:

- The total number of schemes managed in each country
- Number of schemes broken down in different dimensions such as
  - Certification or self-declaration schemes;
  - Public or private;
  - Types of products covered;
  - Types of production processes covered;
  - Policy areas covered;
  - Number of umbrella schemes; and,
  - Owner or operator of the scheme.

2 Number, shares and characteristics of food labelling schemes

A total of 901 food labelling schemes operating in Europe were identified in the study. Figure 2 shows the number of food labelling schemes identified in this study that are managed in each country. The websweep found more food labelling schemes in Spain than any other country (20% of all food labelling schemes were found in Spain), with Germany second (12.5%), and Italy, the Czech Republic, France, and Portugal having the next largest number of schemes (5.9% to 7.8% respectively).

Figure 2: Number of food labelling schemes managed per country



Note: One Belgian scheme ceased to exist as of the 1st of July 2013; however, as it was in operation at the time of the websweep and scheme operator survey, it is included in the database. *EU* refers to schemes that operate across the European Union, and are operated or managed by the European Commission. *Europe* on the other hand refers to the total across all countries in the study. *International* refers to schemes that operate on a single (multi-lingual) platform and are not run by the EU, for example the *Marine Stewardship Council*.

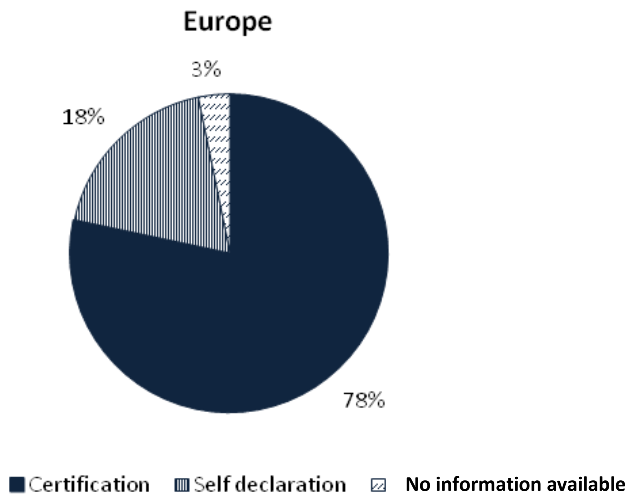
Source: London Economics

2.1 Certification and self-declaration schemes

Figure 3 shows that 78% of schemes identified using the websweep are certified, 18% are self-declared.

In some cases, it has not been possible to assess which type the scheme is because of lack of information provided on the website or the absence of any website; these schemes make up the "no information available" category.

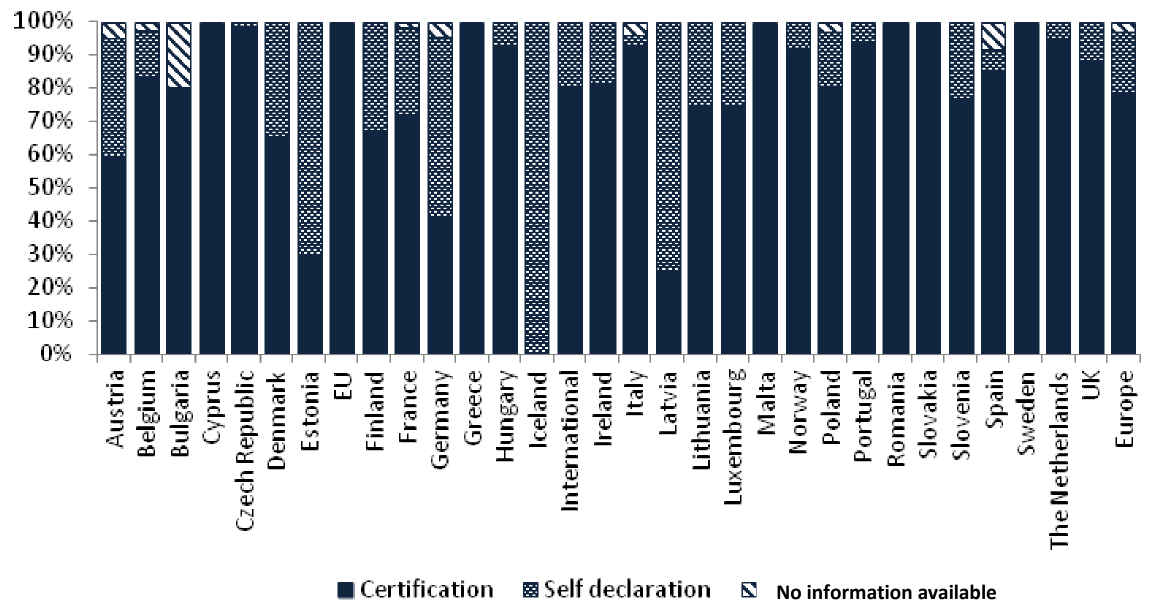
Figure 3: Share of different types of schemes in Europe



Source: London Economics

Figure 4 shows a breakdown of certification and self-declaration schemes in each country. In eight countries, only one type of scheme exists (Bulgaria, Cyprus, Greece, Iceland, Malta, Romania, Slovakia, and Sweden). Iceland is the only country where there are no certified schemes. In general, the majority of schemes in each country are certified. However, Germany, Estonia, and Latvia have more self-declaration than certification schemes.

Figure 4: Share of different types of scheme originating in each country



Note: *EU* refers to schemes that operate across the European Union, and are operated or managed by the European Commission. *Europe* is the average across all countries in this study.
Source: London Economics

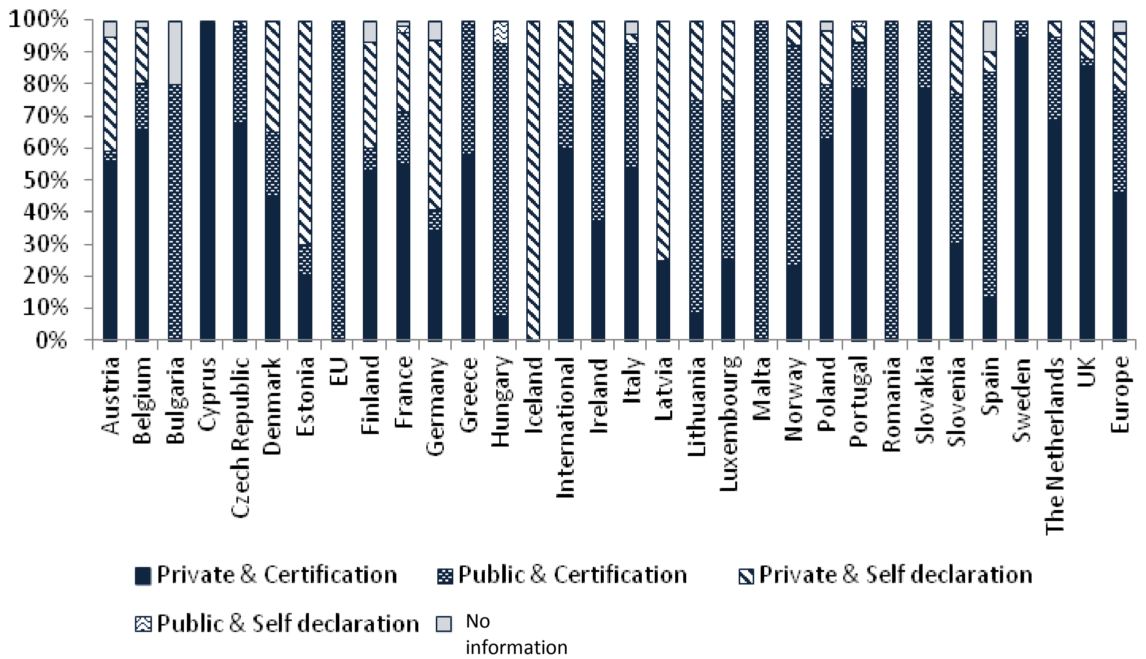
2.2 Public and private schemes

This section presents the food labelling schemes identified in the websweep by public/private status. A scheme is considered public only if its website explicitly states that it is operated by a public body. The figure below shows the distribution of public and private schemes in each country, for EU-level and international schemes, and in Europe as a whole.

The figure shows that the majority of identified schemes in the EU are private (65%). However, there are large cross-country variations with all food labelling schemes in Bulgaria, Malta, and Romania being public (there are 8 schemes in total across these three countries) and with the majority of food labelling schemes in Spain, Hungary, Norway and Lithuania being public.

Figure 5 shows a further breakdown of public and private schemes by certification or self-declaration. At the European level, 96% of schemes are either *private & certification, public & certification,* or *private & self-declaration*. Namely there are very few public self-declaration food labelling schemes. We find that this is also the case in most countries.

Figure 5: Share of schemes by type and public vs. private



Note: *EU* refers to schemes that operate across the European Union, and are operated or managed by the European Commission. *Europe* is the average across all countries in this study.
Source: London Economics

2.3 Types of products covered

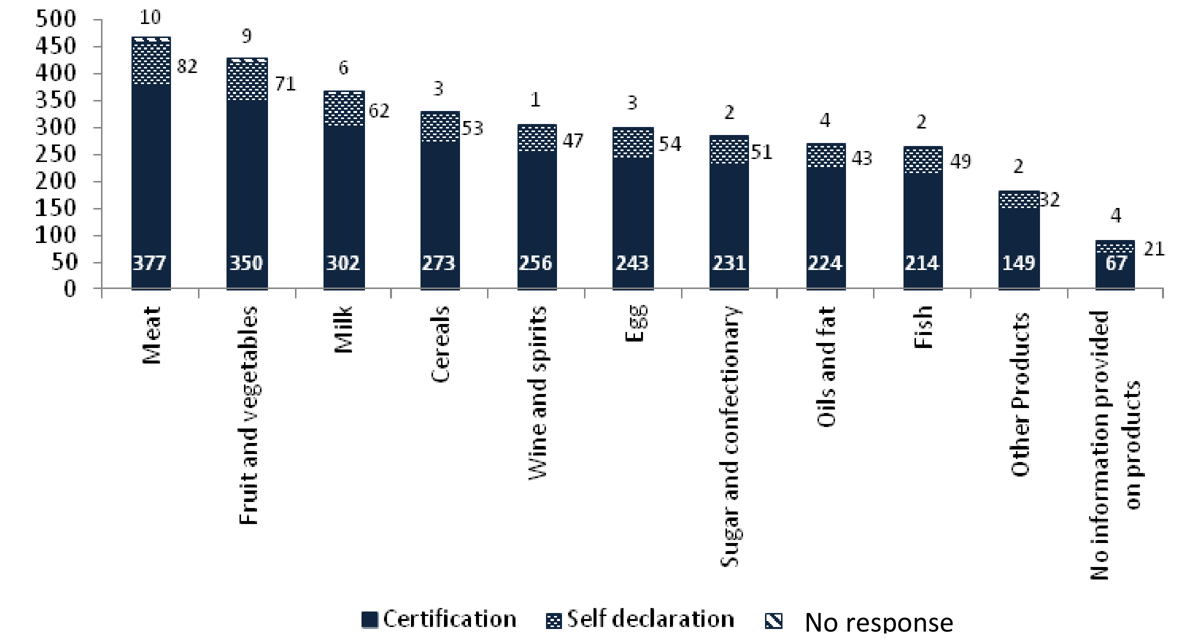
This section presents the identified food labelling schemes in terms of the product(s) covered by the schemes. Nine distinct product categories were included in the websweep checklist plus an 'other' product category. For some schemes the products covered were not identifiable. In many cases schemes cover more than one product group. The categories were selected in consultation with the contracting authority and aligned with product categories used in an earlier study by DG AGRI[24]. They also represent distinct categories from a consumer perspective.

Figure 6 shows the different products covered by the food labelling schemes identified in the study. It shows that *Meat* and *Fruit and Vegetables* are covered by the greatest number of schemes (around half of all schemes). Roughly 10% of the schemes provide no information on the products covered.

As can also be seen from the figure, no product category stands out as being particularly prevalent among self-declaration schemes or certification schemes. The relative proportion of certification to self-declaration schemes is very similar across all product categories.

[24] European Commission, 2010, Inventory of certification schemes for agricultural products and foodstuffs marketed in the EU Member States.

Figure 6: Number of schemes covering different products in Europe

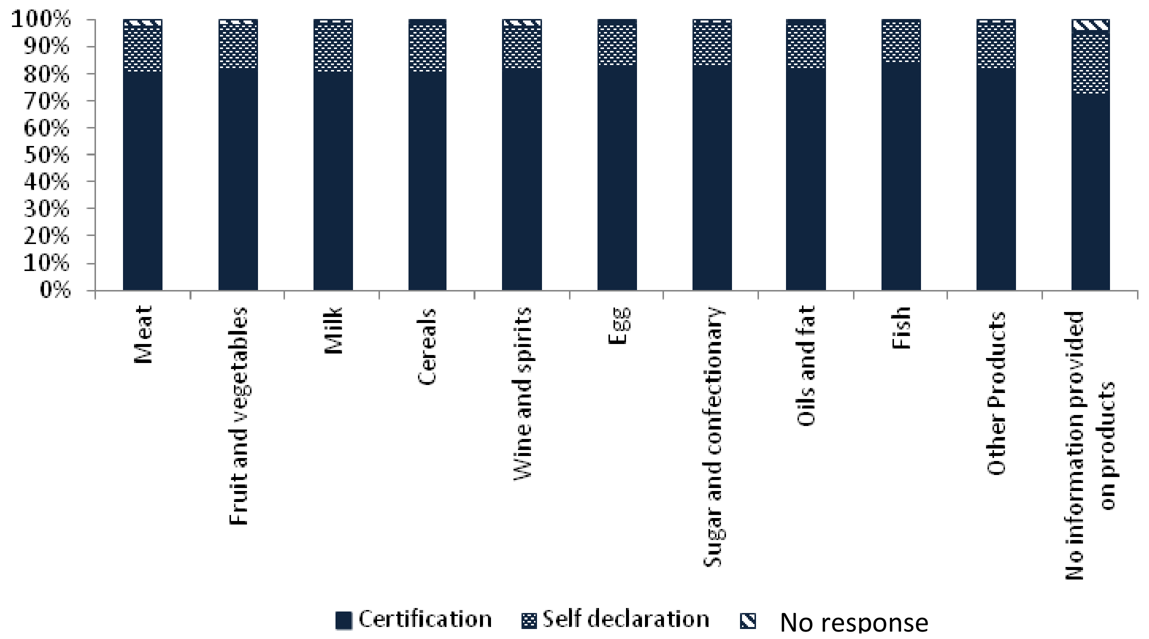


Note: The study identified 901 schemes in Europe

Source: London Economics

Figure 7 presents the share of schemes that are certification and self-declaration by the type of product covered. The majority of schemes identified are certification schemes, and this share is similar across all product types (approximately 80%).

Figure 7: Share of certification/self-declaration food labelling schemes by product covered



Note: The study identified 901 schemes in Europe

Source: London Economics

2.4 Types of production processes covered

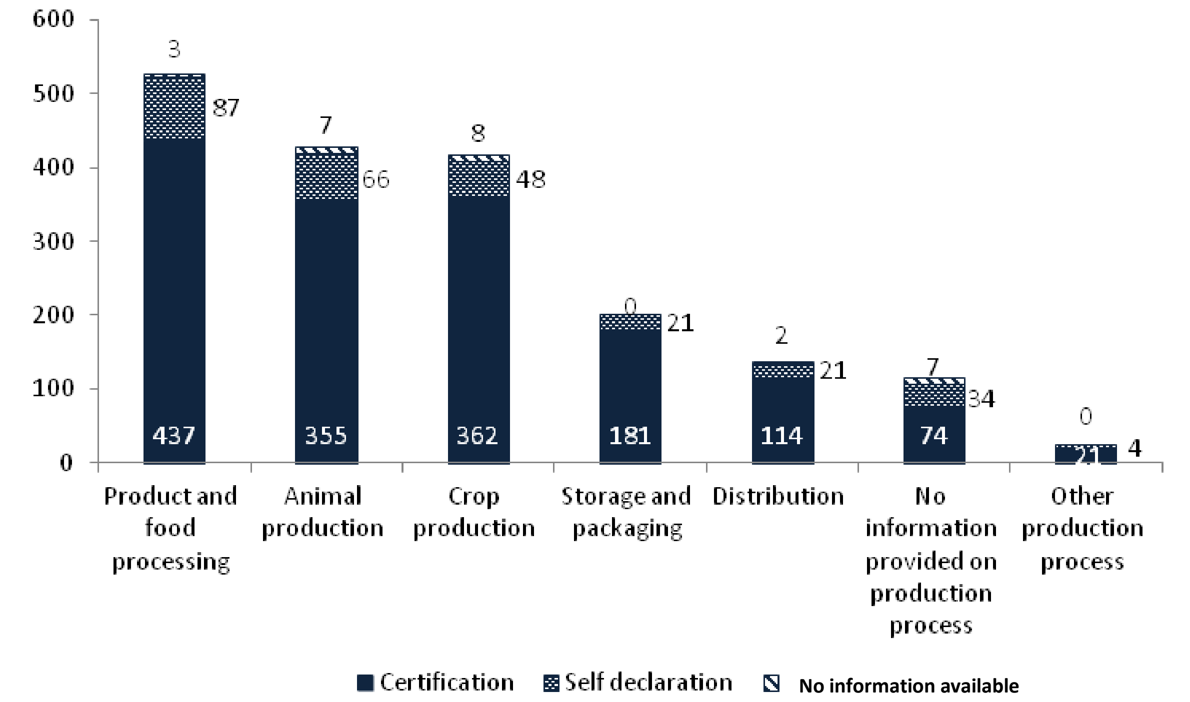
This section summarises the identified food labelling schemes in terms of the production process(es) covered. Five distinct production processes and one 'other' production process were included in the websweep checklist. For some schemes, the production processes covered were not identifiable. Many schemes cover more than one production process.

The categories were selected in consultation with the contracting authority and aligned with product process categories used in an earlier study by DG AGRI[25]. They also represent distinct categories from a consumer perspective. The definitions used in the websweep are included in Annex 3.

Figure 8 shows that the greatest numbers of schemes are for *Product and food processing* with *Crop production* and *Animal production* being the next most prevalent production processes.

[25] European Commission, 2010, Inventory of certification schemes for agricultural products and foodstuffs marketed in the EU Member States.

Figure 8: Number of schemes covering different production processes in Europe

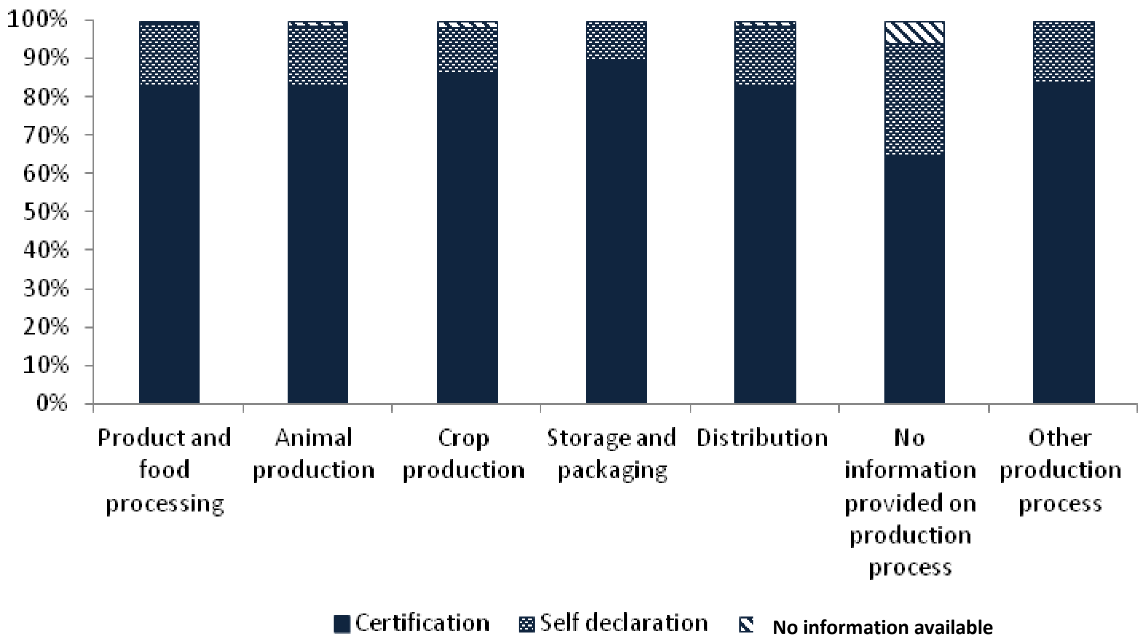


Note: The study identified 901 schemes in Europe

Source: London Economics

The figure below shows the distribution of certification and self-declaration schemes by production process. In general the distribution of self-declaration and certification is similar across all production processes. However, *Storage and packaging* has a slightly higher share of certification schemes than the other production processes.

Figure 9: Production processes covered, by share of Certification and Self-declaration schemes



Note: The study identified 901 schemes in Europe.
Source: London Economics

2.5 Policy area covered

This section summarises the identified food labelling schemes by policy area(s). The websweep checklist included 16 distinct policy areas and one 'other' policy category. For some schemes the policy areas covered were not identifiable. Schemes often cover more than one policy area.

The policy areas were selected in consultation with the contracting authority and aligned with policy areas used in an earlier study by DG AGRI[26]. They also represent (reasonably) distinct areas from a consumer perspective. The definitions used in the websweep are included in Annex 3.

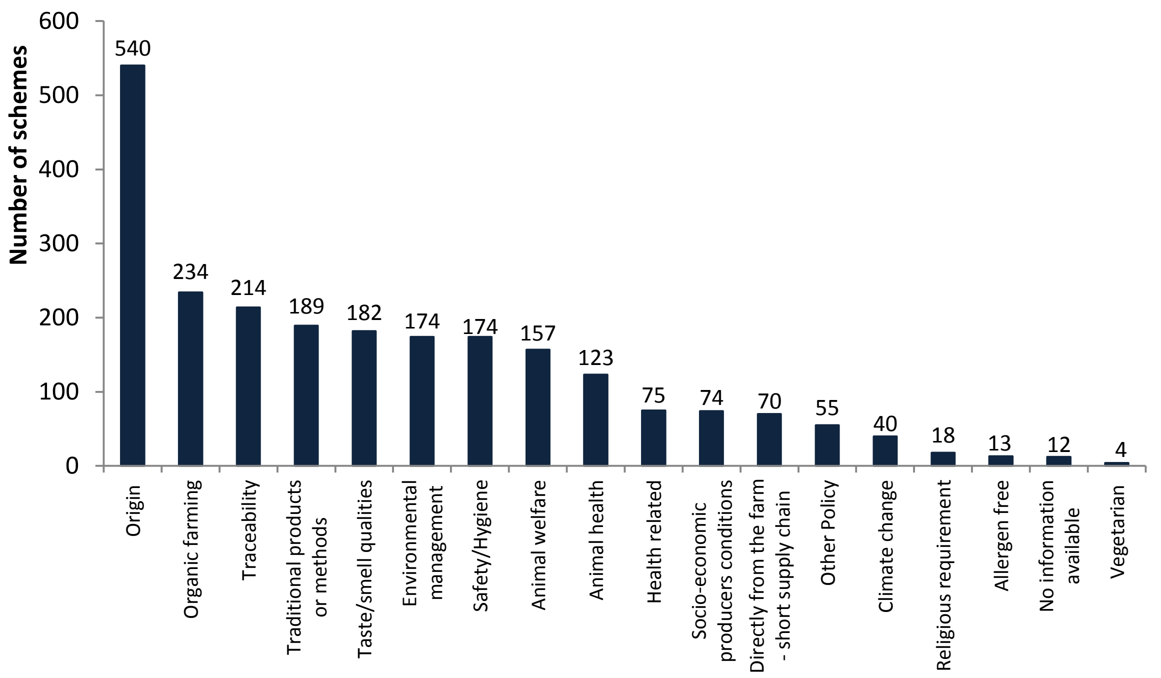
Figure 10 presents the number of schemes for each policy area. The most prevalent policy area is *Origin*, which is covered by 60% of all schemes (540 schemes out of 901 schemes identified). The second most prevalent policy area is *Organic farming*, with *Traceability* following in third (234 and 214, respectively).

Spain has the greatest number of origin schemes, with a total of 157 Spanish schemes covering *origin*. The large number of origin schemes in Spain, but also in other countries, is mostly driven by a large number of regional origin schemes as opposed to origin schemes at the national level. This is particularly the case in countries such as Portugal, Germany, and Spain. Other such countries (like Italy, the Netherlands and France), also have origin schemes referring to the regional level, but while 93% to 99% of origin schemes in Portugal, Germany and Spain refer to region, the

[26] European Commission, 2010, Inventory of certification schemes for agricultural products and foodstuffs marketed in the EU Member States.

Netherlands and France have 60% and 63%, respectively, and for Italy only 18% of origin schemes refer to the region.[27]

Figure 10: Number of schemes by policy area



Note: The study identified 901 schemes in Europe.
Source: London Economics

The table below presents the number of schemes by type (certification and self-declaration) for each policy area. As previously stated origin schemes make up the largest proportion of schemes identified. Of these by far the majority were found to be certified. Traceability was found to be the second largest policy area covered by the identified schemes.

[27] 1 origin scheme in Italy refers to the EU (as opposed to *region* or *country*); this scheme is not included in the figure for Italy.

Table 11: Number of schemes by type of scheme and policy area

Policy area	Number of certification schemes	Number of self-declaration schemes	Number of unidentified schemes	Total number of schemes	% of total schemes related to this policy area
Origin	441	83	16	540	61.4%
Traceability	208	23	3	234	26.6%
Taste/smell qualities	167	43	4	214	24.3%
Traditional products or methods	160	26	3	189	21.5%
Organic farming	141	39	2	182	20.7%
Safety/Hygiene	153	20	1	174	19.8%
Environmental management	141	32	1	174	19.8%
Animal welfare	129	27	1	157	17.9%
Animal health	110	13	0	123	14.0%
Socio-economic producers conditions	60	15	0	75	8.5%
Other Policy	58	14	2	74	8.4%
Health related	55	14	1	70	8.0%
Directly from the farm - short supply chain	39	14	2	55	6.3%
Climate change	30	10	0	40	4.6%
Religious requirement	12	1	0	13	1.5%
Allergen free	6	6	0	12	1.4%
Vegetarian	2	2	0	4	0.5%

Note. It was not possible to assign policy area for 22 schemes.
Source: London Economics

Many schemes cover more than one policy area. The table below shows the number of schemes identified in this study that cover 1 or more policy areas.

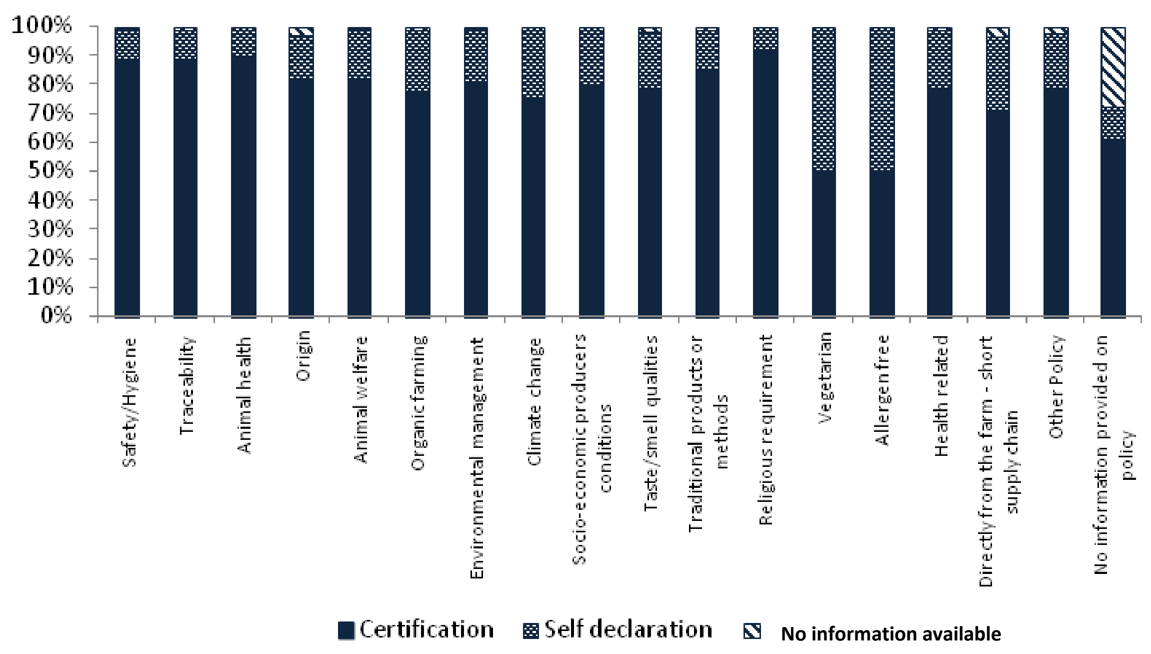
Table 12: Number of policy areas covered by food labelling schemes

Number of policy areas	Number of schemes
1	259
2	249
3	153
4	81
5	73
6	38
7	16
8	6
9	3
10	1

Note: The number of policy areas covered allows for "other policy" to be covered, but excludes "no information on policy area found" (it has not been possible to assign policy area for 22 schemes).
Source: London Economics

Figure 11 shows the variability in policy areas covered by certification and self-declaration schemes. *Vegetarian* and *Allergen free* schemes have the largest share of self-declaration schemes. *Climate change* and *Short supply chain* also have a relatively large share of Self-declaration schemes.

Figure 11: Policy areas by Certification and Self declared schemes



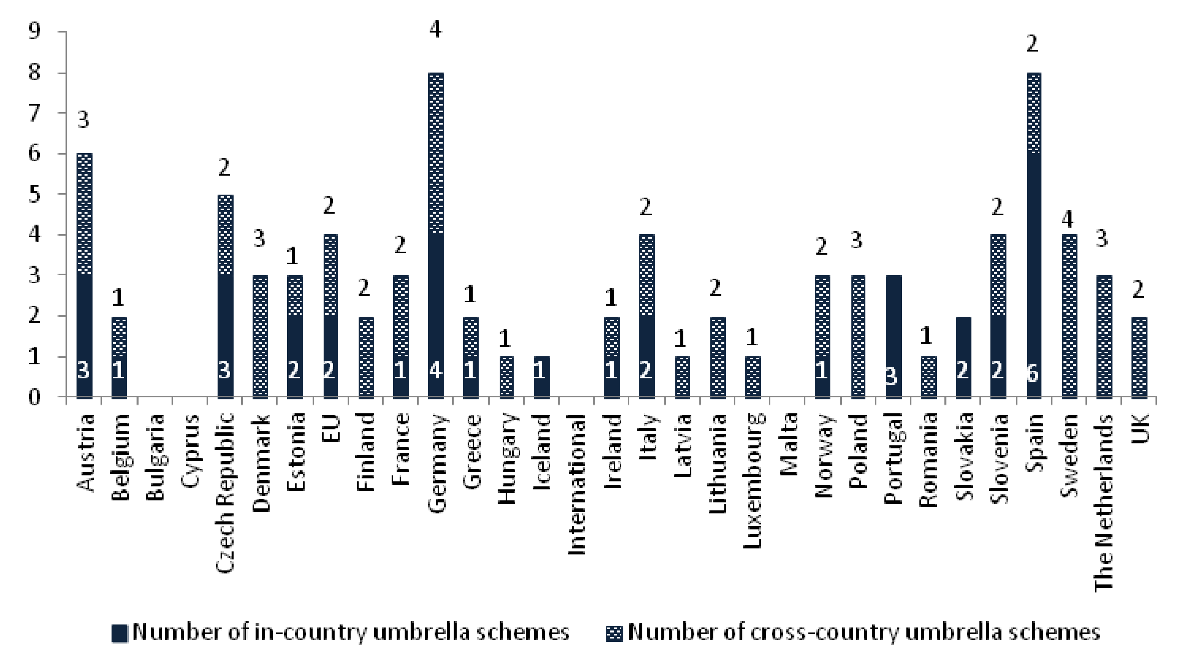
Source: London Economics

2.6 Umbrella schemes

Figure 12 shows the number of umbrella schemes separated by in-country umbrellas and cross-country umbrellas, which are mainly EU schemes, in the different countries.

Although still low, Germany, Spain, Austria, and the Czech Republic have the largest number of umbrella schemes.

Figure 12: Number of umbrella schemes in Europe



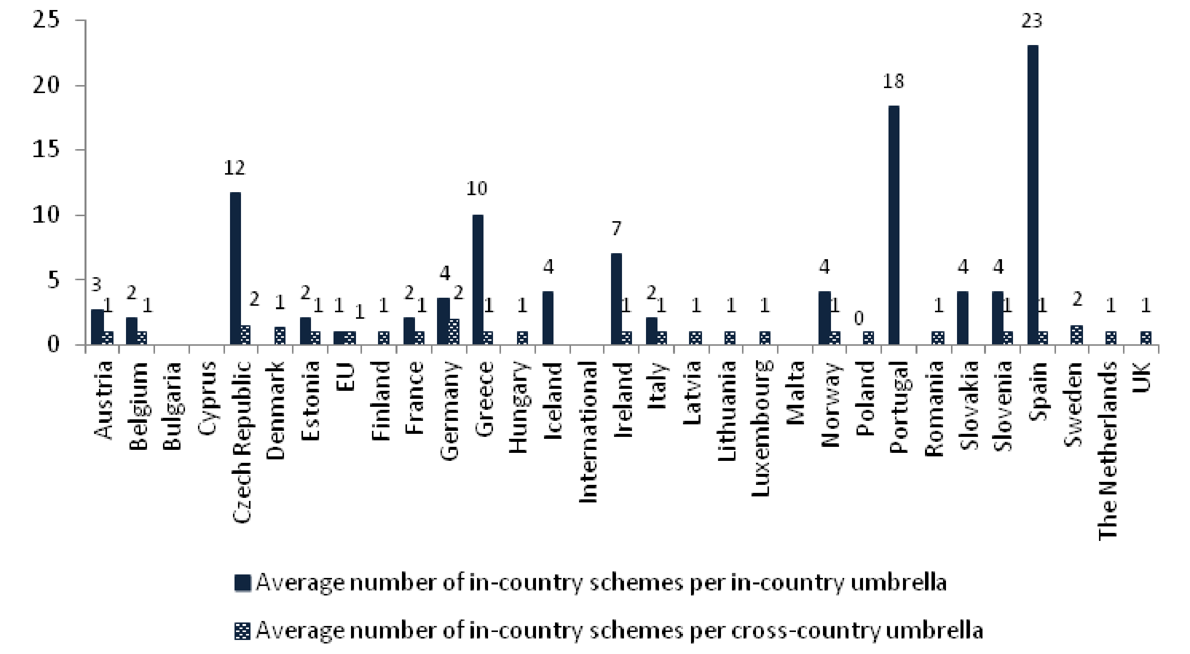
Note: *EU* refers to schemes that operate across the European Union, and are operated or managed by the European Commission.
Source: London Economics

Figure 13 shows the average number of food labelling schemes per umbrella scheme, by domestic and cross-country schemes. It shows that domestic Spanish, Portuguese and Czech umbrella schemes have the largest number of individual schemes on average per umbrella scheme.

For Spain, the largest umbrella schemes are origin schemes locally managed in each of Spain's 59 regions, with even further geographic granularity for some schemes.

Two Czech schemes for regional products cover as many schemes as there are regions in the Czech Republic. The Czech Republic has 13 regions plus Prague which is also designated as a region.

Figure 13:Average number of food labelling schemes per umbrella scheme



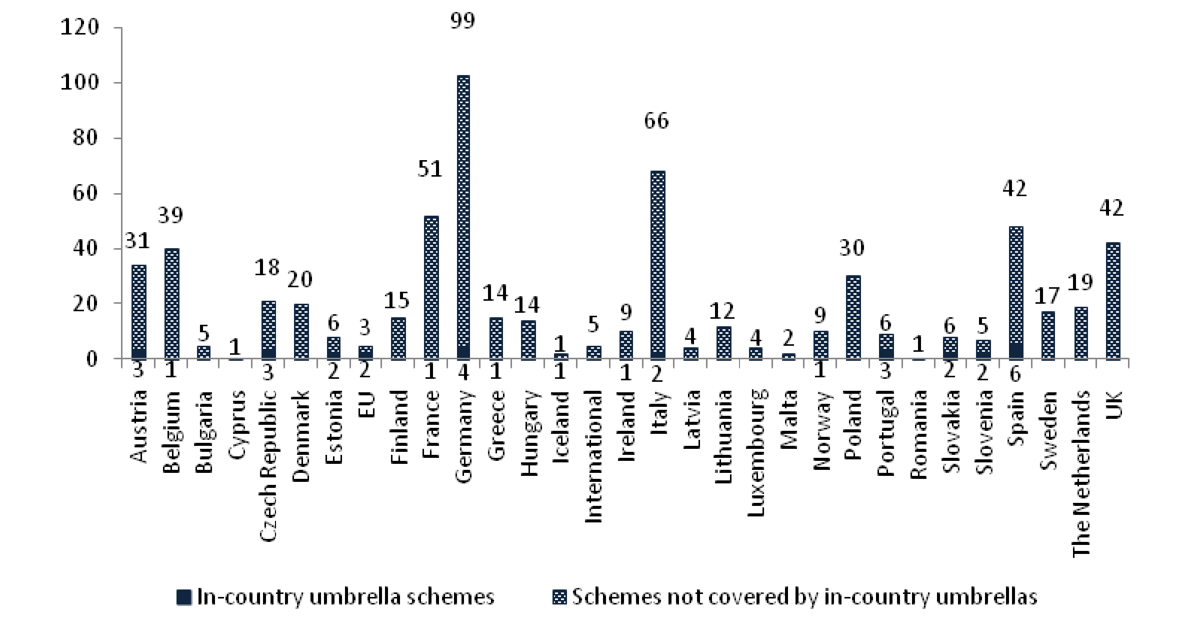
Note: *EU* refers to schemes that operate across the European Union, and are operated or managed by the European Commission.
Source: London Economics

Figure 14 shows the number of schemes within an umbrella scheme. For example, in Spain there are 6 umbrella schemes, and 42 schemes that are not included within an umbrella scheme. If we combine the observations in Figure 14 below with those in of Figure 13 above, we see that the average number of schemes in an in-country umbrella scheme in Spain is 23. There are 59 regions in Spain, and the fact that two umbrellas have one member from each region means that the average Spanish umbrella is very wide. Putting these facts together, we can derive that a total of 138 Spanish schemes are members of 6 umbrellas altogether (i.e. 6*23).

Similarly, Figure 14 shows that Germany, Italy and France have the majority of schemes that are not within an umbrella. The same figure shows that in Germany there are 4 in-country umbrella schemes. Figure 13 above shows that on average there are 3.5 schemes within an in-country umbrella scheme in Germany. Therefore we can derive that a total of 14 German schemes are members of 4 umbrella schemes.

Finally, if we compare the two figures we can see that the number of members of Spanish umbrella schemes explain why we find a very large number of Spanish schemes. The small solid-coloured bar for Spain in the figure below shows that six umbrella schemes include 138 of the 180 schemes identified in Spain.

Figure 14:Number of schemes, in a country within an umbrella scheme



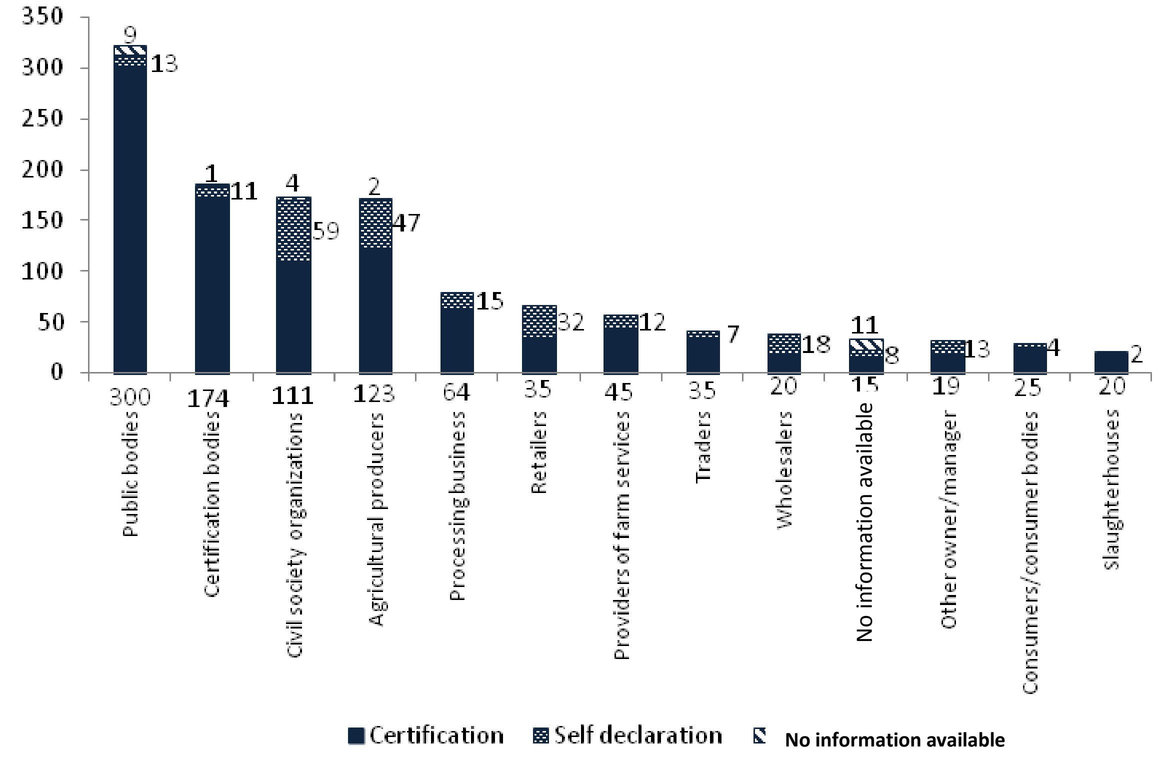
Note: *EU* refers to schemes that operate across the European Union, and are operated or managed by the European Commission.
Source: London Economics

2.7 Actor (manager) of the scheme

This section presents the identified food labelling schemes in terms of scheme manager(s). Managers include members of the board and other managing organisations and partners that influence the operation of the scheme. Schemes can have more than one type of manager, and many have several. The most common type of managers are public bodies (322 schemes). The second most common type of manager are certification bodies (186 schemes), civil society organisations (174 schemes) and agricultural producers (172 schemes).

Self-declaration schemes are most likely to be managed by civil society organisations, retailers, wholesalers and agricultural producers. Certification schemes are most likely to be managed by slaughterhouses, public bodies and certification bodies.

Figure 15:Number of schemes by actor



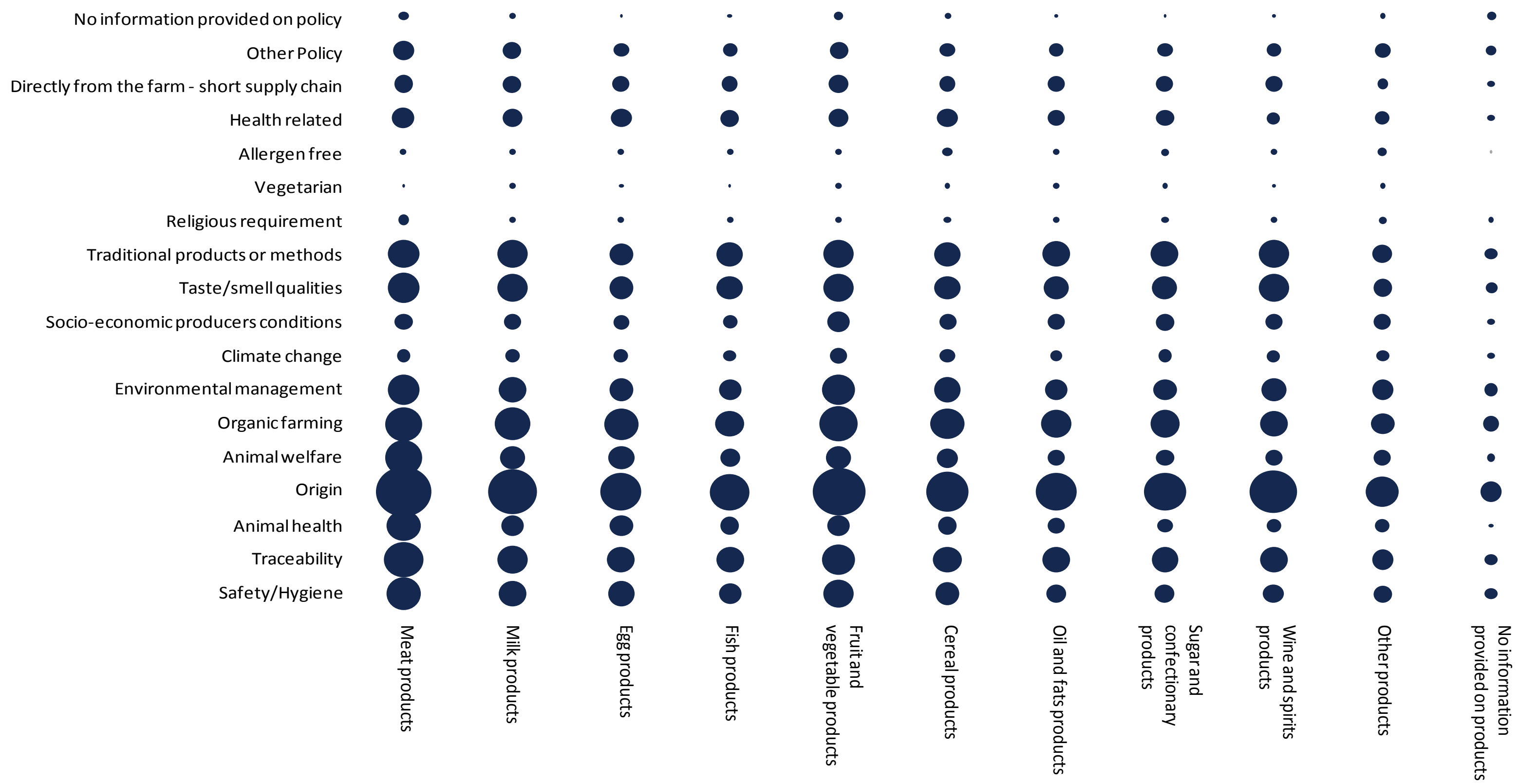
Source: London Economics

2.8 Most common combinations of types of schemes

The Figure 16 shows a graphical representation of the combinations of policy area and product type. The size of the bubbles indicate the number of schemes that cover the specific combination of policy area and product.

The largest bubble represents *origin* schemes dealing with *meat* (269 schemes). Aggregation of the size of all bubbles in the same row indicates the number of schemes covering a policy area (this figure was previously reported in Table 12). Similarly, aggregation of the size of all bubbles in the same column indicates the number of schemes covering a product (these figures were previously reported in Figure 6).

Figure 16:Number of schemes covering different policy areas and products in Europe



Source: London Economics

Note: The size of the bubbles indicates the number of schemes that cover the specific combination of policy area (y-axis) and product (x-axis). As a point of reference, the combination *Meat/Origin* is covered by 269 schemes and is the largest bubble. The aggregated size of bubbles in the same row indicates the number of schemes covering the policy area and the aggregated size of the bubbles in the same column indicates the number of schemes covering the product.

2.9 Market shares of food products participating in a voluntary food labelling scheme

This section presents findings regarding the market share of food products participating in voluntary food labelling schemes. In order to assess these market shares, a relevant question was included in the stakeholder and scheme operator surveys, which asked respondents to estimate market shares (by volume and by value) of their own food labelling schemes, of schemes in general and for all product categories within their country.

The first thing to note is that nearly all respondents indicated that such detailed data is not available to them and that most estimates will necessarily be rough and imprecise. In addition, a number of respondents also indicated that the product categories considered in the study were too broad. For example, the proportion of meats carrying food labels varies significantly by the specific type of meat. Another example, given by a consumer organisation from the UK, is that 100% of shell eggs in the UK take part in some voluntary food labelling scheme, yet none of the other egg products such as powdered or liquid eggs do.

Bearing these caveats in mind, Table 13 below summarises the responses received from the scheme operators and stakeholders estimating the market share by volume of products taking part in some voluntary food labelling scheme.

Table 13: Estimated market shares by volume, by product category

	Meat	Milk	Eggs	Fish	Fruit & Vegetables	Cereals	Oils and fats	Sugar and confectionary	Wine and spirits
Scheme operators	42% (18)	19% (10)	27% (10)	27% (10)	29% (16)	21% (12)	33% (8)	11% (7)	12% (9)
Producer farmers and retailers	49% (16)	59% (14)	48% (13)	35% (11)	46% (16)	27% (10)	32% (9)	26% (9)	34% (11)
Consumer organisations	37% (14)	40% (13)	45% (12)	24% (12)	25% (12)	33% (13)	25% (12)	21% (11)	19% (11)

Source: Stakeholder surveys and scheme operator survey
Note: Numbers in parenthesis indicate the number of respondents who gave estimates

As indicated above, respondents were also asked to estimate market share by value as opposed to volume. However, it is worth noting that significantly fewer respondents supplied estimates for market shares by value than by volume, so the numbers are not directly comparable. A higher market share by value than by volume does not necessarily imply anything about the relative value of products participating in voluntary food labelling schemes. Instead, the estimates of market share by value should be seen as a second, complementary estimate as some organisations are more likely to have access to one estimate than the other.

Table 14: Estimated market shares by value, by product category

	Meat	Milk	Eggs	Fish	Fruit & Vegetables	Cereals	Oils and fats	Sugar and confectionary	Wine and spirits
Scheme operators	40% (14)	17% (8)	9% (7)	19% (9)	21% (11)	22% (7)	28% (6)	15% (7)	16% (4)
Producer farmers and retailers	44% (7)	43% (7)	35% (7)	16% (6)	36% (8)	9% (6)	6% (6)	8% (6)	25% (6)
Consumer organisations	38% (10)	34% (9)	55% (8)	28% (9)	29% (7)	27% (8)	26% (8)	31% (7)	24% (8)

Source: Stakeholder surveys and scheme operator survey
Note: Numbers in parenthesis indicate the number of respondents who gave estimates

The measures for market share used in the study indicate that the penetration of voluntary food labelling schemes is relatively evenly spread amongst product categories. Fewer products in the categories cereals, fish and sugar are estimated to take part a voluntary food labelling scheme and meat, milk and eggs emerge as having a relatively higher penetration of food labelling schemes.

2.10 Proportion of products affiliated with a food labelling schemes.

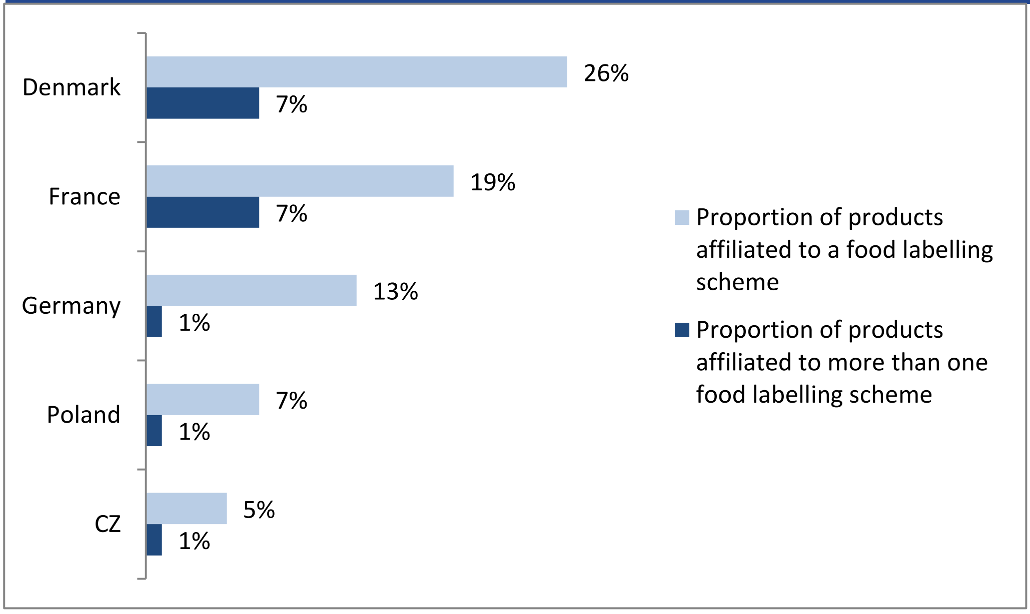
This section presents the results of the virtual online shopping exercise. This exercise was conducted in five countries (France, Germany, Denmark, Czech Republic and Poland) and consisted of recording the food labelling schemes that could be found on 15 different product categories in online grocery stores.

This section includes information on the proportion of products identified via the online shopping exercise which are affiliated with a food labelling scheme per product category and per country. . It also provides results on the most common food labelling schemes that can be found per country per product category and as well as the proportion of products with multiple food labelling schemes and which types of schemes commonly appear together.

Across four countries, 14% of all selected products were found to be affiliated to a food labelling scheme and 3% were affiliated with more than one food labelling scheme.

The figure below shows the proportion of products affiliated to a food labelling scheme and the proportion of products affiliated to more than one food labelling scheme among all selected products per country.

Figure 17: Proportion of products affiliated to a food labelling scheme by country

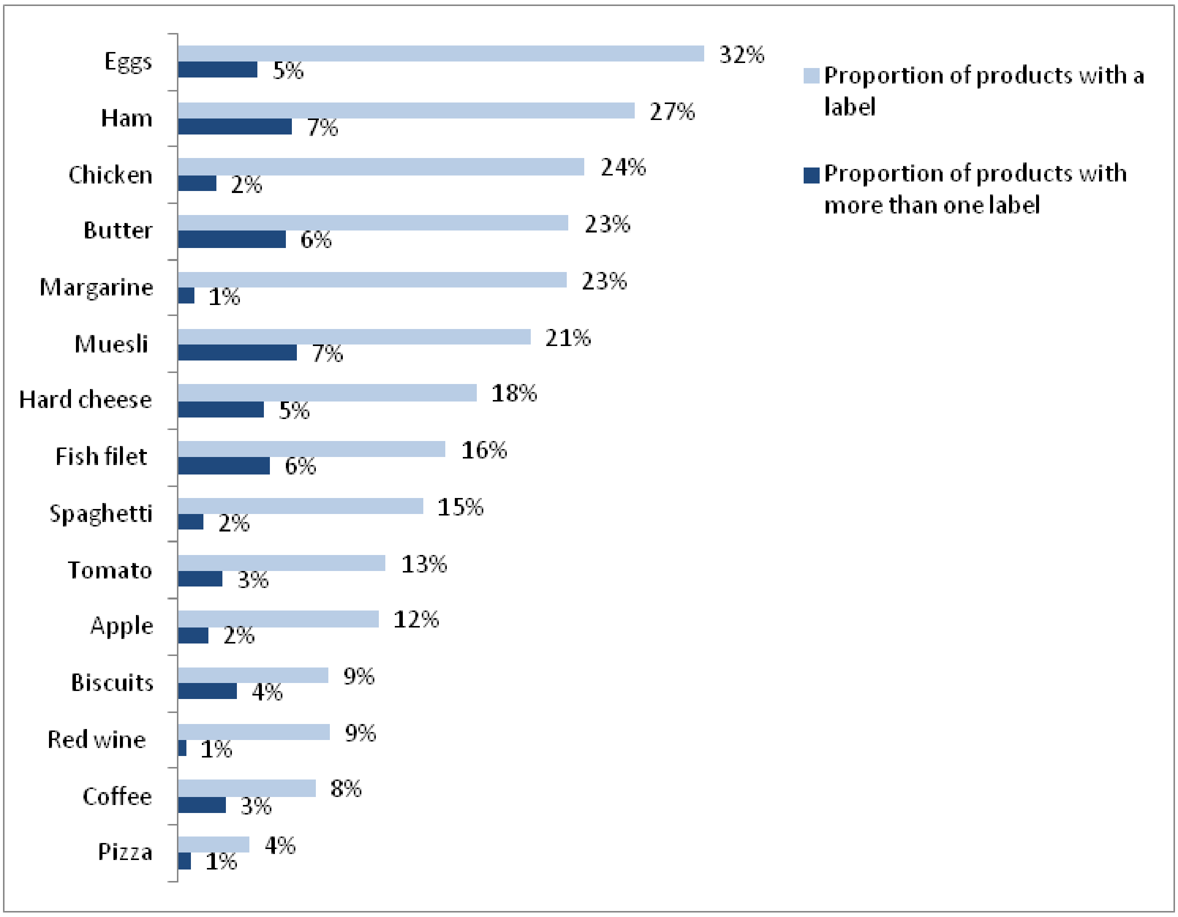


Source: Virtual online shopping – Ipsos

- Denmark was the country with the highest proportion of products affiliated to a food labelling scheme online followed by France. Both have the same proportion of products affiliated to more than one labelling schemes.
- Poland and Czech Republic were at a similar level on both measures.

The following figure shows the proportion of products affiliated to a food labelling scheme and the proportion of products affiliated with more than one food labelling scheme across the four countries per product category.

Figure 18: Proportion of products affiliated to a food labelling scheme



Source: Virtual online shopping – Ipsos

- Animal related products were the most likely to be affiliated to a food labelling scheme with eggs and ham ranking first, followed by chicken and butter. However fish was less likely than meat to be affiliated to a scheme.
- Pizza was the product the least likely to be affiliated with a food labelling scheme.
- The proportion of products found with a food labelling scheme among fresh fruits and vegetables (tomatoes, apples), among biscuits and among coffee and red wine was also quite low.
- Ham and muesli were the two products most likely to be affiliated to more than one scheme, followed closely by butter and fish fillet.
- Often scheme logos that could be found together on products were from the same type of policy scheme. For example a local origin label could often be seen with a European origin scheme label or two organic labels could also be found together. For coffee in France, Germany and Denmark it was also common to see organic and fair trade labels shown together.

The market share of products affiliated to a food labelling scheme is the highest for eggs and meat (ham, chicken) followed by butter and margarine.

- In the websweep exercise (section 1, chapter 2.3), it was found that meat products were also covered by the highest number of schemes in Europe (468).
- Eggs are the product the most often affiliated to a food labelling scheme (32% of eggs) but the number of schemes covering eggs (300 across Europe) is smaller than on many other products such as meat, fruit and vegetables, milk, cereals and wine and spirits. This could mean that some food labelling schemes are covering many egg products on the market. For example in Germany, among the 17 eggs found online, 14 were affiliated to the KAT scheme.

The category of product covered by the second highest number of schemes (430) is fruit and vegetables. However, from the virtual online shopping exercise, as can be seen in the figure above, only 13% of tomatoes and 12% of apples were affiliated to a food labelling scheme. This could be linked to fresh products being under-represented in online stores but it could also mean that there are many small schemes on fruits and vegetables not covering a big share of the market.

The table below presents the proportion of products affiliated to a food labelling scheme and the proportion of products affiliated to more than one food labelling scheme per product category and per country. However these results need to be looked at with caution due to low base sizes.

Base sizes in brackets refer to the number of products available in the three online stores in that category of products.

Table 15: Estimated market shares by value, by product category

Country	Product	Proportion of products affiliated to a food labelling scheme in product category	Proportion of products affiliated to a food labelling scheme in product category
Germany	Eggs *(base=17)*	88%	12%
France	Eggs *(base=40)*	40%	25%
Denmark	Eggs *(base=21)*	19%	5%
CZ	Eggs *(base=18)*	17%	0%
Poland	Eggs *(base=50)*	16%	0%
Denmark	Ham *(base=64)*	47%	0%
France	Ham *(base=190)*	47%	16%
CZ	Ham *(base=39)*	13%	10%
Germany	Ham *(base=93)*	9%	2%
Poland	Ham *(base=136)*	7%	1%
France	Chicken *(base=29)*	62%	0%
Denmark	Chicken *(base=57)*	53%	9%
CZ	Chicken *(base=49)*	6%	0%
Germany	Chicken *(base=32)*	3%	3%
Poland	Chicken *(base=46)*	0%	0%
Denmark	Butter *(base=40)*	38%	13%
France	Butter *(base=110)*	30%	8%

Table 15: Estimated market shares by value, by product category			
Country	**Product**	**Proportion of products affiliated to a food labelling scheme in product category**	**Proportion of products affiliated to a food labelling scheme in product category**
CZ	Butter *(base=26)*	19%	4%
Poland	Butter *(base=59)*	17%	3%
Germany	Butter *(base=59)*	10%	5%
CZ	Margarine *(base=47)*	36%	0%
Denmark	Margarine *(base=36)*	33%	3%
Poland	Margarine *(base=121)*	24%	2%
France	Margarine *(base=60)*	15%	0%
Germany	Margarine *(base=23)*	0%	0%
Denmark	Muesli *(base=58)*	52%	38%
France	Muesli *(base=32)*	50%	25%
Germany	Muesli *(base=147)*	19%	1%
CZ	Muesli *(base=76)*	18%	0%
Poland	Muesli *(base=136)*	5%	0%
France	Hard cheese *(base=99)*	55%	25%
Denmark	Hard cheese *(base=201)*	28%	6%
CZ	Hard cheese *(base=123)*	20%	8%
Germany	Hard cheese *(base=347)*	6%	2%
Poland	Hard cheese *(base=211)*	9%	0%
Denmark	Fish filet *(base=37)*	68%	16%
Germany	Fish filet *(base=10)*	40%	20%
Poland	Fish filet *(base=122)*	11%	8%
France	Fish filet *(base=184)*	10%	2%
CZ	Fish filet *(base=26)*	0%	0%
Denmark	Spaghetti *(base=21)*	43%	0%
Germany	Spaghetti *(base=52)*	17%	2%
France	Spaghetti *(base=29)*	10%	7%
Poland	Spaghetti *(base=55)*	9%	2%
CZ	Spaghetti *(base=33)*	6%	0%
Denmark	Tomato *(base=32)*	25%	0%
Germany	Tomato *(base=15)*	20%	7%
CZ	Tomato *(base=21)*	10%	10%
Poland	Tomato *(base=23)*	4%	0%
France	Tomato *(base=21)*	0%	0%
Denmark	Apple *(base=20)*	35%	5%
France	Apple *(base=20)*	25%	0%
CZ	Apple *(base=23)*	4%	4%
Germany	Apple *(base=15)*	0%	0%
Poland	Apple *(base=30)*	0%	0%
Denmark	Biscuits *(base=158)*	22%	10%

Table 15: Estimated market shares by value, by product category			
Country	**Product**	**Proportion of products affiliated to a food labelling scheme in product category**	**Proportion of products affiliated to a food labelling scheme in product category**
France	Biscuits *(base=425)*	16%	8%
Poland	Biscuits *(base=383)*	7%	0%
CZ	Biscuits *(base=233)*	2%	1%
Germany	Biscuits *(base=301)*	1%	0%
Germany	Red wine *(base=675)*	22%	0%
Denmark	Red wine *(base=325)*	7%	2%
France	Red wine *(base=324)*	3%	0,3%
Poland	Red wine *(base=307)*	1%	0,3%
CZ	Red wine *(base=411)*	0,2%	0%
Denmark	Coffee *(base=235)*	23%	8%
France	Coffee *(base=326)*	14%	6%
Germany	Coffee *(base=257)*	8%	4%
Poland	Coffee *(base=525)*	3%	0,0%
CZ	Coffee *(base=316)*	0,3%	0%
Denmark	Pizza *(base=40)*	15%	0%
France	Pizza *(base=139)*	6%	1%
Poland	Pizza *(base=64)*	2%	2%
Germany	Pizza *(base=70)*	1%	0%
CZ	Pizza *(base=59)*	0%	0%

Source: Virtual online shopping – Ipsos

<u>Denmark</u>

- More than two thirds of fish fillets were affiliated to a food labelling scheme in Denmark. The main label found was the 'Nøglehulsmærket', a label from the ministry of Food, indicating this food is healthy.
- The proportion of ham and chicken affiliated to a food labelling scheme was also particularly high. The main types of scheme labels found on these products were health and organic labels.
- The Danish Ø-mark as well as the EU organic schemes were the most common.
- Very few products were affiliated to an origin scheme and the only origin labels used were those from European schemes. Origin labelling schemes were mainly found on cheese products.

<u>France</u>

- In the exercise, France had the highest proportion of food labelling schemes for cheese and chicken.
- Many origin types of schemes were found on animal related products. Both European schemes and French specific schemes were found. A common one for ham was the VPF (Viande de Porc Française) label. AOC

labels (Appellation d'Origine Controlée) was also widely used especially for hard cheese and butter.

- The logo of the 'Label rouge' scheme was commonly found on ham, chicken eggs and fish. This scheme indicates a high quality product.
- Another common type of food labelling scheme found was organic schemes. The AB logo was a frequent one that could be seen in most product categories.

Germany

- Most eggs were found to be affiliated to a scheme in Germany. The main one used was the KAT label. However it is important to note that there were only 17 eggs products available across the three websites and 15 were affiliated to a scheme.
- Germany had the highest proportion of food labelling schemes for red wine. This was mainly due to the pregnancy label.
- Organic label was the most common type of label scheme found and there were a number of different one used.

Czech Republic

- More than a third of the margarine products found in Czech Republic were affiliated to a food labelling scheme and in majority this was to the International health label 'Healthy choice'.
- Origin schemes were widely used. The Czech Republic origin scheme could be found on chicken and cheese while the European origin schemes were on ham, cheese and biscuits.
- The Klasa A scheme from the Ministry of Agriculture was also common and could be found on cheese, spaghetti, muesli and butter.

Poland

- In Poland margarine had the highest level of products affiliated to a food labelling scheme. This may be due the very large number of products available in this category in Poland compared to the other countries. As in the Czech Republic, the main scheme found on margarine was the healthy choice label.
- A high number of labelling schemes could be found on products in Poland compared to the other countries but not many products were affiliated to each scheme. For example in Poland, 13 different schemes were found on coffee.
- Many labelling schemes found were related to quality of the product with quite a few schemes showing the product had won a prize or awards.

3 The EU 2010 Guidelines and compliance with the UCPD

The last has decade seen substantial growth in the number of voluntary food labelling schemes[28]; hence the European Commission published best practice guidelines for voluntary certification schemes for agricultural products and foodstuffs in 2010[29].

These guidelines were developed in cooperation with stakeholders, in particular the DG AGRI Advisory group on the quality of agricultural production. The aim of these guidelines is twofold. First to describe the existing legal framework and secondly to highlight best practice in the operation of such schemes, in particular by offering guidance on how to: avoid consumer confusion and increase the transparency and clarity of the scheme requirements; reduce the administrative and financial burden on farmers and producers, including those in developing countries; and, ensure compliance with EU internal market rules and principles on certification.

The guidelines are directed primarily at scheme developers and operators, as well as other stakeholders.

The following sections assess the food labelling schemes recorded in the inventory relative to the guidelines and lay out the perceived obstacles to, and drivers for, complying with the guidelines.

While assessing the level of compliance with the guidelines, it is important to bear in mind that the Commission 2010 guidelines are voluntary and relatively recent and not all scheme operators will have heard of them. Out of the 92[30] scheme operators who responded to our survey, 48% had previously heard of the guidelines. It is not unreasonable to assume that those scheme operators who responded to the survey were at least as likely to have heard of the guidelines – if not more so – than those scheme operators who did not respond to the survey.

As a reference for comparison, we show in Figure 19 the proportion of consumer organisations, accreditation bodies and producer farmer and retailer organisations who had heard about the guidelines before the survey. The producer, farmer and retailer organisations were the group the most aware of the guidelines with 58% of the respondents claiming they knew about the guidelines. 67% of producer organisations and 60% of farmer organisations that responded to the survey were aware of the guidelines, while 40% of the retailer organisations were aware. 40% of the certification and accreditation bodies and 29% for the consumer organisations stated they were aware of the guidelines. It is important to recognise that the number of responses for this question was low. Only 6 producer organisations, 15 farmer organisations and 5 retailer organisations answered this question.

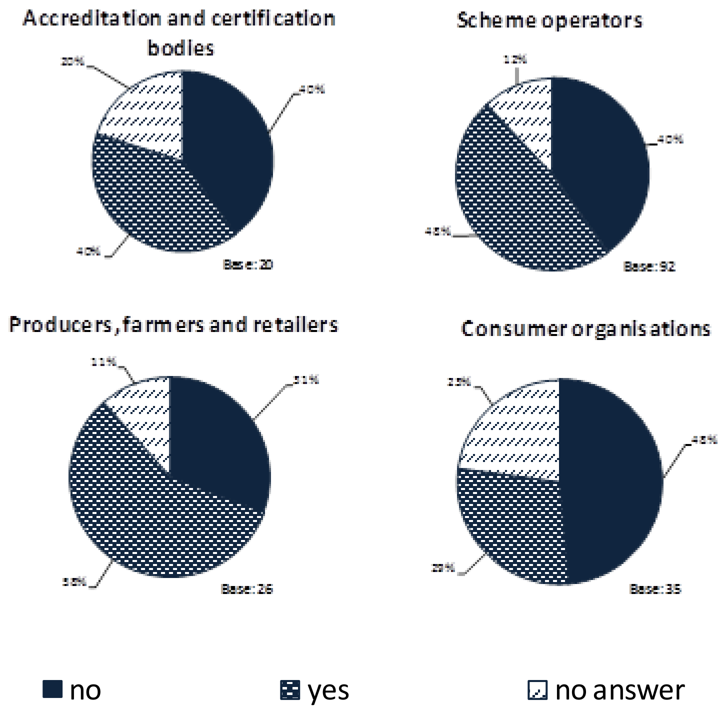
In all figures that follow we present producers, farmers and retailer organisations as a single group. We have also conducted the analysis on each of these 3 groups separately. Where there are differences in responses between these groups we note this. All figures for these groups shown separately are included in Annex 15.

[28] Commission Communication (2010) EU best practice guidelines for voluntary certification schemes for agricultural products and foodstuffs.

[29] http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:C:2010:341:0005:0011:en:PDF

[30] Out of these 92 scheme operators, one manages two schemes and one manages three. The answers of these scheme operators have been taken to apply to all schemes the scheme operator manages.

Figure 19:Proportion of stakeholders, scheme operators, consumer organisation and accreditation bodies that were aware of the guidelines before the survey



Note: Producer, farmers and retailers broken down in Annex 15

Source: Scheme operator survey, stakeholder survey, consumer organisation survey and accreditation body survey

3.1 Current level of compliance with the EU 2010 guidelines

In order to assess the level of compliance of the identified food labelling schemes with the EU 2010 guidelines, a two-pronged approach was used:

- Scheme operators and other stakeholders were asked directly to what extent they believe that schemes in their country comply with these guidelines
- An independent assessment was carried out with the help of the websweep and the scheme operator survey. Each recommendation which could be tested through the websweep was assessed through the websweep as this represents the most objective and independent assessment and the remaining recommendations were addressed through the scheme operator survey.[31] Using the websweep data and the responses to the scheme operator survey, the following indices of compliance were created:

[31] Some questions were addressed by both the scheme operator survey and the websweep. In this case, we selected the most favourable response. The indices and the respective guidelines are provided in the Annex to this report. The count by country where the answers to the websweep and scheme operator were different is also presented in the Annex.

- Combined index 2010 guidelines
  - This included all guidelines that were assessed using the websweep and the scheme operator survey. 95 schemes are included in this index. 92 scheme operators responded to the survey and two of these operated more than one scheme
- Websweep index 2010 guidelines
  - This included the guidelines that were assessed using the websweep only; 901 schemes are included in this index.
- Websweep index consumer
  - This included the guidelines that were assessed using the websweep and which are of particular importance from the consumer perspective; 901 schemes are included in this index.
- Combined index 2010 guidelines – self-declaration only
  - This included the guidelines that were assessed using the websweep and the scheme operator survey but included only those guidelines that self-declaration schemes can be reasonably expected to meet. For example, a self-declaration scheme would not be reasonably expected to meet the following criteria *"does the scheme clearly state that it requires certification by an independent body and provides details of that body?"* 95 schemes are included in this index.

The guideline requirements included in each index are presented in the Annex 6 to this report. The method assessed schemes against all criteria in the guidelines with exception of 3 requirements. These were: guideline 4.7 regarding changes to scheme requirements being made only when justified and appropriate notice given, guideline 6.2(7) inspections should focus on analysing verifiable criteria and guideline 6.3 (3) any cost savings arising from mutual recognition should be passed on operators. For these 3 guidelines it was considered that the methods employed as part of this study would not effectively asses these individual guidelines as they could not be independently verified using the websweep or the scheme operator survey.

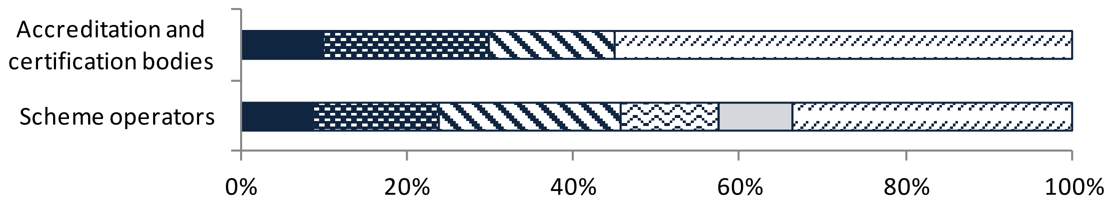
3.1.1 Views from the stakeholders and scheme operators

Scheme operators and accreditation and certification bodies were asked to what extent they agree with the statement "All schemes in my country comply with these guidelines". Figure 20 below shows that scheme operator views appear evenly split between whether or not all schemes in their country comply with the EU 2010 guidelines. Accreditation and certification bodies on the other hand are clearly more positive with not a single respondent disagreeing with the statement.

Two of the respondents who disagree with the statement (that is, who give a score of either 4 or 5) indicate that schemes owned by retailers do not fulfil the guidelines and one explains further that this is due to the fact that these schemes force participants to use their control bodies, that they do not receive input from farmers and that they lack transparency. One respondent who disagrees with the statement that all schemes comply with the guidelines points out that the requirements of mutual recognition between schemes is a major problem for schemes in his or her country.

It should be noted that there was high level of “no response” to this statement with over 30% of scheme operators and 55% of accreditation and certification bodies not responding to this statement.

Figure 20: “All schemes in my country comply with these guidelines”



	Scheme operators	Accreditation and certification bodies
1 Totally agree	8	2
2	14	4
3	20	3
4	11	0
5 Totally disagree	8	0
No response	31	11

Note: Producer, farmers and retailers broken down in Annex 15

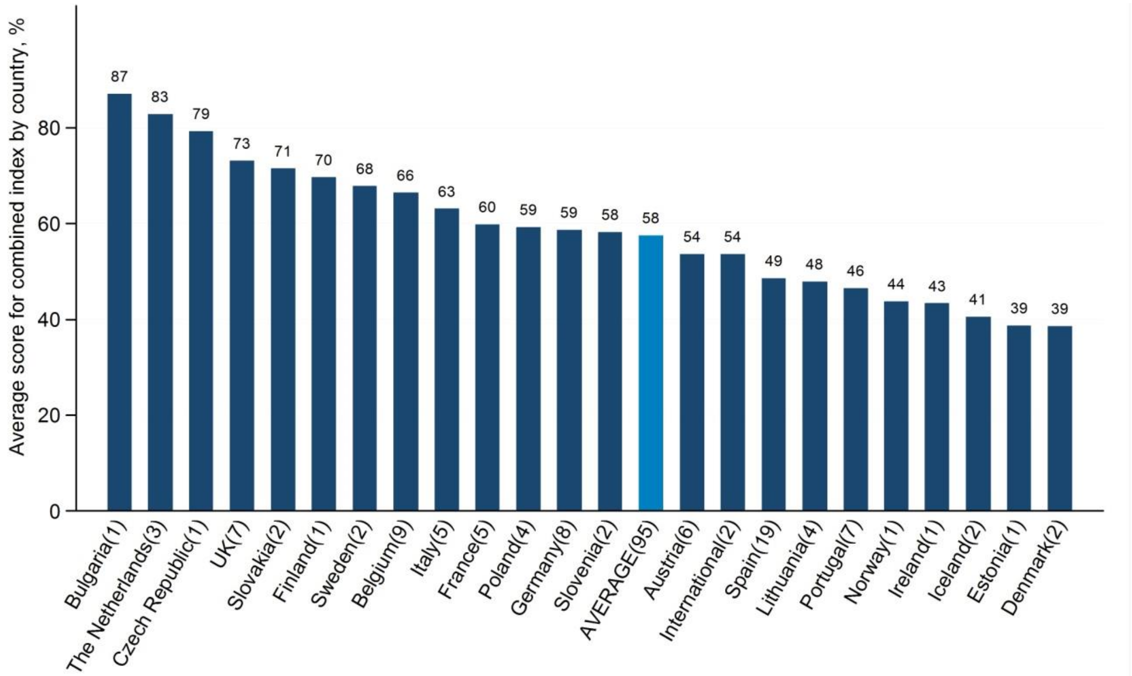
3.1.2 Findings from the websweep and the scheme operator survey

The indices are presented below. First we present each of the four indices by country then we present the indices by type of scheme self-declaration and certification, and between the EU12 and EU15. We then follow with the indices by manager type and product type.

Indices by country

The combined index (Figure 21) includes all schemes that responded to the scheme operator survey. The combined index includes only those schemes that responded to the scheme operators’ survey. This is because the combined index has additional criteria that could only be assessed though a survey. These criteria are shown in Table 16 below. Ninety two schemes operators responded to the survey. Two of these operators operate more than one scheme such that there are and are 95 food labelling schemes included in the combined index. In Cyprus, Germany, Hungary, Latvia, Luxembourg, Malta and Romania no scheme operator responses were received. Out of a normalised score of 100 Bulgaria receives the highest average score of 87. The number of scheme operator responses in each country is quite low. This is shown by the figure in brackets for each country in Figure 21. The figure also shows the average score across all the 95 schemes ((labelled as AVERAGE in the figure)

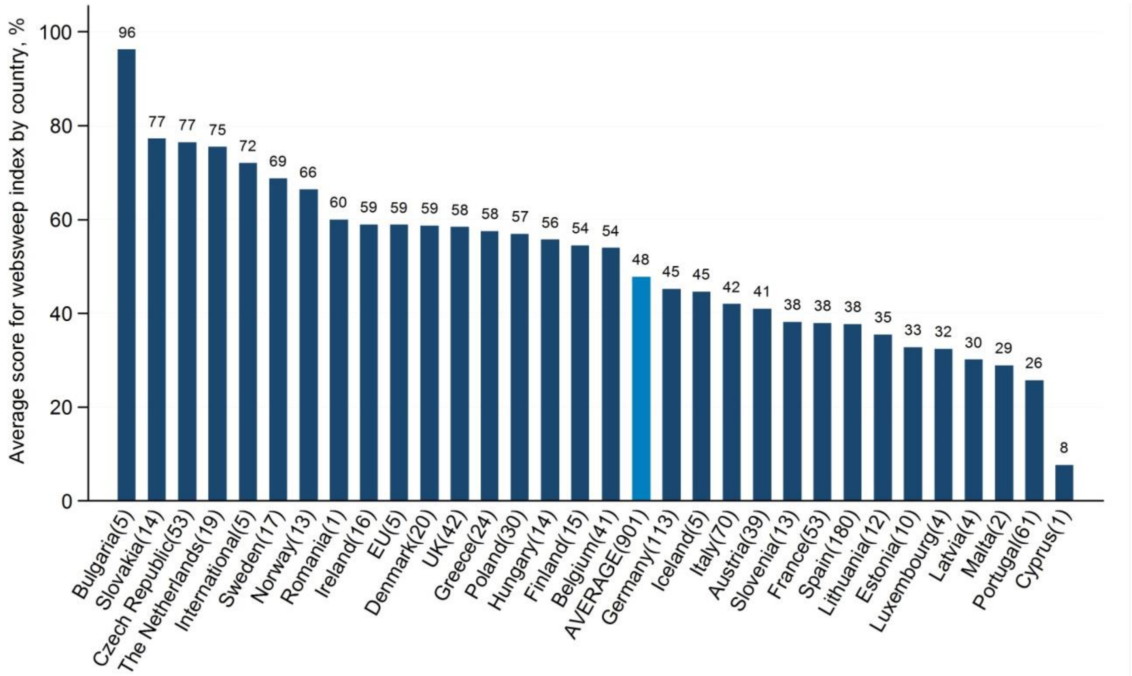
Figure 21:Combined index 2010 guidelines all countries



Note: The *combined* index draws on both websweep and the scheme operator survey. The number in brackets represents the number of respondents to the scheme operator survey and therefore the number of schemes on which the score is based. *EU* refers to schemes that operate across the European Union, and are operated or managed by the European Commission.

Using the websweep information only (Figure 22) we find Bulgaria with a score of 96 followed by Slovakia, the Czech Republic and the Netherlands on similar scores of 77 and 75. Cyprus receives the lowest average score in this index with a score of 8 out of 100 (there was one scheme identified in Cyprus). Country level index scores are defined as the (weighted) average share of schemes fulfilling each criterion, where the weights are assigned based on the number of schemes that are scored against each criterion. The figure also shows the average across all 901 schemes identified in the websweep.

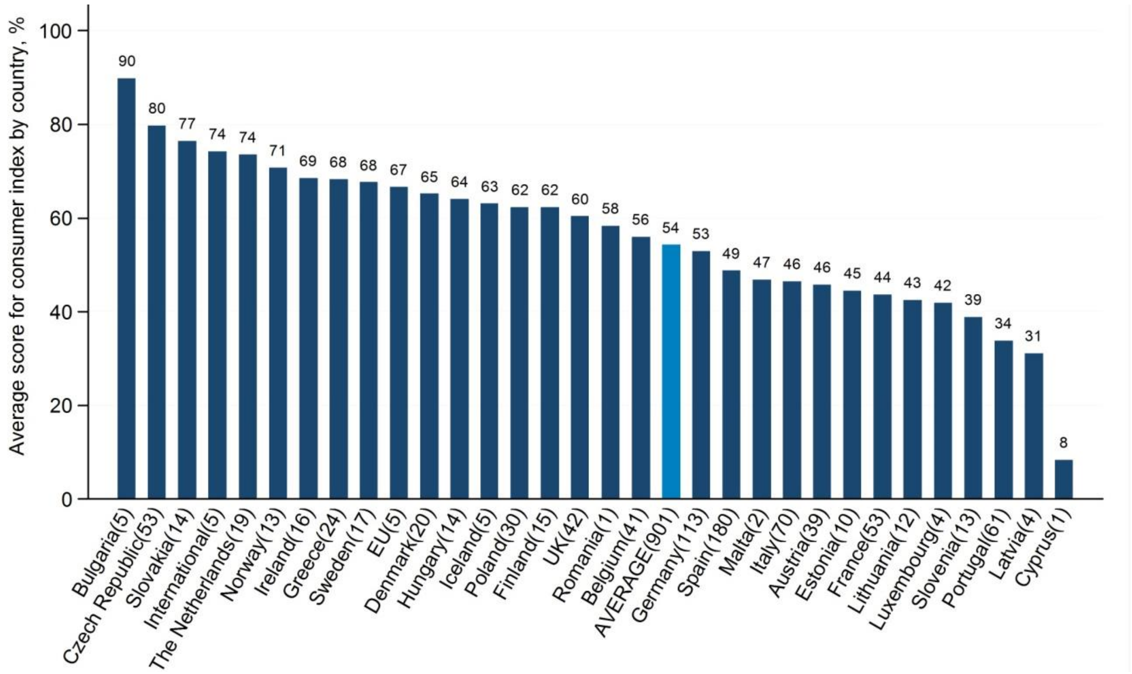
Figure 22:Websweep index 2010 guidelines all countries



Note: The *websweep* index draws only on the websweep. The number in brackets represents the number of schemes identified in the country and thus the number of schemes on which the score is based. *EU* refers to schemes that operate across the European Union, and are operated or managed by the European Commission.

The consumer index (Figure 23) provides a similar ranking to the websweep index. Bulgaria again receives the highest score followed by Slovakia, the Czech Republic and the Netherlands. The figure also shows the average across all 901 schemes identified in the websweep.

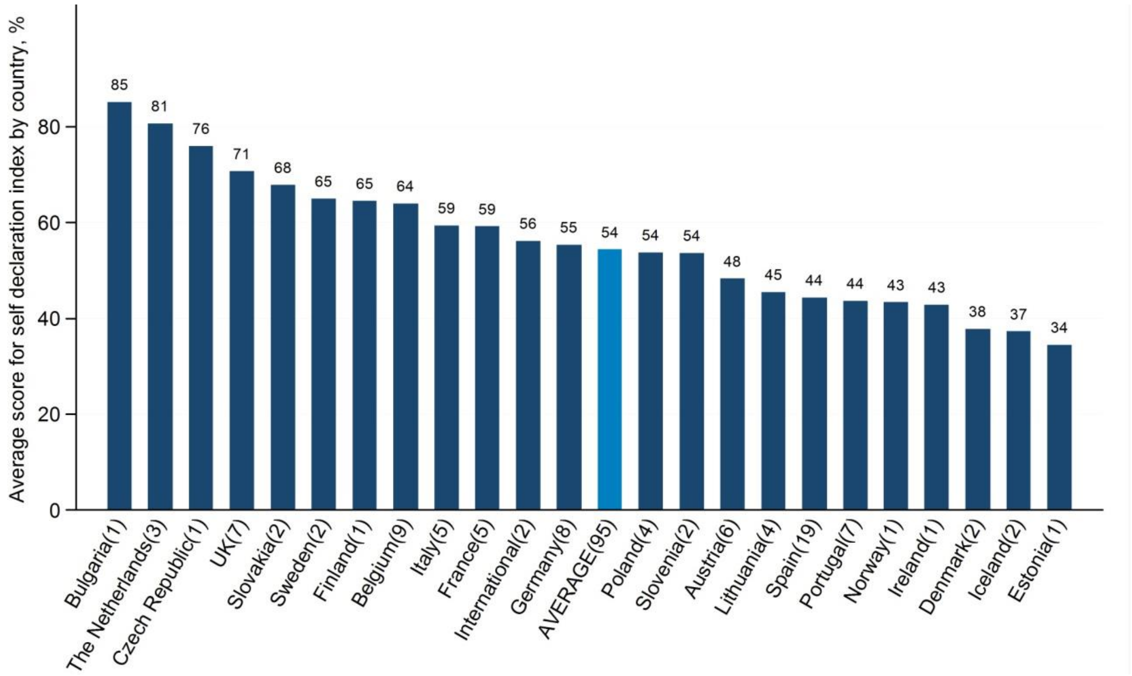
Figure 23:Websweep index consumer all countries



Note: The *websweep index for consumers* draws only on the websweep. The number in brackets represents the number of schemes identified in the country and therefore the number of schemes on which the score is based. *EU* refers to schemes that operate across the European Union, and are operated or managed by the European Commission.

For the index combining information from the websweep and the scheme operator survey (Figure 24), but only considering self-declaration criteria, Bulgaria is once again top with a score of 85 followed by the Netherlands and the Czech Republic (81 and 76, respectively). The combined index includes only those schemes that responded to the scheme operators' survey. This is because the combined index has additional criteria that could only be assessed though a survey. These criteria are shown in Table 16 below. Ninety two scheme operators responded to the survey. Two of these operators operate more than one scheme as such 95 food labelling schemes are included in the combined index. In Cyprus, Germany, Hungary, Latvia, Luxembourg, Malta and Romania no scheme operator responses were received.

Figure 24:Combined index 2010 guidelines self-declaration criteria only



Note: The *combined index, self-declaration criteria only* draws on both websweep and scheme operator survey. The number in brackets represents the number of respondents to the scheme operator survey and therefore the number of schemes on which the score is based.

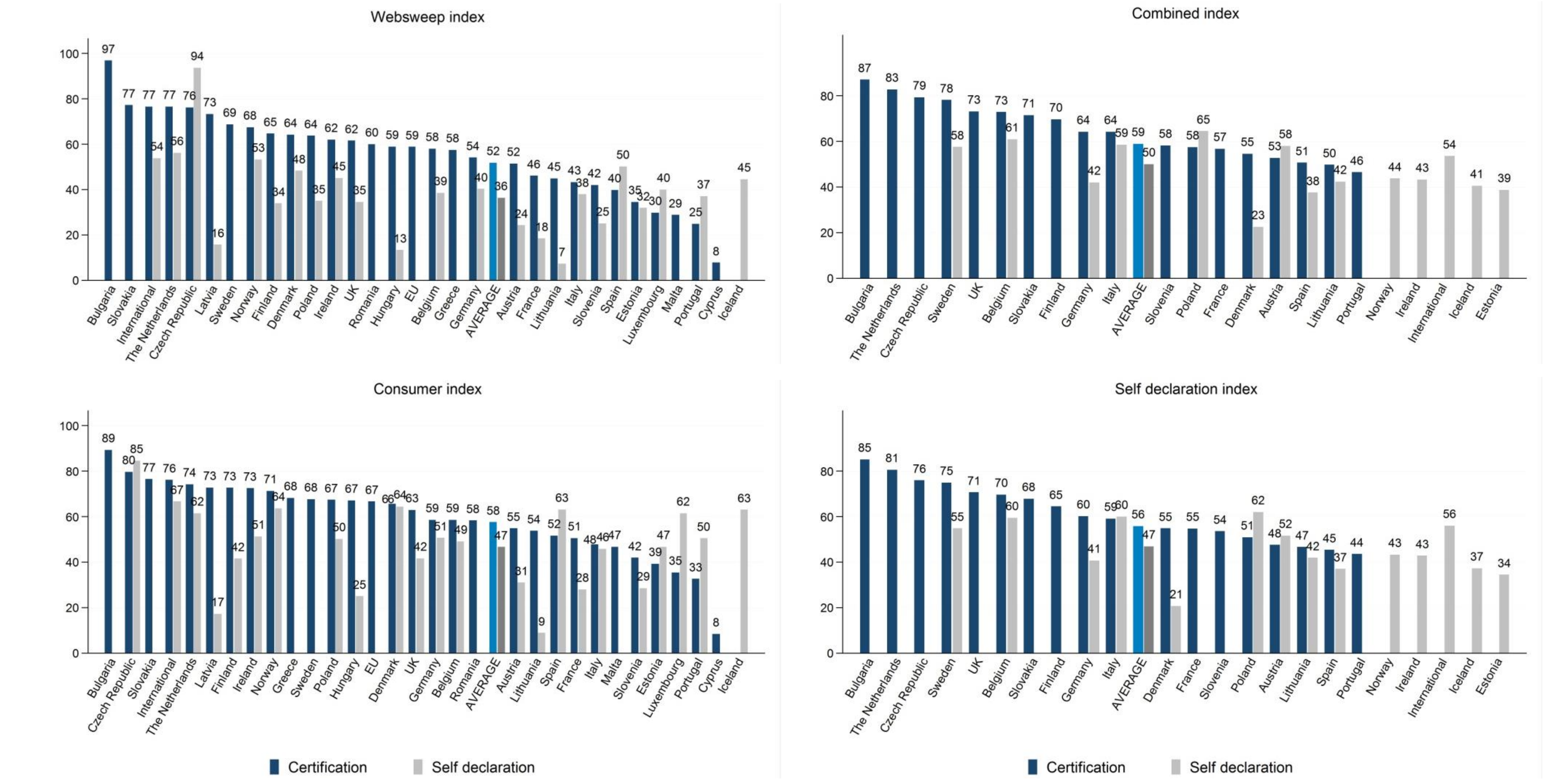
Indices by scheme type – self-declaration and certification schemes

The figure below shows the average scores for all four indices by country and by type of scheme (certification and self-declaration) as indicated by the scheme operators responding to the survey and information from the websites, respectively.[32]

Evaluating the schemes by certification or self-declaration there is a general pattern that certification schemes perform better then self-declaration schemes.

[32] The *combined* and *self declaration* indices are based on the scheme operator survey and *websweep* and *consumer* indices are based on information from the website.

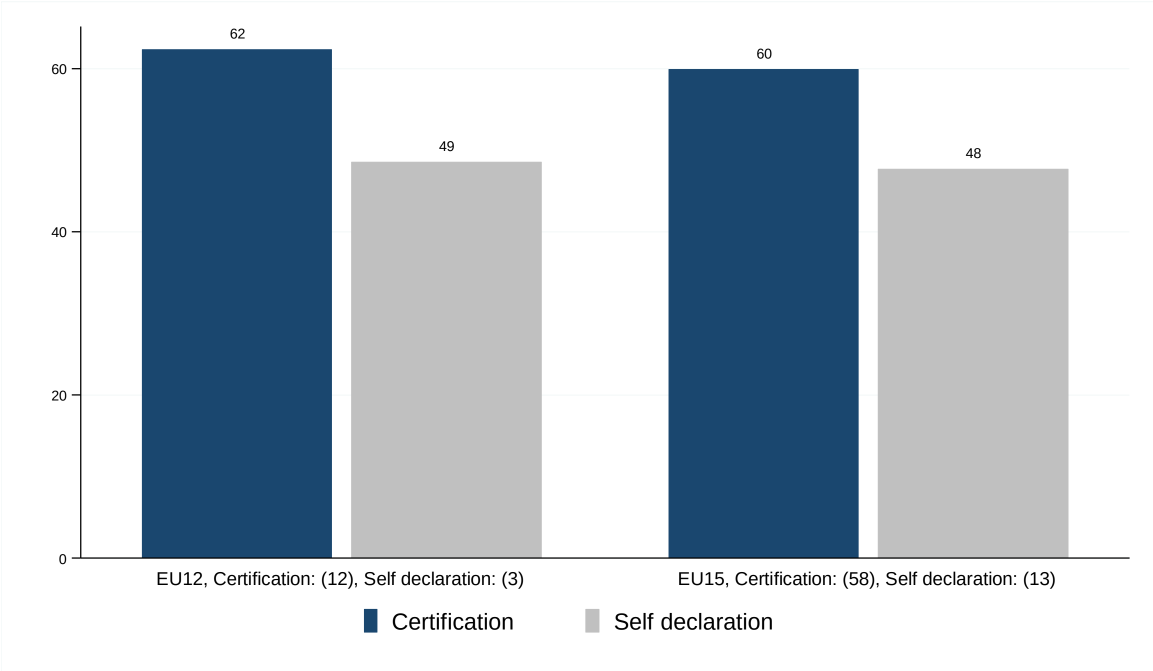
Figure 25: Websweep, combined, consumer, and self-declaration index 2010 guidelines self-declaration and certification schemes



Indices – EU 12 and EU 15

When considering the indices for the EU 12 and EU 15 we find similar outcomes across the country groups. The combined index for self-declaration schemes provides a score of 48 for the EU 15 countries and 49 for EU 12. Likewise in the case of certification schemes, the average compliance score for the EU 12 is 62 and for the EU 15 it is 60. Therefore we find little difference between the country groupings.

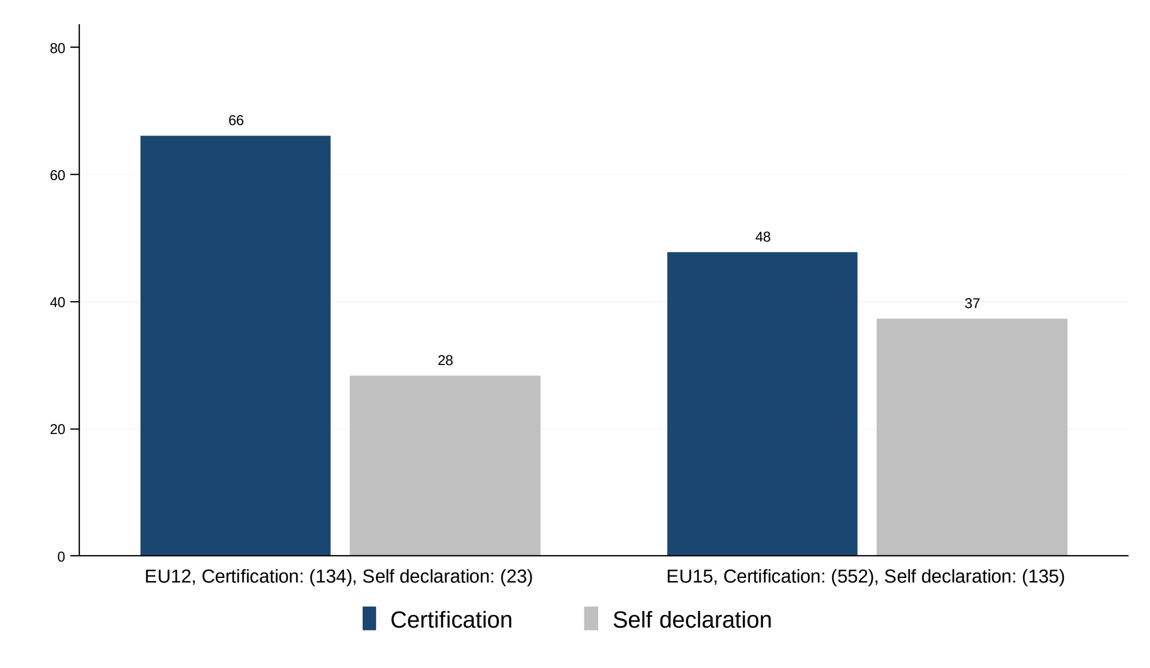
Figure 26:Combined index 2010 guidelines EU12 and EU 15 by scheme type



Note: The *combined index* draws on both the websweep and scheme operator survey. The number in brackets represents the number of respondents to the scheme operator survey and therefore the number of schemes on which the score is based. A total of 95 scheme operators responded to the survey, however, 5 of them did not categorise as EU15 or EU12 as they were based in Iceland, Norway or classified as 'International'.

For the websweep index, we do observe differences between the EU12 and EU15. Certification schemes in the EU12 score an average of 66 while certification schemes in the EU15 score 48. Considering self-declaration schemes, we find an average score of 28 in the EU12, and 37 in the EU15 (see Figure 27).

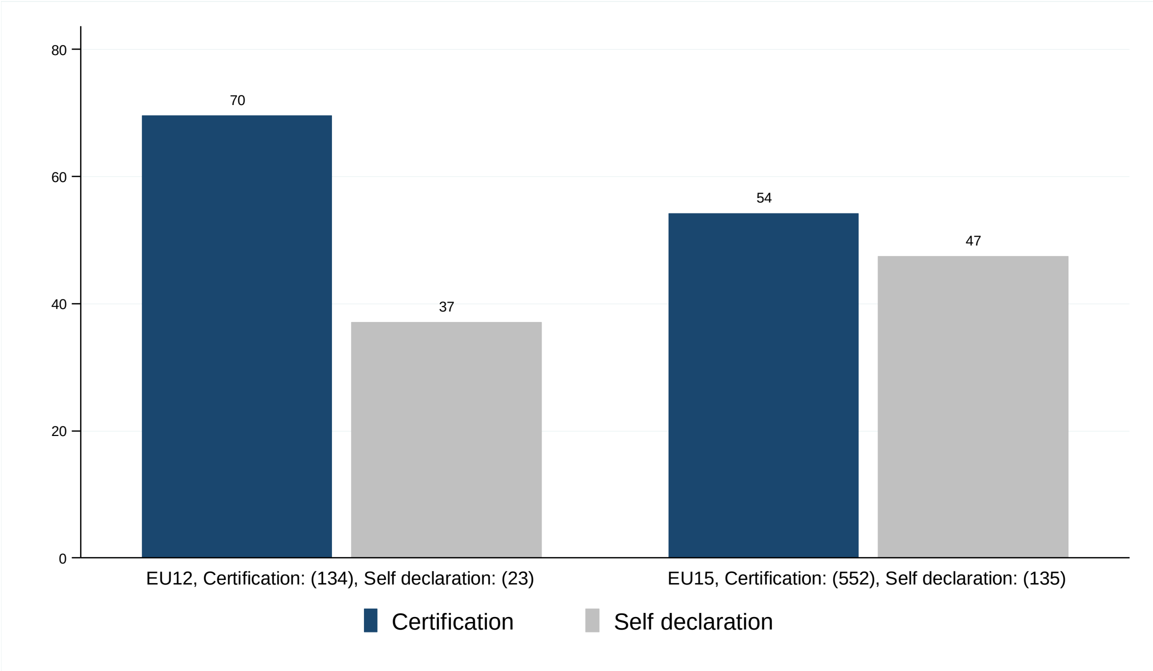
Figure 27:Websweep index 2010 guidelines EU 12 and EU 15 by scheme type



Note: The *websweep* index draws only on the websweep. The number in brackets represents the number of schemes identified in the country group and thus the number of schemes on which the score is based.

The websweep index for consumers, which is shown in the figure below, shows that the average score for certification schemes in the EU12 is 70 and in the EU15 it is 54, while self-declaration schemes score an average of 37 in the EU12 and 47 in the EU15.

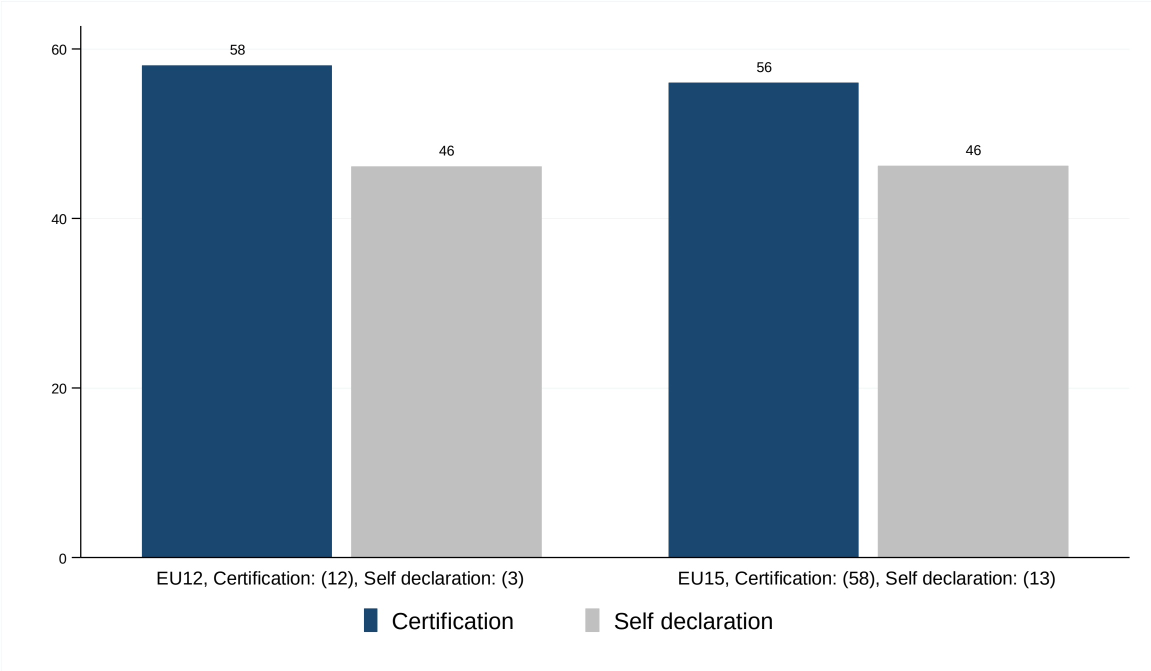
Figure 28:Websweep consumer index EU 12 and EU 15 by scheme type



Note: The *websweep index for consumers* draws only on the websweep. The number in brackets represents the number of schemes identified in the country group and thus the number of schemes on which the score is based.

The figure below presents the combined self-declaration scheme index. Similar to the combined index using all criteria we find very little difference between the EU 12 and EU15.

Figure 29:Combined index 2010 guidelines criteria for self-declaration schemes only EU 12 and EU 15 by scheme type



Note: The *combined index, self-declaration criteria only* draws on both the websweep and the scheme operator survey. The number in brackets represents the number of respondents to the scheme operator survey and therefore the number of schemes on which the score is based. A total of 95 scheme operators responded to the survey, however, 5 of them did not categorise as EU15 or EU12 as they were based in Iceland, Norway or classified as 'International'.

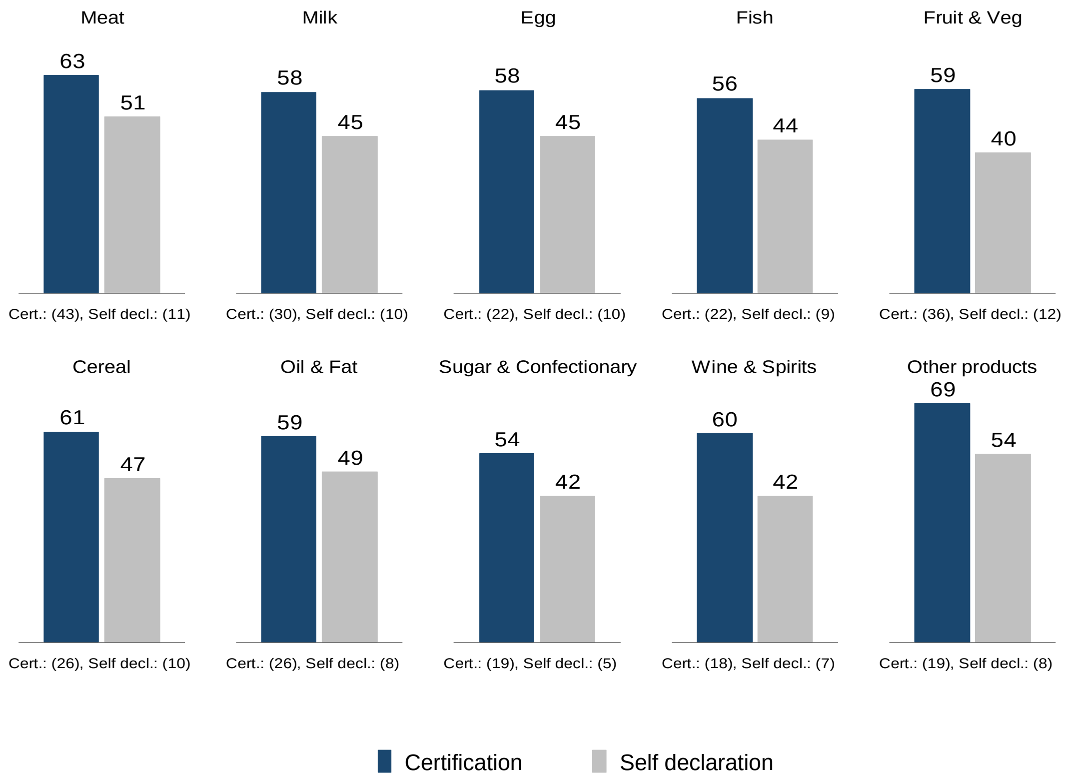
Indices by product type

Considering scheme performance by the product types they cover, overall the indices show that certification schemes perform better than self-declaration schemes across all product types.

The figure below shows the average index score by product type and certification/self-declaration for the combined index. The average index score across all products is **60** out of 100 for certification schemes and **47** for self-declaration schemes.

Meat, *cereal* and '*other' products* score higher than the average for certification schemes. For self-declaration schemes, *meat*, *oil and fats* and '*other' products* score higher than the average. For *milk*, *egg*, *fish*, *fruit and vegetables* and *sugar and confectionary*, both certification schemes and self-declaration schemes score lower than the respective averages.

Figure 30:Combined index 2010 guidelines – product type

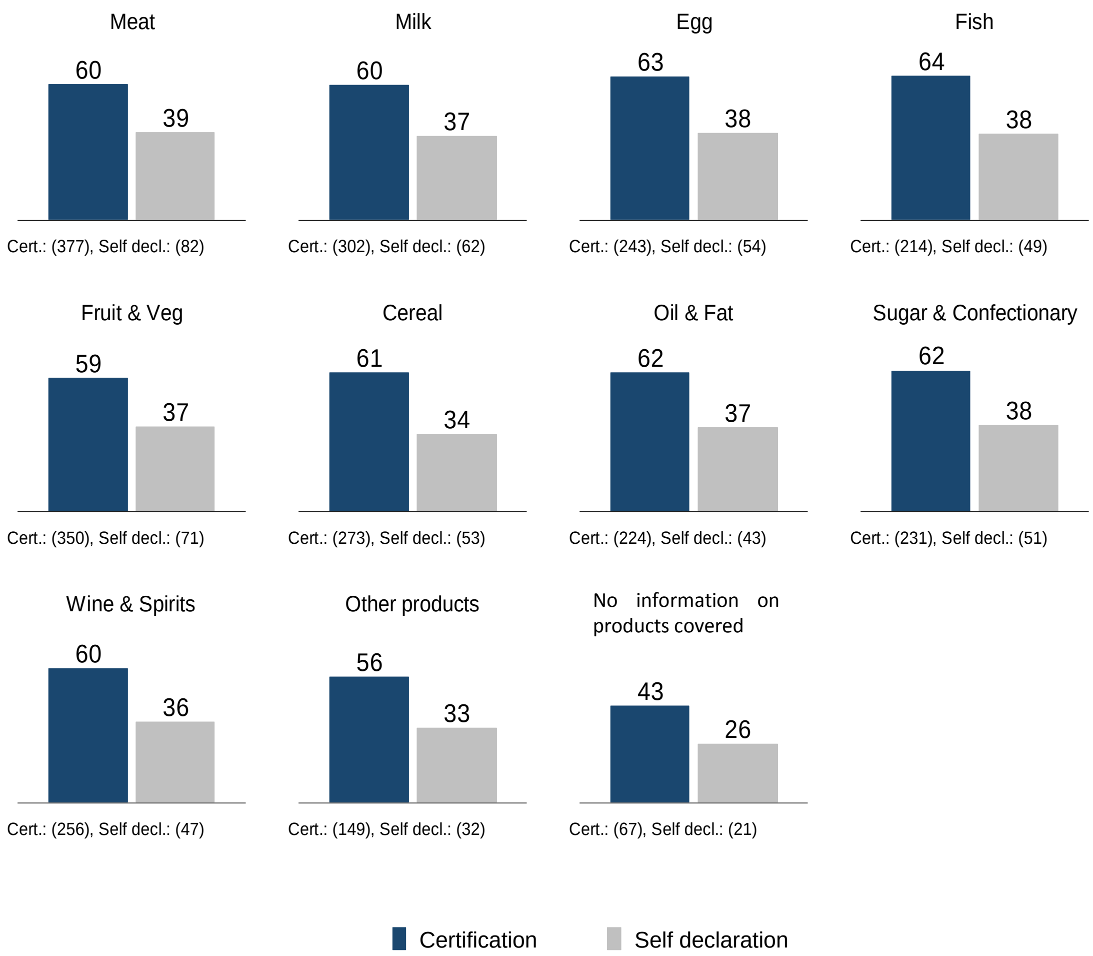


Note: The *combined index* draws on both the websweep and the scheme operator survey. The number in brackets represents the number of respondents to the scheme operator survey and thus the number of schemes on which the score is based. A total of 95 scheme operators responded to the survey.

Figure 31 shows the average index score by product type and certification/self declaration for the websweep index. The average index score across all product types is **52** out of 100 for certification schemes and **36** for self-declaration schemes.

Figure 31 shows that for certification schemes, schemes in all product groups outperform the average with the exception of schemesfor which it has not been possible to identify the products they cover. In contrast to the combined index, certification schemes covering *egg* and *fish* score highest in the websweep index. For self-declaration schemes, the websweep index score shows that *cereal* and *'other' products*, along with schemes where products covered could not be identified, perform worse than the average.

Figure 31: Websweep index 2010 guidelines - product type

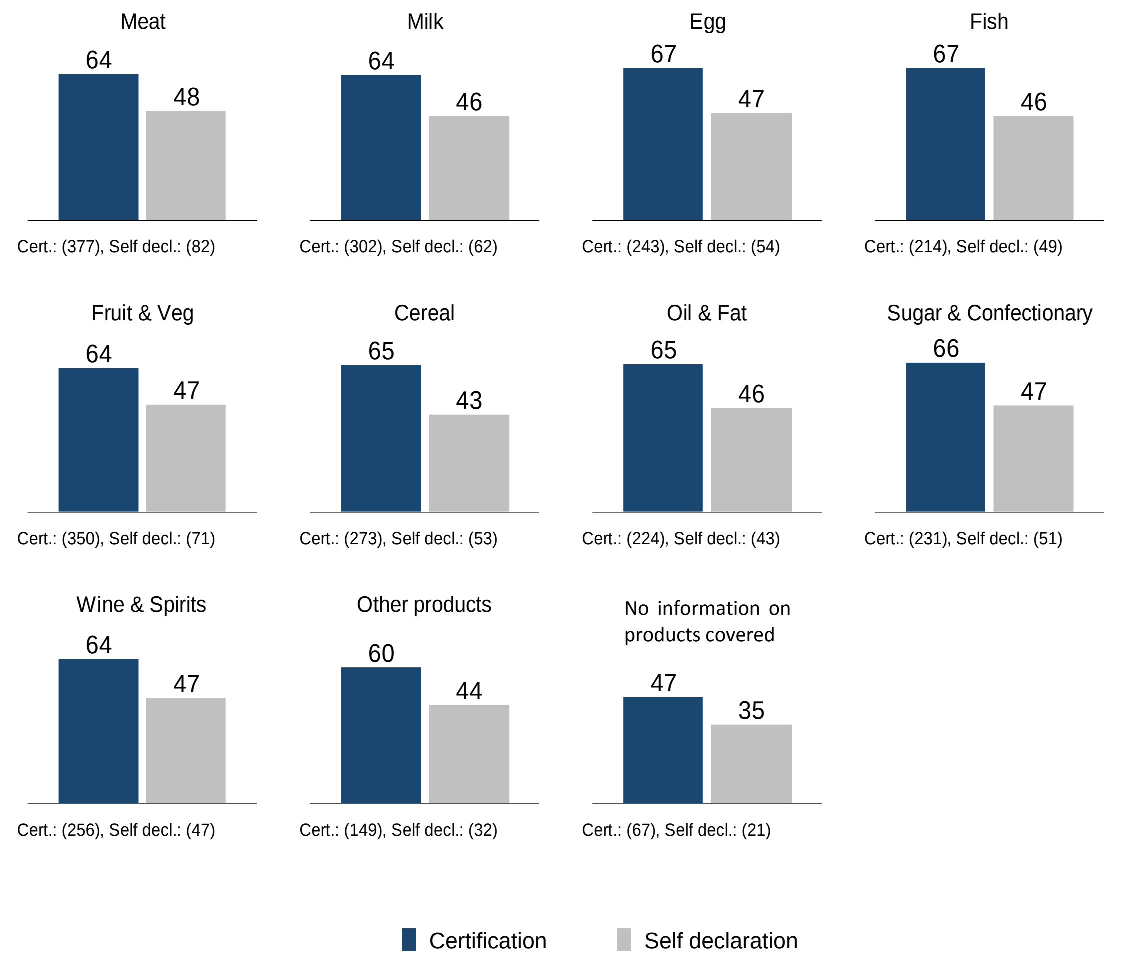


Note: The *websweep* index draws only on the websweep. The number in brackets represents the number of schemes identified and thus the number of schemes on which the score is based.

The figure below shows the average index score by product type and certification/self-declaration for the websweep index for consumers. The average index score across all product types is **58** out of 100 for certification schemes and **47** for self-declaration schemes.

The websweep index for consumers displays very similar results to the combined websweep index as shown below.

Figure 32: Websweep index consumer - product type

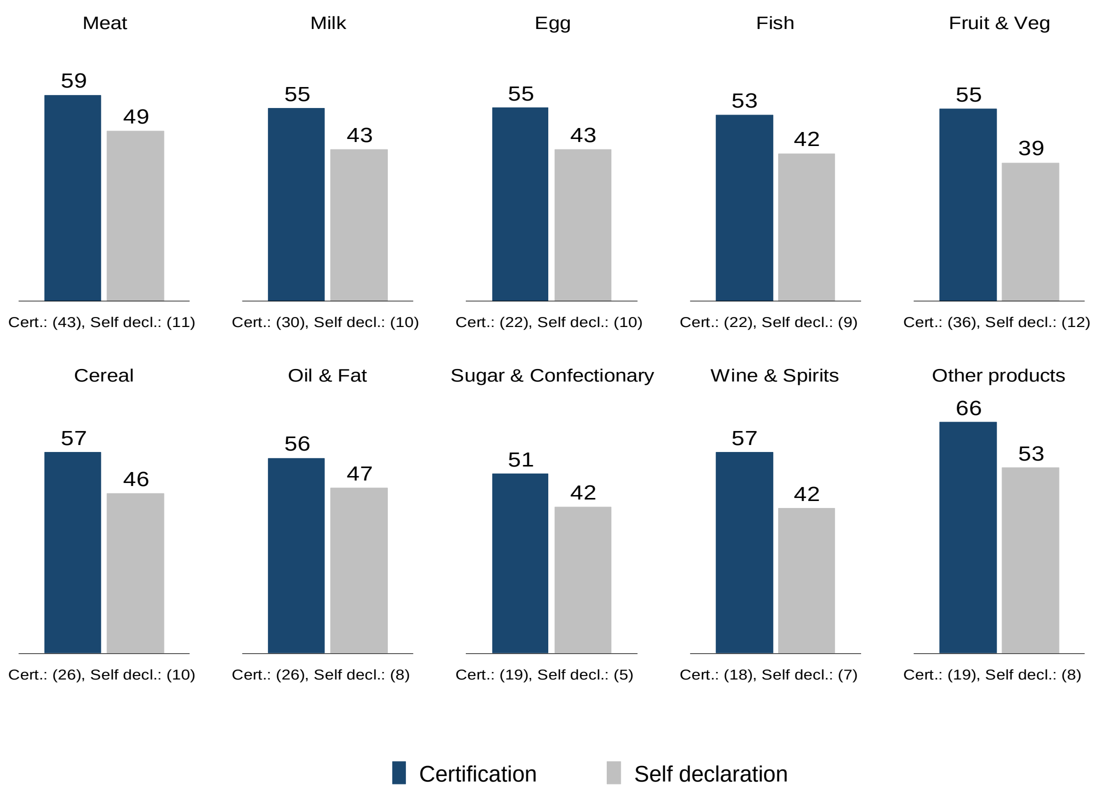


Note: The *websweep index for consumers* draws only on the websweep. The number in brackets represents the number of schemes identified and thus the number of schemes on which the score is based.

The figure below shows the average index score by product type and certification/self-declaration for the combined index with self-declaration criteria only. The average index score across all product types is **56** out of 100 for certification schemes and **46** for self-declaration schemes.

For certification schemes, the figure shows that *meat*, *cereal*, and *wine and spirits* perform marginally better than the average, and that *'other' products* perform much better. For self-declaration schemes, *meat*, *oil and fats* and '*other' products* score higher than the average. The combined index with self-declaration criteria only shows results that are very similar to those of the combined index including all criteria.

Figure 33: Combined index 2010 guidelines self-declaration guidelines only - product type



Note: The *combined index, self-declaration criteria only* draws on both websweep and scheme operator survey. The number in brackets represents the number of respondents to the scheme operator survey and thus the number of schemes on which the score is based. A total of 95 scheme operators responded to the survey.

Policy area

The indices below show that overall self-declaration schemes perform worse than certification schemes in most policy areas. Schemes can cover more than one policy area and in many cases they cover several.

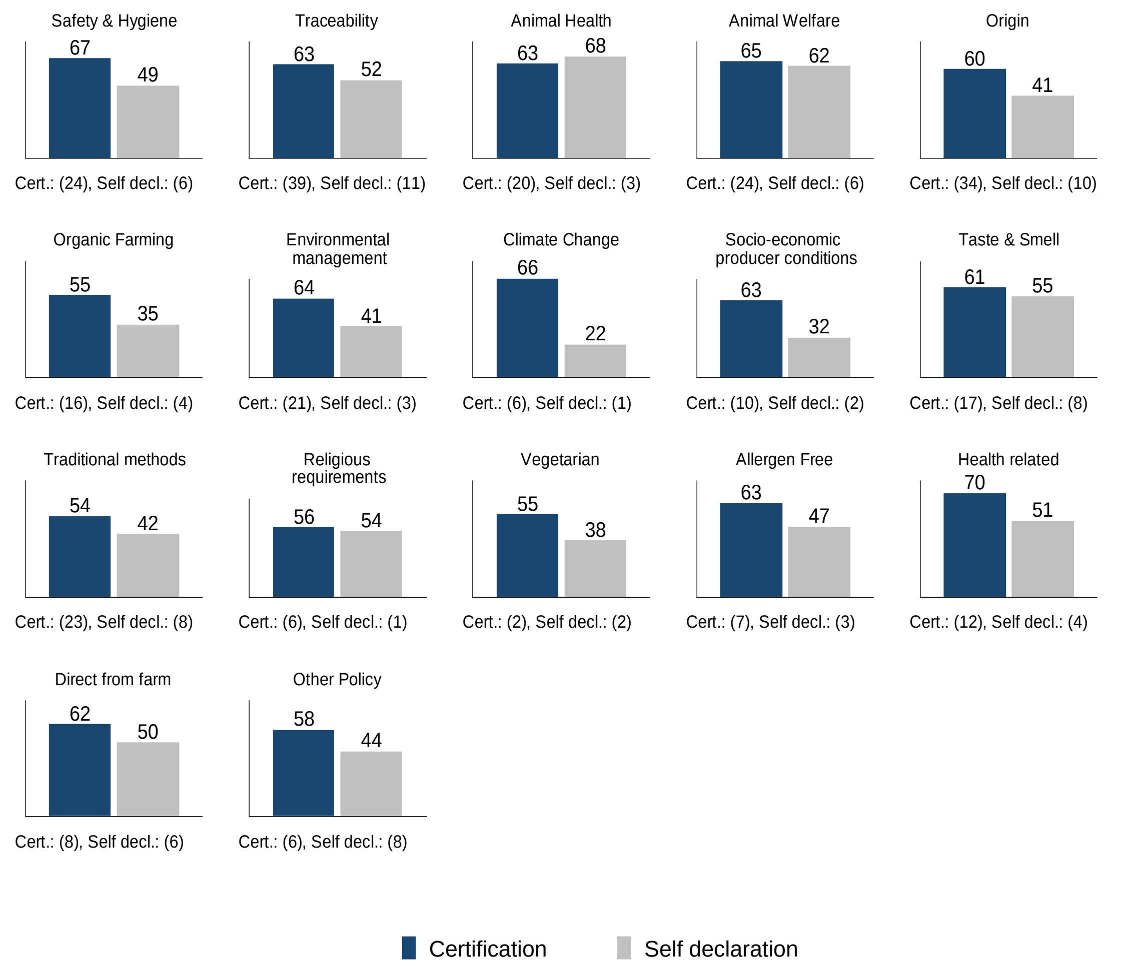
The figure below shows the average index score by policy area and certification/self-declaration for the combined index. The average index score across all policy areas is **60** out of 100 for certification schemes and **47** for self-declaration schemes.

The general picture that certification schemes tend to perform better than self-declaration schemes is supported by the analysis for policy areas, except for *animal health*, where self-declaration schemes perform better than certification schemes (68 versus 63 respectively).

For eight policy areas (Safety & hygiene, Traceability, Animal health, Animal welfare, Taste & smell, Allergen free, Health related, and Direct from farm), both certification schemes and self-declaration schemes perform at least as well as their respective averages. For five policy areas *Origin*, *Organic farming*, *Traditional methods, Vegetarian,* and '*Other' policy)*, both certification schemes and self-declaration schemes perform no better than their respective averages.

For three of the remaining four policy areas (*Environmental management, Climate change,* and *Socio-economic producer conditions)*, certification schemes perform better than the average and self-declaration schemes worse, with the opposite true of the last policy area (Religious requirements). However, the sample sizes for these four policy areas are not very large.

Figure 34: Combined index 2010 guidelines policy area



Note: The *combined index* draws on both the websweep and the scheme operator survey. The number in brackets represents the number of respondents to the scheme operator survey and therefore the number of schemes on which the score is based. A total of 95 scheme operators responded to the survey.

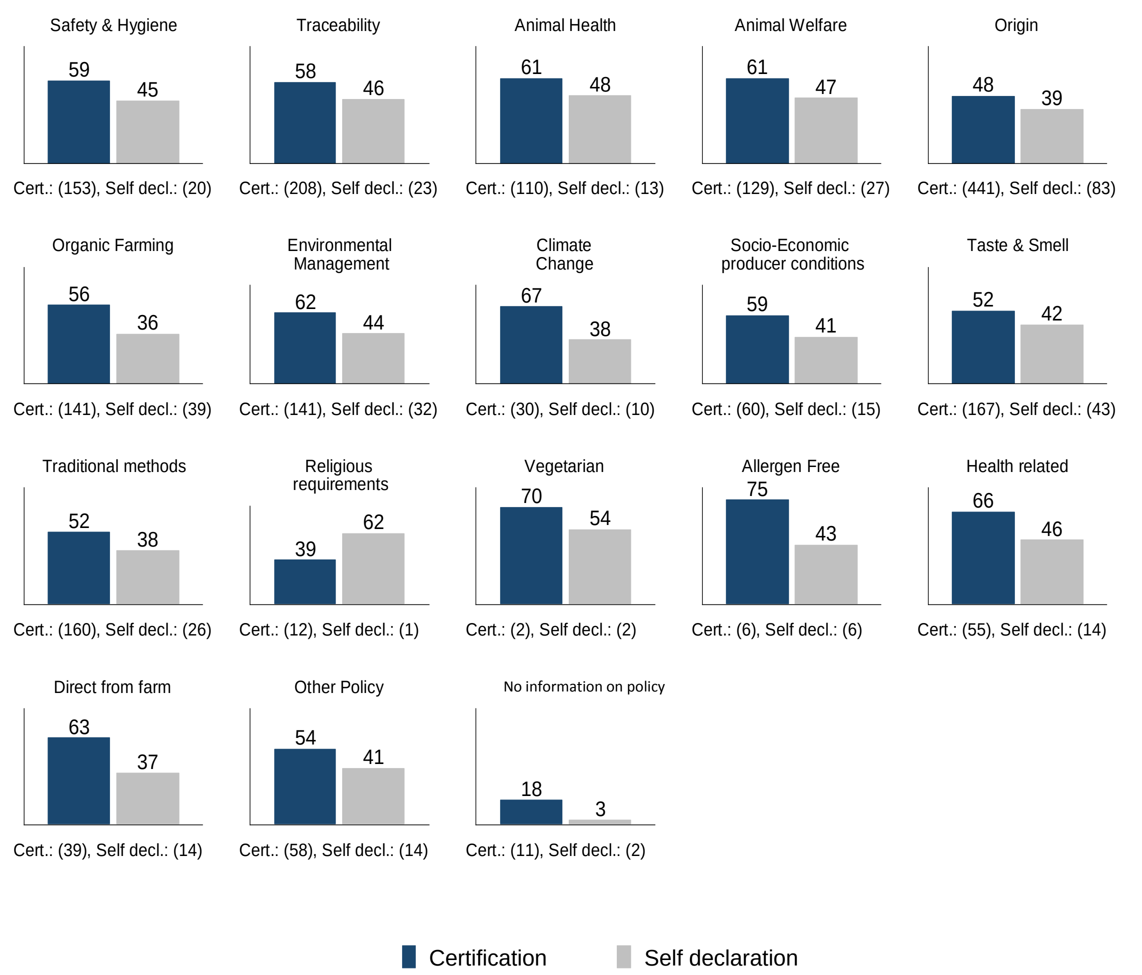
The figure below shows the average index score by policy area and certification/self-declaration for the websweep index. The average index score across all policy areas is **52** out of 100 for certification schemes and **36** for self-declaration schemes.

For all policy areas except *Origin*, and *Religious requirements* (and schemes for which it has not been possible to identify the policy area), certification schemes and self-declaration schemes perform at least as well as overall the average. For *Religious requirements*, certification schemes perform worse than self-declaration schemes.

That the schemes without information on policy area perform worse than all other schemes is no surprise because policy area should be one on the most readily available pieces of information, so the more detailed information required to score well in the compliance index is reasonably expected to be missing as well.

As previously stated, it is important to note that several schemes cover more than one policy area.

Figure 35: Websweep index 2010 guidelines policy area



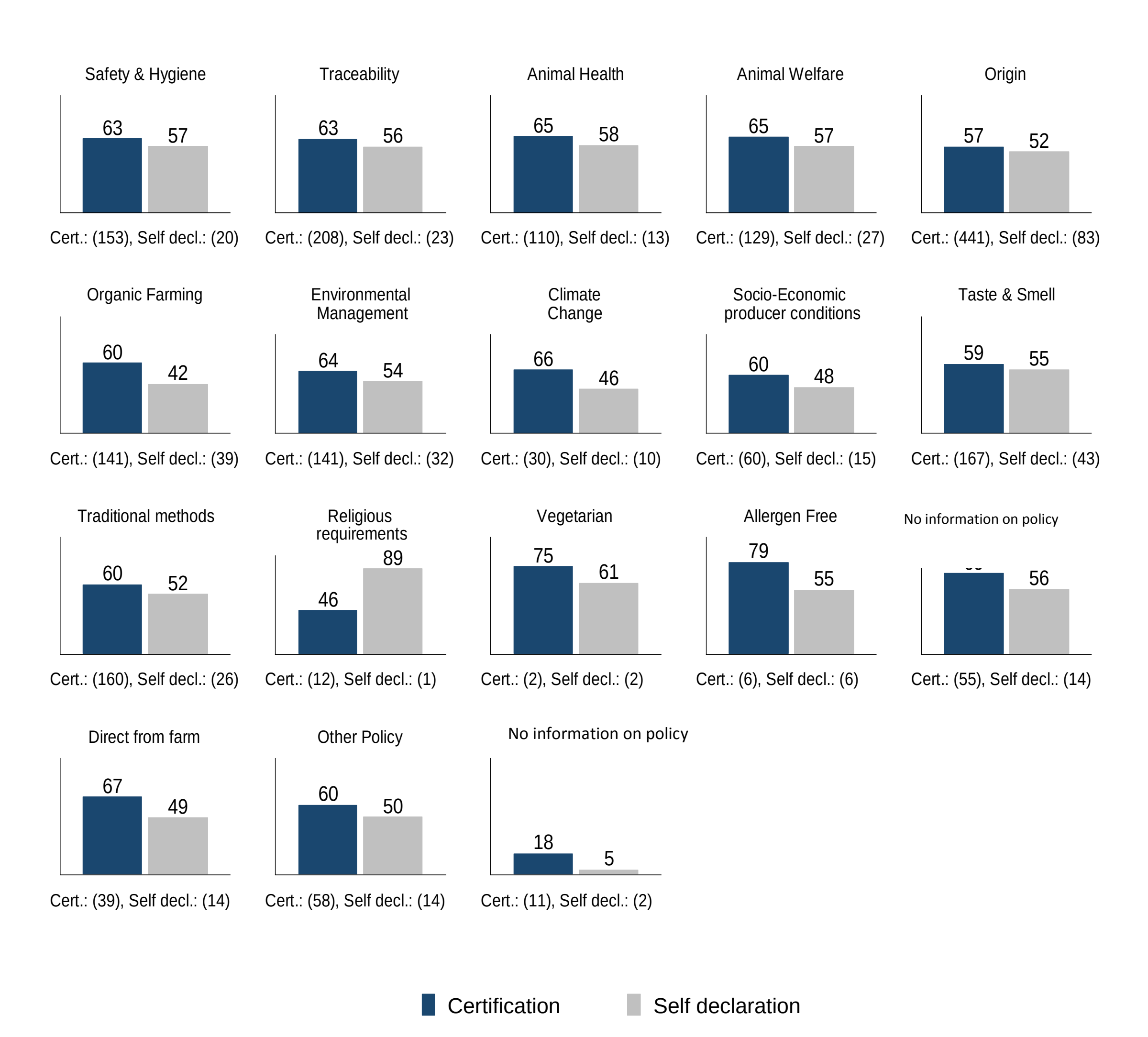
Note: The *websweep* index draws only on the websweep. The number in brackets represents the number of schemes identified and thus the number of schemes on which the score is based.

The figure below shows the average index score by policy area and certification/self-declaration for the websweep index for consumers. The average index score across all policy areas is **58** out of 100 for certification schemes and **47** for self-declaration schemes.

Certification schemes and self declaration schemes perform better than their respective averages for eleven[33] of the 18 policy areas. Schemes in the policy areas of *Vegetarian* and *Allergen free* score very highly relative to the overall average. The one self-declaration scheme covering *Religious requirements* scores very highly and the certification schemes covering *Religious requirements* score very low relative to their averages. For *Origin* (the largest policy area in terms of scheme coverage), self declaration schemes perform better than the average and certification schemes a little bit worse.

[33] *Safety & hygiene, Traceability, Animal health, Animal welfare, Environmental management, Socio-economic producer conditions, Traditional methods, Vegetarian, Allergen free, Health related, Direct from farm*, and *'Other' policy*.

Figure 36: Websweep consumer index policy area



Note: The *websweep index for consumers* draws only on the websweep. The number in brackets represents the number of schemes identified and thus the number of schemes on which the score is based.

The figure below shows the average index score by policy area and certification/self-declaration for the combined index with self-declaration criteria only. The average index score across all policy areas is **56** out of 100 for certification schemes and **46** for self-declaration schemes.

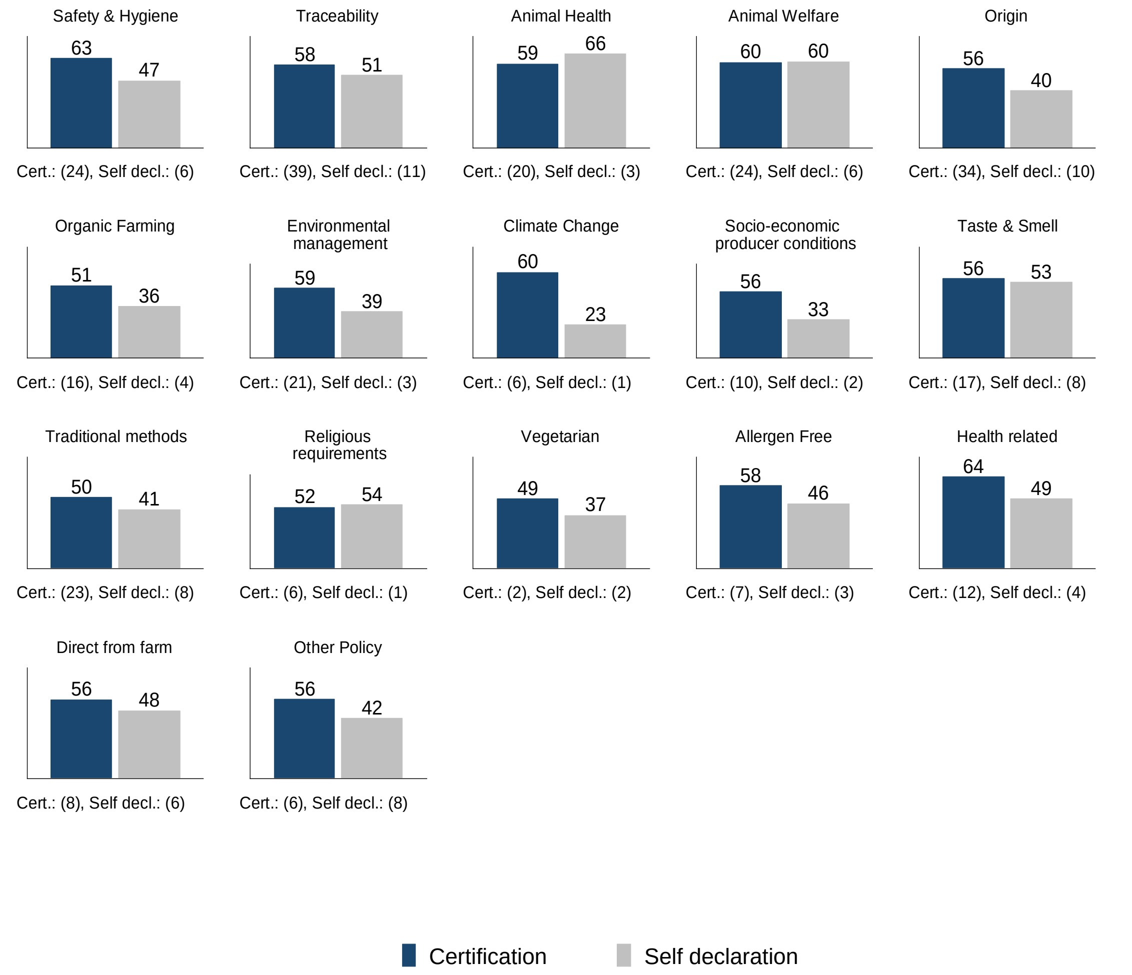
Animal health and *Animal welfare* (and to lesser extent *Religious requirements* because of the sample size) are the odd ones out as all three policy areas show self-declaration schemes performing better than certification schemes. There are eight policy areas[34], where both certification schemes and self-declaration schemes score at least as high as their respective averages. For six policy areas[35], both certification and self-declaration schemes score at most the

[34] *Safety & hygiene, Traceability, Animal health, Animal welfare, Taste & smell, Allergen free, Health related*, and *Direct from farm.*

[35] *Origin, Organic farming, Socio-economic producer conditions, Traditional methods, Vegetarian,* and *'Other' policy.*

respective average. For *Environmental management* and *Climate change*, certification schemes score higher than the average, and self-declaration schemes markedly lower. It should be noted that the sample in both these policy areas is quite small.

Figure 37: Combined index 2010 guidelines - self-declaration only policy area



Note: The *combined index, self-declaration criteria only* draws on both the websweep and the scheme operator survey. The number in brackets represents the number of respondents to the scheme operator survey and thus the number of schemes on which the score is based. A total of 95 scheme operators responded to the survey.

3.2 Guidelines most often and least often met

Below we present each of the criteria used in the indices and present the percentage of schemes complying with each requirement.

Table 16: Compliance by index criterion

Guideline	Criterion	Source	Combined index	Websweep index	Websweep index - consumers	Combined – self declaration
4.1	Are the criteria (if any) transparent and non-discriminatory and open to all willing and able to comply?	Websweep	91%	87%	87%	91%
4.2	Are there mechanisms for other stakeholders to contribute to the development of the scheme?	Websweep	27%	15%	n/a	27%
4.2	Is it clear what these mechanisms are? *[this question only applies if there are mechanisms for other stakeholders to contribute]*	Websweep	88%	80%	n/a	88%
4.3	If yes, are these same mechanisms available in all countries in which your scheme operates? **AND** Are these mechanisms translated into the local language? *[Only applies to schemes operating in more than one country]*	SOS†	5%	n/a	n/a	5%
4.4	Were technical committees of experts involved in the development of the scheme's requirements? **AND** Were the scheme requirements submitted to a broad group of stakeholders for input?	SOS	67%	n/a	n/a	67%
4.5	Were stakeholders involved in the development of inspection criteria and checklist as well as in the determination of thresholds for sanctions?	SOS	37%	n/a	n/a	37%
4.6	Are any feedback mechanisms in place through which scheme participants can review the rules and requirements of the scheme?	SOS	75%	n/a	n/a	75%
4.8	Are there contact details on the website? **OR** Is there a feedback form for comments on the website?	Websweep	100%	94%	94%	100%
5.1(1)	Does the scheme clearly state the objectives?	Websweep	91%	82%	82%	91%
5.1(2)	Are claims and requirements clearly linked to the objectives?	Websweep	79%	73%	73%	79%
5.1(3)	Is the scope of the scheme (i.e. The type of products or processes it covers) clear?	Websweep	79%	73%	73%	79%

Table 16: Compliance by index criterion

Guideline	Criterion	Source	Combined index	Websweep index	Websweep index - consumers	Combined – self declaration
5.1(4)	Are the scheme requirements/specifications available on the website for free?	Websweep	73%	59%	59%	73%
5.1(6)	Are the specifications clear and understandable? **AND** Are the specifications sufficiently detailed for consumers to understand the requirements for producers to enter the scheme?	Websweep	62%	51%	51%	62%
5.1(8)	Does the scheme clearly state that it requires certification by an independent body and provides details of that body?	Websweep	73%	59%	59%	n/a
5.2(1)	Does the scheme claim to be based on objective and verifiable evidence and scientifically sound documentation? **AND** Are the documents on which the claims are based freely available on the schemes website?	Websweep	21%	16%	16%	21%
5.2(2)	Are the scheme's requirements adapted to local conditions in each country in which the scheme operates?	SOS	40%	n/a	n/a	40%
5.2(3)	Does the scheme indicate to what extent their requirements go beyond the relevant legal requirements?	Websweep	27%	24%	24%	27%
6.1(1)	Is the certification of compliance carried out by a nationally or internationally accredited body?	SOS	71%	n/a	n/a	n/a
6.1(2)	Were any geographical restrictions in place when selecting the certification body?	SOS	59%	n/a	n/a	n/a
6.2(1)	Does the website provide clear and documented procedures for inspections of scheme participants?	Websweep	40%	29%	n/a	40%
6.2(1)	Does the scheme state how many control bodies can perform controls for the scheme?	Websweep	48%	38%	n/a	48%
6.2(1)	Is there a minimum inspection frequency of the scheme's participants?	SOS	69%	n/a	n/a	69%
6.2(2)	Does the frequency of inspection depend on the previous inspection result?	SOS	63%	n/a	n/a	63%
6.2(3)	How are inspection results evaluated? *[if the answer indicated systematic evaluation, the scheme fulfilled the criterion]*	SOS	62%	n/a	n/a	62%

Table 16: Compliance by index criterion						
Guideline	**Criterion**	**Source**	**Combined index**	**Websweep index**	**Websweep index - consumers**	**Combined – self declaration**
6.2(4)	Are there unannounced inspections and is notice given at short notice (e.g. within 48 hours)?	SOS	46%	n/a	n/a	46%
6.2(5)	Are the guidelines, checklists and plans for inspections of scheme participants publically available either on the website or other means?	Websweep	35%	23%	n/a	35%
6.2(6)	Are there clear and documented procedures to deal with non-compliance?	SOS	82%	n/a	n/a	n/a
6.2(6)	And are there well defined knock-out criteria which would lead to non-issue or withdrawal of the certificate?	SOS	72%	n/a	n/a	72%
6.3(1)	Are membership fees publicly available **AND** Are fees for certification and inspection public?	Websweep	21%	9%	n/a	21%
6.3(2)	If there are different fees for different participants, is it explained why this is the case?	Websweep	73%	55%	n/a	73%
6.4	Are your auditors/inspectors required to have qualifications/accreditation or certifications?	SOS	74%	n/a	n/a	74%
6.5	Are any provisions in place enabling and promoting the participation of small-scale producers?	SOS	35%	n/a	n/a	35%
7.1	Is there a mutual recognition and/or benchmarking with other schemes **AND** Does the website link to other relevant schemes?	Websweep	21%	8%	8%	21%
7.2	Do you accept (partially or totally) the inspections and audits carried out by other schemes?	SOS	63%*	n/a	n/a	43%
7.3	Do you carry out any combined audits with other schemes?	SOS		n/a	n/a	40%
7.4	Were any attempts made to harmonise the auditing protocols and documentation requirements with other schemes?	SOS		n/a	n/a	46%

Table 16: Compliance by index criterion						
Guideline	**Criterion**	**Source**	**Combined index**	**Websweep index**	**Websweep index - consumers**	**Combined – self declaration**
UCPD	Does the scheme state that it is endorsed by a public or other body and is this actually the case? *[One minus point if this is not actually the case, zero points otherwise]*	Websweep	n/a	n/a	0%	n/a
n/a	If the scheme refers to a geographical origin, does the claimed place of provenance really exist?	Websweep	n/a	n/a	95%	n/a
n/a	Does the scheme state the number of the scheme's members?	Websweep	n/a	n/a	41%	n/a
n/a	In case there are specific legal requirements on the subjects covered by the scheme, e.g. organic farming or animal welfare, does the scheme make reference to these requirements?	Websweep	n/a	n/a	67%	n/a
	Overall index score‡		**58%**	**48%**	**54%**	**54%**

Note: The percentage compliance score for each criterion is defined as the number of schemes complying with the criterion divided by all the schemes that are scored against the criterion. The number of schemes scored against each criterion varies between indices and between criteria, within indices. †: SOS refers to the Scheme Operator Survey, *: one point awarded if either criterion is met. ‡: defined as the weighted average of criteria scores (weighted by the number of schemes scored against the criterion).

Overall compliance across all criteria used in the indices ranges between 58% and 48%. If we consider the criteria for which we find a high level of compliance these relate to the provision of contact information and/or feedback mechanism where almost all schemes provide this information upfront on their websites (guideline 4.8). We also find that schemes achieve a high level of compliance in regard to guideline 5.1, and its corresponding parts, which relate to clarity and transparency of scheme requirements and claims made. Here we observe that between 91% and 82% of schemes clearly state their objectives; between 79% and 73% have claims and requirements which are clearly linked to their stated objectives, and similarly the scope of the scheme in regard to the products and process it covers are clear. However, when seeking more detailed information on scheme requirements and specifications, this is not always available for free on the website, as can be seen by the 59% score for guideline 5.1(4) for the websweep-combined index and the websweep consumer index. Further, when these specifications are available they can often be difficult to understand from the point of view of a consumer (guideline 5.1(6)).

Lower levels of compliance are observed in regard to guideline 5.2, which relates to the evidence base of scheme claims and their requirements. Here we find scores between 16% and 21% (guideline 5.2(1)) indicating that it is not always clear to the consumer if the scheme is based on objective and verifiable evidence; and, where these claims may be made, the documents are not always available on the websites for the consumer to download and review. In regard to guideline 5.2(2), the compliance score is 40% indicating that where schemes operate in more than one country, few schemes adapt to the local conditions. Further, for guideline 5.2(3) compliance scores range between 27% to 24% which indicates that schemes do not always clearly indicate whether, where and to what extent their specifications go beyond the relevant legal requirements.

In regard to guideline 6, recommendations regarding certification and inspections, we also observe some low compliance scores. In particular, low scores arise for guideline 6.2(1) indicating that scheme websites do not always provide clear and documented procedures for inspections of scheme participants. However, these may be available upon request from the scheme (the guideline does not require that these documents are available on the website necessarily). We also observe low compliance (between 23% and 35%) for guideline 6.2(5) indicating that guidelines, checklists and plans for scheme inspections are not always publically available. Likewise low compliance scores are observed for guideline 6.3(1) in regard to publically available membership fees and fees for certification (21% from the combined index and 9% from the websweep index). Guideline 6.5 relates to small scale producers and here we find that few schemes have specific provisions for enabling and promoting the participation of small scale producers (35%).

3.3 Compliance with the Unfair Commercial Practices Directive (UCPD)

In addition to testing the level of compliance with the Commission 2010 guidelines, the websweep also contained one question to assess whether or not all schemes comply with the relevant requirement of the UCPD. The requirement is '*claiming that a code of conduct has an endorsement from a public body or other body which it does not have*'. This question used to asses this was the following: 'Does the scheme state that it is endorsed by a public body?" "If so is this actually the case?" For all schemes identified in the websweep that reported they were endorsed by a public body (293) the websweep identified no instances where this was not true.

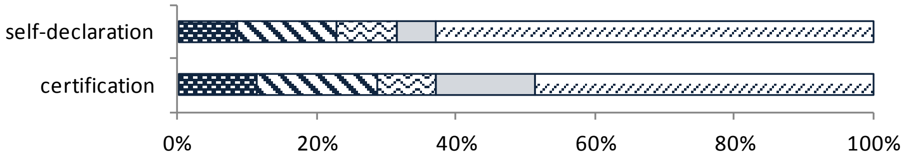
The stakeholder surveys also included questions that aimed at assessing the compliance of the schemes with the UCPD. First, stakeholders were asked to what extent they agree with the following statement: "There are voluntary schemes in my country which falsely claim endorsement by public or other bodies" using a scale of 1 to 5 where 1 is "I totally agree" and 5 is "I totally disagree". The question was asked separately for certification and self-declaration schemes.

In 88 cases, across the questions for certification and self-declaration schemes, the respondents to the survey chose not to answer this question. In the case of the consumer organisations the majority of respondents provided a ranking of 3 (across both certification and self-declaration schemes), which indicates they neither agree nor disagree with the statement. Five respondents totally disagreed with the statement for certification schemes and this was two for self-declaration schemes. No respondents totally agreed with the statement. In the case for producer, farmer and retailer organisations, 13 chose not to provide an answer relating to certification schemes or self-declaration schemes. The five that responded totally disagreed with the statement for certification schemes and one disagreed for self-declaration schemes. In the case of the certification/accreditation bodies the pattern was very similar with (again) no respondents totally agreeing; and, 5 and 1 respondent totally disagreeing for certification and self–declaration schemes respectively. Considering the overall picture, with the majority of responses 3 or above, there is general agreement that schemes do not falsely claim endorsement.

Only one producer organisation responded to this question. In this case they reported that they agreed with the statement. Farmer organisations on the other hand were evenly split between agreeing and disagreeing. While retailer organisations tended to disagree with the statement.

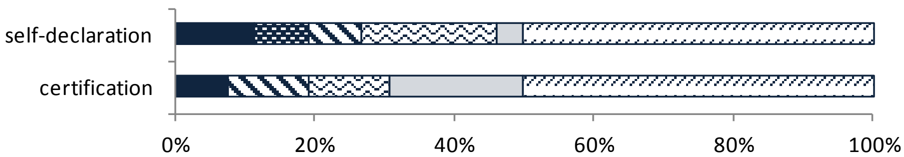
Figure 38: "There are voluntary schemes in my country which falsely claim endorsement by public or other bodies."

1) Consumer organisations



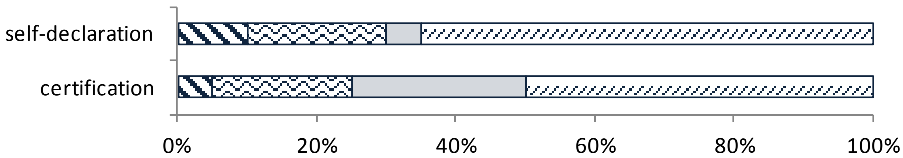
	certification	self-declaration
1 Totally agree	0	0
2	4	3
3	6	5
4	3	3
5 Totally disagree	5	2
No response	17	22

2) Producer, farmer and retailer organisations



	certification	self-declaration
1 Totally agree	2	3
2	0	2
3	3	2
4	3	5
5 Totally disagree	5	1
No response	13	13

3) Accreditation bodies



	certification	self-declaration
1 Totally agree	0	0
2	0	0
3	1	2
4	4	4
5 Totally disagree	5	1
No response	10	13

Note: Producer, farmer and retailer responses are broken down in Annex 15.

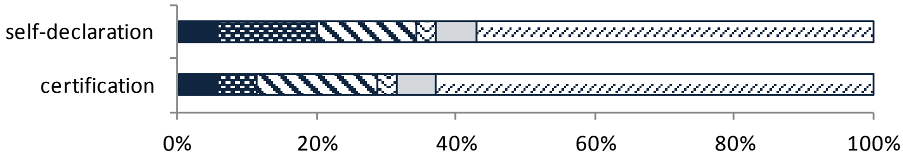
The next statement that respondents were asked to comment on was “there are voluntary schemes in my country which present rights given to consumers by law as a distinctive feature of their scheme.” This relates to Annex 1 (10) of the UCPD, a misleading commercial practice includes ‘presenting rights given to consumers in law as a distinctive feature of the traders offer’.

The consumer organisations did not agree nor disagree with this statement concerning certification schemes. The most popular answer was 3. The stakeholders mostly disagreed with 9 out of 14 respondents rating this question 4 or 5. Finally, a small majority of accreditation bodies (4 out of 7 respondents) agreed that the certification schemes are presenting rights given to consumers by law as a distinctive feature of their scheme.

The consumer organisations mostly agreed with the proposed statement for self-declared schemes, suggesting that they perceive self-declared schemes as complying less with the UCPD. The majority of the producer, farmer and retailer associations gave opposite answers to the consumer organisations with 6 disagreeing with the proposed statement and 3 agreeing. The one producer organisation that answered this question disagreed with the statement. Farmer organisations were generally split between agreeing and disagreeing. While retailers tended to disagree. Accreditation bodies were evenly split between “agree”, “disagree” and “neither agree nor disagree”. It is therefore less obvious to conclude whether or not schemes present legal consumer rights as a specificity of their own scheme.

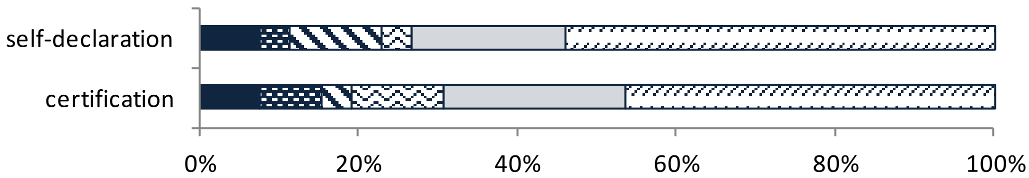
Figure 39:"There are voluntary schemes in my country which present rights given to consumers by law as a distinctive features of their scheme."

1) Consumer organisations



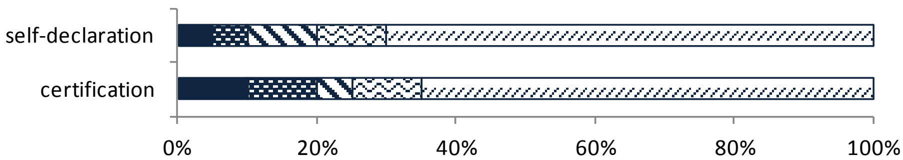
	certification	self-declaration
1 Totally agree	2	2
2	2	5
3	6	5
4	1	1
5 Totally disagree	2	2
No response	22	20

2) Producer, farmer and retailer organisations



	certification	self-declaration
1 Totally agree	2	2
2	2	1
3	1	3
4	3	1
5 Totally disagree	6	5
No response	12	14

3) Accreditation bodies



	certification	self-declaration
1 Totally agree	2	1
2	2	1
3	1	2
4	2	2
5 Totally disagree	0	0
No response	13	14

Note: Producer, farmer and retailer responses are broken down in Annex 15.

3.4 Drivers and obstacles to complying with the guidelines

In addition to the websweep and the scheme operator survey that assessed compliance of schemes with the 2010 Guidelines, scheme operators and stakeholders were asked what they believe are the most important drivers which encourage scheme operators to comply with the guidelines and what are the most important obstacles which prevent scheme operators from complying with the guidelines. These were open questions and were not prompted. The findings are summarised below.

3.4.1 Drivers

Scheme operators

The driver most commonly listed by scheme operators for complying with the guidelines is increased **transparency** (mentioned by 13 respondents). In particular, increased transparency towards consumers, retailers and other stakeholders appears to be one of the most important reasons why scheme operators choose to comply with the 2010 guidelines.

“[To] avoid consumer confusion and increase the transparency and clarity of the whole process."

"Demand from customers (retail, live stock production) for EU harmonised requirements, interchangeability, transparency, trust in line with the EU internal market"

As the second comment above already indicates, other major drivers to comply with the guidelines are **retailers demanding compliance** (mentioned by 5 respondents) and the ultimate aim of facilitating cross-border sale of food products through a **harmonized single market** and **greater uniformity** (five responses).

"[T]he possibility to be interchangeable with other [E]uropean food schemes"

"Uniformity of different schemes"

"Uniformity for the different schemes, transparency, interchangeability."

Many respondents also stated that they hope complying with the EU 2010 guidelines will make their products more **competitive** (six responses) and will allow them to command a price premium.

"Respect [for] the European guidelines allow[s having] a label that is more credible at the EU level and therefore increases the value of the product"

"Better guarantees and therefore wider possibilities for the sale of the products and hopefully receiving a better price for the products. Although this is unfortunately not always the case. "

A small number of respondents (three) stated that complying with the EU 2010 guidelines helped raise **awareness** and **improve the image** of their food labelling scheme.

Finally, one respondent also indicated that complying with the EU 2010 guidelines is helpful in allowing them to secure **financial support** and another indicated that complying with the guidelines helps improve their **reputation with governmental agencies**.

Consumer bodies

Three consumer bodies mentioned **consumer trust** as a driving force for complying with the guidelines. Two consumer bodies on the other hand stated that currently there are **no drivers** for complying with the guidelines while two other consumer bodies mentioned **better quality product** and **competitiveness** for products carrying such a label and a higher market price.

A number of consumer bodies did not outline what the current drivers for complying with the EU 2010 guidelines are, but instead gave suggestions on how compliance with the guidelines *should* be achieved. These were:

- Implementing them as legislation (5 responses)
- Making them more thorough and flexible (1 response)
- Improving awareness among consumers (1 response)
- Running a TV programme on food labelling schemes (1 response)

Producer associations

Only one producer association listed a driving force for complying with the guidelines and that was to be more competitive.

Farmer associations

Four farmer associations also stated that a driver for complying with the guidelines was the fact that including food scheme labels on their products made them more competitive thereby increasing their profits. Three of these associations also identified improved reputation as a result of the labelling scheme was a driver for complying with the guidelines.

Retailer associations

The drivers which were listed by retailer associations were that using a labelling scheme would lead to better acceptance worldwide and that it would boost consumer trust. Each of these drivers was listed by a single retailer association.

Accreditation and certification bodies

The answers given by accreditation and certification bodies were evenly split between (2 responses each):

- To achieve a **competitive advantage**
- **Recognition** (at a local or European level)
- For greater scheme **transparency**

3.4.2 Obstacles

Scheme operators

When asked what obstacles prevent scheme operators from complying with the guidelines, by far the most common response from scheme operators was the **administrative burden** associated with complying with the guidelines (12 scheme operators indicated this) and the **cost** (11 scheme operators) of doing so. Two of the respondents who indicated that cost is a major obstacle also explicitly mentioned the economic crisis as a reason for why schemes do not comply with the EU 2010 guidelines.

> *"[I]n [country] it is necessary to talk to 4 different ministries!!"*

Another related reason for non-compliance listed by two respondents was that while there is a cost associated with complying with the guidelines, there is **no direct financial benefit** from doing so.

> *"If they only want to increase the turnover of a product-line, they are not interested in any guidelines."*
>
> *"To become and stay a member of a certification scheme, costs are involved. These additional costs don't always lead to additional income. "*

Three respondents also noted that **language barriers** make it difficult for schemes to comply:

> *"Language difficulties and lack of assistance in order to comply"*

Two respondents noted that the guidelines were **too long** and only of **marginal importance**.

> *"[I]n this case the EU guidelines is simply too big and complicated for a country this small, and also unnecessary"*

Finally, two respondents cited a **lack of awareness** as a reason for why schemes may not comply with the guidelines.

Consumer bodies

Consumer bodies also cite **cost** (three responses) and **lack of interest** (two responses) as obstacles for complying with the guidelines. One respondent also noted that a **lack of trust by consumers**, particularly after the horse meat scandal presents an obstacle to complying with the guidelines.

Producer associations

The only obstacle that is mentioned by a producer association is the **administrative burden** associated with labelling schemes.

Farmer associations

Once again, **cost** emerges as the most commonly mentioned obstacles, this time along with the fact that the guidelines are simply **not known** (four responses each). Two respondents further note that without **binding legislation** there is little incentive to comply with the guidelines which is echoed in the comment by another respondent who suggests that there should be some **recognition** for complying with the guidelines.

Administrative burden is mentioned as an obstacle by one farmer association. One respondent indicates that some of the **requirements of the guidelines are problematic** and that this makes compliance difficult if not impossible for some scheme operators:

> *"They [the guidelines] stray into areas where they have no expertise, such as requiring multiple certification bodies. This has 2 effects, one is to introduce inconsistency of audit standards, the other is to increase costs for businesses as multiple CBs all gaining accreditation is expensive".*

Finally, one respondent also notes that **language barriers** are a problem because the guidelines have not been promoted in local languages.

Retailer associations

The **administrative burden** and **problematic requirements in the guidelines** (however, without providing details on which particular requirements were found problematic) were listed as obstacles by retailer associations (1 response each).

Accreditation and certification bodies

Three accreditation or certification bodies also note that **cost** is a major obstacle to complying with the guidelines and one notes that there is **no benefit** to complying with the guidelines.

Also among the accreditation and certification bodies, one respondent isolated one particular **requirement of the guidelines as problematic**:

> *"[T]he provision of [...]mutual recognition among schemes with similar contents, even if in my opinion it is very important to reach an agreement among manager of schemes with similar contents"*

Two respondents however also note that there should be **no obstacles** to fully complying with the guidelines.

3.5 Stakeholder and scheme operator assessment of the guidelines

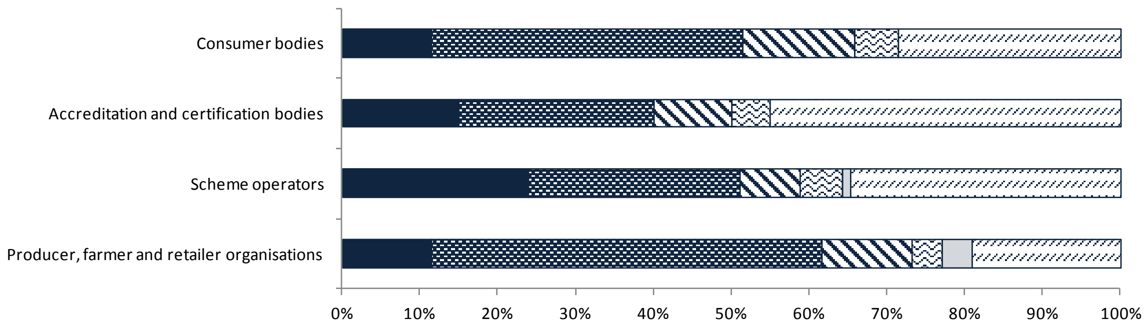
The stakeholder survey and the scheme operator survey also elicited the respondents' views on the EU 2010 guidelines. This section summarises the views of the stakeholders on the following topics:

- Do the guidelines help increase scheme transparency?
- Do the guidelines help avoid consumer confusion?
- Do they help reduce the financial and administrative burden on farmers and producers?
- Do they offer guidance on how to ensure compliance with EU internal market rules and principles of certification? And finally,
- What are the most importance requirements of the guidelines?

3.5.1 Transparency

Respondents were asked to indicate to what extent they agree with the statement that the EU 2010 guidelines help increase scheme transparency on a scale from 1 to 5 where 1 means "Totally agree" and 5 means "Totally disagree". The vast majority of respondents agree with the statement with a "2" being the most common score amongst all stakeholders.

Figure 40:"These guidelines help increase scheme transparency"



	Producer, farmer and retailer organisations	Scheme operators	Accreditation and certification bodies	Consumer bodies
1 Totally Agree	3	22	3	4
2	13	25	5	14
3	3	7	2	5
4	1	5	1	2
5 Totally Disagree	1	1	0	0
No response	5	32	9	10

Note: Producer, farmer and retailer responses broken down in Annex 15.

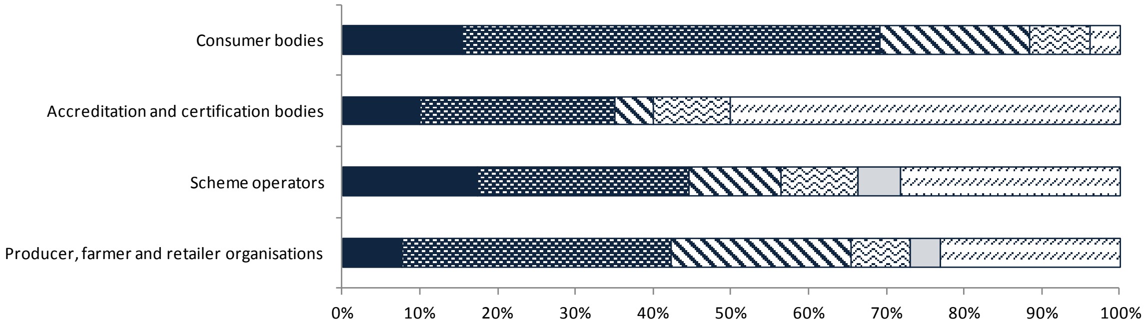
3.5.2 Consumer confusion

Similarly, the majority of respondents believe that the guidelines help reduce consumer confusion. However, 14 scheme operators disagree that this is the case and of these, five 'totally disagree' with the statement that the guidelines help reduce consumer confusion.

One of the scheme operators who 'totally disagrees' that the guidelines help reduce consumer confusion explains that this is due to the fact that the guidelines give more credibility and legitimacy to private certification, making it more difficult for the consumer to distinguish between public and private certification. Another scheme operator who 'totally disagreed' with this statement explains that he or she simply thinks that consumers are unaware of certification taking place and that the guidelines cannot prevent fraud from happening.

Similarly, the one farmer organisation who 'totally disagrees' with the statement that the guidelines help reduce consumer confusion complains that the guidelines are not legally binding and are, in fact, entirely unknown in German speaking countries.

Figure 41:"These guidelines help avoid consumer confusion"



	Producer, farmer and retailer organisations	Scheme operators	Accreditation and certification bodies	Consumer bodies
1 Totally Agree	2	16	2	4
2	9	25	5	14
3	6	11	1	5
4	2	9	2	2
5 Totally Disagree	1	5	0	0
No response	6	26	10	1

Note: Producer, farmer and retailer responses are broken down in Annex 15.

3.5.3 Administrative and financial burden on farmers

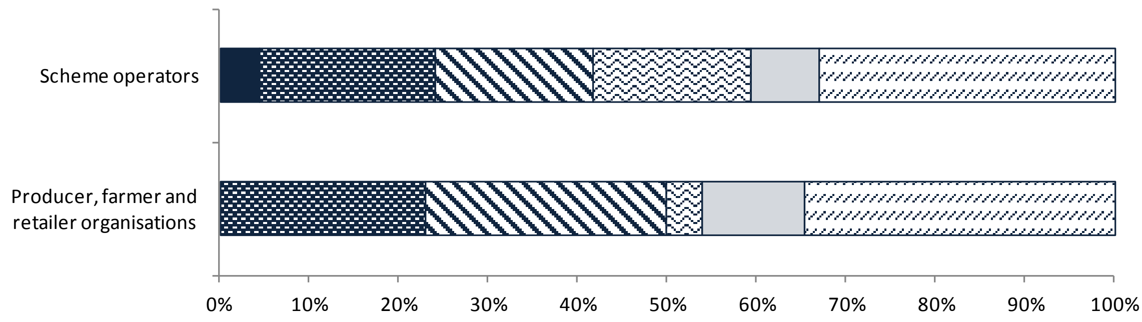
Another aim of the EU 2010 guidelines is to reduce the administrative and financial burden on farmers. Scheme operators and producers, farmer and retailer associations were asked whether they agree with the statement "These guidelines help reduce the administrative and financial burden on farmers and producers", the results of which are shown in Figure 42 below.

Overall, a large number of respondents disagree with this statement, with seven scheme operators "totally disagreeing". Amongst those who totally disagree, one operator explains that certification is adapted to industrial farming practices and does not extend well to small scale and diversified agriculture. Certification will necessarily be a large financial and administrative cost for such small and diversified enterprises.

Other operators who "totally disagree" state that the guidelines only add costs and burdens or that the administrative part of the guidelines is too long and complicated.

One farmer association who "totally disagreed" explains that the guidelines do not help reduce the administrative and financial burden on farmers and producers because they are not legally binding and because they are virtually unknown in German speaking countries.

Figure 42:"These guidelines help reduce the administrative and financial burden on farmers and producers"



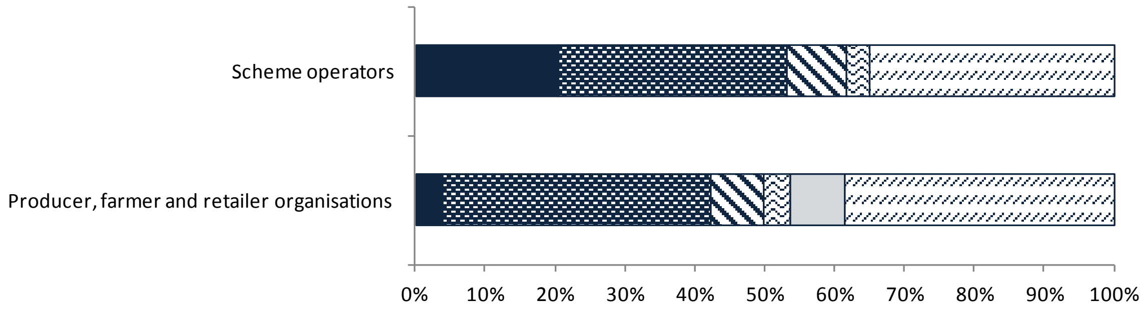
	Producer, farmer and retailer organisations	Scheme operators
1 Totally Agree	0	4
2	6	18
3	7	16
4	1	16
5 Totally Disagree	3	7
No response	9	30

Note: Producer, farmer and retailer responses are broken down in Annex 15.

3.5.4 Guidance on complying with EU internal market rules and principles of certification

When asked whether or not the guidelines fulfil their objective of offering guidance on how to comply with EU internal market rules and principles of certification, the vast majority of respondents agree that this is indeed the case. Overall, only six respondents indicate that they disagree with this statement (three giving a score of 4 and 2 giving a score of 5, the lowest possible).

Figure 43:"These guidelines offer guidance on how to ensure compliance with EU internal market rules and principles of certification"



	Producer, farmer and retailer organisations	Scheme operators
1 Totally Agree	1	19
2	10	30
3	2	8
4	1	3
5 Totally Disagree	2	0
No response	10	32

Note: Producer, farmer and retailer responses are broken down in Annex 15.

3.5.5 Most important requirements of the guidelines

All the organisations surveyed were asked which of the requirements they thought were the most important. The following figure reports the most popular answers among the different institutions

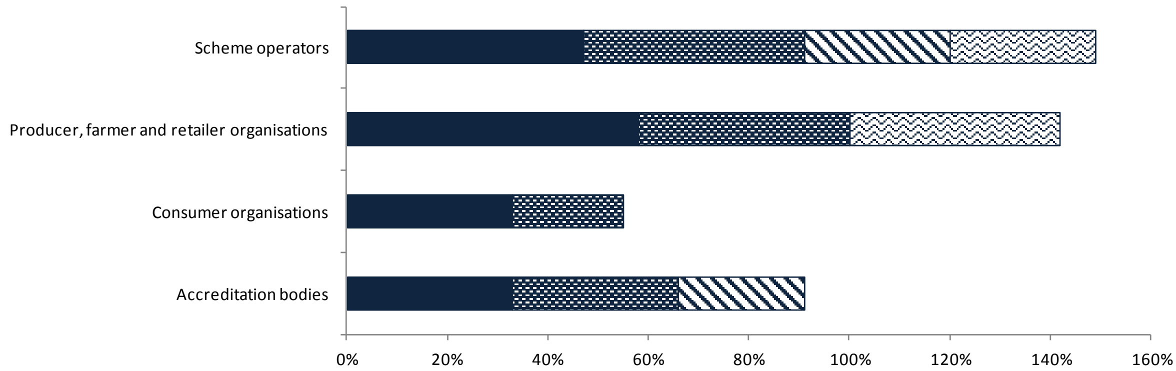
Transparency comes across as being one of the most important requirements for all the organisations – this includes the producer farmer and retailer associations, the scheme operators, the accreditation bodies and the consumer organisations. Many comments underlined the importance of chapters 4 and 5 of the guidelines: schemes should have transparent and non-discriminatory criteria as well as clear and transparent claims and requirements.

A second very common answer to this question was the importance of **third party certification**. A third of the accreditation bodies, 42% of the producer, farmer, retailer associations and 44% of the scheme operators mentioned this requirement in their answer. This is significantly more than the consumer organisations – just over one in five highlighted this part of the guidelines as critical.

In addition, 25% of the accreditation bodies underlined the importance of certifying a scheme with an **accredited body**. Even though this idea is only cited by 29% of the scheme operators and the other groups do not mention it at all. On the other hand, 42% of the farmers, producers and retailers emphasised the importance for the **stakeholders to participate in the creation and development** of the scheme. This idea is also supported by 29% of the scheme operators but not mentioned by any other group.

The answers reported in Figure 44 show the very popular answers and those that are popular across various categories of institutions. For each category, some ideas are repeated more than once and deserve to be highlighted in this report. For example, in the scheme operator survey, 5 answers out of 34 mention the importance of harmonising the procedures and recognising at least part of the inspection checklist between similar schemes. In the same survey, the importance of making the inspection checklist public is highlighted 5 times. In the producer farmer and retailer survey, the simplicity and the comprehensiveness of the guidelines are underlined.

Figure 44:"From the point of view of your organisation, what are the most important requirements of the guidelines?"



	Accreditation bodies	Consumer organisations	Producer, farmer and retailer organisations	Scheme operators
Transparency	33%	33%	58%	47%
Third party certification	33%	22%	42%	44%
Accreditation of the certifying body	25%	0%	0%	29%
Participation of the stakeholders	0%	0%	42%	29%

Note: Results do not necessarily sum to 100% as respondents could mention more than one requirement as being the most important. Producer, farmer and retailer responses broken down in Annex 15.

To establish the previous percentages, we included in the total only the relevant answers. In other words, empty cells or answers like "don't know" or "no data" or any other sign that the respondent did not know, did not want to answer or had not understood the question properly were not included. Overall, it is important to note that only 34 scheme operators gave a relevant answer out of the 92 who responded to the survey. Only 12 of the 26 producer, farmer, retailer associations, 12 of the 20 accreditation bodies and 9 of the 35 consumer organisations are represented in Figure 44. The figure is therefore only relevant for a part of the population surveyed. It suggests that a large proportion of the respondents were not aware of the guidelines, were not aware of the details of the guidelines, were not interested in answering this question or did not understand the question.

Very few stakeholders and scheme operators gave a negative feedback such as "they are a door opener for fraud" or "none". Some respondents, on the contrary, gave a very positive feedback:

"All of the requirements guidelines are very important and useful".

"We subscribe to all the principles of the Guidelines. We watched their development and believe they cover all the correct points. We have benchmarked ourselves against them and believe that we meet all the criteria. And we have found them very useful in working with UK government agencies."

"All of them are good-sense recommendation on the 3 pillars Obligation to have a transparent scheme, good technical requirements and a serious control."

"That they stress the value and importance of third party certification. That they stress communication and openness. That they help define between self-declarations and third party certification. That they exist at all, a large step forward to attain legitimacy and credibility of the certifications. Thank you, all involved!"

3.6 Conclusions to the assessment of compliance with the 2010 Guidelines and the UCPD

The assessment process used a multi-modal approach. This included the websweep of identified schemes, the scheme operator survey, and the survey of stakeholders.

The first point that arises is that awareness of the EU 2010 Guidelines is currently not very high amongst stakeholders and scheme operators surveyed. While this may not be surprising as the guidelines are voluntary and have only been in operation since 2010, 48% of scheme operators that responded to the survey stated they were aware of the guidelines, 29% of consumer organisations, and 40% of accreditation and certification bodies reported they were aware. Producer, farmer and retailer associations were most aware at 58% as an overall group. Of these retailer organisations were least aware at 40%, while producer and farmer associations were 67% and 60% respectively.

In addition the stakeholder face-to-face interviews with the EUFIC and BEUC indicate that awareness and knowledge of the guidelines at the EU level may be quite low.

Information from the websweep assessment and the scheme operator survey, finds that overall certification schemes receive higher scores in the compliance indices than self-declaration schemes. Perhaps this is not surprising as the guidelines are aimed at certification schemes. However, even when the study assesses both certification and self-declaration schemes against criteria in the guidelines that both types of schemes can be reasonably expected to meet, we again find that in general certification schemes outperform self-declaration schemes in regard to meeting the guidelines.

Stakeholder opinions on the extent to which schemes meet the guidelines provides no clear answer. Overall accreditation and certification bodies tend to agree more often that schemes comply with guidelines compared to scheme operators however these differences are small.

Drilling deeper into the specific criteria contained within the guidelines, we find that compliance is reasonably high amongst identified schemes in regard to guideline 5.1. This guideline, and its corresponding parts, relate to clarity and transparency of the scheme. For example, whether the scheme clearly states its objectives and if the scope of the scheme in terms of the products and process it covers are clear. The highest level of compliance is found for guideline 4.8 which relates to the provision of contact information and/or feedback forms on the website, here between 100% and 94% of identified schemes meet this criterion. In a very small number of cases schemes identified did not have a website. Schemes generally clearly state their objectives (between 91% and 82%), clearly link their claims to their objectives (79% and 73%), and the scope of the scheme in terms of products and processes it covers is clear. However, access to information on scheme requirements and specifications is not always available and when they are available these can be difficult for the consumer to understand.

Provision of an evidence base for scheme claims and clear requirements is an area in which schemes tended to perform low in terms of compliance. In regard to guideline 5.2(1) which states that all claims should be based on objective and verifiable evidence and sound documentation, and that these should be freely available, e.g. on the scheme website, we find that schemes score between 16% and 21% on average. This suggest that it is not always clear to the consumer if the scheme is based on objective and verifiable evidence; and, where these claims are made documentation may not always be easily accessible.

The guidelines that cover inspections (guideline 6.2) and costs (guideline 6.3), also return some low compliance scores. Scheme websites do not always provide clear and documented procedures for inspections of scheme participants (however the guideline does not specifically state these need to be on the website). Scheme guidelines, checklists and plans for scheme inspections are not always publically available (guideline 6.2(5)). Membership fees and fees for certification are also not always easily accessible on websites.

Guideline 6.5 which states that schemes should include provisions enabling and promoting the participation of small-scale producers in the scheme also returned a low compliance score (35%).

Another key element of the guideline assessment was stakeholder and scheme operator views on the key drivers and obstacles to compliance. While the results need to be interpreted with caution, as the number of responses to these questions was low, they do provide some insight to these different groups' views of the guidelines.

Key drivers of compliance include increased transparency, minimising consumer confusion and facilitating consumer trust. These drivers were identified by scheme operators, retailer associations and consumer bodies. This is supported by the majority of stakeholders agreeing that the guidelines increase scheme transparency and help avoid consumer confusion when asked the question 'these guidelines help increase scheme transparency'.

Producer and farmer associations tended to identify improving the competitiveness of products, enabling producers to charge a premium and increasing profits as key drivers. While retailer associations and scheme operators mentioned demand for compliance by retailers and the facilitation of cross-border sale of food products as key drivers.

Accessing markets in other EU countries, and internationally was also raised as driver by scheme operators and retailer associations. This included retailers requiring compliance and facilitating cross-border sale of food products through a harmonised single market and greater uniformity.

Key obstacles identified by stakeholders who responded to the survey include administrative burden and cost associated with compliance. This obstacle was reported by scheme operators, farmer associations, retailer associations and accreditation and certification bodies. Lack of awareness was also identified as a key obstacle for compliance by scheme operators and farmer associations.

3.7 Elements of a best practice food labelling scheme

This section presents some key elements that a model food labelling scheme could have to improve consumer understanding and use of such schemes in their decision making, and help producers, farmers and retailers better understand scheme requirements. This section draws from the assessment of schemes identified in this study against the 2010 guidelines, the stakeholder consultation and the consumer survey.

The following elements are recommended.

- The food scheme label affixed to a product should clearly state the name of the scheme and have details such as a website address for interested parties to find information about the scheme.
- A website with clear contact details and feedback forms for relevant parties to access and provide feedback.
- Clear statement of scheme objectives on the website and the types of products or processes the scheme covers.
- If the scheme operates in more than one country, key information about the scheme, such as objectives, scope, contact details and feedback forms, should be available in the national languages.
- Clear statement about who owns and manages the scheme. Contact information for scheme owners and managers should be available on the website, and a statement about whether the scheme is public or private should be made.
- If the scheme is endorsed by other bodies, then this should be clearly stated, and contact details for the bodies/organisations that endorse the scheme should also be provided.
- Clear statement on the website if the scheme is certified or self-declaration; and, if the scheme is certified the name of the certification body and information on the certification process and requirements in clear and transparent language for non-technical readers should be available. For example, how often certification procedures take place. More detailed technical specifications and requirements could also be provided on the website for users who want access to more specific details. However, this would be in addition to information that was easy to access and understand for the consumer.

- Transparent information about whether the scheme requirements go beyond the relevant legal requirements for the products and processes it covers.
- Where the scheme does cover areas where there are specific legal requirements, such as organic farming or animal welfare, the scheme should provide details of these requirements in clear and accessible information for all interested parties, and provide links to further information for parties interested in accessing more detailed legal information.
- Statement of the types of organisations that are members of the scheme. For example, producers, retailers, supply chain processes such as close to farm gate.
- Provision of clear guidance on how to meet the scheme main requirements for parties interested in joining the scheme. Contact details, question forms or other mechanisms to access assistance with understanding and meeting the requirements for membership.

SECTION II: CONSUMER UNDERSTANDING AND BEHAVIOUR TOWARDS FOOD LABELLING SCHEMES

This section discusses the findings of the second area addressed by the study which relates to consumer understanding and behaviour towards schemes. This section is mainly based on the results of the consumer opinion survey and behavioural experiment that was conducted online in 26 European countries and the web listening exercise that was conducted in four countries (Poland, Spain, Sweden and UK).

The online survey consisted of

- a consumer questionnaire measuring understanding and perceptions of food labelling schemes; and
- a choice experiment evaluating the impact of food labelling schemes on product choices and willingness to pay for products affiliated to labelling schemes.

Fieldwork took place between the 8th and the 29th May 2013. The survey was conducted among household main grocery shoppers. The same questionnaire and experiment was used across the 26 countries and data were weighted to ensure each country was proportionally represented among the total population of the surveyed countries.

The web listening exercise consisted of identifying the unprompted views of consumers on food labelling schemes. The exercise helped understand the importance of food labelling schemes for consumers. It also identified some of the main issues/concerns consumers have with food labelling schemes and the level of their possible confusion with regard to food labelling schemes. In this section, the results of the web listening exercise are used to illustrate and give context to the quantitative data from the online survey. This section also includes, whenever relevant, inputs from other elements of the study including the literature review, the web sweep, the national stakeholder survey, the scheme survey and the virtual online shopping exercise.

In the results, data are analysed at total level and when relevant, at individual country level. Results from among the ‘EU15’ countries and from among the ‘EU12’ countries are also presented.

- The 26 surveyed countries include all 27 EU Member States except Malta and Cyprus, plus Norway. In this report this group is referred as ‘EU 27 + NO’.
- The ‘EU15’ group refers to countries which joined the European Union before 1st May 2004. This includes Austria, Belgium, Denmark, Finland, France, Germany, Greece, Ireland, Italy, Luxembourg, Netherlands, Portugal, Spain, Sweden and the United Kingdom.
- The ‘EU12’ group refers to countries which have joined the European Union after 1st May 2004 except Malta and Cyprus. This includes Bulgaria, Czech Republic, Estonia, Hungary, Latvia, Lithuania, Poland, Romania, Slovakia, and Slovenia.

When relevant results have been analysed by subgroups including:

- Socio-demographic groups (age, gender, working status, living area, level of income, level of education, presence of children in household).
- Analysis by where respondents do their usual grocery shopping
- Analysis by whether respondents or someone in their household is vegetarian or by whether respondents or someone in their household have food allergies.

The socio–demographic profile of respondents in each country can be found in Annex 9. The proportion of respondents buying food by channel as well as the proportion of respondents living in a household including a vegetarian or someone with food allergies can be found in Annex 11.

4 Consumer awareness and understanding of different types of food labelling schemes

4.1 Consumer awareness of different types of food labelling schemes

In order to gauge awareness of different types of food labelling schemes, respondents were asked whether they had ever seen a number of different types of logos or statements on food products.

The results indicate that the majority of the surveyed respondents are aware of at least one food labelling scheme and that on average they have seen 6.4 types of schemes from the 15 they were presented. The most often known logos or statements are those indicating that the product is organic, has health benefits or that it is allergen free. The least often known labelling schemes are those indicating the production method had a limited impact on the environment or climate, those indicating conformity with religious requirements and those indicating a quality of taste or smell.

Respondents from the EU15 group are aware of a higher number of labelling schemes than those from the EU12 group which may be explained by the larger number of schemes operating in the EU15 countries. However there are large differences in awareness between countries in the EU15 group. Respondents in Ireland and Italy say they have seen the highest number of schemes on average (over 8 in each country) while in Germany and Denmark respondents have seen the fewest types of scheme on average (4.1). Among the EU12 countries, less variation is observed and most respondents have seen around six schemes on average.

There are also differences in level of awareness by socio-demographic group.

- Women tend to be aware of a higher number of schemes than men.
- The level of awareness is higher among the 18-34 years old than among the 44-64 years old although those aged 65 and over are the most aware of some specific schemes such as food safety and hygiene, traceability and short supply chain labelling schemes.
- Respondents with low income, low education and who buy some of their food in discount stores know fewer schemes than the rest of the population. It may be that products with food labelling schemes are less available in these kinds of stores.
- Those living in a household including a vegetarian, someone with food allergy or with children tend to be more aware of the different types of food labelling schemes which may be explained by their need to pay more attention to the type of food they buy.

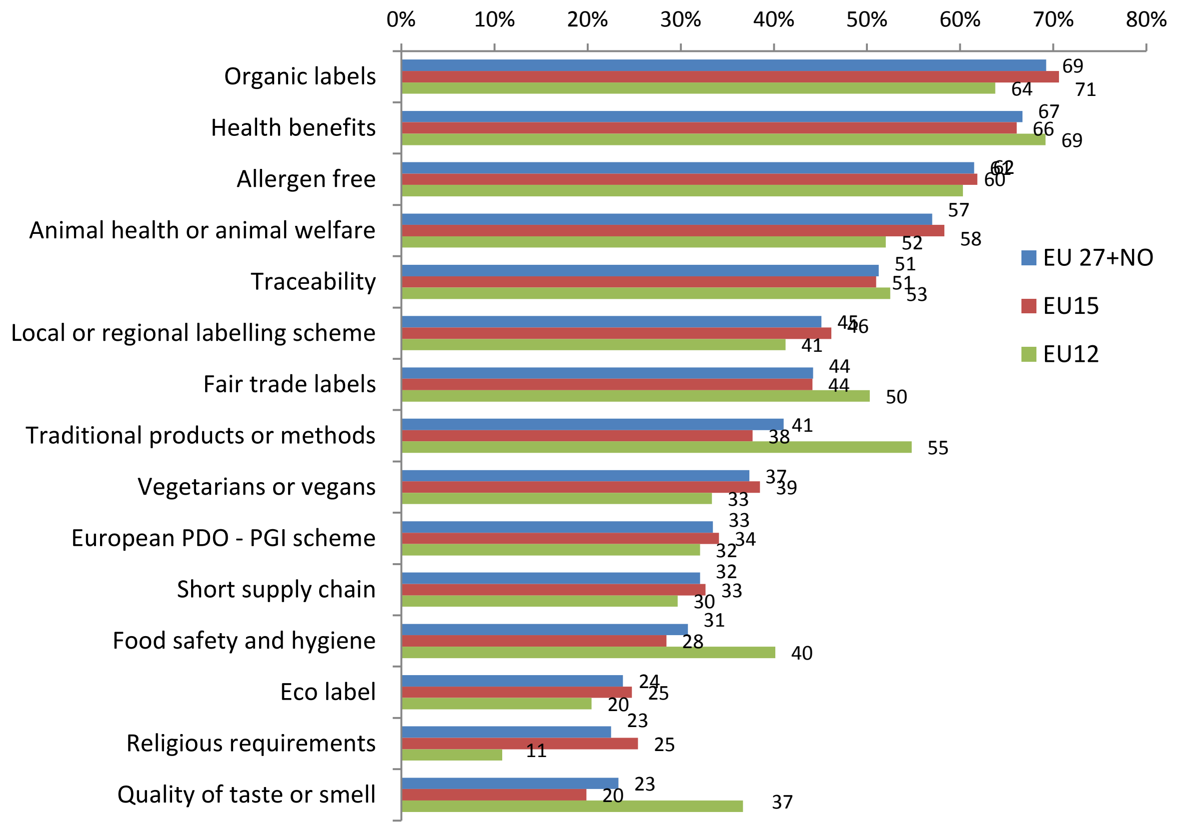
The majority of respondents (86%) are aware of at least one of the fifteen schemes presented and on average have seen 6.4 of them. However, as presented in the following sections, there are large variations by types of scheme and by country. The fifteen types of schemes presented were those that could be the most commonly found in Europe and included: organic schemes, health benefits schemes, allergen free schemes, animal health or animal welfare schemes, traceability schemes, local or regional schemes, fair trade schemes, schemes indicating traditional products or methods have been used, vegetarian or vegan schemes, European PDO or PGI schemes, short supply chain schemes, food safety and hygiene schemes, schemes indicating a limited impact on the environment, conformity with religious requirements and a quality of taste or smell.

4.1.1 Awareness by type of schemes

The types of food labelling schemes most commonly seen by all EU27+NO respondents are organic schemes (69%), health benefit schemes (67%) and allergen free schemes (61%). The types of labelling schemes with the lowest level of awareness are environmental schemes (24%), religious requirement schemes (23%) and schemes about the quality of taste or smell of a product (23%).

The figure below shows the level of awareness of the different types of food labelling schemes among all EU27+NO respondents, among respondents from the EU15 group and among respondents from the EU12 group.

Figure 45: Proportion of respondents who have seen the following type of logos or statement on food product



Base size: all respondents EU27+NO (19,260), EU15 (11,847), EU12 (6,909)
Q3. Have you ever seen the following type of logos or statement on food products?

It is important to compare these results against the number of schemes found in each category of food labelling schemes in the websweep exercise (section 1, chapter 2.5). For example, many schemes about quality of taste/smell were found (214) while this is the type of scheme consumers are the least aware of in the survey (23%). Similarly, the highest number of schemes found was origin schemes (540) while awareness of local or regional labelling schemes and European PDO / PGI schemes is not particularly high (45% and 33% respectively). On the contrary, organic labels are the type of labels consumers are the most aware of (69%) while the number of organic labels schemes found is not particularly high (182). This is even more visible on health related labelling schemes with 67% of EU27+NO aware of these schemes and only 70 schemes found on the market in Europe. These results show relatively low correlation between the number of food labelling schemes on the market and awareness of the schemes. However, looking at the results from the virtual online shopping exercise, the most common type of labels found were organic and origin labels.

Food labelling schemes that EU15 respondents are more likely to have seen compared to EU12 respondents include: organic schemes, animal health or animal welfare schemes, allergen free schemes, local or regional labelling schemes, vegetarian or vegan schemes, schemes indicating a short supply chain, environmental schemes, religious requirements schemes and European PDO - PGI schemes.

However, the level of awareness is higher among the EU12 group for a number of labelling schemes including those indicating health benefits, traceability, fair trade, schemes indicating that traditional products or methods have been used, food safety and hygiene schemes and labelling schemes indicating a quality of taste or smell.

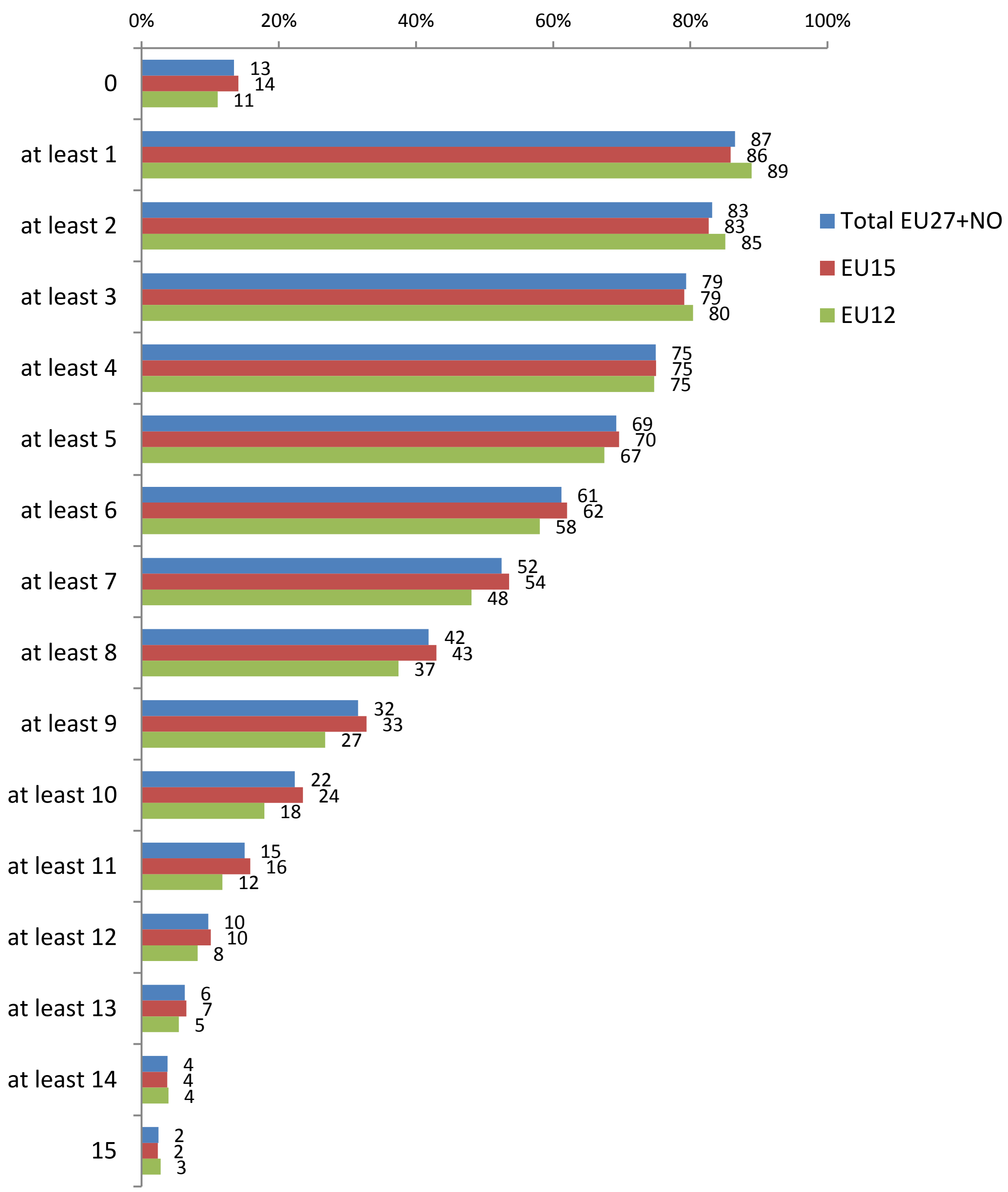
4.1.2 Awareness by country

As presented in Figure 46 and Figure 47 below, respondents from the EU15 group are aware of more schemes than those from the EU12 group.

Whilst slightly more respondents from the EU12 are aware of at least one scheme (89% compared to 86% among the EU15), this trend reverses when awareness of multiple scheme is considered. Three quarters (75%) are aware of at least four schemes both in the EU15 and the EU12. Over 60% of EU15 respondents are aware of at least six schemes while it is 58% in the EU12. A quarter of the EU15 (24%) is aware of at least 10 schemes compared to 18% among the EU12.

This may be explained by the larger number of schemes operating in EU15 countries in general.

Figure 46: Proportion of respondents aware of a given number of food labelling schemes

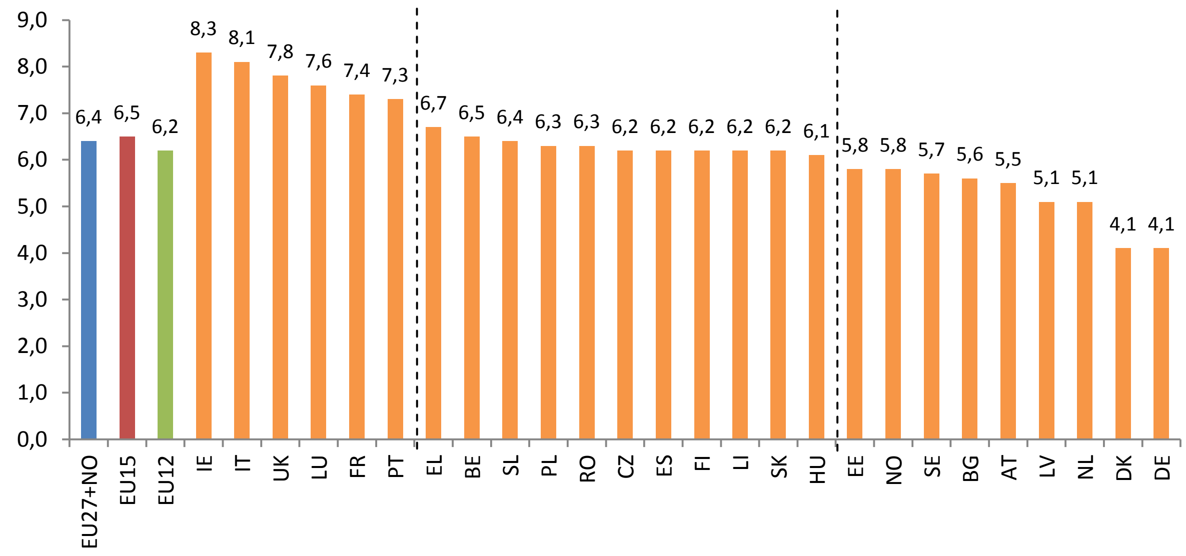


Base size: all respondents EU27+NO (19,260), EU15 (11,847), EU12 (6,909)
Question: Q3. Have you ever seen the following type of logos or statement on food products?

In line with the figures observed above, the average number of schemes known by respondents from the EU15 is 6.5 while it is 6.2 among the EU12.

However within each group, awareness varies considerably across countries. The figure below presents the average number of food labelling schemes respondents are aware of in each country.

Figure 47: Average number of food labelling schemes seen by country



Base size: all respondents EU27+NO (19,260), EU15 (11,847), EU12 (6,909)
Q3. Have you ever seen the following type of logos or statement on food products?

The EU15 higher average is primarily driven by the fact that all the countries with significantly above average numbers of schemes being recognised form part of the EU15, with Ireland (8.3), Italy (8.1) and the UK (7.8) all exemplifying this trend. Luxembourg, France and Portugal also have above average numbers of schemes being recognised by their respondents. However, the EU15 also includes those countries where respondents recognise the fewest number of schemes, notably Germany and Denmark (both 4.1). Those from the Netherlands, Austria and Sweden are also aware of a relatively low number of schemes (less than 6 on average).

Average awareness varies less among the EU12 group. Respondents from most countries have seen on average between 6.1 and 6.4 labelling schemes on food products, helping to explain this group's lower average. The EU12 countries with the highest average are Slovenia (6.4) and Romania (6.3). Only Estonia (5.8), Bulgaria (5.6) and Latvia (5.1) have an average below 6.

A table with the level of awareness by type of scheme and by country can be found in Annex 7.

4.1.3 Awareness of individual schemes

Respondents in Ireland and Italy have seen the most number of schemes on average across the EU27+NO. While 70 schemes were listed in the websweep in Italy only 16 were found in Ireland.

- Compared with all the other surveyed countries, Ireland has the highest awareness of health benefit schemes (84% of the respondents are aware), traceability schemes (81%) allergen free schemes (80%) and schemes indicating food safety and hygiene (56%). In the websweep, over half (9 schemes out of 16) of the schemes identified in Ireland cover the area of hygiene and safety compared with 19% overall in Europe. This may explain the high level of awareness of this type of scheme in Ireland compared to other countries. Similarly, five health benefit schemes and five traceability schemes were identified in Ireland which represents 31% of existing schemes in the country while across Europe as a whole, health benefits schemes accounted for just 8% of those found and traceability schemes 26%. The labelling schemes Irish respondents are the least aware of are the European PDO - PGI schemes (16%). By way of contrast, Italian respondents are, across all surveyed countries, those with the highest level of awareness for European PDO - PGI labelling schemes (65%). Origin schemes are also the types of schemes that were the most commonly found in Italy in the websweep (39 out of 70 schemes identified in the country). Italian respondents are also particularly aware of labelling schemes indicating a short supply chain (56% vs 32% on average for the EU27 + NO) and those indicating the production method had a limited impact on the environment or climate (35% vs 24%).

On the other side of the scale, Germany and Denmark are the two countries where respondents are the least aware of food labelling schemes.

The pattern of awareness by types of scheme in Germany is similar to other countries but at a lower level. The type of scheme which German respondents are most aware of is organic schemes but the proportion that has seen these is low compared to the other countries (46% in Germany compared with 69% overall). The types of schemes with the lowest level of awareness in Germany are religious requirements (10%) and quality of taste or smell (11%). Whilst these are also the least likely to have been seen across all countries, the average is higher at 23%.

Compared with the other countries, German respondents are the least likely to have ever seen health benefit labelling schemes (36%), allergen free schemes s (38%) and animal welfare schemes s (34%). It is worth noting that in Germany, the proportion of respondents saying they do not know whether they have seen the types of scheme presented is usually higher than those saying they have never seen these types of labelling schemes. This is also the country with the highest level of 'don't know/not sure' responses for the different types of schemes.

The low level of awareness in Germany is perhaps surprising given the high number of existing food labelling schemes in the country; 113 schemes were found to be managed in the country by the websweep. However the example of Ireland shows that awareness is not necessarily generated by a high number of schemes in the country. Examination of the results of the survey does not provide specific reasons for this low level of awareness in Germany, but a potential explanation from the virtual online shopping exercise is that the proportion of products affiliated to at least one food labelling scheme in Germany (13%) is lower than in both Denmark (26%) or in France (19%). It could be that the presence of many food labelling schemes in a country does not necessarily mean that many products are affiliated to them and therefore that the population has more limited exposure to them. On the other side, in the virtual online shopping most eggs were found to be affiliated with the KAT scheme which is related to animal welfare while in the survey Germans are the least aware of animal welfare schemes with Latvia (34%).

Denmark, alongside Germany, is the country with the lowest average awareness of food labelling schemes (4.1). It has the lowest level of awareness with Germany on allergen free labels with only 38% of respondents being aware of it. It is also the country (along with the Netherlands) where respondents are the least aware of local or regional labelling schemes (18%) and is the lowest for awareness of traditional products or methods labels (17%) as well as for vegetarian or vegan labels (12%). The types of labels Danish respondents are the most aware of are organic labels (60%), fair trade labels (46%) and health benefit labels (44%).

These results for Denmark are in line with the findings from the websweep and the virtual online shopping exercise. In the websweep the number of food labelling schemes found was very limited (21 schemes of the 901 identified in Europe are found in Denmark. A more detailed examination of the number of schemes managed by country is available in Section I, chapter 2). No schemes indicating that the products are allergen free, vegetarian/vegan or indicating traditional products or methods were identified. The virtual online shopping exercise found that a quarter of the products (26%) were affiliated to a food labelling scheme but this is mainly to organic, health benefit or fair trade labelling schemes. No product affiliated to allergen free schemes, vegetarian/vegan schemes or schemes indicating traditional products or methods were found. Similarly, while eight origin schemes were identified in the websweep, very few products affiliated to origin labelling schemes were found in the virtual online shopping exercise. Only a few included the PDO or PDI logo. Awareness for these PDO or PDI logo schemes is low in this survey (12%) and are confirmed by the results of the Special Eurobarometer 389; (PDO 3%) and PGI (6%).

In some countries we can observe links between schemes awareness and the proportion of product affiliated to schemes seen in the virtual online shopping exercise. For example, France is the country with the highest awareness of organic schemes and in the virtual online shopping exercise, the AB (Agriculture Biologique) logo was frequently found. Similarly a lot of origin schemes were also found on animal related products (chicken, mince beef, hard cheese, butter) and the awareness of origin schemes in France is higher (65%) than in the EU27+NO (45%). In Poland, health benefits schemes were commonly found on products, (especially on margarine) and three quarters (76%) of the surveyed population were aware of this type of scheme.

4.1.4 Awareness by demographic profile

Variations in awareness of different types of schemes can also be observed by socio-demographic groups.

- Women are aware of more schemes on average than men (6.6 schemes compared with 6.1 for men). While women are more familiar with a number of individual schemes there are six where there are no differences between gender: religious, traditional products or methods, environmental (eco), food safety and hygiene, PDO/PGI; local or regional labelling schemes.

- Those aged 18- 34 are aware of the highest number of schemes (6.7) whilst those aged 55-64 are those with the lowest awareness average (5.9).

Table 17: Awareness of food labelling schemes by age

	18-24	25-34	35-44	45-54	55-64	65+
Base	*1589*	*4344*	*4818*	*4110*	*2811*	*1588*
Average number of types of schemes known	6.7	6.7	6.4	6.2	5.9	6.5

Q3. Have you ever seen the following type of logos or statement on food products?

- Compared to the other age groups the 18-34 years old have a particularly high level of awareness of health benefits schemes (72%), organic schemes (72%), allergen free schemes (66%), vegetarian/vegan schemes (46%), and schemes indicating a quality of taste or smell (30%).

- Respondents aged 65+ are the most aware of schemes indicating traceability (59%), schemes indicating a short supply chain (39%), and food safety and hygiene (37%).

- In terms of income, those 'finding it very difficult' are aware of fewer schemes on average (5.8) than 'those finding it difficult' (6.2), 'coping' (6.7) or 'living comfortably' (6.4). With the exception of schemes indicating food safety and hygiene, traditional products or methods and quality of taste or smell where differences are not significant, those 'coping' or 'living comfortably' are more likely to have seen all types of schemes.

- Level of education also plays a role in awareness of food labelling schemes. The more educated the respondents are, the more likely they are to be aware of the different types of schemes. On average respondents with a low education level have seen five schemes, those with a medium level education have seen 6.3 schemes and the most highly educated are aware of 6.9 schemes.

- On the whole, there is no difference in levels of awareness between those living in rural and urban areas. Two exceptions to this are that respondents living in rural areas are more likely to have seen fair trade schemes (47% rural vs 44% urban) and short supply chain schemes (34% vs 32%).

- On average, respondents who buy their food in discount stores have seen fewer labelling schemes on food products (6.1) than those buying food elsewhere (7.0). Those who buy part of their food directly from farmers or small producers are aware of the most schemes (7.6). They are particularly likely to have seen food labelling schemes such as traceability schemes (63%), as local or regional schemes (58%), traditional products or methods schemes (54%), fair trade schemes (51%), short supply chain schemes (46%) and environmental schemes (32%).

- The presence of children in the household has a positive impact on the level of awareness. On average, respondents with children recognise 6.7 schemes compared with 6.3 for those without children in their household. Awareness is higher for all types of schemes except fair trades schemes which are better known among those living without children (45% vs 42%).

It's worth reading labels and opinions about products that we give to our little ones to eat ... most important for me is from what it has been made and whether it has valid eco certificates
dzieci.pl forum (Poland)

- Respondents who are vegetarians (or who live with someone vegetarian) and those with food allergies (or living with someone who has food allergies) are aware of a higher number of food labelling schemes (on average 7.4 and 7.1 respectively) than those who have neither a vegetarian or someone with a food allergy in their household (on average 6.2 for both) . This can be somewhat expected as they are more likely to have to read food labels to ensure the products they buy match their dietary requirements. It was also very clear from the web listening exercise that vegetarian respondents or those with food allergies pay special attention to food labels.

Reading yoghurt label 3 times…despite that I love being a vegetarian

*Fortunately, more and more food manufacturers are aware of problems of people with celiac disease and try to obtain **„Znak przekreślonego kłosa”** certifications for their products…*
portalaktywni.pl forum (Poland)

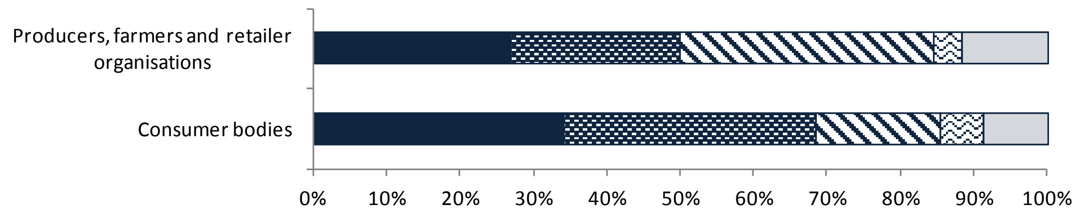
As a type 1 who carb counts I think compulsory food labelling is an excellent idea, often you will find people won't look at food labels unless they are trying to lose weight or have a medical condition that requires they must......for example diabetes, heart disease, celiac disease etc.
Diabetes.co.uk forum (UK)

The problem with lactose intolerance is not only milk. You need to look at the nutritional facts carefully on many products to check if they contain milk.
Aeped.es (forum of the Spanish Paediatrics Society)

4.1.5 Opinion of stakeholders

In addition to the consumer survey, stakeholders were also asked to give their opinion on consumer awareness of food labelling schemes in their country. Stakeholder views reflect to some degree the level of knowledge among consumers in that stakeholders do not believe consumers know of all the different food labelling schemes in their country. The vast majority of consumer bodies and also the majority of producer, farmer and retailer associations who responded to the survey believe that consumers know less than 25% of all food labelling schemes in their country. Between the two surveys, only three respondents believe that consumers know more than 75% of all food labelling schemes.

Figure 48: Stakeholders' assessment of consumer knowledge of food labelling schemes



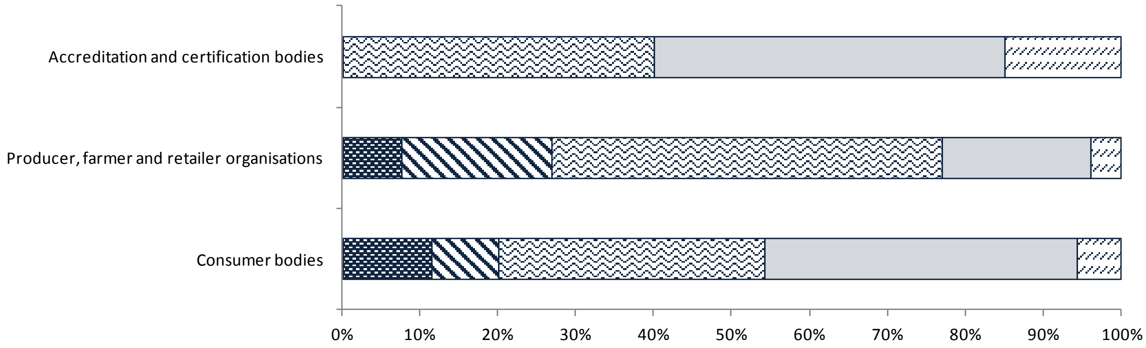
	Consumer bodies	Producers, farmers and retailer organisations
Consumers know less than 25% of all schemes	12	7
Consumers know between 25% and 50% of all schemes	12	6
Consumers know between 50% and 75% of all schemes	6	9
Consumers know more than 75% of all schemes	2	1
No response	3	3

Note: Producer, farmer and retailer responses are broken down in Annex 15

4.2 Consumer ability to distinguish between different types of schemes

Stakeholders were asked whether they believe consumers can easily distinguish between public and private voluntary food labelling schemes. The overwhelming majority of respondents disagrees or "totally disagrees" with this statement. In fact, not a single respondent "totally agrees" with this statement and only a very small number somewhat agrees with it.

Figure 49: "Consumers can easily distinguish between public and private voluntary food labelling schemes"

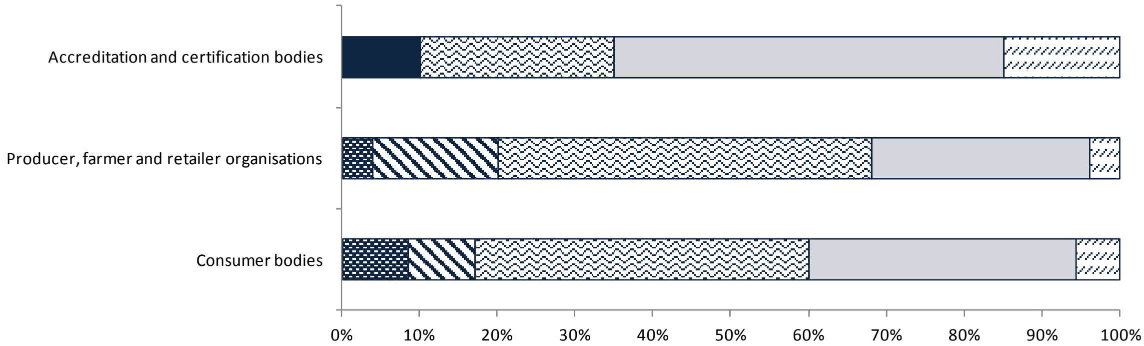


	Consumer bodies	Producer, farmer and retailer organisations	Accreditation and certification bodies
1 Totally Agree	0	0	0
2	4	2	0
3	3	5	0
4	12	13	8
5 Totally Disagree	14	5	9
No response	2	1	3

Note: Producer, farmer and retailer responses are broken down in Annex 15.

Similarly, stakeholders were asked whether or not they believe that consumers can distinguish between self-declaration and certification voluntary food labelling schemes. Once again, the number of respondents who believe that consumers are able to do so is extremely low with the vast majority of respondents disagreeing with the statement “Consumers can easily distinguish between voluntary self-declaration and certification food labelling schemes”.

Figure 50: "Consumers can easily distinguish between voluntary self-declaration and certification food labelling schemes".

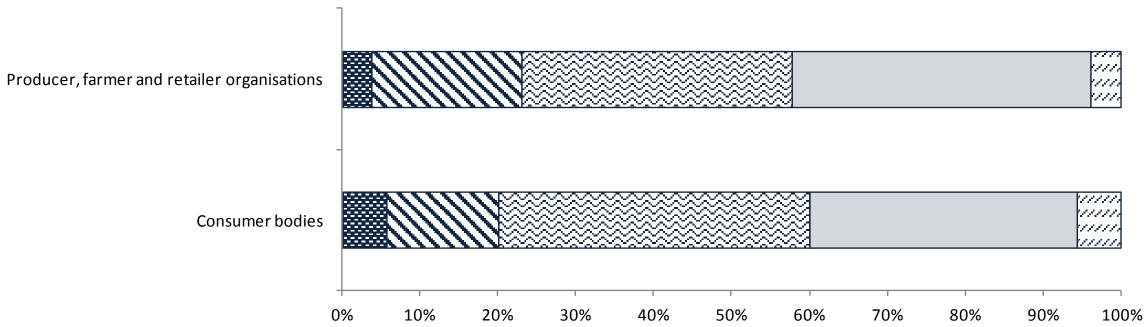


	Consumer bodies	Producer, farmer and retailer organisations	Accreditation and certification bodies
1 Totally Agree	0	0	2
2	3	1	0
3	3	4	0
4	15	12	5
5 Totally Disagree	12	7	10
No response	2	1	3

Note: Producer, farmer and retailer responses are broken down in Annex 15.

Finally, the stakeholders were asked the extent to which they agree with the statement: "Consumers can easily distinguish between product schemes and management schemes". In the producers, farmers and retailers survey, 19 of the 25 respondents totally disagreed or disagreed with the proposed statement. On the other hand, 26 of the 33 consumer bodies who gave an answer disagreed totally or disagreed. The vast majority of stakeholders therefore do not trust the consumers to differentiate the product and the management schemes.

Figure 51: "Consumers can easily distinguish between product schemes and management schemes"



	Consumer bodies	Producer, farmer and retailer organisations
1 Totally Agree	0	0
2	2	1
3	5	5
4	14	9
5 Totally Disagree	12	10
No response	2	1

Note: Producer, farmer and retailer responses are broken down in Annex 15.

4.3 Consumer understanding of information shown on schemes' labels

To measure consumers' understanding of labels showing affiliation to a food labelling scheme, respondents were first asked to say whether they found these labels easy or hard to understand, whether they thought logos and symbols on these labels were clear or confusing, whether print or text on these labels were big enough or too small to read and whether they thought labels showing affiliation to a scheme gave too much or not enough information.

- Around four in ten respondents in the survey find labels showing affiliation to a scheme hard to understand and about a third find logos or symbols on these labels confusing. Almost half of respondents say labels showing affiliation to a scheme are too small to read, and the same proportion think there is not enough information on these types of labels.

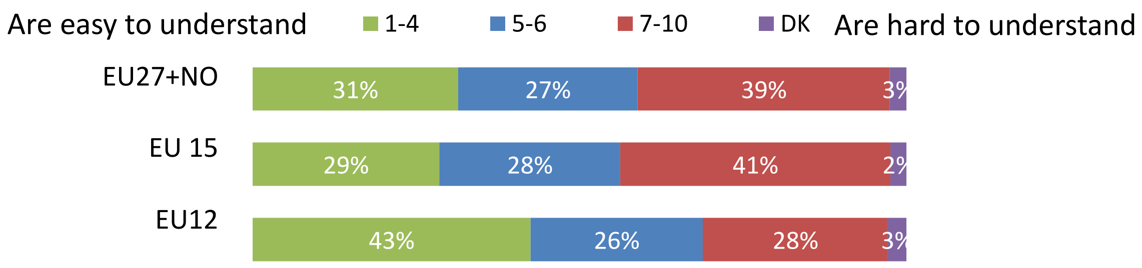
- However these results differ by age group. Older respondents are more likely to find labels showing affiliation to a scheme hard to understand, to think logos or symbols are confusing and to say text on these labels is too small to read. 18-24 years old are more likely to think there is not enough information on these types of labels.

- Respondents from the EU15 group, where the share of older respondents is higher than in the EU12 group, are more likely to find labels showing affiliation to a scheme hard to understand, the logos or symbols confusing and to a lesser extent, text on labels too small to read.

4.3.1 Are labels showing affiliation to a food labelling scheme easy to understand?

Overall about four in ten respondents (39%) find labels showing the affiliation of a product to a food labelling scheme, difficult to understand (rating 7-10 on a scale 1-10). Difficulty with understanding these labels is higher among the EU15 group (41%) than among the EU12 group (28%).

Figure 52: Understanding of labels showing affiliation to a food labelling scheme



Base size: all respondents EU27+NO (19,260), EU15 (11,847), EU12 (6,909)
Q8. Thinking in general about food labelling schemes, please position yourself on a scale ranging from 1 to 10 where 1 means you agree more with the opinion on the left and 10 means you agree more with the opinion on the right.

- Within the EU15, German respondents are the most likely to find labels showing affiliation to a scheme difficult to understand. More than half (52%) consider these labels hard to understand. This may be linked to the high number of labelling schemes in the country and especially the high number of self-declared schemes, as well as the low level of awareness observed among the population.

- Elsewhere in the EU15, other countries with a higher than average proportion of respondents stating that they think labels showing affiliation to a scheme are hard to understand include Sweden (44%), Austria (43%), Denmark and Luxembourg (42%), France and the Netherlands (41%).

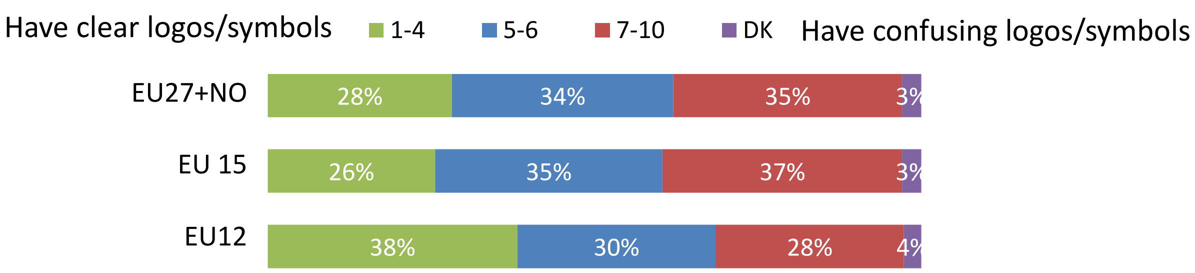
- In contrast, those countries with the highest proportions of respondents who think these types of labels are easy to understand are mainly found in the EU12 Slovakia (48%), Bulgaria and Lithuania (45%), Poland and Romania (44%) are all indicative of this trend. In Bulgaria 11% of respondents give the highest rate (1) but to put this into perspective it is worth noting that the number of food labelling schemes identified in Bulgaria is very limited (five were found in total during the websweep exercise).

- However, Greece with half (50%) of its respondents saying labels showing affiliation to a scheme are easy to understand is an exception to the generally higher levels of EU15 respondents saying they find labels hard to understand.

4.3.2 Do labels showing affiliation to a food labelling scheme have clear logos or symbols?

More than a third of respondents (35%) say labels showing affiliation to a scheme have confusing logos or symbols (rating 7-10 on a scale 1-10). About the same proportion (34%) rates the clarity of logos and symbols as average (5-6) and slightly less than three in ten (28%) find logo and symbols on these labels clear enough.

Figure 53: Clarity of logo or symbols



Base size: all respondents EU27+NO (19,260), EU15 (11,847), EU12 (6,909)
Q8. Thinking in general about food labelling schemes, please position yourself on a scale ranging from 1 to 10 where 1 means you agree more with the opinion on the left and 10 means you agree more with the opinion on the right.

In line with the results for understanding of labels showing affiliation to a scheme, respondents from the EU12 countries are more likely than those from the EU15 countries to think the logos and symbols on these labels are clear.

- Within the EU15, five countries have a particularly high proportion of people saying they find labels showing affiliation to a scheme confusing. These include Luxembourg (45%), France (41%), Belgium (40%) as well as the Netherlands and Germany (38%).

- The EU12 relatively higher proportion of respondents saying they find these labels clear is driven by three countries, which include Slovakia (48%), Poland and Bulgaria (41% each).

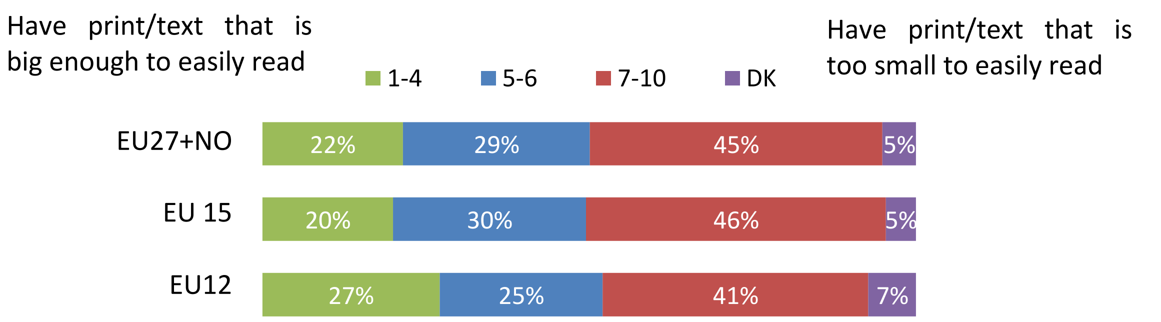
- In quite a few countries, the ratings given by the largest proportion of respondents are 5 or 6, showing mitigated opinion on the clarity of labels showing affiliation to a scheme. This is particularly the case in the Scandinavian countries: Sweden (41%), Finland (40%), Denmark (38%), Norway (35%) and in Latvia and the UK (39%).

4.3.3 Is the print/text big enough to read?

Almost half of respondents (45%) think print or text on labels showing affiliation to a scheme is too small to read. Three in ten (29%) have a neutral opinion on the subject and 22% have no problem with the size of the print or text.

Respondents from the EU15 countries are more likely to find print or text too small to read but the difference with the EU12 group is not as marked as on ratings on whether labels showing affiliation to a scheme are easy to understand or have confusing logos.

Figure 54: Size of print or text



Base size: all respondents EU27+NO (19,260), EU15 (11,847), EU12 (6,909)
Q8. Thinking in general about food labelling schemes, please position yourself on a scale ranging from 1 to 10 where 1 means you agree more with the opinion on the left and 10 means you agree more with the opinion on the right.

Respondents from Luxembourg are the most likely to find the text on labels showing affiliation to a scheme too small to easily read (53%), followed by the Belgians and the Hungarians (51%), the Austrians (50%) and the Czechs (49%).

Poles are the least likely to think print or text are too small (34%) and about the same proportion believe the size is right (33%).

Within the EU12, the group's three most populous countries including Poland (33%), Bulgaria (29%) and Romania (26%) all have above average proportions of respondents saying that these labels are easy to read and so act as the principal influence on this grouping's higher figure. However, this relatively higher figure of respondents in the EU12 saying they find these labels easy to read is not universal in this grouping. Hungary (51%) is one of only three countries of the 26 which has a majority of respondents saying they find labels showing affiliation to a scheme hard to read.

Meanwhile, in two EU15 countries, Belgium (51%) and Austria (50%), half of respondents say they find labels hard to read. However, the main driver of this grouping's higher figure in this bracket (46%) is the fact that seven EU15 countries have figures that fall within a narrow, two point band between 45% and 47%, rather than any large variation in these countries' figures.

This comment from the UK shows the difficultly some consumers have with small writing on labels.

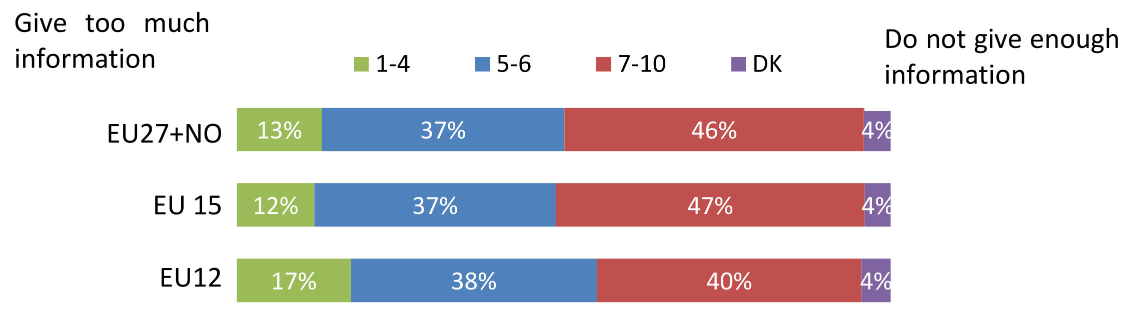
> Putting even more microscopic writing on a label is, frankly, ludicrous.
> Daily Mail

4.3.4 Is there enough information on labels showing affiliation to schemes?

Another important aspect of measuring consumer understanding of information shown on affiliation schemes' labels is to assess whether they think the level of information provided on these labels is sufficient.

In general, respondents tend to think labels showing affiliation of a product to a food labelling scheme do not give enough information. Almost half of respondents (46%) give a rating of 7-10, with 10 indicating that labels do not give enough information. In contrast just 13% give a rating of 1-4.

Figure 55: Level of information given on labels showing affiliation to a scheme



Base size: all respondents EU27+NO (19,260), EU15 (11,847), EU12 (6,909)
Q8. Thinking in general about food labelling schemes, please position yourself on a scale ranging from 1 to 10 where 1 means you agree more with the opinion on the left and 10 means you agree more with the opinion on the right.

There are more respondents among the EU15 group who tend to think labels showing affiliation to a scheme do not give enough information (47% vs 40% among the EU12 group). Within the EU15, Austrian and German respondents are the most likely to think these labels do not give enough information (59% and 57% respectively).

On the other hand, the EU12 group is slightly more likely to think these labels give too much information (17% vs 12%). The country with the highest proportion of respondents thinking affiliation schemes labels give too much information is Bulgaria with 23%.

In a number of countries, the proportion of respondents happy with the level of information provided on labels showing affiliation to a scheme (rating 5 or 6) is higher than those saying these labels do not give enough information. This is the case in Denmark, the Netherlands, Portugal, Hungary, Latvia, Slovenia, Greece, Estonia, Slovakia and the Czech Republic. The broad geographical spread of these countries helps to explain why there is not a significant difference between the two country groupings in the proportions of their respondents expressing a neutral opinion.

4.3.5 Understanding of labels showing affiliation to a scheme by demographic profile

As may be expected, the difficulty of reading affiliation schemes' labels due to the size of the print or text increases with age. Those aged 65 or over are the most likely to find the text too small (54%) while only 37% of 18-24 year olds think the same. A similar pattern can also be observed for difficulty of understanding these labels and finding logos and symbols confusing.

Table 18: Comprehension of labels showing affiliation to a scheme by age group

	18-24	25-34	35-44	45-54	55-64	65+
Base	*1589*	*4344*	*4818*	*4110*	*2811*	*1588*
Are hard to understand	34%	35%	36%	38%	43%	46%
Have confusing logos/symbols	28%	29%	34%	37%	39%	42%
Have print /text too small	37%	38%	41%	47%	51%	54%
Do not give enough information	49%	46%	45%	44%	46%	47%

Q8. Thinking in general about food labelling schemes, please position yourself on a scale ranging from 1 to 10 where 1 means you agree more with the opinion on the left and 10 means you agree more with the opinion on the right.

Considering that the proportion of the population aged more than 65 years old is considerably higher in countries of the EU15 group than in countries of the EU12 group the differences observed between the EU15 and the EU12 groups on this item can be partly explained by the age distribution of the sample. In this survey 15% of the EU15 sample are more than 65 years old compared to only 1% of the EU12 sample and the proportion of 55-64 year olds is twice the size in the EU15 group (20%) than in the EU 12 group (10%). The proportion of the sample by age group in each country can be found in annex 9.

However, patterns differ regarding level of information. Across the EU 27+ NO, those aged 18-24 are more likely than the other age groups to think that labels showing affiliation to a scheme do not give enough information (49% of 18-24s vs 46% of those aged 25+).

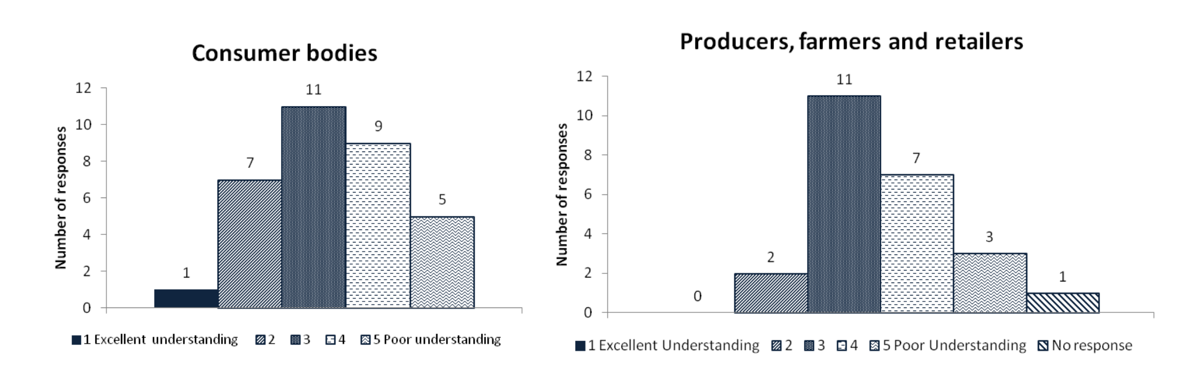
Those with a lower level of education tend to think labels showing affiliation to a scheme are more difficult to understand (42% vs 38% of those with medium or high education) and are more likely to find logos or symbols confusing (38% vs 35%). Regarding the amount of information provided on affiliation schemes' labels, those with a high level of education tend to think these labels do not give enough information (48% vs 44% among those with a low or medium education level) as well as those without children (47% vs 42%).

Those who say they do not trust information shown on schemes labels (which is further elaborated on in section II, chapter 6.1) are also more likely to indicate they find these labels hard to understand (50% vs 32% of those who trust the information), that logos or symbols are confusing (43% vs 31%) and that the size of the print or text are too small to read (48% vs 44%). Additionally, respondents who do not trust information shown on schemes labels are also more likely to think these labels do not give enough information (52%) than those who say they trust information shown on affiliation schemes labels (44%). It is worth noting that there is no correlation between age and trust in information shown on affiliation schemes labels. These results reveal how understanding of schemes and trust in these schemes are interlinked and how improvement on one element could influence the other.

4.3.6 Opinion of stakeholders

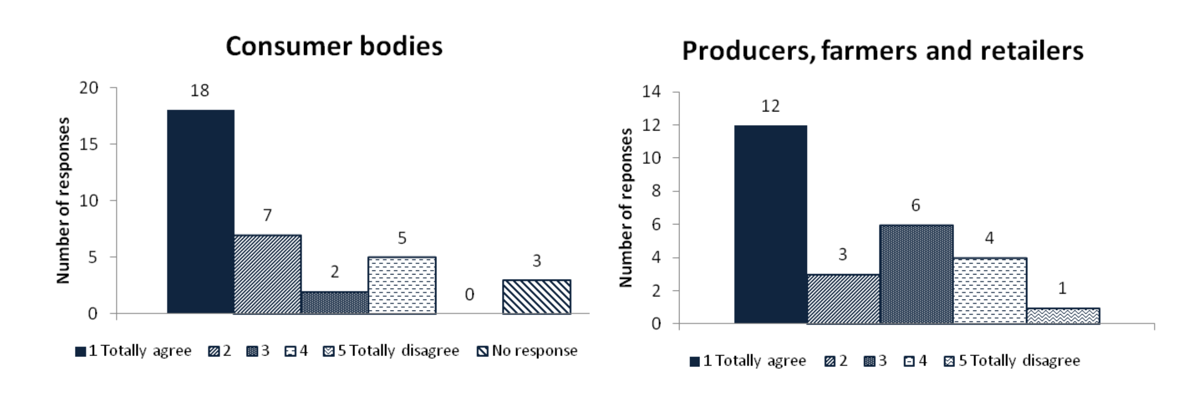
Stakeholders were also asked to rate, to the best of their knowledge, consumer understanding of food labelling schemes. The results are presented in Figure 56 below: the most commonly given rating is 3 out of 5 where 5 stands for "poor understanding" and 1 for "Excellent understanding". That is, most stakeholders feel that consumer understanding of food labelling schemes is neither very good nor very poor.

Figure 56:"How would you rate consumers' understanding of the most important voluntary food labelling schemes in your country"



In addition, stakeholders were asked whether or not they believe that there is a need to improve consumer understanding of food labelling schemes. The vast majority of stakeholders strongly believe this to be the case as can be seen from the results in Figure 57 below.

Figure 57:Do you agree with the following statement: "There is a clear need to improve consumer understanding of voluntary food labelling schemes"?



In addition, respondents were asked to indicate how consumer understanding could be improved.

Consumer bodies

By far the most common response from consumer bodies was that an **information campaign** was needed (indicated by 14 consumer bodies). Suggestions of how such an information campaign should be undertaken included:

- Traditional media (newspapers magazines, TV, etc)
- Social media and social networks
- Information given out at the point of sale or on the products themselves
- Leaflets (either also at the point of sale or as part of other campaign events)
- Seminars and courses
- Events at schools or as part of the regular curriculum
- Information at libraries

Producers, farmers and retailers

Similarly in the producers, farmers and retailers survey, the most common idea to increase the consumers' understanding of the food labelling schemes was to organise more and better **information campaigns**. Over all the responses, 12 mentioned this idea and they suggested different vectors of information:

- TV, press
- Education system
- Websites
- Seminars and courses etc.

The respondents also suggested that the rules could be simplified and harmonized to increase transparency; some also suggested turning these rules into a legally binding requirements.

One retailer organisation suggested that more precise and clear scheme labels would help consumers, with one producer and one farmer organisation similarly identifying this feature. Educating consumers whilst at school and the introduction of increased legislation relating to food scheme labels were also mentioned by producer and farmer organisations as methods for improving consumer understanding. Other issues which were mentioned by farmer organisations as potential methods for improving consumer understanding related to specific funds being allocated to voluntary food labelling schemes which respect EU guidelines, national databases which clearly identify the nature of schemes guaranteeing transparency in the market and limiting the number of labelling schemes.

4.4 Meaning of labels showing affiliation to a food labelling scheme

To evaluate consumer understanding of different affiliation scheme labels, three labels were specially created for this survey and presented to respondents with a list of potential definitions they could choose from. Mock up labels were used so that the same three labels could be shown in all countries and answers could be compared. The same labels showing affiliation to a scheme were also used in the experiment. These three labels were designed to represent three types of common labelling schemes that can be found on products in every country: origin, health benefits and animal welfare.

Respondents were asked to select all the definitions they thought match the label presented. Those who chose more than one definition were then asked to select from among all their answers which one they thought is the main definition.

4.4.1 Label showing affiliation to an origin scheme

When presented with the origin scheme label, three-quarters of respondents (76%) think this label means that ‘the product has been produced, processed and prepared in their country’. This is by far the most commonly selected option in all countries.

On average respondents choose two meanings for this label except in Romania where the average is three. Among those who selected more than one definition for the origin scheme label, more than half (59%) chose ‘the product has been produced, processed and prepared in their country’ as the main definition.

Respondents from the EU12 group are even more likely to believe that this logo means ‘the product has been produced, processed and prepared’ in their country (87%).

The countries with the highest proportion of respondents choosing this option are Bulgaria and Romania (both 91%).

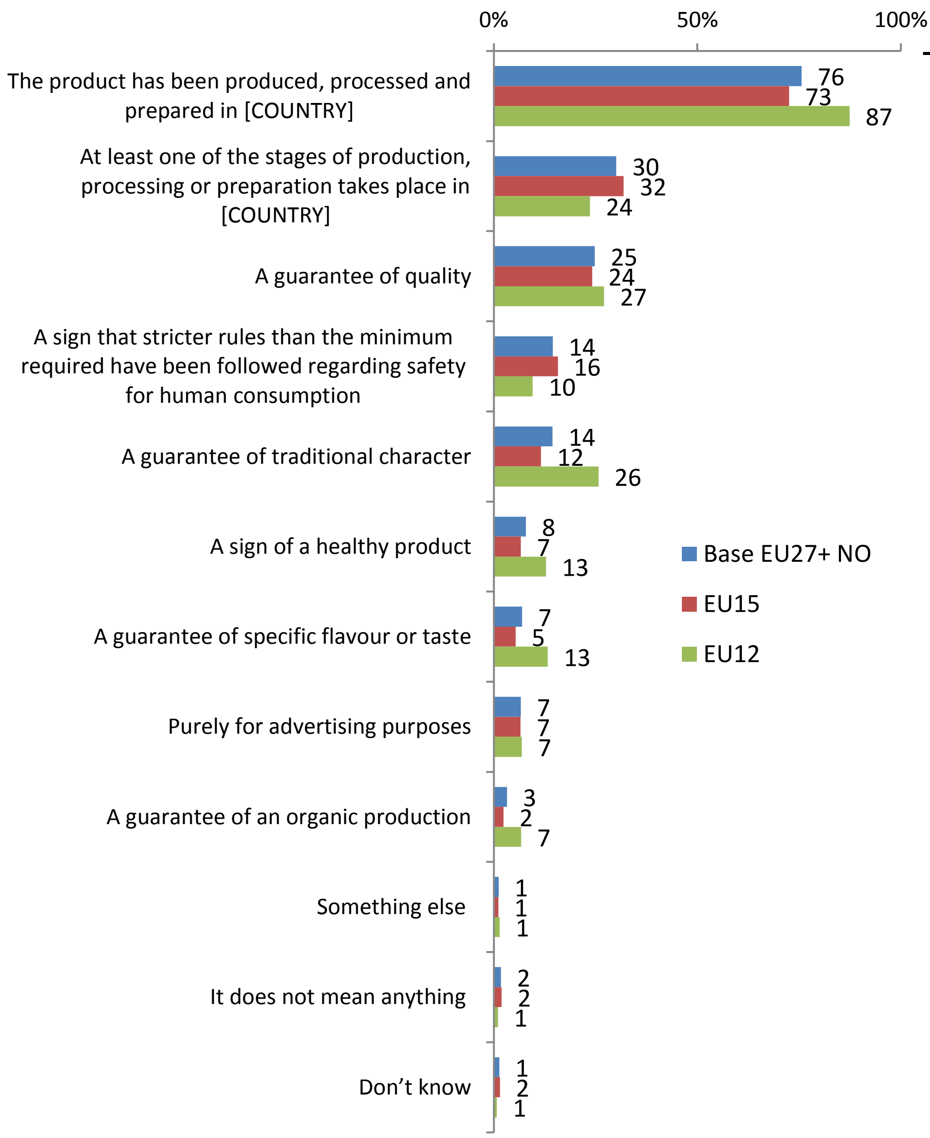
Austrians are the least likely to choose that meaning (62%) but it is still the most commonly chosen option in this country.

‘At least one of the stages of production, processing or preparation takes place in their country’ is the second most popular option selected in the EU15 group (32%). This is particularly high in Austria where almost half (47%) believe this label to mean that. However, among the EU12 group this lies in fourth place (24%) behind ‘a guarantee of quality’ (27% vs 24% in EU15 group) and ‘a guarantee of traditional character’ (26% vs 12% in EU15 group).

The option ‘a guarantee of quality’ is chosen by 21% to 37% of the EU12 group, except for respondents from the Baltic countries. Only 12% choose this option in Lithuania and 15% do in Latvia and Estonia.

Figure 58: Meanings of label showing affiliation to an origin scheme

All meanings



Main meaning

	EU27+ NO	EU15	EU12
The product has been produced, processed and prepared in [COUNTRY]	59%	56%	70%
At least one of the stages of production, processing or preparation takes place in [COUNTRY]	18%	21%	10%
A guarantee of quality	8%	9%	7%
A sign that stricter rules than the minimum required have been followed regarding safety for human consumption	5%	6%	2%
A guarantee of traditional character	3%	3%	2%
A sign of a healthy product	2%	2%	5%
A guarantee of specific flavour or taste	2%	1%	2%
Purely for advertising purposes	1%	1%	2%
A guarantee of an organic production	1%	0%	1%
Something else	0%	0%	0%
It does not mean anything	0%	0%	0%
Don't know	1%	1%	1%

Base size: all respondents EU27+NO (19,260), EU15 (11,847), EU12 (6,909)
Q4a. Which of the following, if any, do you think this logo means when placed on a food product?

Base size: those giving more than one meaning - EU27+NO (8,782), EU15 (5,222), EU12 (3,368))
Q4b. And which ONE do you think is the main meaning of this label?

Romania (41%) and Bulgaria (36%) are the main drivers behind the high proportion who believe this logo means 'a guarantee of traditional character' among the EU12, while the very low percentages of people selecting this option in Scandinavian countries (Denmark 3%, Finland and Sweden 4%) is influencing the lower proportion mentioning it in the EU15. Generally, 'a guarantee of traditional character' is mainly chosen in combination with other answers and is not seen as the main meaning of the logo (only 3% think it is the main meaning overall).

The option 'a sign that stricter rules than the minimum required have been followed regarding safety for human consumption' is more likely to be chosen by respondents from the EU15 (16%) than by respondents from the EU12 (10%). Overall only 5% think this is the main definition of this origin label, reducing to just 2% in the EU12.

On the other hand, respondents from the EU12 are more likely to think that the origin label shown to them is 'a sign of a healthy product' (13% vs 7% among the EU15) and that it 'guarantees a specific flavour or taste' (13% vs 5% among the EU15). Again few say it is the main meaning across the EU27+NO.

A minority of 7% believes this kind of logo on food products are 'for advertising purpose only' while 2% thinks it does not mean anything.

4.4.2 Label showing affiliation to a health benefits scheme

According to the requirements of Regulation (EC) No1924/2006 on nutrition and health claims made on foods, this health scheme label with the statement 'Good for your heart' should be accompanied by a related specific health claim. The survey tested consumer understanding of this rather vague and general logo and the results show that it is still given various meanings across the EU 27 and Norway.

- A third thinks that it means that 'the product is particularly good for people with heart problems' (34%).

- Another third believes that 'the product is suitable for people with health issues (diabetic, cholesterol etc...)' (33%).

- For more than a quarter this label means that 'the product is recommended as part of a balanced diet' or that 'the product is intended to improve health' (both 27%).

- Furthermore, for two in ten (20%) this label means 'a guarantee that the product is not harmful to health'.

In general, respondents tend to give two meanings to the health scheme label and half of those saying it means that 'the product is particularly good for people with heart problems' also think it means 'the product is suitable for people with health issues (diabetic, cholesterol etc...)'.

When asked to choose what they think is the main meaning, the most commonly selected option is 'the product is particularly good for people with heart problems' (29%). This is followed by 'the product is suitable for people with health issues (diabetic, cholesterol etc...)' selected by 20% and that 'the product is recommended as part of a balance diet' selected by 17%.

When looking at a total level, the health label is given various meanings, but when considering the EU12 group, two meanings are more prevalent. For almost half (49%) of respondents from the EU12 group the health logo means 'the product is particularly good for people with heart problems'. For about the same proportion (45%) it means that 'the product is suitable for people with health issues (diabetic, cholesterol etc...)'.

Poland is the country with the highest proportion of respondents selecting these two meanings. Six in ten Polish respondents believe the label means ‘the product is particularly good for people with heart problems’. For more than half (54%), it means ‘the product is suitable for people with health issues (diabetic, cholesterol etc...).

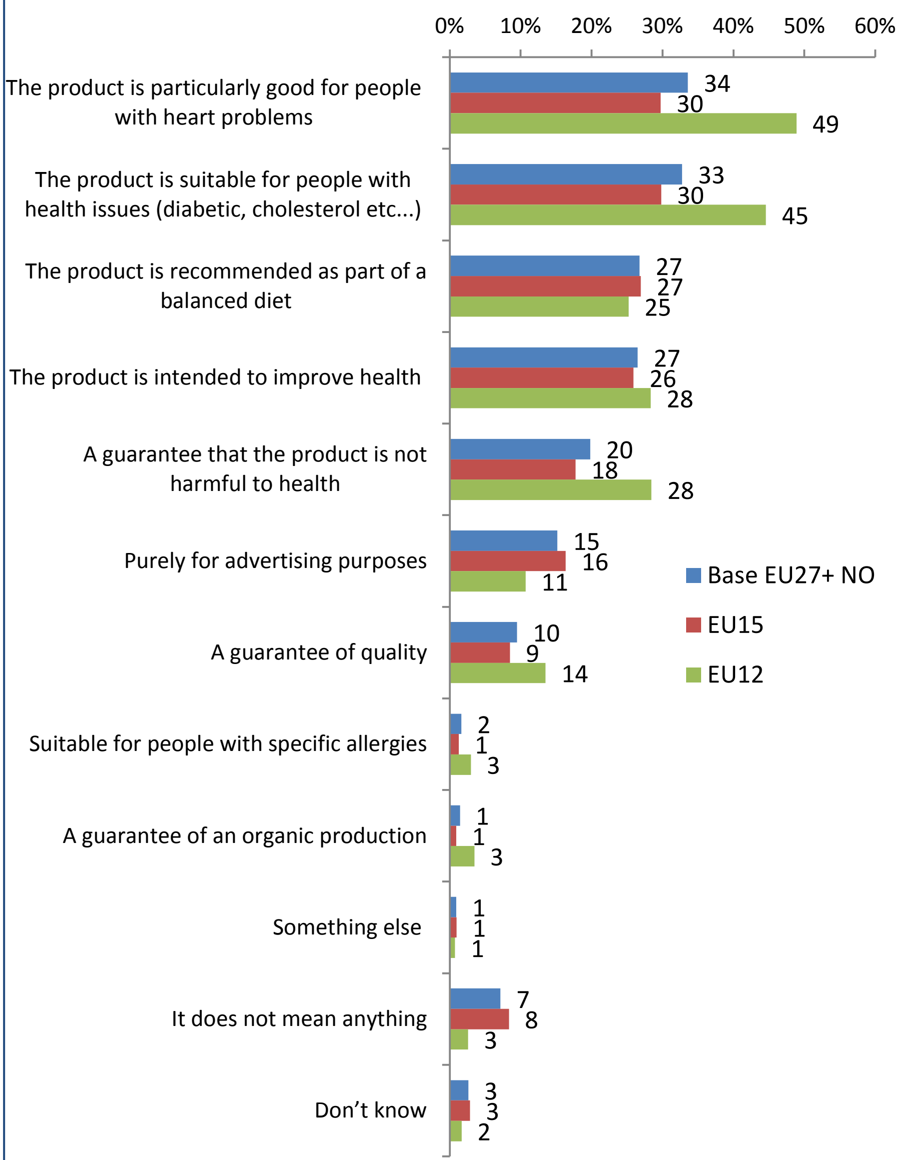
By way of comparison, for respondents from the EU15 these two definitions are each selected by just 30%.

When asked to select only one meaning, the main one given by respondents from the EU12 group is that ‘the product is particularly good for people with heart problems’ (40%).

Among respondents from the EU15 group, results between the different meanings are much closer. A quarter (25%) believes this label means the product ‘is particularly good for people with heart problems’. 20% think that ‘it is suitable for people with health issues’, 19% say that ‘it is recommended as part of a balanced diet’.

Figure 59: Meanings of label showing affiliation to a health scheme

All meanings



Base size: all respondents EU27+NO (19,260), EU15 (11,847), EU12 (6,909)
Q4a. Which of the following, if any, do you think this logo means when placed on a food product?

Main meaning

	EU27+ NO	EU15	EU12
The product is particularly good for people with heart problems	29%	25%	40%
The product is suitable for people with health issues (diabetic, cholesterol etc...)	20%	20%	22%
The product is recommended as part of a balanced diet	17%	19%	10%
The product is intended to improve health	15%	16%	10%
A guarantee that the product is not harmful to health	10%	10%	11%
Purely for advertising purposes	5%	6%	4%
A guarantee of quality	3%	2%	3%
Suitable for people with specific allergies	0%	0%	0%
A guarantee of an organic production	0%	0%	1%
Something else	0%	0%	0%
It does not mean anything	0%	0%	0%
Don't know	1%	1%	1%

Base size: those giving more than one meaning - EU27+NO (8,782), EU15 (5,222), EU12 (3,368))
Q4b. And which ONE do you think is the main meaning of this label?

Respondents from the EU12 group are also more likely to think this label means that 'the product is intended to improve health' (28% compared to 26% of the EU15 group) and that it is 'a guarantee that the product is not harmful to health' (28% compared to 18% of the EU15 group). However, the countries scoring the highest on 'the product is intended to improve health' are both in the EU15 and comprise Finland (56%) and the Netherlands (52%).

Conversely, respondents from the EU15 group are more likely to think that the health logo, when placed on a food product, means that ‘it is recommended as part of a balanced diet’ (27% of EU15 compared to 25% of EU12) and this is particularly the case in Scandinavian countries (Norway 48%, Finland 39%, Sweden 31%). This difference between answers from the EU15 group and the EU12 group is higher among those asked to choose the main meaning of the label. For 19% of the EU15 group the health label means the product ‘is recommended as part of a balanced diet’ whilst this is meaning is only chosen by 10% of the EU12 group.

Those from the EU15 group also tend to be more doubtful regarding any meanings of the health label.

They are 16% to think that the label ‘is only a mean of advertising’ compared to 11% among the EU12 group. This percentage is particularly high in Luxembourg (27%), Germany (25%) and Austria (22%). This is also the highest level among the three labels shown to respondents.

Another 8% of the EU15 believe this label does not mean anything compared to 3% of respondents from the EU12 group. The countries with the highest percentage for this answer are France (14%) and Germany (13%).

Animal Welfare Approved

4.4.3 Label showing affiliation to an animal welfare scheme

The animal welfare logo is clearly identified in each country as ‘a guarantee that the animals are in good health, are well treated and are killed in an appropriate and humane manner’.

This is the definition selected for this logo by seven in ten respondents in the survey (69%). This score goes up to 74% among the EU12 countries, led by Bulgaria (88%), Hungary (78%), Poland and Slovakia (both 77%). The smallest proportion of respondents choosing this definition is in Germany (54%), the Netherlands (58%) and Austria (60%). All of which are members of the EU15 and help to explain the grouping’s lower average.

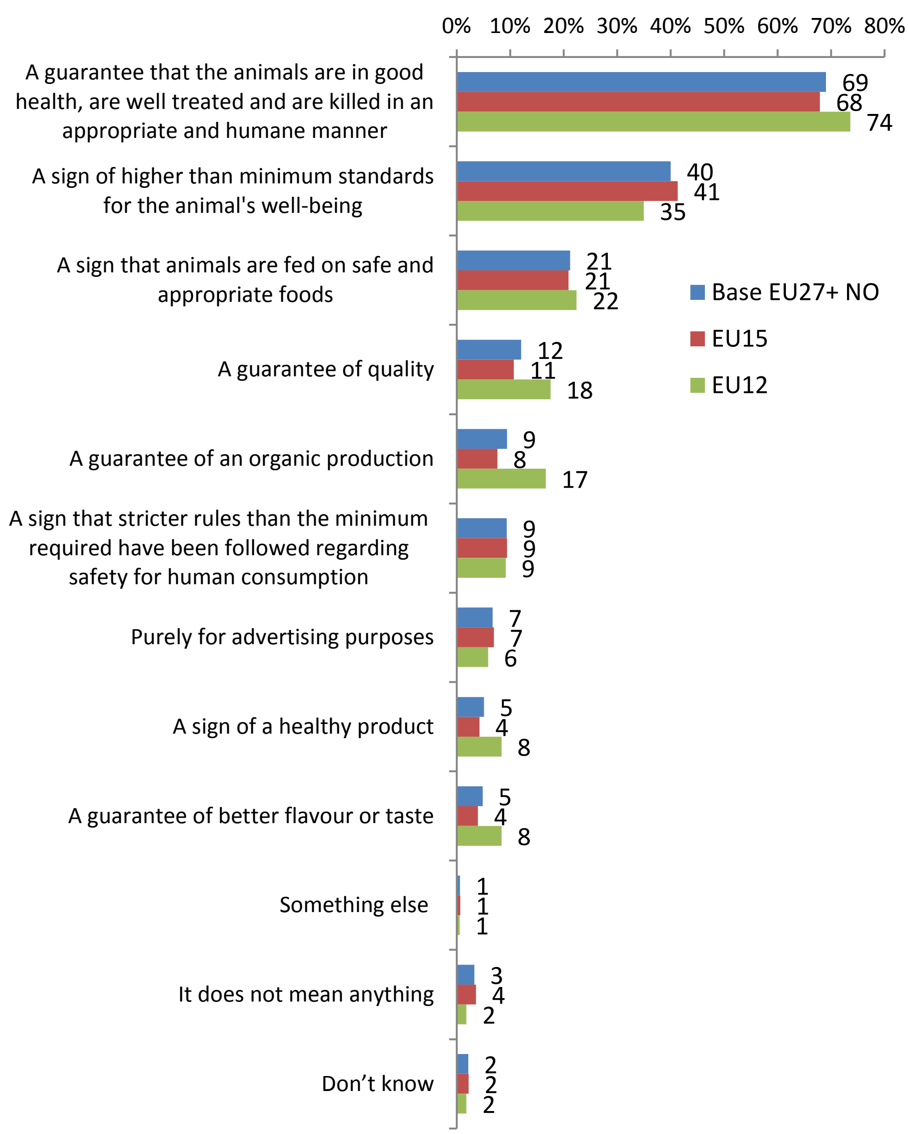
The second most commonly selected definition is ‘a sign of higher than minimum standards for the animal's well-being’. Respondents from the EU15 group are more likely than those of the EU12 group to think so (41% compared to 35% of the EU12 group). Finland is the country with the highest score (55%), whilst in Bulgaria it is only selected by 6% of the surveyed population.

About two respondents in ten believe this logo is ‘a sign that animals are fed on safe and appropriate foods’ (21%). Finland is again the country where this meaning is selected the most often (36%) but overall the level is similar between countries from the EU15 and the EU12 groups.

The proportion of respondents for whom the animal welfare logo represents ‘a guarantee of quality’ is higher among the EU12 group (18%) than the EU15 group (11%). The EU12’s higher average is explained by the fact that Romanian respondents are the most likely to think so (24%) followed by those in Poland (20%). Similarly, for 17% of the EU12 group this logo also means ‘a guarantee of an organic production’ while this is only selected by 8% of the EU15 group. Again, it is in Poland and Romania that these proportions are the highest (24% and 20% respectively).

Figure 60: Meanings of label showing affiliation to an animal welfare scheme

All meanings



Main meaning

EU27+ NO	EU15	EU12
59%	58%	61%
25%	27%	19%
4%	4%	5%
3%	2%	4%
2%	2%	4%
2%	2%	2%
2%	2%	2%
1%	0%	1%
0%	0%	1%
0%	0%	0%
0%	0%	0%
1%	1%	1%

Base size: all respondents EU27+NO (19,260), EU15 (11,847), EU12 (6,909)
Q4a. Which of the following, if any, do you think this logo means when placed on a food product?

Base size: those giving more than one meaning - EU27+NO (8,782), EU15 (5,222), EU12 (3,368))
Q4b. And which ONE do you think is the main meaning of this label?

Fewer than one in ten (9%) see the animal welfare logo as ‘a sign that stricter rules than the minimum required have been followed regarding safety for human consumption’. It is selected most often in Ireland (14%).

For 7% of respondents this label shown on food product is ‘purely for advertising purposes’. As for the health label, the respondents most likely to select this answer are the Germans, the Austrians and respondents from Luxemburg (all 10%). Only 3% of all respondents think it does not mean anything.

The proportion of respondents who consider this label as a ‘sign of a healthy product’ and as ‘a guarantee of better flavour or taste’ is low overall (5%) but is twice as high among the EU12 group (8%) than among the EU15 group (4%).

As observed for the other two logos, respondents select two meanings on average for the animal welfare label.

Among those who select more than one meaning the majority of respondents (59%) think that the main meaning of this label is ‘a guarantee that the animals are in good health, are well treated and are killed in an appropriate and humane manner’.

The second meaning given is ‘a sign of higher than minimum standards for the animal's well-being’ (25%). Each of the other definitions is selected by relatively few respondents.

4.4.4 Meaning given by demographic profile

Women are more likely to select the most common answers than men. For example, as presented in the table below for the label showing affiliation to an origin scheme, women are more likely than men to select the top answer ‘the product has been produced, processed and prepared in their country’ and to select ‘a sign that stricter rules than the minimum required have been followed regarding safety for human consumption’.

Table 19: Meaning of the origin scheme label by gender

Origin scheme label	Male	Female
Base	*7727*	*11533*
The product has been produced, processed and prepared in [COUNTRY]	72%	78%
At least one of the stages of production, processing or preparation takes place in [COUNTRY]	31%	30%
A guarantee of quality	24%	25%
A sign that stricter rules than the minimum required have been followed regarding safety for human consumption	13%	16%
A guarantee of traditional character	14%	15%
A sign of a healthy product	8%	8%
A guarantee of specific flavour or taste	8%	6%
Purely for advertising purposes	9%	5%
A guarantee of an organic production	3%	3%
Something else	2%	1%
It does not mean anything	2%	1%

Q4a. Which of the following, if any, do you think this logo means when placed on a food product?

Similarly, when shown the health logo, women are slightly more likely to select 'the product is suitable for people with health issues', 'the product is recommended as part of a balanced diet' and 'the product is intended to improve health'.

Table 20: Meaning of the health scheme label by gender

Health scheme label	Male	Female
Base	*7727*	*11533*
The product is particularly good for people with heart problems	34%	33%
The product is suitable for people with health issues (diabetic, cholesterol etc...)	31%	34%
The product is recommended as part of a balanced diet	22%	30%
The product is intended to improve health	24%	28%
A guarantee that the product is not harmful to health	19%	20%
Purely for advertising purposes	17%	14%
A guarantee of quality	9%	10%
It does not mean anything	9%	6%
Suitable for people with specific allergies	2%	2%
A guarantee of an organic production	1%	1%
Something else	1%	1%

Q4c. Which of the following, if any, do you think this logo means when placed on a food product?

On the label showing affiliation to an animal welfare scheme, women are more likely to choose the options 'A guarantee that the animals are in good health, are well treated and are killed in an appropriate and humane manner', 'A sign of higher than minimum standards for the animal's well-being', 'A sign that animals are fed on safe and appropriate foods' and 'A sign that stricter rules than the minimum required have been followed regarding safety for human consumption'.

Table 21: Meaning of the animal welfare scheme label by gender

Animal welfare scheme label	Male	Female
Base	*7727*	*11533*
A guarantee that the animals are in good health, are well treated and are killed in an appropriate and humane manner	64%	72%
A sign of higher than minimum standards for the animal's well-being	38%	42%
A sign that animals are fed on safe and appropriate foods	19%	23%
A guarantee of quality	12%	12%
A guarantee of an organic production	9%	9%
A sign that stricter rules than the minimum required have been followed regarding safety for human consumption	8%	10%
Purely for advertising purposes	9%	5%
A sign of a healthy product	5%	5%
A guarantee of better flavour or taste	5%	5%
Something else	1%	1%
It does not mean anything	5%	2%

Q4e. Which of the following, if any, do you think this logo means when placed on a food product?

For all three labels, men are more likely than women to say the labels are ‘for advertising purposes only’. For the origin and animal welfare logos this answer is selected by 9% of men vs 5% of women, while 17% of men say this for the health label compared with 14% of women.

Those with a high education are another group who tend to be more sceptical about the logos and are likely to think these labels are ‘for advertising purposes only’. As shown in the table below, this is the answer given by 8% of the high education group for the origin label and the animal welfare logo (vs 6% among the low and medium education group for each label) and by 17% of the high education group for the health label (vs 14% for the low and medium education group).

Those who consider that they are ‘living comfortably on their current income’ are also more likely to think these logos are ‘for advertising purposes only’. They are less likely to think the logo shows ‘the product is particularly good for people with heart problems’ (28% vs 35% of those ‘coping, finding it difficult or very difficult on their present income’) or that ‘the product is suitable for people with health issue’ (28% vs 34%).

Table 22: Proportion of respondents thinking the labels are ‘for advertising purpose only’ by income, education and trust on information shown on labels

	Income		Education		Trust information shown on labels	
% of 'Purely for advertising purposes'	Living comfortably	Coping + Finding it difficult + Finding it very difficult	High	low + medium	Trust information	Do not trust information
Base	*2808*	*15974*	*8727*	*10533*	*11186*	*6049*
Origin label	9%	6%	8%	6%	4%	11%
Health label	20%	14%	17%	14%	11%	24%
Animal welfare label	9%	6%	8%	6%	3%	13%

Q4a/c/e. Which of the following, if any, do you think this logo means when placed on a food product?

As can be excepted, those who say that they tend to not trust information shown on labels (relevant results are presented in chapter 6.1 of this section) are also a lot more likely to also indicate that they believe the logos are ‘for advertising purposes only’.

The older age group also tends to be more sceptical about the meaning of the health and animal welfare labels. For instance, those aged 55 and over are less likely to think the health logo means that ‘the product is particularly good for people with heart problems’, that ‘it is suitable for people with health issues (diabetes, cholesterol etc...)’, that ‘the product is recommended as part of a balanced diet’ or that ‘it is intended to improve health’. However, those aged 55+ are more likely to believe the health logo is for advertising purposes only (17% among the 55-64 and up to 19% among the 65+ vs 14% among 18-54).

This scepticism regarding the meaning of the health label among the older age group can also be observed on the answers given for the meaning of the animal welfare logo. Those aged 55 or over are less likely to think that the logo is a 'guarantee that the animals are in good health, are well treated and are killed in an appropriate and humane manner', which is the top answer overall across countries and socio-demographic groups.

Table 23: Meaning of the health label and the animal welfare label by age

Good for your Heart	18-24	25-34	35-44	45-54	55-64	65+
Base	*1589*	*4344*	*4818*	*4110*	*2811*	*1588*
The product is particularly good for people with heart problems	39%	36%	32%	35%	31%	30%
The product is suitable for people with health issues (diabetic, cholesterol etc...)	44%	38%	32%	32%	29%	27%
The product is recommended as part of a balanced diet	26%	29%	29%	28%	24%	23%
Animal Welfare Approved						
A guarantee that the animals are in good health, are well treated and are killed in an appropriate and humane manner	71%	74%	72%	70%	63%	63%

Q4c/e. Which of the following, if any, do you think this logo means when placed on a food product?

On the origin label, it is the youngest (18-24) who seem slightly more sceptical of the logo's meaning. As presented below, they are less likely to believe 'the product has been produced, processed and prepared in their country' and more likely to think that 'at least one of the stages of production, processing or preparation takes place in their country'.

The same discretion about the meaning of the origin label can be observed among those 'living comfortably'. Seven in ten (70%) believe it has been 'produced, processed and prepared in their country' compared to 77% in the rest of the population, but they are slightly more likely to think that 'at least one of the stages of production, processing or preparation takes place in their country'.

Table 24: Meaning of the origin label by age and income

	Age						Income	
	18-24	25-34	35-44	45-54	55-64	65+	Living comfortably	Coping + Finding it difficult + Finding it very difficult
Base	*1589*	*4344*	*4818*	*4110*	*2811*	*1588*	*2808*	*15974*
The product has been produced, processed and prepared in [COUNTRY]	68%	77%	78%	77%	73%	76%	70%	77%
At least one of the stages of production, processing or preparation takes place in [COUNTRY]	34%	30%	28%	30%	31%	31%	32%	30%

Q4a. Which of the following, if any, do you think this logo means when placed on a food product?

Similarly, the highly educated and those without children are a little more likely to choose that second answer (32% for both groups vs 29% among those with low or medium education and 26% among those with children).

In the web listening exercise, scepticism on the role of food labelling scheme and confusion on their actual meaning is something that was found to generate quite a few comments online.

> *Let us not be deceived by labels such as **"country eggs" or "eco eggs"** on the packaging - when it comes to quality, the most important number is located on the egg.*
> skibicki.pl forum (Poland)

> *Maybe the **food labels need to be less confusing**. People throw away food based on the date on the packaging, but food is still edible after the best before date.*
> Daily Mail discussion board (UK)

> *Most supermarkets and some suspicious on-line shops label their food as eco. In order to know what we eat we need to pay attention to the certificates, not nice packaging. **Only certificates are the indisputable guarantee of organic food.***
> portalspozywczy.pl (Poland)

> I only buy KRAV labeled organic eggs now. I have one loose in my info that I have not found answers to. Initially I thought that Eco eggs were automatically KRAV labeled, but it does not seem to be. I accidentally purchased Eco-egg that was NOT KRAV labeled. I´m more careful about that now!
> *Kostdoktorn.se - Forum*

5 Consumer knowledge about food labelling schemes and information about food labelling schemes

5.1 Consumer knowledge about food labelling schemes

To measure consumers' knowledge about food labelling schemes, respondents were first asked to assess their own knowledge of such schemes. They were also asked to select whether they thought a number of statements about scheme certification and scheme requirements were true or false.

Two thirds of respondents think they don't know enough about food labelling schemes. Overall, there are no differences between the EU15 and the EU12 but countries where respondents recognise the most their lack of knowledge are the UK and France. Meanwhile, respondents in Bulgaria, Hungary and Italy are more confident about their levels of knowledge.

- While we saw earlier that women were aware of more schemes than men, they tend to be less confident than men in their knowledge of food labelling schemes.
- Other groups that are more likely to think they don't know enough about food labelling schemes include the economically inactive, those with low levels of education and income.
- Respondents living in a household with a vegetarian or someone with food allergies are likely to be more confident in their knowledge of food labelling schemes.

When looking at actual knowledge of scheme certification and scheme requirements, respondents tend to be slightly more familiar with issues regarding schemes requirements than with issues about scheme certification.

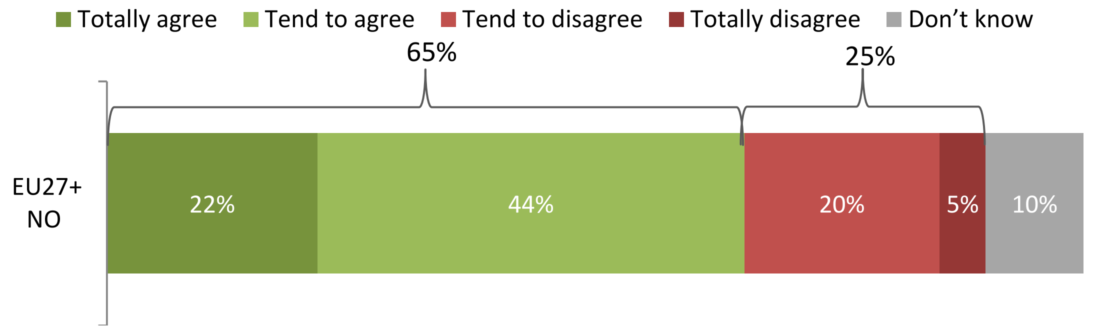
- The level of don't know is particularly high for statements regarding scheme certification and knowledge is more limited. Respondents tend to believe regulations on certification of schemes are stricter than in reality, especially in the EU12. For example, they are more likely to think that 'all food labelling schemes are certified by a third party organisation' or that 'third party organisations that certify schemes have to be public bodies'.
- Issues related to requirements of food labelling schemes are better known. The 'don't know' response rate is lower. The majority think 'products with a labelling scheme must fulfil certain requirements of that scheme' and that 'there are legislative requirements for the production of a product labelled as organic' but three quarters also believe that 'products with a labelling scheme have to be checked regularly against the requirements of that scheme' which is not always the case.

Those who say they don't know enough about food labelling schemes are more likely to answer 'don't know' at the different statements given. However, those who were the most confident in their knowledge of food labelling schemes are not always the most likely to give the correct answer.

5.1.1 Consumer self-declared knowledge about food label schemes

Two out of three respondents (65%) think they 'don't know enough about food labelling schemes'. A quarter (25%) disagrees with this statement while 10% select 'don't know'.

Figure 61: Proportion of respondents thinking they do not know enough about food labelling schemes



Base size: all respondents EU27+NO (19,260)
Q7.9 To what extent does you agree or disagree with the following statements about food labelling schemes? 9. I don't know enough about food labelling schemes

The results are similar between the EU15 group and the EU12 group but there are differences across countries.

- French (76%) and British (74%) respondents are most likely to say that they don't know enough about food labelling schemes.
- Countries where over 70% of respondents think they don't know enough about food labelling schemes include: Sweden, Estonia, Luxembourg, Ireland, Latvia and the Czech Republic. .
- On the other side of the scale, respondents from Bulgaria are the least likely to say they don't know enough about food labelling schemes (50%).
- Hungarian and Italian respondents are the second most likely to reject the idea that 'they don't know enough about food labelling schemes'. Just over half (56%) in both countries agree they don't know enough about food labelling schemes) followed by the Lithuanians (60%).

Knowledge of food labelling schemes also differs by demographic groups.

- Men are more confident than women in their knowledge of food labelling schemes.
    - Almost three in ten men (28%) believe they know enough about food labelling schemes whilst 23% of women have the same opinion.

- Women are more likely to think their knowledge of food labelling schemes is limited (67% compared to 63% of men).

- People who are 55-64 years old are more likely to think they don't know enough about food labelling schemes (68%) when compared to people in other age groups (between 64% and 66% of people depending on the age groups). Similar to the trends seen amongst people in different age groups, 67% of those who are economically inactive are less confident in their knowledge, when compared with the 64% of those who are active.

- Those 'coping, finding it difficult or very difficult' are less likely to think they know enough about food labelling schemes (24% vs 28% of those 'living comfortably') and this is similar among those who have low and medium levels of education (24% vs 26% among those with a high level of education).

- Respondents living in households where vegetarians are present, who may be more used to reading food labels, are more confident than those living without vegetarian in their knowledge of food labelling schemes (33% think they know enough compared to 23% of non-vegetarians). This difference can also be observed among those with allergies (28% vs 24% of those without allergies).

5.1.2 Knowledge of food labelling schemes regulations

To gauge respondents' actual knowledge of food labelling schemes, they were asked to say whether they believe a number of statements about regulation of these schemes were true or false. Three statements were about scheme certification and three were about requirements of schemes.

Regulations in terms of scheme certification state that 'food producers or retailers can establish their own food labelling schemes based on their own product standards' however there is no regulation stipulating that 'all food labelling schemes are certified by a third party organisation' nor that 'third party organisations that certify schemes have to be public bodies'.

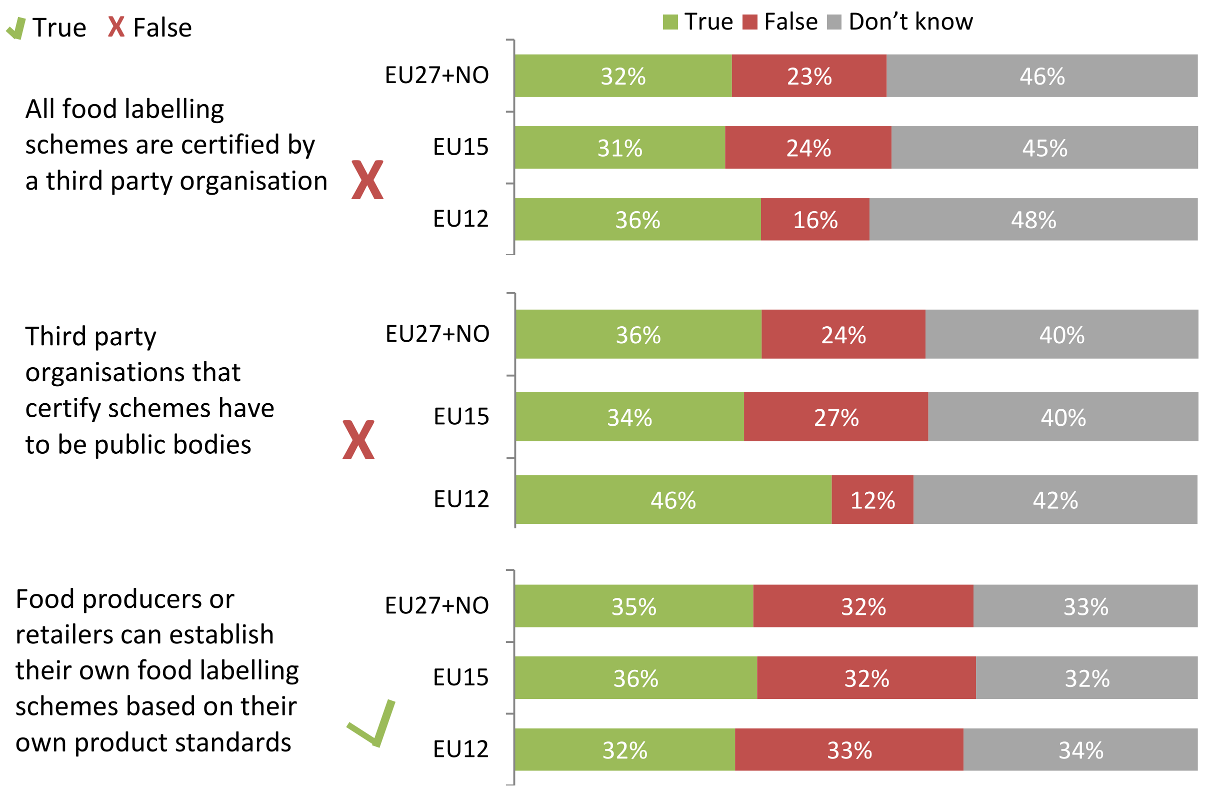
Regulations about requirements of schemes state that 'products with a labelling scheme must fulfil certain requirements of that scheme' and that 'there are legislative requirements for the production of a product labelled as organic'. However, regulations do not state that 'products with a labelling scheme have to be checked regularly against the requirements of that scheme'.

It is clear that respondents are more familiar with issues regarding requirements of schemes rather than issues regarding scheme certification. Don't know answers reach 46% of the total EU27+ NO population for statements regarding scheme certification whilst the highest don't know score for statements about scheme requirements is 23%.

Certification of food labelling schemes

Knowledge of the regulations applicable to scheme certification is limited across all 26 countries. 'Don't know' is the main answer given in many countries. Among those who chose responses other than 'don't know', respondents generally believe regulations on certification of schemes are stricter than in reality.

Figure 62: Knowledge of regulations applicable to certification of schemes



Base size: all respondents EU27+NO (19,260), EU15 (11,847), EU12 (6,909)
Q5. Please indicate whether you think each of the following statements is true or false

'All food labelling schemes are certified by a third party organisation'

This statement is not true. Almost half of respondents (46%) say that they don't know if 'all food labelling schemes are certified by a third party organisation'. A third (32%) believes this is true and only 23% know that this is not the case. Within the EU12 group, only 16% of respondents are aware that not 'all schemes are certified by a third party organisation' (compared to 24% of EU15 respondents).

Italian respondents are the most likely to believe 'all schemes are certified by a third party organisation' (57%), followed by Romanians (53%). However, in addition to Romania, another two EU12 countries (Estonia and Hungary) have above average proportions (42% and 46% respectively) saying they believe this statement is true. These three countries influence significantly the EU12's higher average.

Among the EU15 group, seven countries drive the higher average figure for the proportion of respondents saying this statement is false. These countries have a proportion of respondents saying they believe this statement is false which is above the EU27+NO average and which range from 26% in Austria to 46% in Sweden.

Sweden is also the only country where there are more respondents who know that not 'all schemes are certified by a third party organisation' (46%) than respondents saying they don't know (39%).

Swedish respondents are also the least likely to believe that 'all schemes are certified by a third party organisation' (15%).

However, "don't know" is the top answer in many countries and it is particularly high in Latvia (66%), Slovenia and Czech Republic (63%). These three countries are in the EU12 group explaining why EU12 respondents are slightly more likely to say they don't know.

'Third party organisations that certify schemes have to be public bodies'

This statement is not true. However, more than a third of respondents (36%) believe that 'third party organisations certifying schemes have to be public bodies'. Only a quarter (24%) are aware that this is not the case, and four in ten (40%) say they don't know.

Among respondents from the EU12 group, almost half think 'third party organisations certifying schemes have to be public bodies' and only 12% think the opposite. In the EU15 group just over a third (34%) believe that organisations have to be public bodies.

The EU12 higher figure is primarily driven by respondents in Bulgaria, where the vast majority (78%) think all certification organisations are public bodies. This is by far the country with the highest result with 18 percentage point difference with the next country. Only 2% think this statement is not true.

The EU12 figure is further supported by Estonia where 60% (the second highest figure among the 26 countries) believe it is true and 6% think it is not. Romania (56%) also has more than half its respondents saying they believe scheme certification bodies have to be public bodies.

The EU15 group is more sceptical on this statement and this is mainly driven by four Northern European states where more than 30% of respondents think this statement is false. These countries include Sweden (39%), the Netherlands (33%), Germany (32%), the UK (31%).

However, what should be noted to put these points into perspective is that a plurality of respondents in both groupings says they don't know (40%in the EU15 and 42% in the EU12).

Sweden is again the country where respondents are the most aware that 'third party organisations certifying schemes do not have to be public bodies' (39%), but even more (43%) recognise they don't know.

Results in Finland are quite opposite with only 9% knowing that third party organisations certifying schemes do not have to be public bodies. This is closer to results found in the Baltic countries (Lithuania 8%, Estonia 6%) than in the other Scandinavian countries (Norway 26%, Denmark 22%).

‘Food producers or retailers can establish their own food labelling schemes based on their own standards‘

This statement is true. However, the respondents' opinion is divided. More than a third know this is possible (35%), another third (32%) think food producers or retailers cannot establish their own food labelling schemes, and the last third (33%) say they don’t know.

Results are similar for the EU15 and the EU12 groups. However, differences can be observed between the North and the South of Europe.

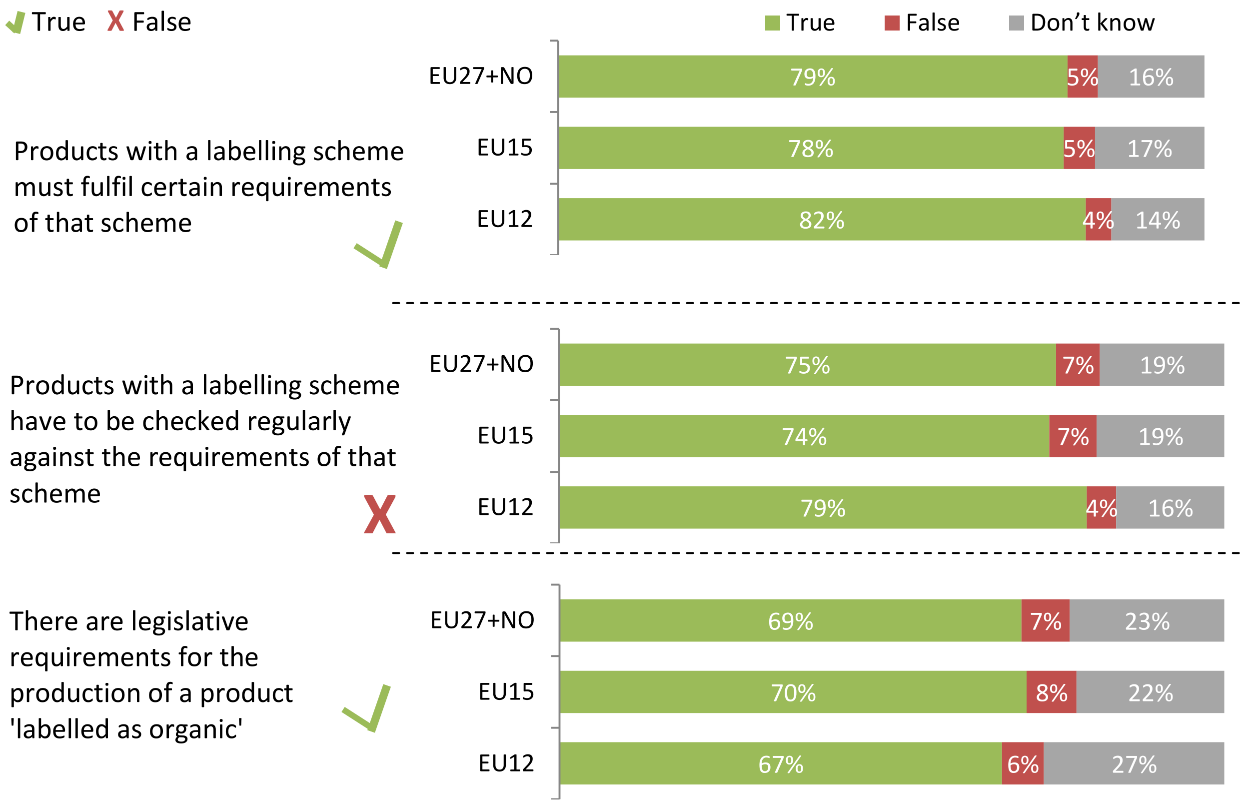
Respondents in Sweden are the most aware of self-declared schemes, followed by the UK (51%), Germany (46%), the Netherlands (45%), Norway and Denmark (both 44%).

On the other side, respondents in Spain are the least likely to think food producers or retailers can establish their own food labelling schemes (15%) followed by those in Italy (21%), the Czech Republic (21%), Greece (22%), Romania (23%) and Portugal (24%). It is interesting to note that according to the websweep 72% of schemes identified in Spain are public, which may explain why most respondents are not aware of producer or retailer schemes. However this cannot be the only explanation as the proportion of public schemes is much lower in Italy (40%), the Czech Republic (30%), Greece (42%) and Portugal (16%). In Romania the only scheme found was public.

Requirements of food labelling schemes

Respondents were also asked to assess whether they thought three statements about requirements of food labelling schemes were true or false. Issues related to requirements of food labelling schemes appear to be better known among respondents. The proportion saying ‘don’t know’ to these statements is lower than for the statements related to certification of schemes. There are also very small differences between results from the EU15 and the EU12 groups.

Figure 63: Knowledge of requirements applicable to food labelling schemes



Base size: all respondents EU27+NO (19,260), EU15 (11,847), EU12 (6,909)
Q5. Please indicate whether you think each of the following statements is true or false

'Products with a labelling scheme must fulfil certain requirements of that scheme'

This statement is true. The vast majority (79%) are aware that 'products with a labelling scheme need to fulfil certain requirements of that scheme'.

The results are slightly higher among the EU12 group (82%) than among the EU15 group (78%) but in general the pattern of responses is similar.

The EU12 high proportion is primarily explained by large numbers of respondents in countries like Bulgaria (93%), Lithuania (92%), Romania (88%) and Estonia (86%) saying they think this statement is true. The results of the websweep show that in Bulgaria the five schemes found were all displaying their scheme requirements on their website. However in Lithuania scheme requirements were only available online for five schemes out of 12 (42%) and in Estonia for only two schemes out of 10 (20%). In Romania, the only food labelling scheme found did not show its scheme specifications on its website.

Slovenian respondents are the least likely to think 'products with a labelling scheme must fulfil certain requirements' (67%) followed by Norwegians (72%), the Dutch (72%) and the British (73%). These last two countries help to explain the EU15 lower average. Slovenian and Norwegian respondents are also the most likely to say they 'don't know' (25% and 23% respectively).

The proportion of labelling schemes checked in the websweep, which show their requirements on their website also varies greatly in these countries. Only 31% of Slovenian schemes (4 out of 13) make their scheme requirements available on their website, but this increases to 64% in the UK (27 out of 42 schemes), 95% in the Netherlands (18 out of 19 schemes) and 100% in Norway (13 schemes). Therefore it is difficult to establish any link between respondent knowledge of whether labelling schemes have to follow certain requirements and the actual display of schemes requirements on the schemes' website.

'Products with a labelling scheme have to be checked regularly against the requirements of that scheme'

This statement is not true. Three quarters of respondents (75%) believe 'products with a labelling scheme have to be checked regularly against the requirements of that scheme'. Only 7% do not think this is true and almost two in ten prefer to say they don't know (19%).

Respondents from the EU12 group (79%) are more likely to think this is true than those in the EU15 group (74%).

Among EU 12 countries, the highest proportions of respondents thinking this is true are in Bulgaria (94%) and Lithuania (91%)..

The lowest results are in the Netherlands (50%), Norway (58%), the UK and Sweden (both 62%), three of which are in the EU15. These are also the countries where the level of "don't know" is the highest.

However, Greece (91%) has a proportion of respondents believing this statement to be true that is closer to the proportions seen in some EU12 countries.

'There are legislative requirements for the production of a product labelled as organic'

This statement is true. Seven in ten respondents (69%) think 'there are legislative requirements for products labelled as organic' and only 7% do not believe this is true.

The level of 'don't know' responses is higher for this statement compared to the two other explored so far in this section. Overall this is the answer given by 23% of respondents in the EU27+NO group, which rises to 27% among the EU12 group.

- Countries with the highest levels of respondents saying this is true are Greece (82%), Denmark (81%), Slovenia (80%) and Bulgaria (79%).

- In Slovakia this level is particularly low with only 10% believing that there are legislative requirements for the production of a product labelled as organic and 38% disagreeing. More than half (52%) do not know. It is worth noting that Slovakia is also the country with the lowest awareness of organic labels (35% compared to 69% among the EU27+NO) and in the websweep only one organic labelling scheme was found in the country.

- The country after Slovakia with the lowest proportion of respondents thinking 'organic labels must fulfil legislative requirements' is the Czech Republic but the level is much higher at 40%. According to the websweep exercise, there are two organic labelling schemes in the Czech Republic. The level of "don't know" answers in these two countries is similar (50%) while in all the other surveyed countries, the 'don't know' response rate does not exceed 27%.

Knowledge by demographic profile

Men and older people tend to be more cautious in their belief regarding scheme legislation and requirements of food labelling schemes.

As can be observed on the following table, men's perception of certification issues seems slightly closer to current regulations than women's.

- Men are more likely than women not to believe that 'all food labelling schemes are certified by a third party organisation' and 'that third party organisations that certify schemes have to be public bodies'.

- Men are also more aware than women that 'food producers or retailers can establish their own food labelling schemes based on their own product standards'.

However, men's answers (in some cases) seem to be driven more by scepticism regarding food labelling schemes than actual knowledge of certifications or requirements for schemes. This can be observed for the statements relating to requirements of food labelling schemes.

- Men are less likely to believe that 'products with a labelling scheme must fulfil certain requirements of that scheme' (76% vs 81% of women), despite this being, in fact, true.

- They are also less likely to think that 'products with a labelling scheme have to be checked regularly against the requirements of that scheme' (72% vs 77%) and that 'there are legislative requirements for the production of a product labelled as organic' (65% vs 73%).

As was observed in the self-assessment of knowledge about food labelling schemes, women are more likely than men to say they don't know about certification issues. But the 'don't know' response rate for schemes requirements statements is broadly similar.

Table 25: Knowledge of certification and requirements applicable to food labelling schemes by gender

	Gender	
	Male	Female
Base	*7727*	*11533*
Certification of schemes		
All food labelling schemes are certified by a third party organisation *(false)*		
True	32%	32%
False	28%	19%
Don't know	40%	50%
Third party organisations that certify schemes have to be public bodies *(false)*		
True	35%	37%
False	30%	20%
Don't know	35%	44%
Food producers or retailers can establish their own food labelling schemes based on their own product standards *(true)*		
True	41%	31%
False	30%	34%
Don't know	29%	35%
Requirements of schemes		
Products with a labelling scheme must fulfil certain requirements of that scheme *(true)*		
True	76%	81%
False	7%	3%
Don't know	17%	16%
Products with a labelling scheme have to be checked regularly against the requirements of that scheme *(false)*		
True	72%	77%
False	9%	5%
Don't know	19%	18%
There are legislative requirements for the production of a product labelled as organic *(true)*		
True	65%	73%
False	11%	5%
Don't know	24%	22%

Q5. Please indicate whether you think each of the following statements is true or false

In terms of age, older respondents seem to be slightly more aware of certification issues for food labelling schemes than young people.

- Those aged 55+ are more likely to know that not 'all food labelling schemes are certified by a third party organisation'.
- Those aged 65+ are the least likely to believe that 'third party organisations that certify schemes have to be public bodies'.

- And those who are the most likely to be aware that 'food producers or retailers can establish their own food labelling schemes based on their own product standards' are aged 65+.

On food labelling scheme requirements statements, the youngest respondents are a little more sceptical than the others on the existence of requirements for food labelling schemes.

- 8% of 18-24 year olds do not believe that 'products with a labelling scheme must fulfil certain requirements of that scheme' compared to 4% in the other age groups.

- One in ten respondents aged 18-24 thinks the statement 'products with a labelling scheme have to be checked regularly against the requirements of that scheme' is false.

- And among 18-34 year olds, two thirds (66%) think 'there are legislative requirements for the production of a product labelled as organic' compared to 71% among the 35+.

Table 26: Knowledge of certification and requirements applicable to food labelling schemes by age						
	Age					
	18-24	**25-34**	**35-44**	**44-54**	**55-64**	**65+**
Base	*1589*	*4344*	*4818*	*4110*	*2811*	*1588*
Certification of schemes						
All food labelling schemes are certified by a third party organisation *(false)*						
True	34%	33%	31%	33%	29%	34%
False	23%	22%	21%	22%	24%	25%
Don't know	43%	45%	48%	45%	47%	41%
Third party organisations that certify schemes have to be public bodies *(false)*						
True	37%	35%	34%	37%	38%	36%
False	23%	25%	23%	23%	23%	28%
Don't know	41%	40%	42%	40%	39%	36%
Food producers or retailers can establish their own food labelling schemes based on their own product standards *(true)*						
True	37%	36%	33%	32%	36%	39%
False	30%	31%	32%	35%	33%	31%
Don't know	33%	33%	35%	33%	31%	30%
Requirements of schemes						
Products with a labelling scheme must fulfil certain requirements of that scheme *(true)*						
True	73%	77%	77%	81%	81%	82%
False	8%	5%	5%	4%	4%	5%
Don't know	19%	18%	17%	15%	15%	13%
Products with a labelling scheme have to be checked regularly against the requirements of that scheme *(true)*						
True	70%	73%	75%	77%	76%	74%
False	10%	7%	6%	6%	6%	7%
Don't know	20%	20%	19%	18%	18%	19%
There are legislative requirements for the production of a product labelled as organic *(false)*						
True	66%	66%	69%	72%	72%	71%
False	9%	9%	6%	6%	7%	8%
Don't know	25%	25%	25%	22%	21%	21%

Q5. Please indicate whether you think each of the following statements is true or false

In line with the men and the older age groups, the most affluent respondents are also a little more wary of the certification of food labelling schemes.

- Those 'living comfortably' are more likely to say that 'all food labelling schemes are certified by a third party organisation' is false (33% vs 21% among the others income groups).

- This is similar among respondents with a high level of education (26% think this is false compared to 20% of those with low and medium levels of education).

A similar pattern can be observed for the two other statements. Those 'living comfortably' and those with a high level of education are more likely to think 'third party organisations that certify schemes have to be public bodies' is false and to believe 'food producers or retailers can establish their own food labelling schemes based on their own product standards'.

Table 27: Knowledge of certification and requirements applicable to food labelling schemes by income and education groups

	Income		Education	
	Living comfortably	**Coping, finding it difficult or very difficult'**	**High education level**	**Low and medium education level**
Base	*2808*	*15974*	*8727*	*10533*
Certification of schemes				
All food labelling schemes are certified by a third party organisation *(% of false)*	33%	21%	26%	20%
Third party organisations that certify schemes have to be public bodies *(% of false)*	33%	23%	29%	20%
Food producers or retailers can establish their own food labelling schemes based on their own product standards *(% of true)*	47%	33%	38%	33%
Requirements of schemes				
Products with a labelling scheme must fulfil certain requirements of that scheme *(% of true)*	81%[1]	77%[2]	82%	77%
Products with a labelling scheme have to be checked regularly against the requirements of that scheme *(% of false)*	11%	6%	7%	6%
There are legislative requirements for the production of a product labelled as organic *(% of true)*	68%	70%	72%	68%

[1]Based on 'Living comfortably and coping'; [2] Based on' finding it difficult or very difficult'
Q5. Please indicate whether you think each of the following statements is true or false

Differences by income groups are not as obvious for the statements related to schemes requirements.

- However those 'living comfortably or coping' and those with a high level of education are still more likely to answer that 'products with a labelling scheme must fulfil certain requirements of that scheme'.

- Those living comfortably are also more likely to doubt that 'products with a labelling scheme have to be checked regularly against the requirements of that scheme'.

- 'There are legislative requirements for the production of a product labelled as organic' is the only statement where results for those 'living comfortably and coping' and the highest educated respondents differ. Whilst those 'living comfortably and coping' are slightly less likely to believe it, the more highly educated respondents are more likely to think it is true.

As can be expected, those who said earlier that they know enough about food labelling schemes are less likely to answer don't know at the different statements about scheme certification and requirements. However, it does not necessarily mean that their perceptions of scheme certification are more correct than those who said they don't know enough about food labelling schemes.

- 44% of those who say they 'know enough about food labelling schemes' believe that 'all food labelling schemes are certified by a third party organisation' and the same proportion that 'third party organisations that certify schemes have to be public bodies' both of which are misperceptions. Those who say 'they don't know enough about food labelling schemes' are less likely to believe these statements are right and therefore have a perception of scheme certification that is closer to the actual regulations; 29% and 35% respectively).

Similarly, 41% of those who think they know enough about food labelling schemes do not believe that 'food producers or retailers can establish their own food labelling schemes based on their own product standards' which is actually true (compared to 30% of those who think they don't know enough about food labelling schemes). Respondents living in a household where a vegetarian is present are less likely to answer 'don't know'. However they are more inclined to think the statements about the certification of schemes are correct:

- 41% think 'all food labelling schemes are certified by a third party organisation' (compared to 30% of respondents with no vegetarian in their household) which is not correct.),

- 40% mistakenly believe that 'third party organisations that certify schemes have to be public bodies' (vs 35%),

- 38% rightly believe that 'food producers or retailers can establish their own food labelling schemes based on their own product standards' (vs 35%).

Regarding statements about schemes requirements, respondents living in a household where a vegetarian is present are also more likely to believe that 'there are legislative requirements for the production of a product labelled as organic' (74% vs 69%) which is true. However they are more likely to think that the statement 'products with a labelling scheme must fulfil certain requirements of that scheme' is not true (7% vs 4%) as well as that 'products with a labelling scheme have to be checked regularly against the requirements of that scheme' is not correct (9% vs 6%) whilst both are stipulated in the regulations.

5.2 Information about food labelling schemes

In order to gauge how easy respondents perceived it to find information about food labelling schemes, they were asked to place their feelings on a four point scale (very easy, quite easy, not very easy and not easy at all, in addition to a don't know option). The below points illustrate this chapter's key findings:

Ease of finding information

- Across the EU27+NO, 29% of respondents say it easy to find information about food labelling schemes, whilst the majority (56%) do not find it easy.
- Only three countries (Finland, Greece and Romania) have more respondents saying that information was easy to find than not.
- Men are more likely than women to say that information is easy to find.
- The perception of how easy it is to find information progressively decreases with age.

Preferred sources and ways of obtaining this information

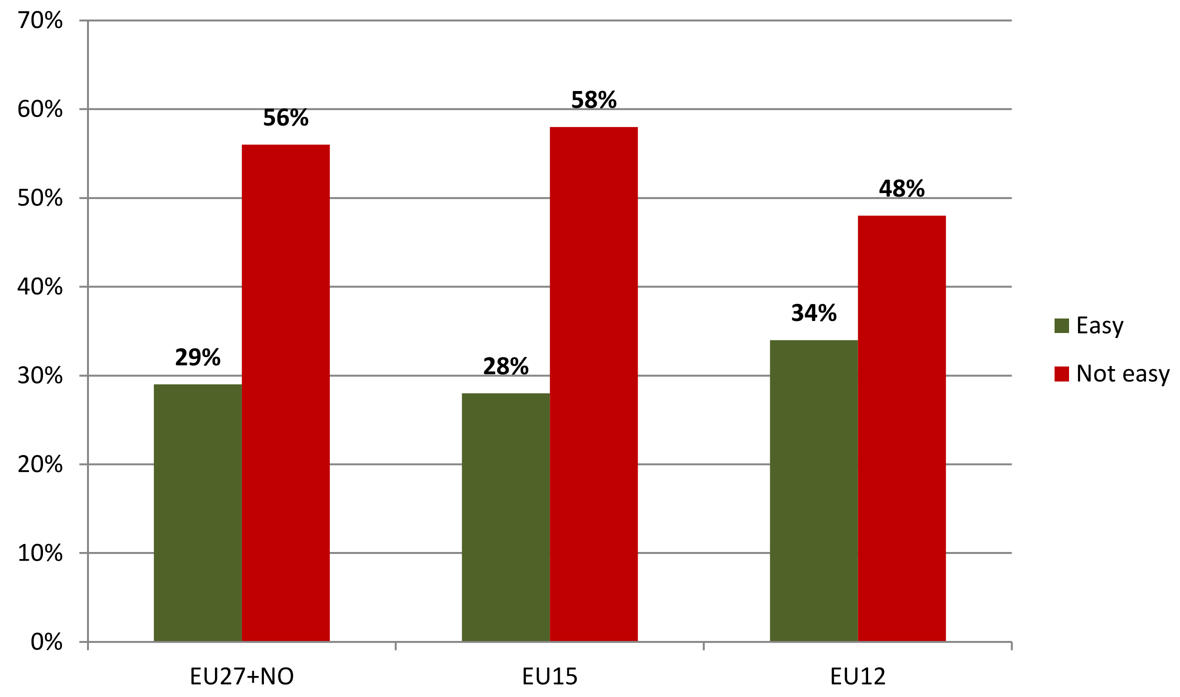
- Respondents' preferred way of obtaining this information is by having it on the product's packaging itself. Seven in ten across all 26 countries mentioned this method, and over half in all countries did so.
- Acquiring this information from over the internet is an option mentioned by half of respondents and is the second most popular method. TV follows and is cited by over four in ten.
- Ways of obtaining information that are more direct and proactive (e.g. approaching a consumer organisation) are the least commonly cited; fewer than one in ten mentioned this particular type of way.
- Men prefer methods that are more technology-based, whilst women prefer those ways which have more of a presence in-store.
- People in the younger age groups are more likely to favour technology-based methods such as the internet and using apps, whilst those in the older age groups are more likely to favour store-based approaches.

The rest of the chapter will now consider the trends alluded to above in more detail. This chapter will examine them at a EU27+NO level, at the EU15 and EU12 country grouping levels as well as examining pertinent individual, country-level trends.

5.2.1 Ease of finding information about food labelling schemes

Before considering variations between individual countries, the differences between the EU15 and EU12 groups of countries will first be briefly discussed. The chart below illustrates the variation in the combined 'easy' and 'not easy' scores (i.e. the sum of 'very easy' and 'quite easy') figures between these two country groupings (percentages do not sum to 100% as those who said 'don't know' are not included in the chart):

Figure 64: Ease of finding food labelling scheme information in the EU15 and EU12



Q10: How easy do you think it is to find information about food labelling schemes?
Base: all respondents (19,260), EU15 (11,847), EU12 (6,909)

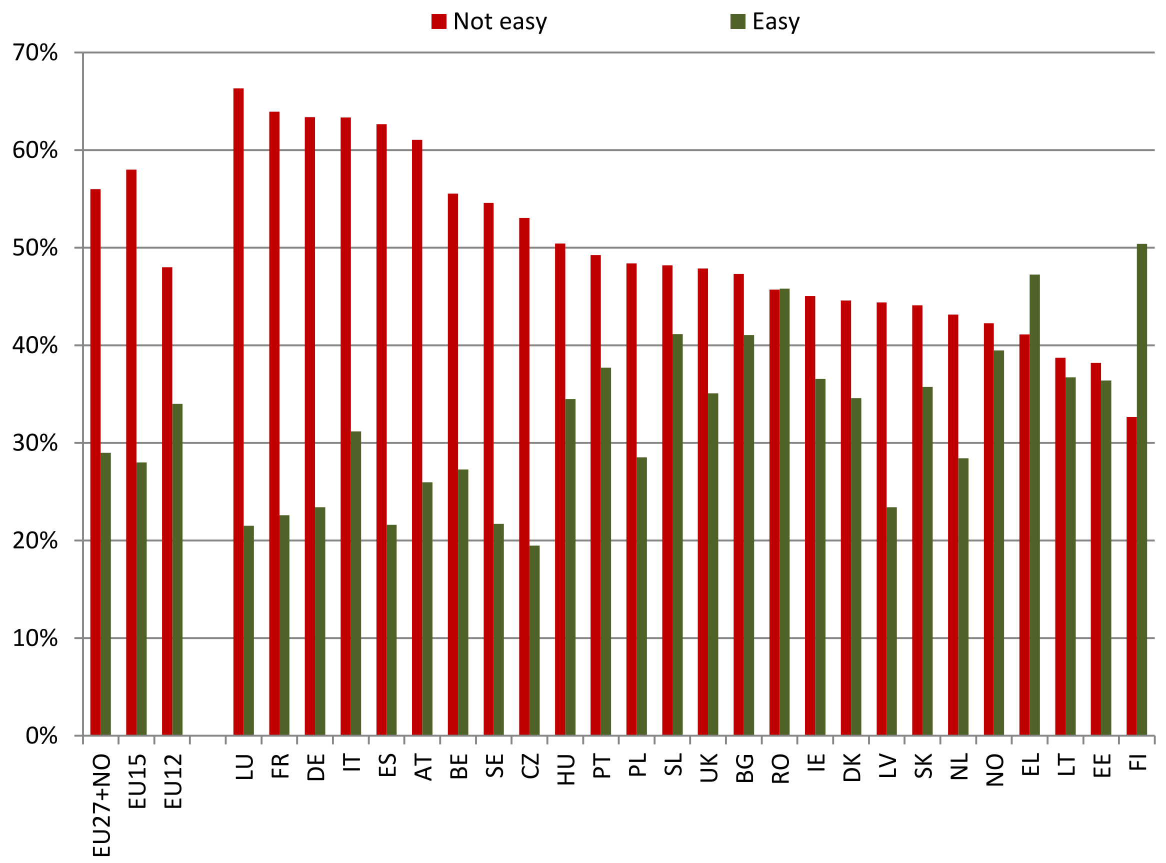
Across all 28 countries over half (56%) of respondents think information on food labelling schemes is not easy to find, compared to three in 10 (29%) who say the opposite.

Respondents from the EU12 countries think information is easier to find than those from EU15 countries (34% and 28% respectively). Within the EU12, the countries with the highest proportion of respondents perceiving this information as easy to find are Romania (46%), Slovenia (41%) and Bulgaria (41%). However, the two countries with the highest proportion of respondents saying information is easy to find are Finland (50% of respondents) and Greece (47%). In addition, these are the only two countries in which a greater proportion of respondents say food labelling information is easy rather than not easy to find.

Except for Finland and Greece, most respondents in the EU15 countries say that information about food labelling schemes is not easy to find. This share is however higher than in the EU12 (58% compared to 48%). The EU15 contains six countries where over 60% of respondents say this information is not easy to find. These are: Luxembourg (66%), France (64%), Italy (63%), Germany (63%), Spain (63%) and Austria (61%). There are two countries within the EU12 where half or more of respondents perceive food labelling scheme information as not easy to find: Hungary (50%) and the Czech Republic (53%). This is despite the fact that of those schemes found in both Hungary and the Czech Republic, the majority did display the schemes' requirements on their websites.

The below chart presents the country-by-country findings on how respondents perceive the ease of finding information on food labelling schemes (the below is ranked by the prevalence of combined 'not easy' in each country):

Figure 65: Ease of finding information by country



Q10: How easy do you think it is to find information about food labelling schemes?
Base: all respondents (19,260)

Beyond these combined figures, respondents in Romania (9%), Portugal, Ireland and Greece (all 8%) are the most likely to say that information is very easy to find. Whilst respondents in Belgium, the Czech Republic, Estonia, France, Luxembourg and Sweden (all 2%) are the least likely to say this information is very easy to find. The differences between the EU12 and EU15 are most pronounced among those respondents who answered that information was quite easy to find. Of the nine countries whose respondents' 'quite easy' responses were significantly above the EU27, EU15 and EU12 averages, six were in the EU12 and two are in the EU15, the other was Norway. Overall the results of the websweep show that schemes identified in the EU12 are more likely to comply with the 2010 Commission guidelines and have their schemes requirements available for free on their website more often than those from the EU15. Across all EU12 countries 74% of schemes display this information on their website compared to 55% of EU 15 schemes. It is important to note that there are a lot more schemes in the EU15 (714) than in the EU12 (159). If at EU12 and EU15 level these figures match the survey results and could explain why people in the EU15 find information about food labelling schemes more difficult to find, when looking at country results the results are not always as coherent as seen above with Hungary and Czech Republic.

Those countries' respondents saying information on food labelling schemes was not very easy to find are mainly found in the EU15. Italy (63%), Luxembourg (53%), Spain (51%), France (50%) and Germany (48%) are those most exemplifying this trend. Conversely, the highest proportion recorded in a EU12 country is 44% in Slovenia. Indeed, Hungary and Bulgaria (both with 40%) are the only other EU12 countries where the proportion of respondents choosing this option is greater than 39%. These relatively low figures help to explain the difference between the 'not very easy' proportions for the EU15 (46%) and EU12 (39%) countries.

Whilst this section has so far largely focused on differences between the EU15 and EU12 as well as differences between individual countries, it is also worth noting that there is a higher level of don't know responses amongst respondents in the EU12 countries. The headline figure for the EU12 is 19% compared with 14% for the EU15. This higher proportion of don't know responses is especially evident in countries such as Latvia (32%), the Czech Republic (27%), Estonia (25%), Lithuania (25%) and Poland (23%).

Ease of finding information about food labelling schemes by demographic profile

How different socio-demographic groups perceive the ease with which they can find food labelling information can vary.

- Men are more likely than women to say that they find it easy to find this information; 32% of men say they find it easy to find this information, compared with 27% of women. Conversely, women are more likely to say they don't find it easy to find information. 57% of women say it is not easy, in contrast to 54% of men. However, it should be noted that more than half of both sexes find it difficult to find information.

- The perception as to how easy it is to find this information progressively decreases with age. 42% of respondents aged between 18 and 24 four say they find it easy, whereas only 23% of those older than 65 say it is easy to get this information.

- Respondents who are in work ('active') say they find it easier to find information than those not in work ('inactive'); by 31% to 27%. Conversely more of those who are not in work say they do not find it easy to find information (59% vs 54%).

- Whether a respondent lives in a rural or urban area does not yield any statistically significant variance in how these respondents perceive the ease of finding food labelling information.

- Those respondents who do not feel they are in immediate financial difficulty (i.e. those living comfortably and those coping) are more likely than those who feel they are in difficulty to say they find it easy to find this information. 34% of those living comfortably on their present income and 31% of those coping say it is easy to find information, whereas 26% of those finding it difficult and 24% of those finding it very difficult say it is easy). Respondents who perceive themselves to be in financial difficulty are more likely to say it is not easy. 57% of those finding it very difficult and 59% of those finding it difficult say it is not easy, whereas 55% of those coping and 53% of those living comfortably say it is not easy.

- Respondents with a high level of education are more likely to say it is easy to find information than those with a low level (31% vs 26%).

- Respondents living in households where a child is present are more likely to say information is easy to find than those living in childless households (33% vs 28%). This is perhaps unsurprising as parents are more likely to pay more attention to what food they give their children.

- Reflecting the need for more detailed food information mentioned above in relation to parents, those respondents who live in households where vegetarians are present and those who live in households where someone has food allergies are also more likely to say information is easy to find. 39% of those living with vegetarians say information is easy to find, compared to 28% of those who don't. Similarly, 34% of respondents living with food allergies say information is easy to find, in contrast to 28% of respondents not living with food allergy sufferers.

- Shoppers who shop 'somewhere else' constitute the group who are most likely to say that information is not easy to find (47%). However this particular group also has a relatively high proportion of respondents saying they don't know (17%). Those who shop at farmers/ producers are most likely to say information is not easy to find (60%), whilst those who shop at corner shops (32%) and somewhere else (36%) are the most likely to say information is easy to find.

- Those respondents who are aware of origin and animal welfare labels (both 33%) are marginally more likely than those respondents who are aware of health labels (32%) to say information is easy to find.

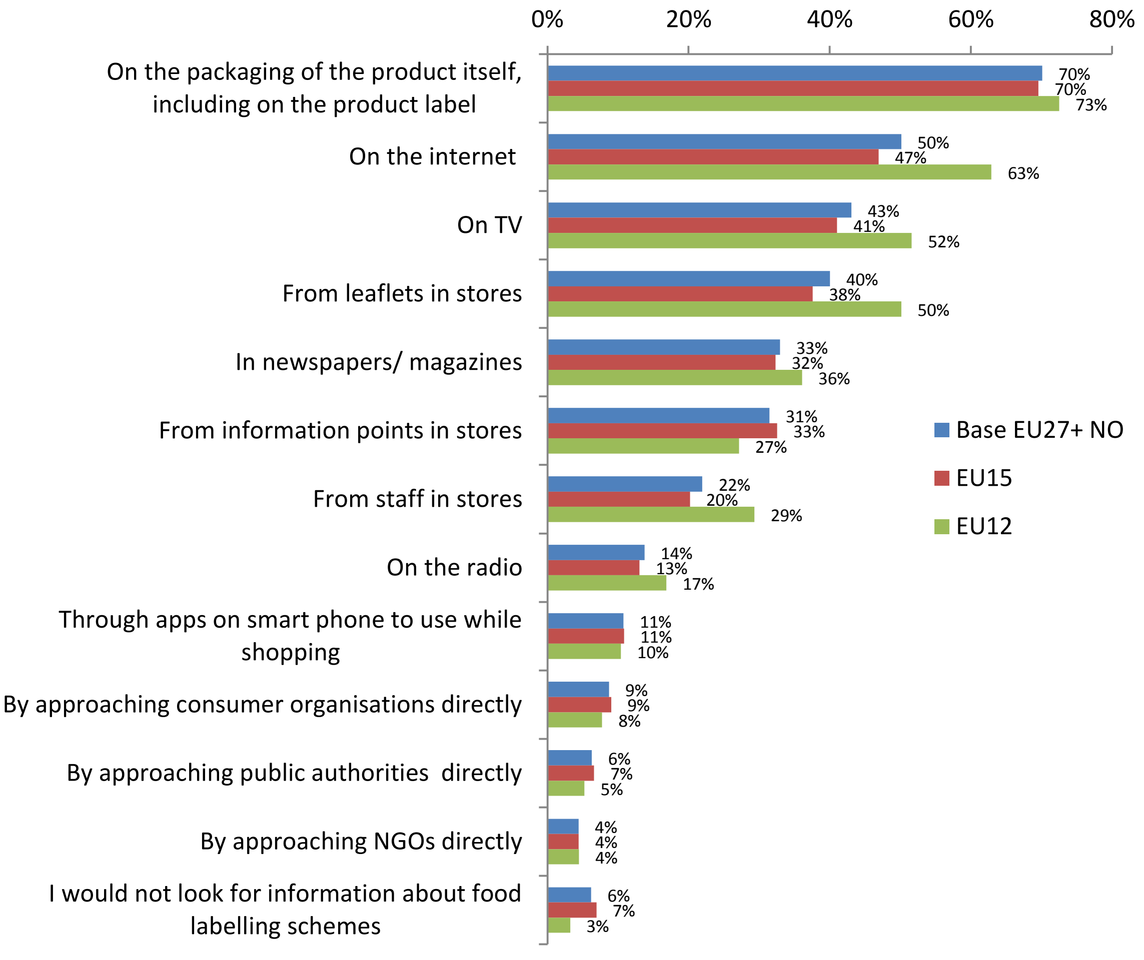
5.2.2 Sources of information consumers would like to use to get information about food labelling schemes

After measuring how easy or difficult it is for respondents to find information on food labelling schemes, respondents were asked how they would like to get such information. They were presented with 12 potential ways of obtaining this information and they were asked to pick all those ways through which they would like to obtain food labelling scheme information.

The option cited most often was the packaging of the product itself, which was the preferred source of information for 70% of respondents across the EU27+NO. The least commonly cited source was getting this information by approaching NGOs directly, which was mentioned by 4% of respondents. Additionally, there seems to be a general willingness to look for this information as only 6% of respondents say they would not look for information about food labelling schemes. Preferred sources of information can vary by country, however, and this section will discuss these differences. The chart below summarises the proportions of respondents from across the 26 countries who wish to obtain information by each of these 12 ways.

Preferred sources of information can vary by country, however, and this section will discuss these differences.

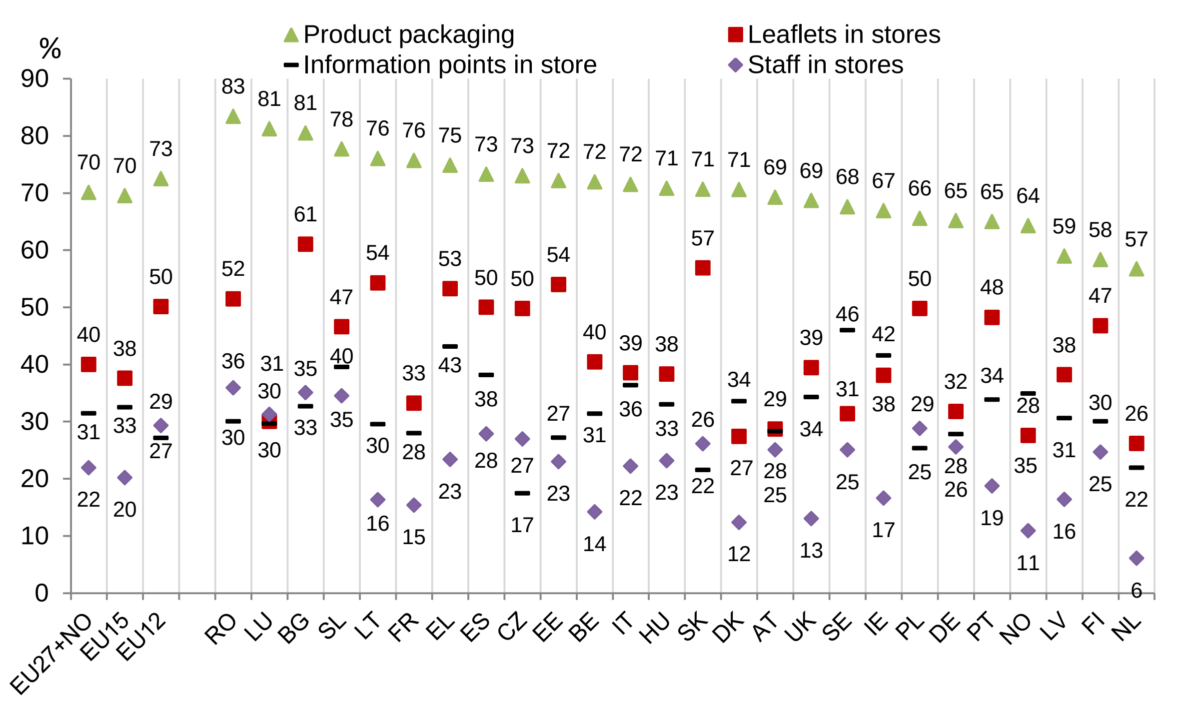
Figure 66: Source of information consumers would like to use to get information on schemes



To better inform the analysis of these differences, the ways respondents wish to obtain information on food labelling schemes has been categorised into three broad groups: store-based, media-based and direct. Store-based ways include the product's packaging, leaflets situated in-store, in-store information points as well as the store staff. Media-based ways include making information available online, via television, via radio or through smart phone apps. Finally, direct ways include approaching consumer organisations, public authorities or non-governmental organisations. When discussing the inter-country variations, this section will treat each broad group separately.

Store based methods of obtaining information

Figure 67: Store-based methods of getting information on schemes by country



Q9: How would you like to get information about food labelling schemes?
Base: all respondents (19,260)

As indicated in the graph above, packaging on the product itself is the most often selected method (by 70% of respondents) for getting information about food labelling schemes. **All countries among the EU27+NO had more than 50% of their respondents citing product packaging as the way they would like to get information on these schemes.** It is mentioned by 70% in the EU15 and by 73% of respondents in the EU12. The three countries where this is mentioned most often are Romania (83%), Luxembourg (81%) and Bulgaria (81%). The high level of mentions for this is perhaps unsurprising as it is one of the more convenient for consumers and is present at the point of purchase. Nonetheless, Latvia (59%), Finland (58%) and the Netherlands (57%) are among those countries which see lower levels of respondents citing this way.

Whilst not as commonly mentioned as product packaging, other store-based ways of getting information still attract relatively high levels of support. Leaflets in stores are selected by 40% of respondents across the 26 countries. However, this is favoured by respondents in the EU12 where

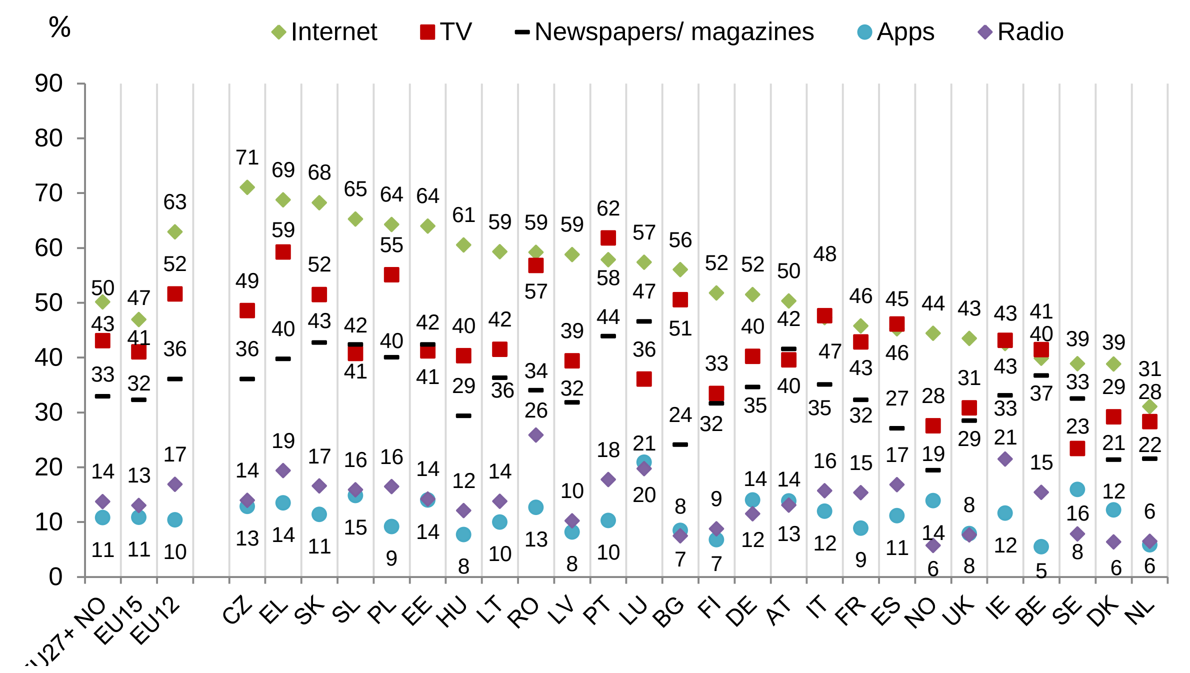
50% of respondents cite this as their preferred means of obtaining information, compared with 38% in the EU15. They are particularly popular in Bulgaria (61%), with another five countries having over half of their respondents citing this as their preferred way. These are Slovakia (57%), Estonia (54%), Lithuania (54%), Greece (53%) and Romania (52%). Reflecting that difference between the EU15 and EU12, all those countries where less than 30% of respondents mention leaflets as their preferred way of getting this information are in Western and Central Europe. These countries include: Austria (29%), Denmark (27%) and the Netherlands (26%). Whilst not a member of the EU15, Norway (28%) has a similar proportion of its respondents preferring leaflets to these EU15 countries

Whilst leaflets in stores are favoured by respondents in the EU12, in-store information points are favoured by respondents in the EU15. A third of respondents in the EU15 mentioned this way of obtaining information, compared with 27% in the EU12. The average figure for all countries is 31%. The top three countries are Sweden (46%), Greece (43%) and Ireland (42%). Slovenia (40%), Spain (38%) and Italy (36%) also have higher than average mentions of this particular way. German respondents seem to go against the trend of EU15 respondents being more amenable to this way; only 28% cite information points. Leaflets in stores were preferred by smaller numbers in the Czech Republic (17%), Slovakia (22%) and the Netherlands (22%).

The final store-based method to explore is getting information from store staff. Whilst this way is the store-based method least commonly cited by respondents across the twenty six countries; it is still mentioned by more than a fifth (22%) of all respondents. Similar to in-store leaflets, approaching staff to get information on these schemes is favoured by respondents in the EU12 (29%), compared with 20% in the EU15. Romanian (36%), Bulgarian (35%) and Slovenian (35%) respondents are most likely to cite this particular way of getting information. The relatively high proportions for these countries help to explain why EU12 respondents as a whole are more likely to state that approaching store staff is their preferred way. Poland (29%), Spain (28%) and Germany (26%) also have a relatively high proportion of their respondents preferring this method. However only 6% of Dutch respondents said staff in stores is their preferred option, Denmark (12%) and the UK (13%) also have relatively low proportions of respondents choosing this option.

Media based methods of obtaining information

Figure 68: Media-based ways of obtaining information on food schemes.



Q9: How would you like to get information about food labelling schemes?
Base: all respondents (19,260)

With the proliferation of digital communication methods in recent years, it is perhaps no surprise that media-based ways feature heavily in how consumers would like to obtain food labelling information. Getting information over the internet is the most commonly mentioned media-based way and television is the second, with 50% and 43% respondents citing them respectively. More traditional media are also represented. 33% would prefer to get this information in newspapers/ magazines and 14% would prefer to obtain it via the radio. Reflecting the recent changes in communication technology, 11% would prefer to get this information through using apps on smart phones whilst shopping.

63% of respondents in the EU12 say they would prefer to get information on food labelling over the internet, compared with 47% in the EU15. The EU12's relatively high proportion is principally driven by the Czech Republic (71%), Slovakia (68%), Slovenia (65%) and Poland (64%). The lower level amongst the EU15 is mainly explained by four northern European countries: Sweden (39%) and Denmark (also 39%) as well as the Netherlands (31%) and the UK (43%). Outside of these countries, the internet is a medium cited on an above average basis in Greece (69%), Hungary (61%), Romania (59%), Latvia (59%), Lithuania (59%), Portugal (58%) and Bulgaria (56%). However, respondents seem to be willing to use the internet less often to get food labelling scheme information in many Western European countries when compared to the EU12. Indeed, in addition to the Netherlands, Sweden, Denmark and the UK, Italy (47%), Ireland (43%), France (46%), Spain (45%) and Belgium (40%) all have clear minorities saying they would like to find this information over the internet.

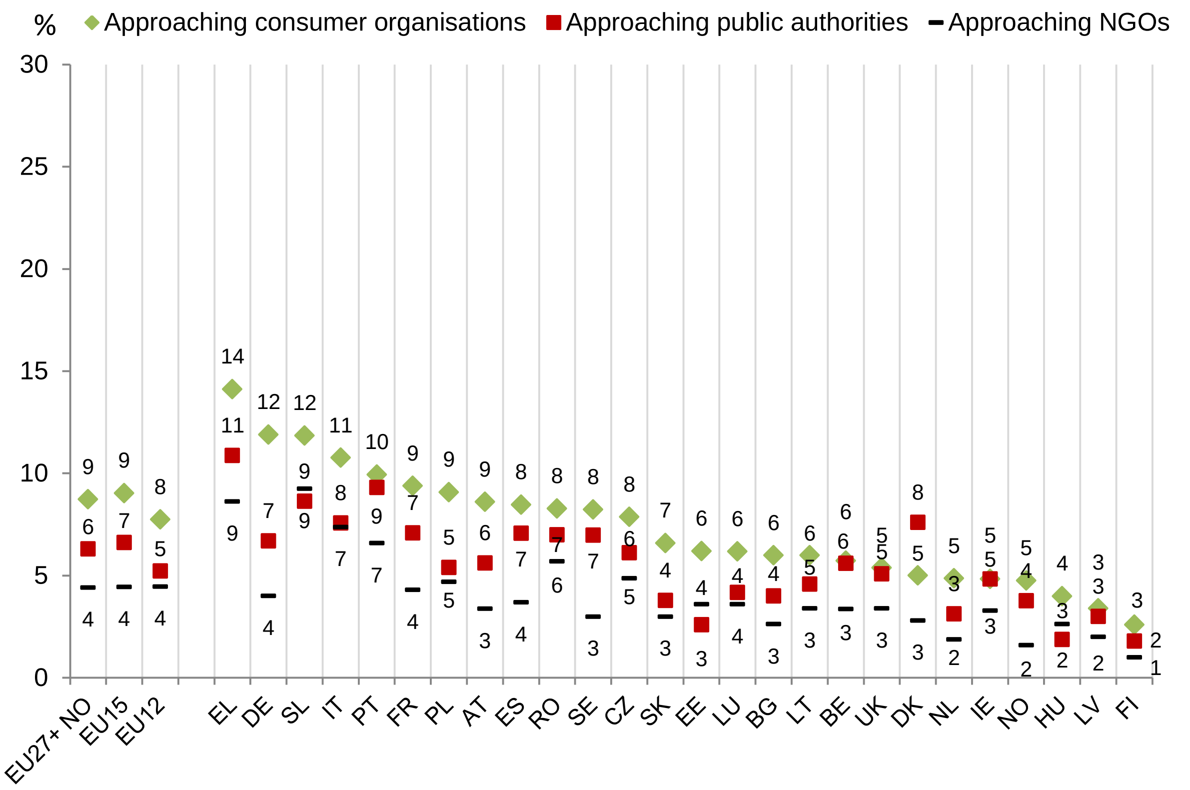
Similar to the trends seen with responses about finding information on the internet, respondents in the EU12 countries are also more likely to mention TV as a medium through which they want to find this information. Just over half of respondents (52%) in the EU12 say they would prefer to get food labelling scheme information through TV, as opposed to 41% in the EU15. The higher proportion for the EU12 is driven mainly by Romania (57%) and Poland (55%). Whereas the EU15's lower figure is principally explained by Denmark (29%), Sweden (23%) and the Netherlands (28%). Populous western European countries such as the UK (31%) and Germany (40%) also dampen the EU15 average. However, this trend among EU15 countries is not universal; respondents in Greece (59%) and Portugal (62%) have the two highest levels of respondents mentioning TV out of the EU27+NO.

More traditional forms of media are still popular among some respondents. Overall, 33% of respondents say they would like to receive this information in newspapers/ magazines. Among those saying they want to get information in newspapers, proportionally more were in the EU12 than in the EU15 (36% and 32% respectively). Among the EU12, Slovakia (43%), Slovenia (42%), Estonia (42%) and Poland (40%) are the main drivers of this higher average for the post-2004 enlargement countries, whereas a group of western European countries made up of the UK (29%), Spain (27%), the Netherlands (22%) and Denmark (21%) are the main influences on the lower EU15 average. However, some EU15 countries' respondents mentioned newspapers/magazines on an above average basis, for example: Luxembourg (47%), Portugal (44%) and Austria (42%)

Reflecting the increasing market penetration rates of smart phone ownership, obtaining information through using apps whilst shopping is mentioned by 11% of respondents across all twenty eight countries. Unlike the other ways of obtaining information explored thus far, there is no statistically significant difference between the EU15 and the EU12 (11% and 10% respectively). App use is mentioned at above average levels in Luxembourg (21%), Sweden (16%), Slovenia (15%), Greece, Germany, Estonia, Austria (all 14%) and the Czech Republic (13%). Countries which have lower levels of respondents mentioning this way are Belgium (5%), the Netherlands (6%), Finland (7%), and the UK (8%).

Direct ways of obtaining information

Figure 69: direct ways of obtaining information on food schemes



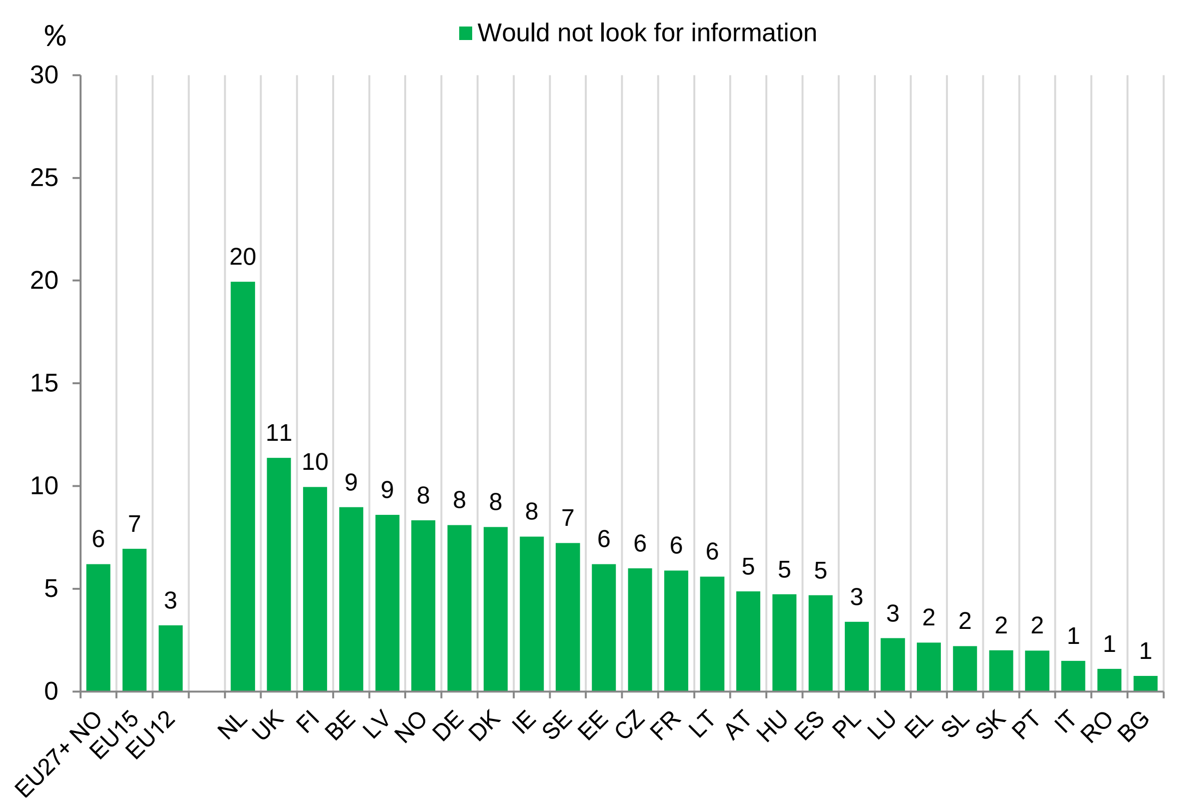
Q9: How would you like to get information food labelling schemes?
Base: all respondents (19,260)

Direct ways require the respondent to take a more pro-active approach to obtaining information. For example, by approaching the relevant public authority and asking for this information, or by approaching other stakeholders within the sector, such as relevant non-governmental organisations (NGOs) or consumer bodies. Of the three types of approaches explored in this section, this is the one with the lowest levels of respondent mentions. Across the twenty six countries, 9% say they would approach consumer organisations directly, 6% say they would approach public authorities directly, and 4% say they would approach NGOs.

Respondents in the EU15 are marginally more likely to approach both consumer organisations and public authorities than those in the EU12; 9% in the EU15 said they would like to approach consumer organisations, as opposed to 8% in the EU12. Similarly, 7% in the EU15 would like to approach public authorities, compared to 5% in the EU12. Just 4% in both the EU15 and EU12 would like to approach NGOs for this type of information.

Proportions of respondents who would not look for information

Figure 70: respondents who would not look for information about food labelling schemes



Q9: How would you like to get information about food labelling schemes?
Base: all respondents (19,260)

The average level of respondents saying they would not look for this information is relatively low at 6%. The Netherlands (20%), the U.K. (11%) and Finland (10%) all have higher proportions of respondents saying they would not look for information.

Ways of finding information by demographic profile

Preferences for getting information on food labelling schemes can also vary by socio-demographic subgroups.

- Men are more likely to favour technology-based approaches; 54% of men say they would like to get this information over the internet, compared to 47% of women. 16% of men prefer the radio (compared with 12% of women) and 13% prefer using apps (compared with 9% of women). Women on the other hand, are more likely to favour store-based approaches. 74% say they would prefer to get this information by having it on the product's packaging (compared with 64% of men). Similarly, 41% of women say they would prefer to get this information by looking at leaflets in-store compared with 38% of men.

- The preference towards more technology-based approaches is also echoed when analysing respondents' answers by their employment status. 51% of those respondents defined as 'active' say they prefer to obtain this information over the internet against 48% of those defined as 'inactive'. Similarly, TV is mentioned by 44% of those in work, compared with 41% of those who are economically inactive. Using smart phone apps whilst shopping is also favoured by those in work (12% compared with 9%).

- Differences in respondents' propensity to mention technology-based ways of obtaining information can also be shown in variations across age groups. Perhaps unsurprisingly, the younger age groups are more likely to favour technology-based approaches. 55% of 18-24s, 56% of 25-34s and 52% of 35-44s prefer getting this information over the internet, compared with 41% of those aged over 65, and 47% of those aged between 55 and 64. A similar trend can be seen in those respondents saying they would use the TV: 51% of 18-24s would prefer to use this medium, compared to 33% of those aged over sixty five. This trend is particularly pronounced with those respondents mentioning using smart phone apps. Almost a fifth (18%) of 18-24 year olds and 16% of 25-34 year olds mention this way, compared with 6% of 55-64 year olds and 5% of those aged over sixty five.

- Those methods favoured by respondents in the older age groups include using the product's packaging itself. More than 70% of those aged 45 and over prefer this way. This is compared with less than two thirds (63%) of those aged between 18 and 24. Leaflets in stores are mentioned more often by those in the middle age groups. 41% of 35-44 year olds and 45% of 45-54 year olds mention this way. In comparison, the two age groups at either end of the spectrum mention them less often; 34% of 18-24 year olds and 37% of those aged 65+ cited leaflets in store as their preferred medium.

- Respondents living in urban areas are more likely than those living in rural ones to mention the internet (51% vs 47%), leaflets in store (41% vs 38%) and approaching consumer organisations directly (9% vs 7%) as their preferred way of obtaining this information.

- Those respondents who perceive they are living less than comfortably on their present income(i.e. coping, finding it difficult or finding it very difficult) are more likely than those who feel they are living more comfortably to say they would prefer to get this information through the TV. 44% of those who say they're coping, 46% of those finding it difficult and 42% of those finding it very difficult say they would prefer this medium compared with 37% of those who said they were living comfortably. For leaflets there is a similar trend. 41% of those who say they're coping, 43% of those finding it difficult and also 41% of those finding it very difficult would prefer to get this information from reading leaflets compared to 34% of those who say they were living comfortably. In contrast, those who said they were living comfortably are more likely to mention smart phone apps as their preferred medium. 14% of this group of respondents chose this particular way compared with 11% of those who said they were coping and also by those said they were finding it difficult and 8% of those finding it very difficult.

- Respondents with a high level of education mention six ways of obtaining information more often than those with a low level of education. These include on the product's packaging (73% vs 63%), on the internet (53% vs 42%), from leaflets in stores (42% vs 35%), in newspapers/ magazines (33% vs 30%), from information points in stores (33% vs 29%) and on the radio (15% vs 11%). Of the ways surveyed here, none was particularly favoured by respondents with a low level of education.

- Households where children are present are more prone than childless households to mention media-based ways as their preferred method of obtaining food labelling scheme information. These include the internet (52% vs 49%), TV (49% vs 41%), radio (15% vs 13%) and smart phone apps (12% vs 10%).

- Given this group's particular dietary requirements it is perhaps unsurprising that those who live with vegetarians are more likely than those who do not to mention many of the ways surveyed. The only exceptions are the internet (indeed, non-vegetarians are more likely to cite this method by 71% to 66%), information points in stores and staff in stores.

- Most probably due to similar reasons to vegetarians, respondents with food allergies are more likely to mention many of the ways surveyed. The exceptions are the internet, leaflets in stores, and information points in stores.

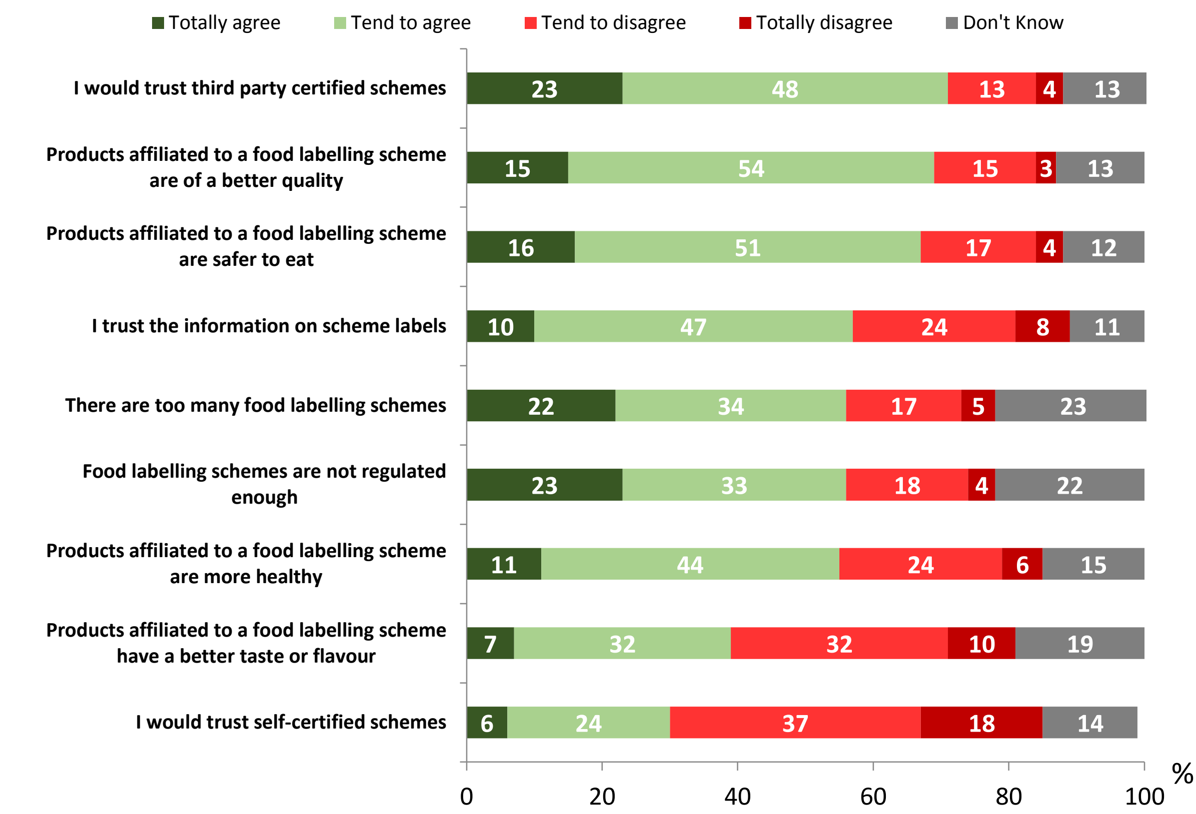
- Shoppers who usually go to supermarkets are among the least likely to mention any of the ways surveyed. Shoppers who go anywhere else are more likely than this particular group of respondents to mention the methods surveyed. Those who go to farmers/ producers are among the most likely to mention the surveyed ways of obtaining information. **This group of respondents is also more likely than supermarket shoppers to mention any one of the ways surveyed in the study.** The difference is particularly strong in newspapers/ magazines (42% vs 33%) and those saying they prefer the radio (20% vs 14%).

6 Consumer trust and perception of food labelling schemes

This chapter will consider the levels of trust respondents place in the information contained in labelling schemes as well as how they feel about them; whether they think they are regulated enough and whether there are too many of them. This section will also include illustrative data from the web listening exercise that took place in four countries (Sweden, Spain, Poland and the UK).

Data will be analysed at the 26 country level, the EU15 and EU12 levels as well as at the level of individual countries if appropriate. However, before considering the specific responses from the country groups and the individual countries themselves, a summary of the findings across all statements should first be evaluated. The figure below summarises respondents' perceptions to these statements (with data presented at the twenty six country level).

Figure 71: Trust levels and credibility placed on food labelling schemes



Q7: To what extent do you agree or disagree with the following statements?
Base: all respondents (19,260)

There are some clear points where respondents recognise or perceive that schemes bring a certain reassurance. Seven in ten (69%) agree that products affiliated to a food labelling scheme are of a better quality and 67% say they are safer to eat. A majority of 57% agree with the statement 'I trust the information shown on scheme labels'. As **71% say they trust schemes certified by a third**

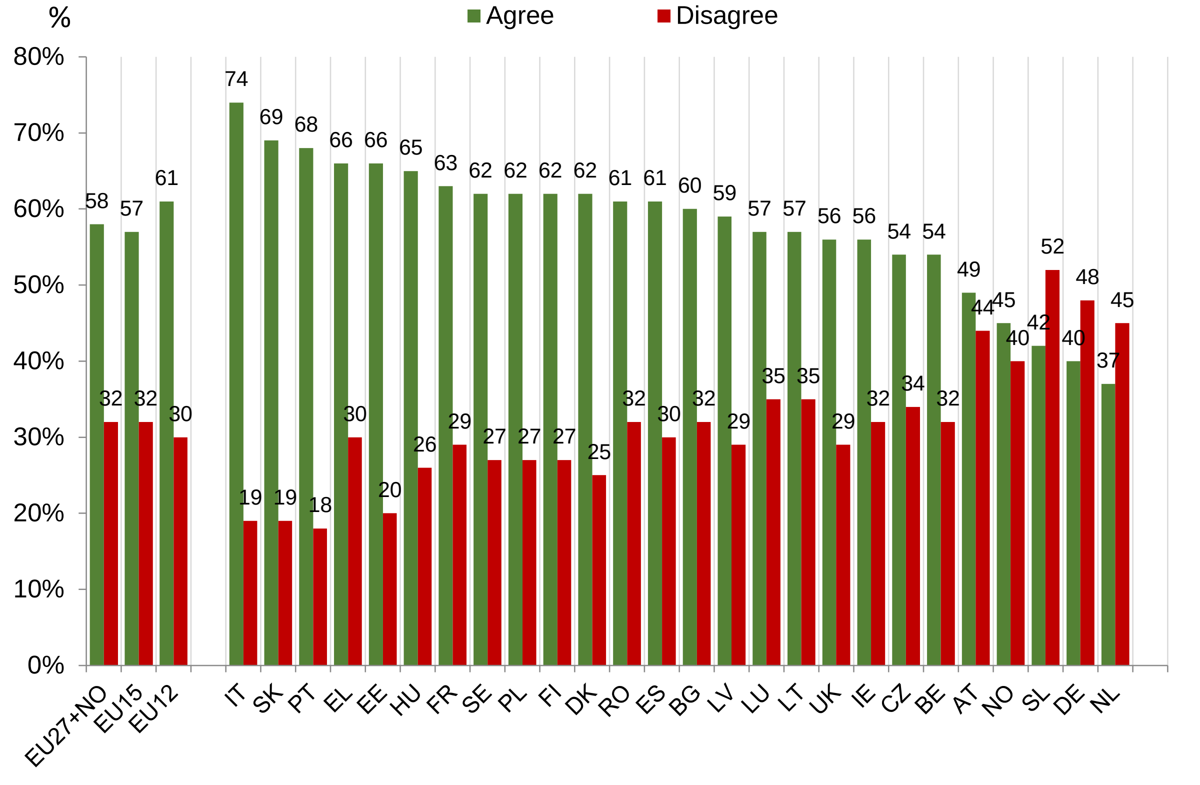
party (compared with only 30% for self-certified schemes), it seems that independent testing is the best way to increase trust. A high "don't know" figure is also present when respondents answer the 'food labelling schemes are not regulated enough' statement. Whilst 56% say they agree, 22% say they don't know.

The following sub-sections will consider the more granular level variations between country groupings and individual countries. This will be coupled with some contextual and illustrative data from the web listening exercise.

6.1 Respondents' levels of trust towards the information on food labels

As mentioned above, a majority of respondents across the 26 countries said they trusted the information on scheme labels. The figure below shows the data for this statement on an individual country level:

Figure 72: Trust perceptions of food labelling scheme information across the EU27+NO



Q7.5: To what extent do you agree or disagree with the following statements about food labelling schemes? I trust the information shown on scheme labels

Base: all respondents (19,260)

Respondents from the EU12 countries are significantly more likely to say they trust this information (61% vs 57% of respondents in the EU15). This higher figure for the EU12 is primarily driven by Slovakia (69%), Estonia (66%), Hungary (65%) and Poland (62%). The EU12's higher rating is further bolstered by particularly high 'totally agree' figures in Romania (18%), Bulgaria (16%), Slovakia (15%) and Hungary (14%). On this statement amongst the EU12, Slovenia seems to be an outlier in the EU12 group. It is the only EU12 country where fewer than 50% of its respondents say they trust the information on scheme labels and it is also the only country (of the 26) where a majority say they disagree with the statement ‘I trust the information on scheme labels’.

Among the EU15, a group of central European countries encompassing Austria (49%), Germany (40%) and the Netherlands (37%) act as the principal downward influence on this group’s average. In addition there are particularly high ‘totally disagree’ ratings in these three countries (Germany with 18%, the Netherlands and Austria both have 15%) along with Belgium (11%). This suggests that in some countries there is a particular group of respondents who do not trust the information on food labels.

The higher level of disagreement with this trust statement is not universal across the EU15. There is a group of three Mediterranean countries which have higher than average proportions of respondents saying they trust this information. They are: Italy (74%), Portugal (68%) and Greece (66%). Furthermore, out of the 26 countries, Italy’s respondents are the most likely to say they trust food scheme label information. This difference within the EU15 may be a consequence of the horse meat scandal that primarily unfolded in northern and central Europe. Several comments were identified on this in the web listening exercise:

I think we as consumers need to make greater demands when it comes to food labelling. Take for instance fresh chicken that is labelled with the name of the farm, the name of the breeder and of course origin.
The same three tasks should be on any kind of food.
If we, the consumers stopped buying products without proper labelling the industry would not make any money, only then I believe that we will have any change. It is not enough that something is produced in Poland for ICA, Coop, axfood, Felix, Findus and so on.
I do not claim or do not think that everything that is produced in Sweden is better, but we must have the right to know what we are eating. There is nothing wrong with eating horse, rabbit, guinea pig, etc. it's more a matter of culture and tradition. *– bukefalos.com (Poland)*

I am disgusted by the food industry. Thank God that we never buy ready-made meals. You have probably heard about the scam where Findus now recanted food after it has been discovered that their lasagne, that is labelled as100% beef, instead contains 100% horsemeat. It's awful how you can’t trust the meat industry.
- flashback.org (UK)

We must be able to trust what the labels says on the packages, we need to demand that food manufacturers label what we buy and eat actually correspond to reality. And that's what makes this so serious, not that it happens to be this particular species is involved. What's more, if the labelling is not right? How many more lies are they in this market, without we knowing it? – *blog (Sweden)*

"YES, I want to know what is bioengineered and sprayed, and what´s not! I want food labelling so that I know exactly what I'm getting into the food".
- Facebook

Wouldn't it be easier that instead of eliminating horsemeat from food, they make sure it's properly labelled? – Spanish tweet

Such feeling is likely to have impacted how many respondents answered in agreement with the trust statement in some northern and central European countries resulting in seemingly lower levels of trust in food label information in the EU15. However, concerns about the credibility and robustness of food label information extended to other areas as well.

The consumer should always be able to trust that what is stated on the package is also what it contains.
It is a good thing that food companies are working in line with new research and are taking their responsibility through launching healthy alternatives. It is positive that the companies are marketing healthy food and seeing this as a competitive benefit. On the other hand it is not good that companies, in search for new customers, choose to not operate according to the effective rules of food labelling. The Food Agency will always counteract this. That is our mission.
- Swedish National Food Agency

Our food is in the hands of companies that monopolise each step of the production, the transformation and distribution of food, from the seeds to the supermarket. They control the game. And our right to food is in the hands of companies like Cargill, Dupont, Syngenta, Monsanto, Kraft, Nestlé, Procter&Gamble, Mercadona, Alcampo, El Corte Inglés, Carrefour... It's clear that this right [to food], as is evident, is not guaranteed.
tercerainformacion.es (Spain)

The truth is that the president of HK is buying these QAFP certificates or rather the people who grant them! Their products have poor quality and the production plant is dirty! portalspozywczy.pl (Poland)

As can be seen here, some respondents mentioned the perceived link between the influence of bodies and organisations with vested interests and the information that is allowed to be placed on a food label. It is this sort of difference that will be explored in the following sub-section and will help to explain the aforementioned trust differential between third party-certified schemes and ones based on self-certification.

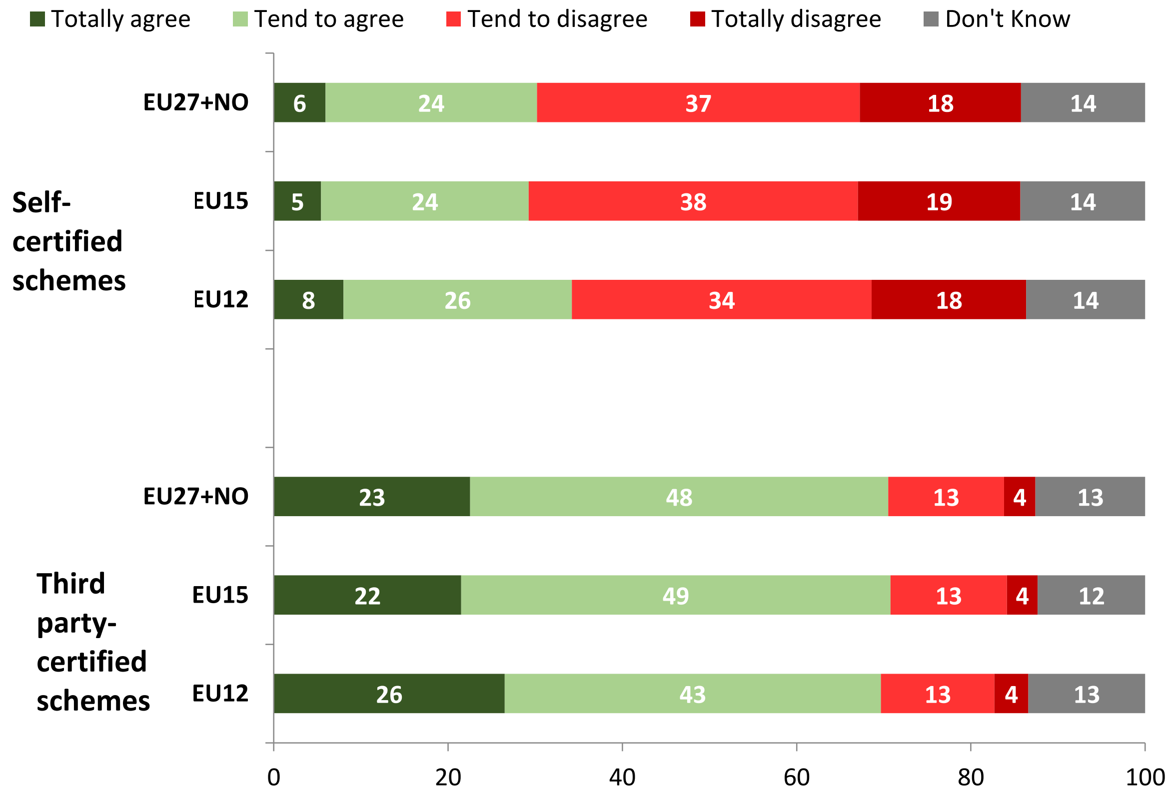
Trust in food labelling schemes by demographic profile

- A majority say they trust food labelling information across every single demographic group with the exception of those who say they find it difficult to cope on their present income and also those who do not give an answer to the income question.
- Women are more likely to trust the information on food labels than men (59% of women, compared to 55% of men). Men on the other hand, are more likely not to trust this information (35% vs 30% of women).
- The middle age groups (i.e. 35-44 and 45-54) are more trusting of food label information. 59% of 35-44s trust label information and 58% of 45-54s do. Similarly, the over 65s are also more trusting of this information (59%). However, it should be noted that a majority within all age groups trust food label information.
- Those coping on their present income (61%) are particularly likely to say they trust this information. Whilst those living comfortably (56%) or finding it difficult (57%) are more likely than those who say they are finding it very difficult (48%) to trust food labels.
- Those with a medium or high level of education (both 58%) are more likely than those or finding it difficult or very difficult (54%) to say they trust this information.
- Those living in households with children are also more likely to trust food labelling information (63%, compared to 56% in childless households).

6.2 The trust differential between third party-certified schemes and those requiring self-certification

As mentioned briefly earlier in this chapter, there are differences in the levels of trust respondents invest in these two different types of schemes. The figure shows this further by illustrating the difference between the EU15 and EU12.

Figure 73: Trust levels in third party-certified schemes and self-certified ones



Q7.7/ Q7.8: to what extent do you agree or disagree with the following statements about food labelling schemes?- I (would) trust certain food labelling schemes that are certified by a third party organisation, for example a public body, a consumer organisation or a NGO/ that are self-declared by the producer or retailer.
Base: all respondents (19,260), EU15 (11,847), EU12 (6,909)

The levels of trust in those schemes certified by third parties are more universal than those attributed to self-certified ones. There is little difference in total levels of trust between the EU15 and the EU12 (71% and 70% respectively) for third party certified schemes, whereas total levels of trust in self-certified schemes are more variable between the two country groupings. A third (34%) of respondents in the EU12 agree that they trust information on self-certified schemes, compared to 29% of respondents in the EU15 countries. EU15 respondents are also more likely to say that they disagree with the statement (56% vs 52%). However, this level of disagreement is substantially higher for both groupings than their comparative figures for third party-certified schemes, where only 17% of respondents in both groupings said they did not trust information on labels certified by a third party. This sub-section will now look at the groupings' countries in more detail, examining both types of scheme in turn.

Third party-certified schemes

Reflecting the generally high levels of trust for third party-certified schemes, several countries have significantly above average proportions of respondents saying they 'totally' agree with the trust statement. These include Romania (37%), Italy (35%), Bulgaria (33%), Greece (32%), Spain (30%), Sweden (27%) and Poland (26%). EU12 respondents tend to express their agreement more strongly. Over a quarter (26%) of EU12 respondents chose 'totally agree', significantly above the 22% for EU15 respondents. This is primarily explained by the fact that the three most populous EU12 countries (Poland, Romania and Bulgaria) all have above average proportions of their respondents saying they 'totally agree'.

Whilst agreement across the 26 countries is high, there are certain countries where disagreement with this trust statement is sizeable. This is particularly concentrated in five countries mainly in central Europe, three of which are in the EU15 and two are in the EU12. Slovenia (29%), Germany (28%), Austria (25%), the Netherlands (23%) and Hungary (21%) all have significant proportions of respondents saying they do not trust information on third party-certified schemes.

Trust in third party certified schemes by demographic profile

- **A majority of respondents trust third party certified schemes across all demographics.**
- There is no statistically significant difference between trust levels for men (71%) and women (70%).
- Over 65s (76%) are the most trusting of this type of scheme, compared with 64% of 18-24s. Indeed this latter age group is the most sceptical age group, with only 22% of 18-24s saying they do trust this type of scheme.
- Those who say they are coping on their present income are particularly trusting (74%). This compares with 63% of those finding it very difficult who say they trust third party certified schemes.
- Those with a high level of education also trust this type of scheme more often. 75% of respondents in this bracket say they trust third-party certification, compared with 59% with a low level of education.
- Respondents living in households with children are marginally more likely than those living in childless households to say they trust this type of scheme (72% vs 70%).
- Those shopping at corner shops (75%), specialised shops, marketplaces and farmers/ producers (all 74%) are all more likely than those who shop at discount stores (69%) to say they trust this type of scheme.

Self-certified schemes

This type of scheme generally fostered less trust in respondents' answers than those given for third party-certified schemes (30% vs 71**%**). **A majority (56%) of respondents across all 26untries say**

they tend not to trust this type of scheme. Indeed, Hungary (53%) is the only country where a majority of respondents say they do trust this type of scheme. Only five countries have a minority of their respondents saying they do not trust these schemes. These countries are mainly in Eastern Europe and include Slovakia (47%), Bulgaria (45%), Latvia (44%) and Hungary (36%). Portugal (38%) is the only EU15 country with a minority of respondents saying they do not trust this type of schemes.

It follows therefore that it is the EU15 countries which take the more sceptical view, with 56% of respondents in these countries saying they do not trust these schemes, compared with 52% in the EU12.

Conversely, EU12 respondents are more positive; with over a third (34%) saying they do trust these schemes, compared to 29% in the EU15. It is EU12 countries which account for most of the nations with higher than average proportions of their respondents saying they do trust this type of scheme. Hungary (53%), Bulgaria (46%), Slovakia (38%), Latvia (36%) and Romania (33%) all exemplify this tendency. However, Portugal (40%), France (37%) and Greece (34%) from the EU15 all have higher than average trust ratings as well, thus suggesting that this lack of trust is mainly found in northern Europe. However, as seen in chapter 6.1, many respondents in the EU12 say they 'don't know' when asked if they think whether all 'all food labelling schemes are certified by a third party organisation' and when asked if 'third party organisations that certify schemes have to be public bodies'. So this lack of knowledge may influence the EU12's proportions here as well.

Luxembourg (68%), Denmark (67%), the Netherlands (66%), Estonia (62%) and Ireland (60%) all have above average proportions saying they don't trust these schemes, reflecting the generally lower levels of trust in third party-certified schemes in Northern Europe. This imbalance helps to explain why EU15 respondents are generally less trusting of self-certified schemes.

Whilst most countries with high levels of respondents saying they don't trust these schemes are in northern Europe, Greece- with 60% of its respondents saying they don't trust these schemes- is an exception to this general trend.

Even though the UK (along with Ireland) was among the first countries to uncover the meat adulteration scandal, British respondents are not statistically more likely to say they do not trust labels that are self-certified. Although it should be noted that at 58%, a clear majority still say they do not trust this type of scheme. In addition, 21% of British respondents said they don't know whether they trust this type of scheme and only 22% said they actively trusted them, suggesting that many British respondents are yet to be fully convinced on self-certified schemes.

Trust in self-certified schemes by demographic profile

- **There are minorities saying they trust this type of schemes across all demographics**
- Women (31%) are only slightly more likely than men (29%) to say they trust this type of schemes. Men, on the other hand, are more likely to say they don't trust this type of schemes (59% vs 53%).
- Of all the age groups, 18-24s (34% vs 28% of over 65s) are the most likely to say they trust this type of scheme. Whilst the older age groups, notably the over 65s (59%), 55-64s (58%) and 45-54s (57%) tend to take a more sceptical view.

- Respondents who are economically active are more likely to trust these schemes (31% vs 28% of those who are inactive).
- Those respondents with low (34%) and medium (32%) levels of education are more likely than those who have a high level of education (27%) to say they trust self-certified schemes.
- Respondents living in childless households trust these schemes more than those who live with children (35% vs 28%).
- Respondents who live in households where a vegetarian is present are more likely to trust this type of scheme than those who live in meat-eater only household (36% vs 29%).
- Those who shop at marketplaces (34%) are more likely to trust this type of scheme than those who shop anywhere else other than farmers and producers.
- Respondents who say they don't know enough about food labelling schemes are less likely to trust this type of scheme (63% say they do not trust them, compared to 57% who say they do know enough about schemes).
- Perhaps unsurprisingly, 73% of those who do not trust information provided on food labelling schemes do not trust self-certified schemes.

Opinions of stakeholders

Stakeholders were also asked to assess consumers' level of trust towards voluntary food labelling schemes. They were asked to assess:

- Trust towards voluntary food labelling schemes in general
- Trust towards public voluntary food labelling schemes
- Trust towards private voluntary food labelling schemes

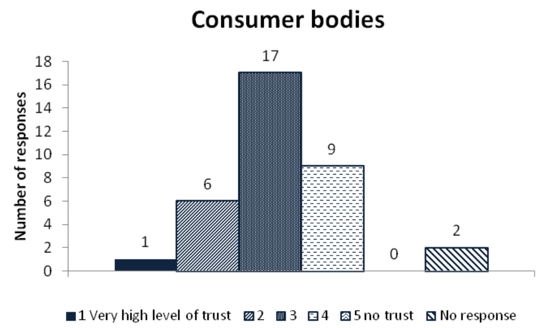
Below we present the results for each of these three questions separately. When asked to assess consumers' trust towards food labelling schemes in general, most stakeholders allocate a score of three out of five. This indicates that stakeholders feel that consumers' neither completely trust the average food labelling scheme, nor do they have no trust towards them either.

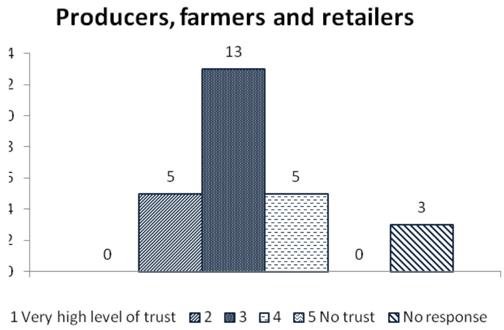
This picture changes somewhat when stakeholders are asked to specifically comment on public and private food labelling schemes. Stakeholders tend to give better scores for public food labelling schemes than for private schemes, indicating that stakeholders believe the level of trust towards public food labelling schemes is greater than towards private food labelling schemes. However, it is worth noting that this is not a very strong result and that, for example, the majority of stakeholders still rate the level of trust towards private food labelling schemes as being three out of five (as was the case for food labelling schemes in general).

Stakeholders mainly disagreed that consumers would be able to tell public and private schemes apart. However, they state that the trust towards public scheme is somewhat higher. This suggests that if it was clearly stated on the label that the scheme was publicly owned, stakeholders believe that consumers would be more inclined to trust the scheme. This implies that private schemes would have to put more effort in building a credible image for the consumers.

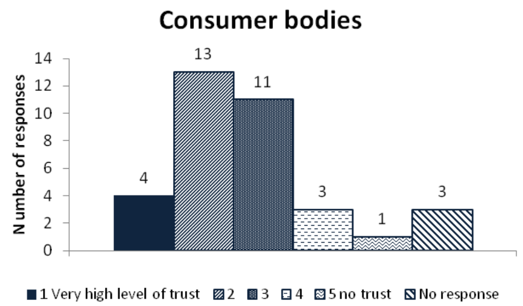
Figure 74:"How would you rate consumers' level of trust towards voluntary food labelling schemes?"

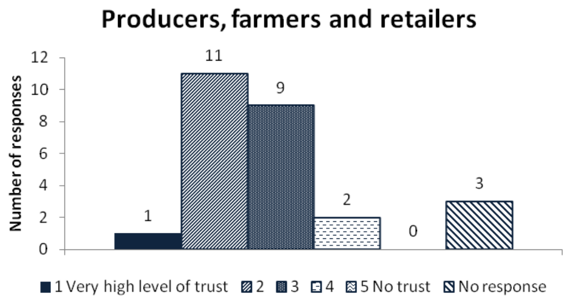
Trust towards food labelling schemes in general



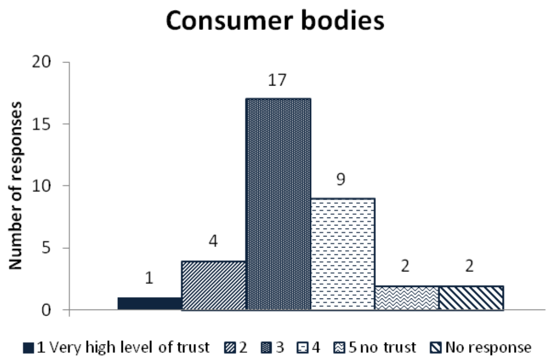


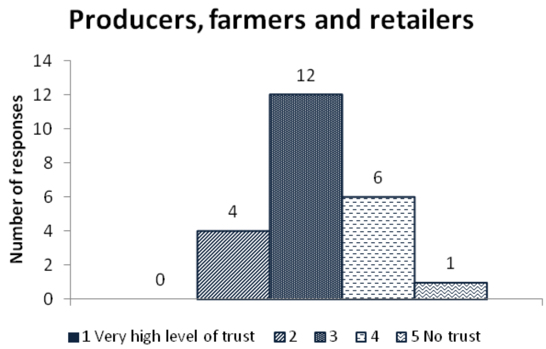
Trust towards **public** food labelling schemes





Trust towards **private** food labelling schemes





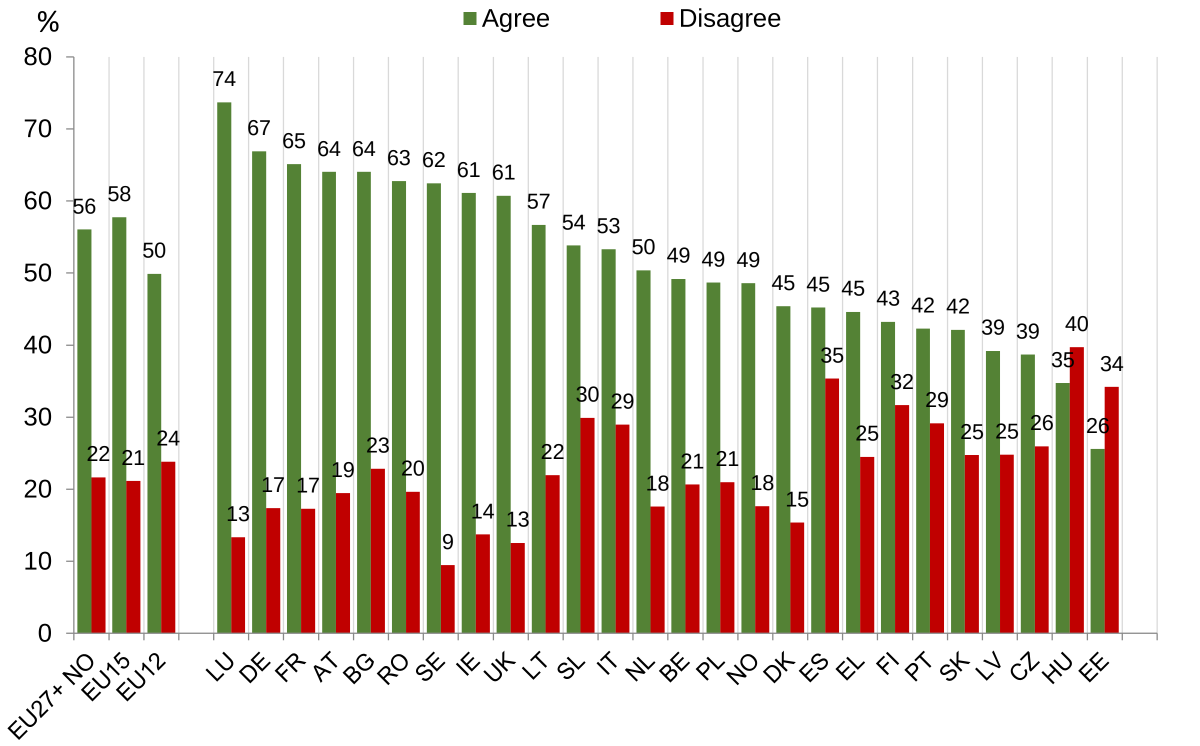
Note: Producer, farmer and retailer responses are broken down in Annex 15. There is no identifiable difference in responses between these groups.

Source: Scheme operator survey, stakeholder survey, consumer organisation survey and accreditation body survey

6.3 Whether respondents think food labelling schemes are regulated enough

Across the EU27+NO, 56% of respondents think food labelling schemes are not regulated enough, whereas 22% think they are sufficiently regulated and a further 22% don't know. Respondents in the EU15 are more likely to say that these schemes are not sufficiently regulated (58% to 50% in the EU12). It therefore follows that respondents in the EU12 are more likely to think that these schemes are regulated enough (24% to 21% in the EU15). Nonetheless, the proportion of respondents across both country groupings saying they do think schemes are sufficiently regulated is a clear minority. The graph below demonstrates these variances between country groupings as well as by individual country.

Figure 75: Perceptions of the sufficiency of current food labelling scheme regulation by country



Q7.6: To what extent do you agree with the following statements about food labelling schemes?- Food labelling schemes are not regulated enough

Base: all respondents (19,260), EU15 (11,847), EU12 (6,909)

The EU15 countries' less positive feelings to the sufficiency of the regulations surrounding these schemes is primarily driven by seven countries in this group where more than 60% of respondents say they do not think schemes are regulated enough. These proportions range from 61% in the UK to 74% in Luxembourg. In addition, the three most populous countries in the study: Germany (67%), France (65%) and the UK (61%) all have a higher than average proportion of respondents saying they do not agree regulation is sufficient. This explains why the EU15's average as a whole is higher than the EU12's.

Coupled with these three large countries having higher than average ratings, there are particularly high 'totally agree' figures in five of the EU15. Germany (38%), Luxembourg (38%), Austria (36%), France (29%) and Sweden (28%) all exemplify this trend among many of the EU15 countries which have substantial numbers of respondents strongly saying that labelling scheme regulation is not sufficient. However, it should also be noted that two countries within the EU12 - Romania (29%) and Lithuania (also 29%) - have similar proportions to the aforementioned EU15 countries who totally agree that food labelling schemes are not regulated enough.

The relatively high proportion EU15 respondents who do not agree that labelling schemes are regulated enough could be linked to the recent meat adulteration scandal that affected many food distributors and retailers across the European Union. Substantial numbers of the comments from the web listening exercise refer to this, particularly in the UK:

My issue with the current horsemeat scandal is the food labelling thing. Once you compromise the honesty of food labelling as a principle you open the door to all sorts of shit
Bluemoon MCFC forum

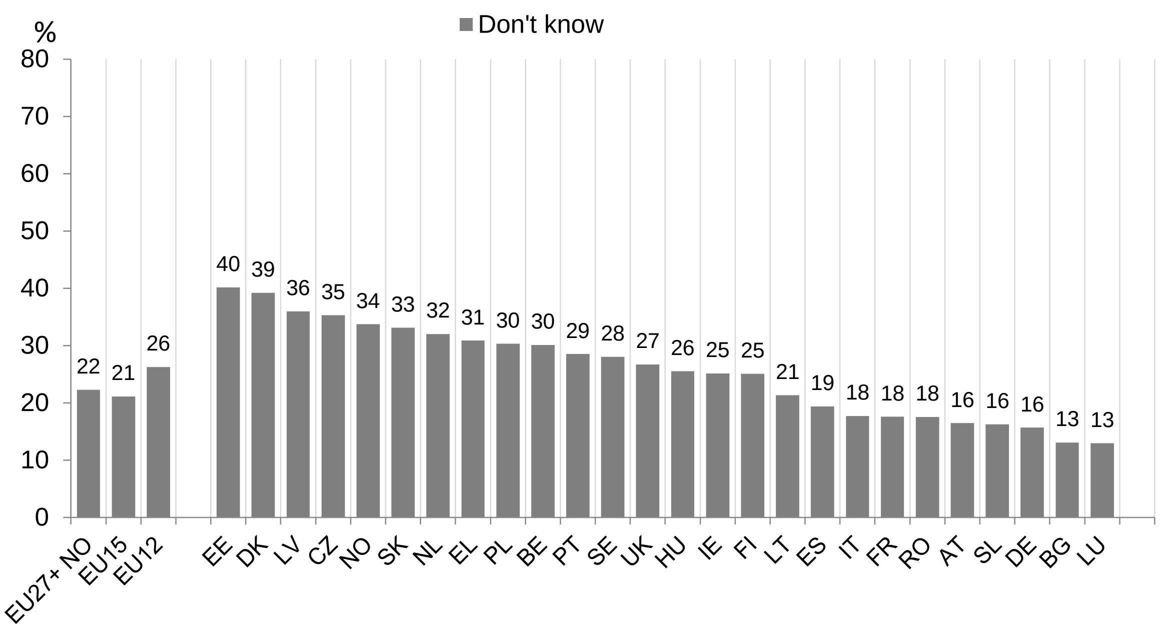
*The **EU regulations aren't worth the paper they are written on**. Not all countries use them, some countries don't understand them, they are not enforced, they can't be forced, and they have no legal basis.*
Pistonheads.com

You can't rely on labelling as the laws behind labels have allowed for all kinds of dishonesty to be hidden in certifications. – The Guardian commentisfree

Whilst half of EU12 respondents think these schemes are not regulated enough, as noted before, this is significantly lower than the level observed in the EU15. These relatively more positive feelings towards the state of current regulation of labelling schemes is driven primarily by large minorities in four countries respondents saying they think regulation is sufficient. These countries include Hungary (40%), Estonia (34%), Slovenia (30%) and the Czech Republic (26%) all of which have at least a quarter of their respondents agreeing that regulation is enough. In addition, the four countries with the smallest proportions of their respondents agreeing that schemes are not regulated enough are all in the EU12. Latvia (39%), the Czech Republic (also 39%), Hungary (35%) and Estonia (26%), thus helping to explain why the average for the EU12 grouping as a whole is significantly lower than the comparative figure for the EU15.

Whilst in general more respondents think food labelling schemes are not regulated enough, there is a substantial minority (22%) across the EU27+NO who say they don't know whether current regulation is sufficient or not. The graph below shows the substantial variation between these countries and what proportion of their respondents chose the 'don't know' option when answering this question.

Figure 76: Don't know responses across the twenty six countries



Q7.6: To what extent do you agree with the following statements about food labelling schemes?- Food labelling schemes are not regulated enough
Base: all respondents (19,260), EU15 (11,847), EU12 (6,909)

Perceptions of the sufficiency of food labelling scheme regulation by demographic profile

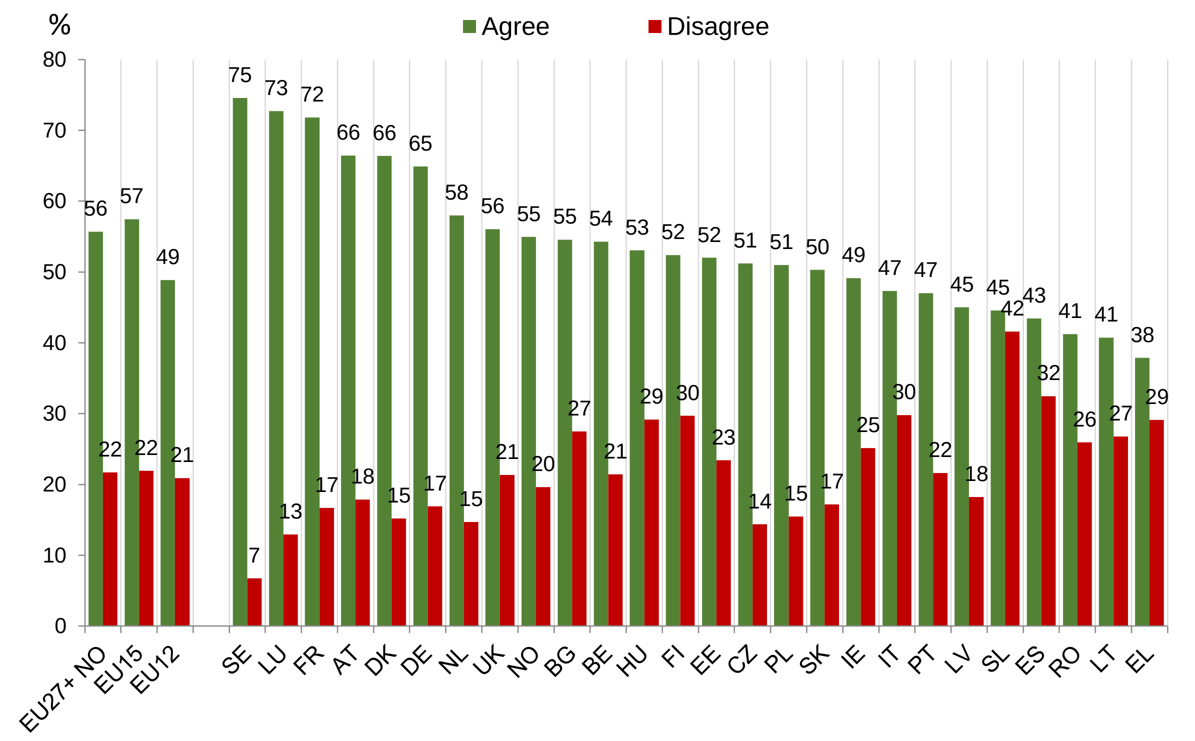
- **A majority agree that schemes are not regulated enough across all demographics.**
- Men are more likely than women to say that schemes are not regulated enough (60% vs 54%).
- Older respondents are more likely than the younger ones to agree that schemes are not regulated enough. 64% of over 65s and 60% of 55-64s say regulation is not enough, compared to 54% of 18-24s and 52% of 24-35s.
- Respondents who are economically inactive (59%) are more likely than those who are economically active (55%) to say regulation is not enough.
- Perhaps counter-intuitively considering the last point, those respondents who say they're living comfortably on current income are more likely to say that regulation of schemes is not enough than those who are finding it very difficult to cope on their income (62% vs 55%).

- Those with a high level of education are also more likely to say that current regulation of schemes is not enough (57% vs 55% for both those with medium and low levels of education).
- Respondents who shop at farmers and producers are more likely than any other type of shopper to say that regulation of schemes is not enough (65% vs 56% of supermarket shoppers- the lowest among the different types of shoppers).
- Respondents who do not trust information on food labels are also more likely to agree that schemes are not regulated enough (70% vs 53% of those who do trust label information).

6.4 Do respondents think there are too many food labelling schemes?

Respondents were also asked whether they thought there were too many food labelling schemes. Across the EU27+NO, a majority (56%) of respondents agree that there are too many food labelling schemes, whilst 22% disagree. EU15 respondents are more likely to agree with this statement than those in the EU12 (57% vs 49%). However, there is no statistically significant difference between the two country groupings when it comes to respondents saying that there aren't too many schemes. Yet EU12 respondents are more likely than those in the EU15 to say they don't know (30% vs 21%). The graph below shows the country-by-country variances in these sentiments:

Figure 77: 'There are too many food labelling schemes' by country



Q7.10: To what extent do you agree with the following statements about food labelling schemes?- There are too many food labelling schemes.
Base: all respondents (19,260), EU15 (11,847), EU12 (6,909)

Within the ‘agree’ figures there are substantial proportions of respondents choosing the more unequivocal ‘totally agree’ option in some of the EU15 countries. Indeed, there are six northern European EU15 countries which saw over a third of their respondents choosing this particular option. These range from 32% in Denmark and France % to 37% in Sweden (by way of comparison, the highest comparable figure for a EU12 country is 23% for Hungary). This trend is also observable in the data obtained through the web listening exercise:

> *The TV is now full of public service adverts for food choice, cigarettes, drink and even how to budget. The Internet is full of information.* ***Products are chock with labels****.*
> Avforums.com

In contrast, the relatively high proportion of respondents disagreeing with the statement that there are too many food labelling schemes in the EU12 is principally explained by a group of five Eastern European countries. These include Slovenia (42%), Romania (26%), Lithuania (27%), Hungary (29%) and Bulgaria (27%). However, similar to the EU15 countries explored in the above paragraph, in these five countries, the proportion of respondents agreeing with the statement is still higher than those disagreeing..

The ‘don’t know’ response rate in the EU12 may – in part – help to explain some of the variances between the two country groupings. As has already been mentioned there is a nine point difference between the levels of EU12 respondents saying they don’t know and those in the EU15 (30% vs 21%). The ‘don’t know’ response rate was particularly high in six of the ten EU12 countries, Five had roughly a third choosing this option: the Czech Republic and Poland (both 34%), Lithuania, Romania and Slovakia (all 33%). At 37%, Latvia had the highest proportion. Similar to the geographical spread of countries whose respondents agreed that there were too many schemes this general trend is not universal. Three EU15 countries also have above average ‘don’t know’ response rate. These include Greece (33%), Portugal (31%) and the Netherlands (27%). Again, the geographical spread of these countries suggests that a sizeable minority of respondents across Europe do not have access to (or are not engaging with) information on these schemes.

Perceptions of whether there are too many food labelling schemes by demographic profile

- **A majority of respondents across all demographics think there are too many food labelling schemes.**
- Men (59%) are more likely than women (53%) to say that there are too many schemes.
- Older respondents are more likely to say that there are too many schemes. 58% of over 65s and 61% of 55-64s say there are too many schemes, compared to 52% of 18-24s.

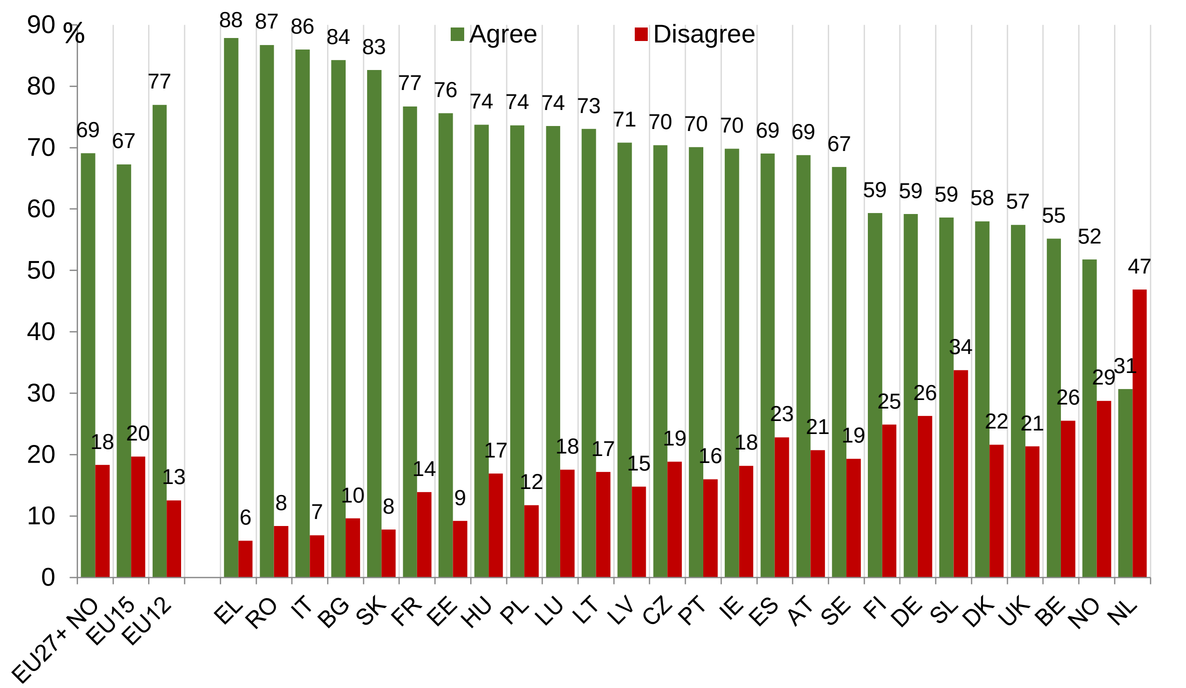
- Respondents living in rural areas are marginally more likely to say that there are too many schemes (58% vs 55% of those living in rural areas).
- Those who say they are living comfortably (63%) are more likely those coping or finding it difficult or very difficult to say that there are too many schemes.
- Respondents with a high level of education are also more likely to say there are too many schemes (57% vs 53% of those with a low educational level).
- Shoppers who go to farmers and producers (59%) as well as discount stores (60%) are more likely than the other types of shopper to say there are too may schemes. This compares with 54% of those who shop at corner shops.
- Respondents who do not trust label information are more likely to say there are too many schemes when compared with those who do trust this information (68% vs 53%).

6.5 The positive perceptions of food labelling schemes: quality, health, safety and taste

The study also helped to shed more light on what consumers associate with products' affiliation to a food labelling scheme. These associations revolve around four elements; quality, health, safety and taste. This particular section deals with each of these individually and analyses the country group and individual country level variations therein. However, it should be noted that this chapter measures consumer perceptions of schemes rather than evaluating the factual accuracy of their information.

Quality

Figure 78: Whether products participating in food label schemes are of a better quality



Q7.1: To what extent do you agree with the following statements about food labelling schemes? - Products affiliated to a food labelling scheme are of a better quality.
Base: all respondents (19,260), EU15 (11,847), EU12 (6,909)

Across the EU27+NO, a substantial majority of 69% agree with the statement that products participating in these schemes are of a better quality (with only 18% disagreeing). This agreement is higher in the EU12, where 77% of respondents agree with this, compared with 67% in the EU15. Furthermore, in all but one country (the exception being the Netherlands) a majority of respondents think that products participating in these schemes are of a better quality. Although still constituting a minority, EU15 respondents are more likely to disagree with this statement (20% vs 13%). That said, agreement surpasses 80% in five countries (two in the EU15 and three in the EU12) these include: Bulgaria (84%), Greece (88%), Italy (86%), Romania (87%) and Slovakia (83%).

Apart from Bulgaria, Romania and Slovakia, the relatively high level of EU12 respondents saying they felt that scheme products were of better quality is also above the EU27+NO average in a further three countries (bringing the total to six out of the ten EU12 countries surveyed). These are Poland (74%), Hungary (74%) and Estonia (76%). Indeed, the only EU12 country where agreement dips below 70% is in Slovenia, where 59% agreed that scheme products were of better quality. These high numbers across many of the EU12 countries help to explain the variance between the two country groupings. This is also reflected in the web listening exercise in Poland:

> *HIPP is the only company present on our market which has **BIO quality certificate.** A good friend of my father lived in Germany and worked for a long time in HIPP Company, they are strict when it comes to product quality…*
> Ebobas.pl forum

The higher proportion of respondents who disagree with the assertion that scheme products are of a better quality in the EU15 is mainly driven by the fact that seven countries in this group have significantly above average proportions of their respondents disagreeing with the statement. These range from 21% in the UK to 47% in the Netherlands. The only EU12 country to have an above average figure on this measure is Slovenia (34%). This helps to explain why EU15 countries in general reported a larger proportion of their respondents disagreeing with this statement.

The Netherlands is the only country where a plurality of respondents disagree (47% vs 31% who agree) with the statement that scheme products are of better quality. This is also coupled with the highest 'don't know' response rate (22%) of the countries surveyed. This relatively high 'don't know' count is echoed by five other western European countries: the UK (21%), Denmark (20%), Belgium (19%), Finland (16%) and Germany (15%). This high 'don't know' count is concentrated within the EU15, and could be an example of reticence to endorse these schemes following the meat adulteration scandal.

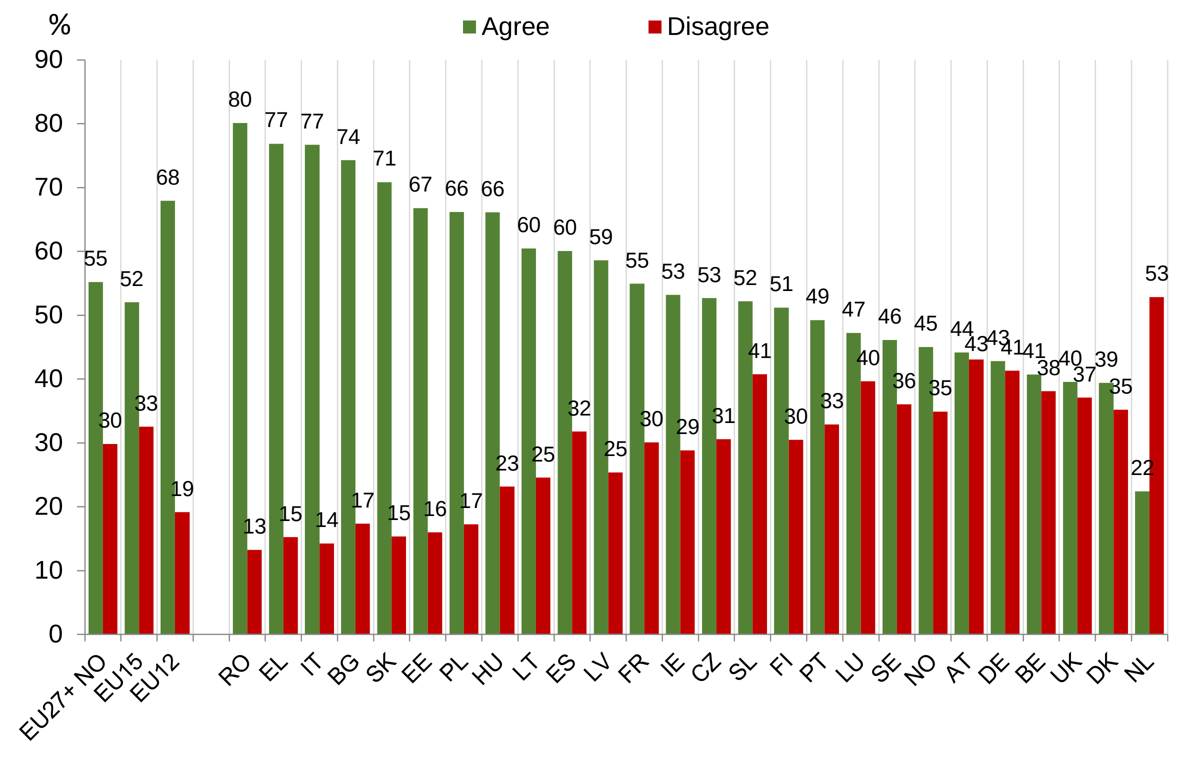
These concerns around the quality of products participating in and affiliated with food labelling schemes are, to an extent, mirrored in the responses to the statement that products in these schemes are healthier, which is the next statement to be explored.

Perceptions of quality by demographic profile

- Across all demographics a majority of respondents think that products affiliated to a scheme are of a better quality.
- Women are more likely than men to think scheme-affiliated products are of a better quality (71% vs 66%).
- Younger people are more likely to agree that these products are of a better quality. Seven in ten 18-45 year olds agree, compared with 66% of 54-65s and 67% of over 65s.
- Respondents who are economically active (71%) are more likely to agree than those who are inactive (66%).
- Those who say they're coping on their present income (73%) are more likely than those living comfortably (65%), finding it difficult (69%) or very difficult (62%) to say that these products are of a better quality.
- Those with high (70%) and medium (69%) levels of education are more likely than those with a low level (66%) to agree that scheme products are of a better quality.
- Respondents living in households with children are also more likely to agree (75%, compared to 67% of those living in childless households).
- Shoppers who go to corner shops (75%), farmers and producers (74%), marketplaces (74%) and specialised shops (73%) are more likely than who go to supermarkets (69%) and discount stores (66%) to say that these scheme products are of a better quality.
- Perhaps unsurprisingly 86% of those who trust the information on food labels agree that these products are of a better quality, whilst only 50% who do not trust this information think the same way.

Health

Figure 79: perception of whether products affiliated to a food labelling scheme are healthier



Q7.2: To what extent do you agree with the following statements about food labelling schemes?- Products affiliated to a food labelling scheme are more healthy.
Base: all respondents (19,260), EU15 (11,847), EU12 (6,909)

At 55%, a clear majority think scheme affiliated products are healthier. However, there are substantial differences between EU15 and EU12 respondents. Whilst 68% of respondents in the EU12 agree that these products are healthier, 52% in the EU15 do. As a corollary, 19% of EU12 respondents disagree with the statement, whilst roughly a third (33%) of EU15 respondents say they do. The web listening exercise helps to explain why a majority of respondents agree that these products are healthier:

I do not know how it is with these certificates, but for me ***if something is certified it certainly is healthier****...Besides organic food tastes much better!*
portalspozywczy.pl

Most supermarkets and some suspicious on-line shops label their food as eco. In order to know what we eat we need to pay attention to the certificates, not nice packaging. ***Only certificates are the indisputable guarantee of organic food.***
portalspozywczy.pl

Within the EU12, agreement that scheme affiliated products are healthier is particularly strong in three countries: Romania (80%), Bulgaria (74%) and Slovakia (71%). Furthermore, there is a majority in every EU12 country agreeing that scheme affiliated products are healthier.

Among the EU15 countries, there are some countries - particularly in Southern Europe - with higher than average agreement ratings, notably Greece (77%), Italy (77%) and Spain (60%). However, northern European countries weigh down this grouping's average. For example, Austria (44%), Germany (43%), Belgium (41%), the UK (40%), and Denmark (39%) are all indicative of this trend. As mentioned at the start of this sub-section, respondents in the EU15 are more likely to disagree with this statement. Indeed, in one country - the Netherlands - the majority of respondents disagree with the statement that scheme products are healthier (at 53% this is also ten points higher than any other country). There are also above average proportions of respondents saying they disagree in another eight EU15 countries, with figures ranging from 35% in Denmark to 43% in Austria.

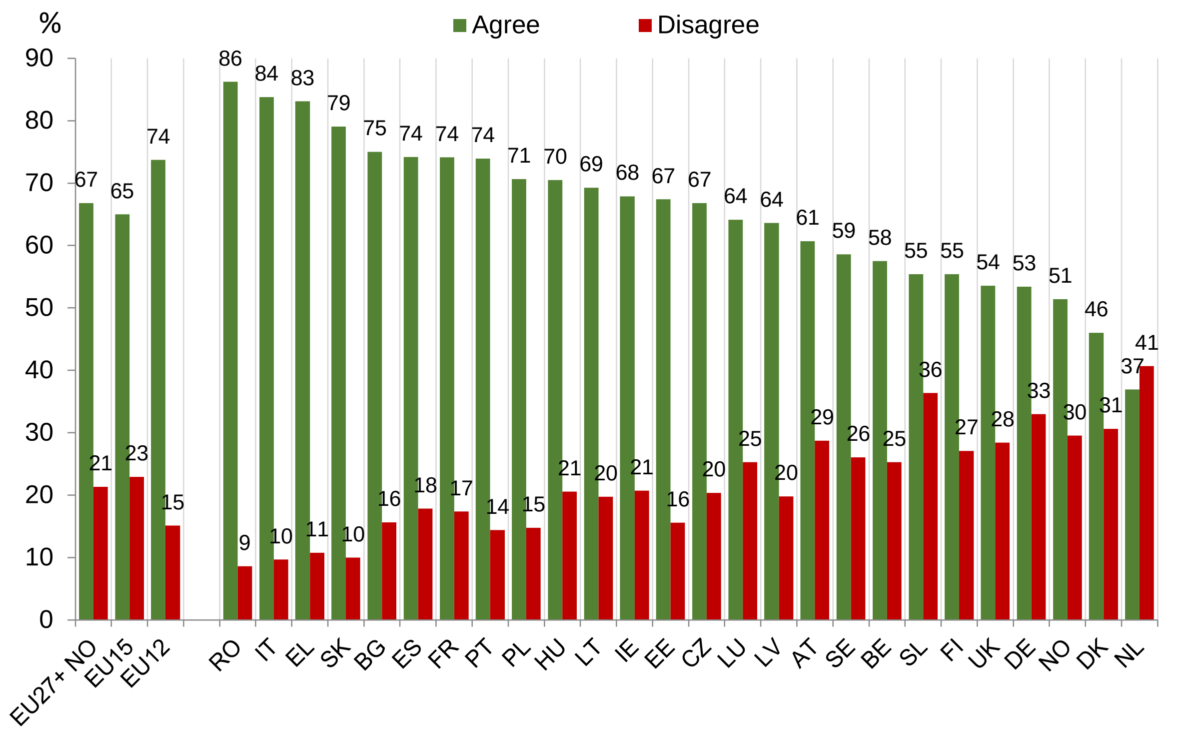
There are similar trends to the quality statement observable here for the health statement when analysing 'don't know' responses. EU15 respondents are more likely to say the 'don't know' than those from the EU12 (15% vs 13%). Again similar to the quality statement, this type of response is particularly concentrated in several western European countries. Nine of the EU15 have between roughly a fifth and a quarter of their respondents choosing this option; ranging from 18% in Finland and Ireland to 25% in the Netherlands and Denmark.

Health perceptions of scheme-affiliated products by demographic profile

- Women (56%) are only slightly more likely than men (54%) to think that these products are healthier.
- Those respondents who say they are coping on their present income (59%) are more likely than those in other income brackets to think these products are healthier. For example, only 47% of those saying they are living comfortably think scheme products are healthier.
- 62% of those living in households where children are present say these products are healthier, compared to 53% of those living in childless households.
- A similar proportion (61%) of respondents living in a household with someone who has food allergies say these products are healthier (this compares with 54% of those who live in a household without a food allergy sufferer).
- Shoppers who shop at marketplaces (62%) are more likely than all other types of shoppers to say that these products are healthier.

Safety

Figure 80: Respondents' perceptions of whether products affiliated to a food labelling scheme are safer to eat



Q7.3: To what extent do you agree with the following statements about food labelling schemes?- Products affiliated to a food labelling scheme are safer to eat.
Base: all respondents (19,260), EU15 (11,847), EU12 (6,909)

There is a majority of just over two thirds (67%) of respondents across the EU27+NO who agree that products affiliated to a food labelling scheme are safer to eat. In 24 of the 26 countries a majority of respondents agree with this statement. This support is particularly concentrated in the EU12 where 74% agree (compared to 65% in the EU15). EU15 respondents are more likely to disagree (23% vs 15% in the EU12), yet this proportion is a clear minority. Additionally, at 12% in the EU15 and 11% in the EU12 'don't know' response levels are relatively low as well. The web listening exercise corroborates this high level of agreement:

> If you want as little chemicals as possible, knowing that the meat from the animals that are in the product had a good life, and be sure that the contents match, then the safest bet is a KRAV-labeled product. But no one can leave a 100% guarantee.
> - *Swedish forum*

The higher levels of agreement in the EU12 countries are primarily driven by Romania (86%- the highest proportion among the 26), Slovakia (79%) and Bulgaria (75%). Agreement only dips below 60% in one EU12 country, which is Slovenia (55%). When compared to the EU15, these stronger assertions of agreement in the ‘totally agree’ bracket are also more prevalent in the EU12. 22% said they strongly agreed (compared with 15% in the EU15). Furthermore, this strength of agreement topped 20% in three EU12 countries: Romania (36%), Bulgaria (25%) and Poland (25%).

The EU15’s lower levels of agreement are partially explained by the fact that this grouping contains the only two countries where agreement did not constitute the majority of respondents’ responses - the Netherlands (37%) and Denmark (46%). Many northern European countries more generally also saw more subdued levels of agreement. Germany (53%), the UK (54%), Finland (55%) are all indicative of this trend. However the EU15 also contains some southern European countries where agreement is particularly high. With agreement at 84% and 83% respectively, Greece and Italy saw the second and third highest levels of agreement.

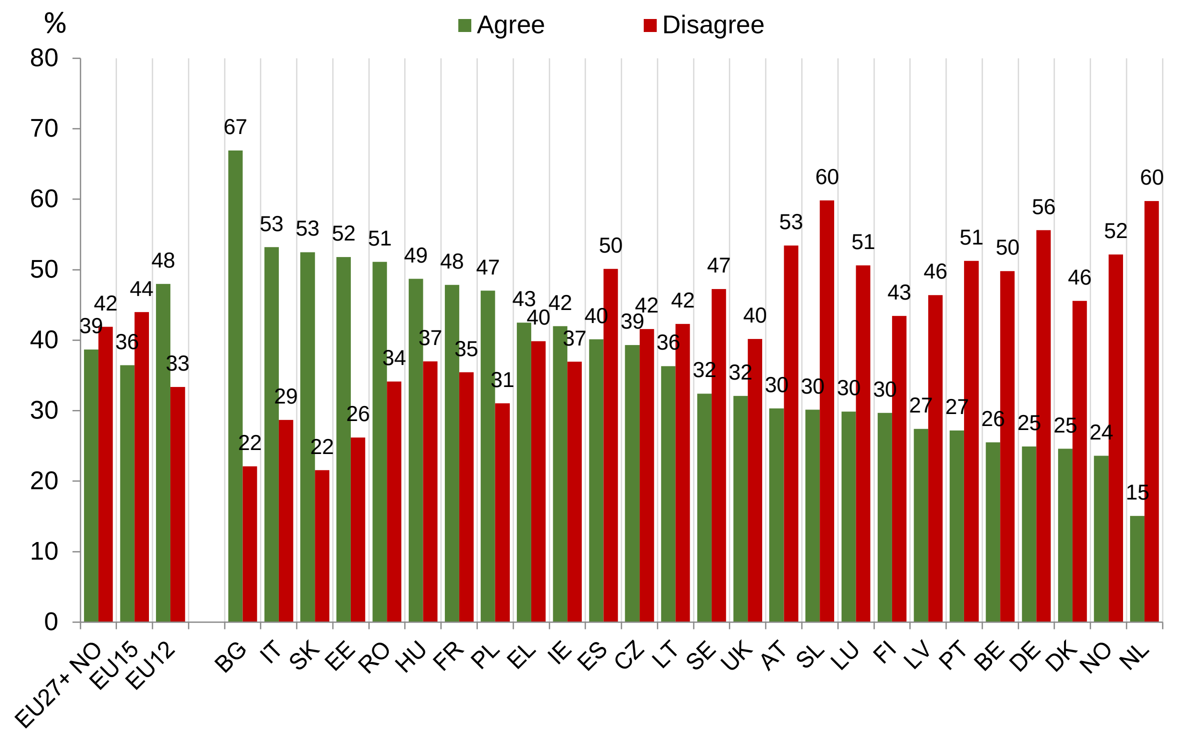
At 23%, disagreement among the EU15, whilst low, is significantly higher than in the EU12 (15%). The majority (18%) of the EU15’s higher levels of disagreement is primarily found within the less strong ‘tend to disagree’ category rather than the ‘totally disagree’ category. However, there were three EU15 countries where total disagreement exceeds 30% - Denmark (31%), Germany (33%) and the Netherlands (41%).

Perceptions of the safety of food labelling scheme-affiliated products by demographic profile

- A majority of respondents across all demographics agree that food labelling scheme products are safer to eat.
- Women (69%) are more likely to agree than men (63%).
- The 35-44 age group (69%) is more likely than both the 18-24 bracket (64%) and the 55-64 group (65%) to agree that these products are safer to eat.
- Economically active respondents (68%) are more likely to agree than those who are inactive (64%).
- Respondents who say they are coping (71%) are more likely than those who say they are living in comfortably (60%) , those finding it difficult (67%) and those finding it very difficult (60%) to say these products are safer to eat.
- Those with a high level of education (68%) are more likely than respondents with a low level (61%) to agree.
- 72% of respondents living in a household with children say these products are safer to eat, compared with 65% of those living in childless households.
- The same proportion (72%) of respondents living in households with vegetarians present agree, compared with 66% of those who live in meat-eater only households.
- All other groups of shoppers are more likely than ones who go to discount stores (62%) to say that these products are safer to eat. The comparative figure for marketplaces is 11 points higher at 72%.

Taste and flavour

Figure 81: Whether respondents think products affiliated to a food labelling scheme have a better taste or flavour



Q7.4: To what extent do you agree with the following statements about food labelling schemes?- Products affiliated to a food labelling scheme have a better taste or flavour.
Base: all respondents (19,260), EU15 (11,847), EU12 (6,909)

On this aspect of food labelling schemes, respondents are divided. 39% agree that products affiliated to a scheme taste better; whereas 42% disagree. A further 19% don't know. Five countries had majorities of their respondents agreeing with the statement. As with the other aspects explored in this sub-section, support is significantly higher in the EU12. Within this grouping almost half (48%) agree with the statement, compared with 36% in the EU15, where respondents are more likely to disagree (44% vs 33%). Levels of respondents choosing 'don't know' are broadly similar across both groupings (20% in the EU15, 19% in the EU12).

The EU12's higher levels of agreement are primarily driven by the fact that this grouping contains four of the five countries where the majority of respondents agree that scheme products taste better. These countries are: Bulgaria (67%), Slovakia (53%), Estonia (52%) and Romania (51%). Hungary (49%) and Poland (47%) also have agreement levels that are above the EU27+NO average.

The EU15's lower levels of agreement are mainly explained by the fact that agreement dips below 30% in five countries within the grouping. These are: Portugal (27%), Belgium (26%), Denmark (25%), Germany (25%) and the **Netherlands (15%- ten points lower than any other country)**. Moreover, in only one EU15 country (Italy, 53%) do the majority of respondents agree. Indeed, France (48%), Greece (43%), and Ireland (42%) are the only other EU15 countries where agreement exceeds 40%.

As already mentioned, the 'don't know' response rates are broadly similar across the two groupings, but exceed a quarter in five countries. These include Latvia (26%), Slovakia (also 26%), Finland (27%), the UK (28%) and Denmark (30%). This suggests that in certain countries in both the EU15 and EU12 there may be a need for greater information on the schemes that highlight quality or product origin.

Perceptions of scheme-affiliated products' taste and flavour by demographic profile

- Women (40%) are more likely than men (36%) to agree that these products taste better. Men, on the other hand, are more likely to disagree (46% vs 39% of women).
- The 25-34 year olds are more likely than every other age group (with the exception of the 35-44 bracket) to agree.
- Economically active respondents (40%) are more likely to agree that these products taste better than those who are inactive (35%).
- Respondents who say they are coping on their present income (42%) are more likely to agree than those who are living comfortably (34%), finding it difficult (38%) and finding it very difficult (36%).
- Those living in a household where children are present are more likely to agree (44% vs 37% living in childless households).
- Similarly, those living in households where vegetarians are present are also more likely to say these products taste better (49% vs 37% in households where there are not vegetarians).
- In a similar vein, respondents who live households with someone who has food allergies are more likely to agree that these products taste better than those living in a household where there is not someone with such allergies (42% vs 38%).
- Of all the types of shoppers those who shop at corner shops and marketplaces (both 44%) are the most likely to agree these products taste better. This compares with 39% of supermarket shoppers and 35% of discount store shoppers.
- Respondents who are aware of the origin label (46%) are more likely to agree than those aware of the health label (43%) and the animal welfare label (44%).

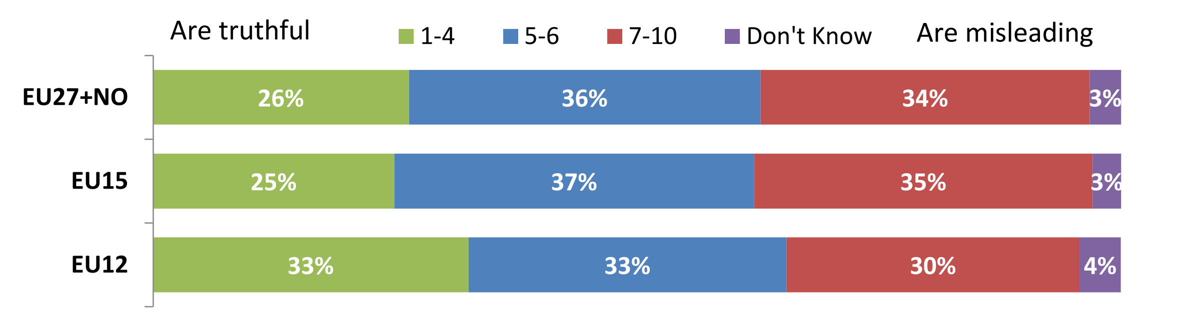
Whilst this sub-section has considered how respondents perceive those products which are affiliated to a scheme, the final sub-section to this chapter will examine respondents' perceptions of the labels themselves.

6.6 Perceived utility and credibility of food labelling schemes

To gauge perceptions of the utility and credibility of food labelling schemes, respondents were asked to place their responses on scale of 0 to 10, where 0 indicated that they agreed more with one of end of spectrum (e.g. truthful) and 10 represents more agreement with the other end (e.g. misleading). For the purposes of this sub-section’s analysis, this part of the report will focus on three groupings:, those responses falling into the 0 to 4 bracket (which indicate responses falling to one end of the spectrum), those in the 5 to 6 bracket (the neutral area) and those in the 7-10 bracket (representing responses toward the opposite end of the spectrum). The analysis will focus on whether respondents think labels are truthful, provide important information, are good value for money and help people make informed choices. As with previous sections, this one will first give an overview at the EU27+NO level before considering variations within the EU15 and EU12 country groupings and individual country level if appropriate.

Whether respondents think labels are truthful or misleading

Figure 82: Perceived truthfulness of labels by the EU27+NO, EU15 & EU12



Q8.2: Thinking in general about food labelling schemes, please position yourself on a scale ranging from 1 to 10 where 1 means you agree more with the opinion on the left and 10 means you agree more with the opinion on the right: B) Are truthful- Are misleading. Base: all respondents (19,260), EU15 (11,847), EU12 (6,909)

Across the EU27+NO, more respondents think labels are misleading than truthful. 34% think they’re misleading, compared to 26% who say they are truthful. Indeed, no country among those surveyed recorded more than 40% of its respondents saying they thought labels were truthful. EU12 respondents are more likely to say they think labels are truthful than those in the EU15 (33% vs 25%). EU15 respondents on the other hand, are more likely to say that labels are misleading (35% vs 30%). EU15 respondents are also more likely to place their responses in the neutral area of the spectrum (37% vs 33% in the EU12). Data gathered in the web listening exercise supports this:

> *There are lots of situations when food producers are not telling the truth. Manufacturers only wonder how to market their products to make consumers buy them in unlimited quantities with clear conscience.* forumowisko.pl

*Not every "**Znak przekreślonego kłosa" label guarantees that the product is gluten free**. In accordance with regulations, manufacturers must indicate gluten-free foods only with words "gluten-free (product) ". Unfortunately, this symbol also labels products with a low level of gluten*
bioslone.pl forum

Within the EU12, the higher levels of respondents saying they perceive labels to be truthful is primarily driven by above average proportions in Hungary (38%), Romania (37%) and Slovakia (35%). The Baltic countries, Poland, the Czech Republic and Slovenia with proportions ranging from 22% (in Slovenia) to 34% (in Estonia) fewer respondents who think labels are truthful.

In three EU12 countries more than 40% of their respondents are neutral. These are Estonia (41%), Slovakia (42%) and Latvia (45%). At 44% (the joint-highest figure among the 26 countries), Slovenia is the only EU12 country which has more than 40% of its respondents saying they find labels misleading.

Indeed, this sort of proportion of respondents saying that labels are misleading is more prevalent among the EU15. This sort of web testimony helps to explain why EU15 are generally more likely to say that labels are misleading:

*Food labelling in the UK is **deliberately deceptive**. Half the time 'sourced' means butchered in the UK but the animal will have been imported. So, the phrase 'sourced meat' is totally different from 'animals sourced'. It is an industry that is ripe with obfuscation.*
Pistonheads.com

Four countries - Austria (41%), the Netherlands (also 41%) Luxembourg (42%) and Germany (44%) - have similar proportions of respondents to Slovenia saying that labels are misleading. Along with the UK (37%), these four countries primarily drive the EU15's higher proportion of respondents placing their answers in the misleading bracket. However, some southern European countries in the EU15 also have above average levels of respondents who think that labels are truthful. These include: Spain (31%), Italy (31%), Portugal (32%) and Greece (34%). This indicates something of a difference between the more northerly EU15 countries and those in Europe's southern reaches.

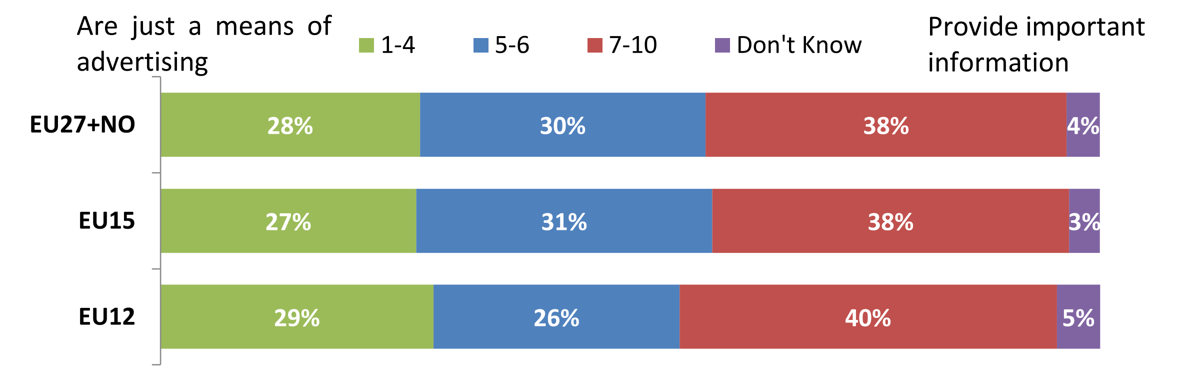
Whether respondents think labels are truthful or misleading by demographic profile

- Men (36%) are more likely than women (33%) to think labels are misleading
- The over sixty fives (37%) are the most likely of the age groups to think labels are misleading (compared to 33% of 18-24s). Whilst the younger age groups are more likely to think they are truthful; 30% of 18-24s and 28% of 25-34s think labels are truthful (compared to 24% of those aged 65+).

- Respondents who say they are coping on their present income (28%) are more likely than respondents in other income brackets to say that labels are truthful. This compares with 25% who are finding it very difficult.
- Those who say they are finding it very difficult on their present income (39%) are more likely than those coping (32%) to say labels are misleading.
- Those living in households where children are present (29%) are more likely to think labels are truthful than those who live in childless households (26%).
- Similarly, those living in households with vegetarians (30%) are more likely to say labels are truthful than those living in meat-eater only households (26%).
- Shoppers who go to discount stores (36%) and farmers & producers (37%) are more likely to say labels are misleading than those who go to marketplaces and corner shops (both 32%).

Whether respondents think labels provide important information

Figure 83: Perceptions of the importance of the information provided by labels by the EU27+NO, EU15 and EU12



Q8.3: Thinking in general about food labelling schemes, please position yourself on a scale ranging from 1 to 10 where 1 means you agree more with the opinion on the left and 10 means you agree more with the opinion on the right: C) Are just a means of advertising- Provide important information.

Overall more respondents think labels provide important information than are just a means of advertising (38% vs 28%). EU12 respondents are marginally more likely to say that labels are just a means of advertising (29% vs 27% in the EU15) but are also more likely to say that they provide important information (40% vs 38%). EU15 respondents therefore, are more likely to be neutral on this statement (31% vs 26%).

Within the EU12, the Baltics, the Czech Republic and Bulgaria primarily drive the EU12 higher proportion of respondents saying labels are just a means of advertising. Respondents in the Czech Republic (40%) and Lithuania (39%) are the most likely to say that labels are just a means of advertising across all countries surveyed. Latvia (33%) and Bulgaria (31%) also have proportions that are above the EU27+NO average.

Austria (38%) and Germany (38%) are the two EU15 countries which have the highest levels of respondents who think that labels are just a means of advertising. Further reinforcing this trend of higher levels of cynicism towards labels among certain members of the EU15, fellow neighbours of Germany- the Netherlands (32%) and Luxembourg (30%) - are the only other countries within this grouping whose proportions meet or exceed 30%.

The EU12 higher proportions of respondents saying that labels provide important information is driven by two countries whose figures exceed 40%, namely Romania (46%) and Hungary (also 46%). The fact that the EU12 most populous country (Poland) also meets the EU12 average of 40% further supports this grouping's figure.

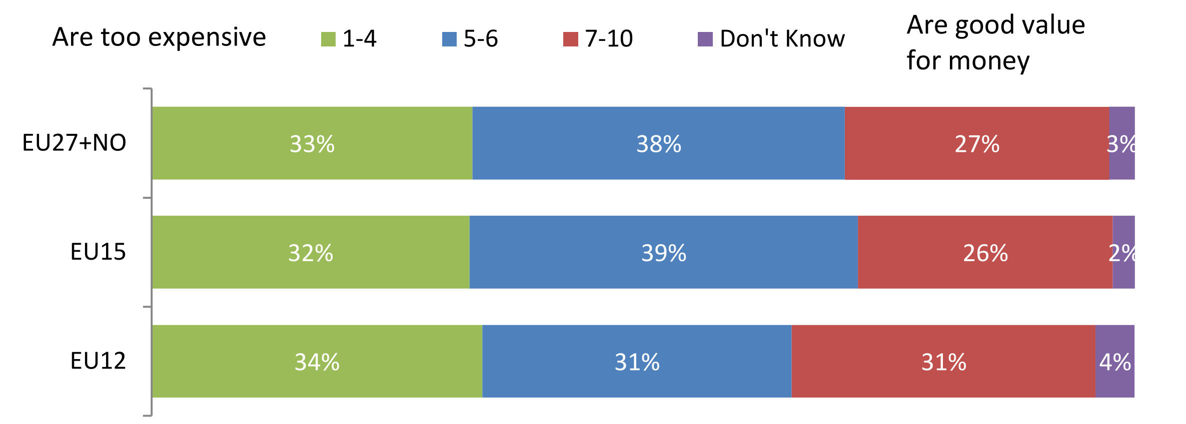
Respondents in the EU15 who tend to think labelling schemes are more a means of advertising are all neighbours of Germany and are found in Northern Europe. By contrast, those EU15 respondents saying labels provide important information are mainly found on the coasts of the Mediterranean. Spain (44%), Greece (also 44%), Italy (47%) and Portugal (49%) are all indicative of this trend. This trend is similar to what is observed with consumer trust on information shown on labels. As detailed at the beginning of this section in chapter 6.1, Mediterranean countries are more likely to say they trust information shown on labels showing affiliation to a scheme while central European countries (Germany, Netherlands, Austria) are less inclined to do so.

Perceptions on the importance of information provided on labels by demographic profile

- 30% of men (compared to 26% women) think labels are just a means of advertising. This reflects the findings of chapter 4.4.4. where men were found to be more likely than women to think that the origin, health and animal welfare labels' main meaning was just as a means to advertise.
- On the other hand, 43% of the over sixty fives (compared to 34% of 18-24s) think labels provide important information.
- Both brackets at either end of the income spectrum have similar views on whether labels are just a means of advertising. 32% of those saying they are living comfortably on their present income and 32% of those saying they are finding it very difficult think labels are a means of advertising. Whilst 40% of those coping and 40% of those finding it difficult say labels provide important information (compared to 35% of those living comfortably and 36% of those finding it very difficult). Again this is mirrored in chapter 4.4.4 findings' where those who say they are living comfortably are more likely than those in other income brackets to think that the origin, health and animal welfare labels are just a means of advertising.
- Shoppers who go to farmers and producers (31%) and those going to discount stores (also 31%) are more likely to say labels are just a means of advertising. This compares with 28% of supermarket shoppers.

Whether respondents think food labelling schemes provide good value for money

Figure 84: whether respondents think schemes provide good value for money



Q8.4: Thinking in general about food labelling schemes, please position yourself on a scale ranging from 1 to 10 where 1 means you agree more with the opinion on the left and 10 means you agree more with the opinion on the right: D) Are too expensive- Are good value for money
Base: EU27+NO (19,260), EU15 (11,847), EU12 (6,909)

Across the EU27+NO, around a third (33%) think products affiliated to schemes are expensive, whilst slightly fewer (27%) think they are good value for money. A plurality of respondents (38%) placed their responses in the neutral bracket. At 32% and 34% respectively, there are broadly similar proportions of EU15 and EU12 respondents saying that products affiliated to schemes are expensive. EU15 respondents are more likely to hold a neutral opinion (39% vs 31% in the EU12), whilst EU12 respondents are more likely to think that schemes provide good value for money (31% vs 26% in the EU15).

Five countries have more than 40% of their respondents who think schemes are expensive. These are: Slovenia (44%), Estonia (43%), Hungary (42%), Lithuania (40%) and Austria (40%). Whilst four of these countries are in the EU12, the populous Eastern European countries of Bulgaria (33%), Poland (32%) and Romania (30%) help to suppress the EU12's average and explain why there is no statistically significant variance between the two groupings. Indeed these three countries between them provided 62% of the EU12 responses that fell into the expensive bracket.

Within the 7 to 10 bracket indicating those responses that show greater agreement with the proposition that products affiliated to food labelling schemes provide good value for money, three eastern European countries drove the EU12's average. These were again the populous countries of Romania (38%), Bulgaria (33%) and Poland (32%). This is the principal explanation behind the EU12's higher average figure for this bracket.

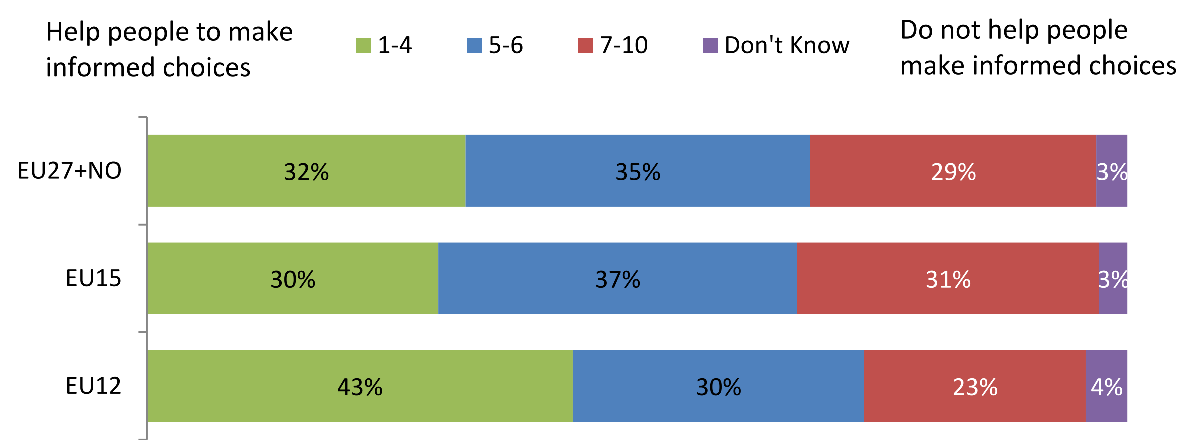
Among the EU15 countries, respondents in the Iberian Peninsula are more likely to think that products affiliated to schemes provide value for money; 31% in each of Spain and Portugal gave a rating between 7 to 10. Two other countries bordering the Mediterranean - France (29%) and Greece (30%) - are also above the EU15 average. As described further in the choice experiment analysis (chapter 7.3 of this section), respondents from Southern and Mediterranean countries tend to be more willing to pay for products with a label showing affiliation to an origin or health schemes than respondents from the Northern countries. This trend does not appear regarding products affiliated to an animal welfare schemes.

Whether respondents think food labelling schemes provide good value for money by demographic profile

- 34% of 18-24s say that products affiliated to schemes are expensive, compared with 29% of those aged over 65. Respondents aged over 65 are also more likely to be neutral on this question than any other age group. At 43%, the percentage of the over 65s in the neutral bracket is five points higher than any other age group and is eight points higher than the 18-24s (35% of whom think the same way).
- Unsurprisingly, respondents in the higher income brackets are more likely to say that products affiliated to schemes provide good value for money. 28% of those living comfortably on their present income think products affiliated to schemes provide good value for money, the same proportion of those coping share this view, whilst 24% of those finding it difficult say the same thing.
- More than four in ten respondents (44%) who say they are finding it difficult to cope on their present income think products affiliated to schemes are expensive compared 29% of those living comfortably.
- Respondents living in households where children are present are likely to say that schemes provide good value for money (29% vs 26% of those living in childless households).
- Similarly, those living in households with vegetarians are also more likely to say that products affiliated to schemes provide good value for money (31% vs 26% of those living in meat-eater only households).
- Shoppers who go to marketplaces and farmers & producers (both 29%) are more likely than other types of shoppers to say that products affiliated to schemes provide good value for money.

Whether respondents think food labelling schemes help people make informed choices

Figure 85: Whether respondents think schemes help people make informed choices



Q8.8: Thinking in general about food labelling schemes, please position yourself on a scale ranging from 1 to 10 where 1 means you agree more with the opinion on the left and 10 means you agree more with the opinion on the right: H) Help people to make informed choices about the food they buy- Do not help people make informed choices about what they buy.
Base: all respondents (19,260), EU15 (11,847), EU12 (6,909)

On this aspect of food labelling schemes, respondents are divided. 32% think schemes do help people make informed choices whilst 29% do not. A further 35% are neutral. When comparing the two country groupings, EU15 respondents are more likely to think that food labelling schemes do not help people to make informed choices (31% vs 23% in the EU12). This could be linked to the fact that EU15 respondents are more likely to say that they do not trust label information (explored in greater detail in sub-section 5.5.1). EU12 respondents are more likely to say that labels do help people to make informed choices (43% vs 30%). EU15 respondents are more likely to be neutral (37% vs 30% in the EU12).

The EU12's more positive attitude is primarily driven by four Eastern European countries. These include Bulgaria (52%- the only country where a majority say labels do help people make informed decisions), Slovakia (49%), Poland (46%) and Romania (44%). Furthermore, every EU12 country has a greater proportion of its respondents saying that labels do help people make informed choices than those who say they do not help. Indeed, the proportion of respondents saying labels do help only falls below 35% in Latvia (31%).

The EU15's slant towards saying labels do not help make informed choices is primarily explained by two of the biggest EU15 countries having figures that are above the EU27+NO average; France (37%) and Germany (39%). In addition, Austria (38%) and Belgium (33%) also have above average numbers of respondents saying that labels do not help.

Whether respondents think food labelling schemes help people make informed choices by demographic profile

- Women are slightly more likely than men to think that schemes do help people make informed choices. Roughly a third (33%) of women hold this view, compared to 31% of men.
- The middle age groups are more likely to think that schemes help people to make informed choices. 36% of 25-34s and 34% of 35-44s hold this view, compared to 28% of 55-64s and 30% of over 65s.
- Those respondents who are economically active are also more likely to think schemes help (34% vs 30% of those who are inactive).
- Roughly a third of respondents in all income brackets think schemes help. 31% of those living comfortably on their present income, 34% of those coping, 32% of those finding it difficult and 31% of those finding it very difficult hold this view.
- Respondents with a high level of education are more likely to take a neutral stance. 36% of this type of respondent has this view, compared to 32% of those with a low level of education.
- Respondents living in households where children are present are more likely to think that schemes help (35% vs 31% of those living in childless households).
- Respondents living in households where vegetarians are present are more likely to think that schemes help (37% vs 32% in meat eater only households).
- Similarly, respondents living in households where a food allergy sufferer is present are also more likely to think that schemes help (35% vs 32% of those living in households where food allergy sufferer is not present).

- Shoppers who go to corner shops are the most likely group to think that schemes help; 38% hold this view. This compares with 30% of discount shoppers (the group of shoppers least likely to think schemes help).

7 Consumer behaviour and purchasing decisions

This chapter examines the extent to which consumers take labelling schemes into account when buying food, and how often they buy products affiliated to food labelling schemes. This chapter also includes the analysis of the behavioural experiment that evaluates consumers' willingness to pay for products affiliated to labelling schemes as well as the barriers and drivers to purchasing products affiliated to food labelling schemes.

The bullet points below illustrate the key points from this chapter:

Taking scheme affiliation into account when shopping

- Food labelling scheme affiliation is the fifth most important factor of the nine included in the survey that respondents take into account when buying the six products which were analysed. Use by/ best before date, price, brand, and country of origin are taken into account more often by respondents.
- Minced beef is the product with the highest proportion saying they would take scheme affiliation into account. Respondents with this opinion are slightly more concentrated in the EU15.
- Almost four in ten say they would take scheme affiliation into account when buying eggs.
- Almost four in ten would also take scheme affiliation into account when buying chicken fillets; 36% in the EU12 and 38% in the EU15.
- Three in ten say they would do this for cheese, with EU12 respondents more likely than those in the EU15 to say they would take scheme affiliation into account when purchasing this product.
- Just under a quarter say they would take scheme affiliation into account when buying yoghurt. A third of EU12 respondents say they would do this, whilst only a fifth of EU15 respondents say they would.
- Only 18% of respondents say they take food labelling schemes into account when buying margarine. This is the lowest proportion of the products included in this survey.
- Those living with a food allergies sufferer are more likely to take scheme affiliation into account than those who do not on every product included in this study.

The frequency with which consumers buy scheme-affiliated products

- Four in ten (40%) respondents say that they buy scheme-affiliated products frequently (against fewer than two in ten - 18% - who seldom buy them). EU12 consumers are more likely to be frequent buyers than those from the EU15 (42% vs 39%).
- However, the largest proportion of respondents (42%) say they 'sometimes' buy these products.
- Women (42%) are more likely to be frequent buyers than men (37%).
- The oldest respondents (i.e. those aged 65+) are more likely to be frequent buyers (43% vs 37% of 18-24s).

- Those who say they're living comfortably on their present income (43%) or coping (42%) are substantially more likely than those who say they are finding things very difficult (32%) to say they buy these products frequently.
- Those living with a vegetarian are much more likely to buy these products frequently (57% vs 37% of those who live in meat-eater only households).

Willingness to pay for scheme-affiliated products

- Across all products, respondents are generally willing to pay a higher premium for products associated with a food labelling scheme than without.
- Mince beef products affiliated with an origin food labelling scheme are popular with respondents. 60% of respondents chose the origin scheme labelled products over unlabelled products at the highest price premium of 28%.
- Cheese products affiliated with origin scheme labels are also preferred by respondents; 50% of respondents chose the product affiliated with a labelling scheme at the highest price premium of 28%.
- The price premium increase was steeper for products associated with animal welfare label schemes than for the origin label schemes. This was to reflect price premiums in the market. Nevertheless, at a 20% price premium the proportion of consumers that chose chicken fillets affiliated with a food labelling scheme was 45%.
- A slightly higher proportion of respondents chose eggs associated with an animal welfare scheme than did for chicken fillets. In this case at a 20% price premium 50% chose the product affiliated with the food labelling scheme.
- Overall willingness to pay for products affiliated with a health labelling scheme is lower than for origin and animal welfare schemes. Only 37% of respondents chose the margarine product associated with a food labelling scheme at the highest price premium of 40%. Similarly with yoghurt, the proportion of respondents willing to pay the highest price premium for products associated with a food labelling scheme was 34%.

Barriers and drivers to purchasing scheme-affiliated products

- There is an income effect associated with willingness to pay for products affiliated with a food labelling scheme. Respondents who are finding it difficult to live on their present income are significantly less likely to pay a premium than respondents who are coping or living comfortably.
- Older respondents are more likely to be willing to pay a price premium for products associated with a food labelling scheme. The exception was products affiliated with health labelling schemes, where these products are more popular with the younger age groups in the experiment.
- Women are much more likely to pay a price premium for products associated with a food labelling scheme than men
- Respondents who live with vegetarians are more likely to pay a price premium for products affiliated with a labelling scheme than people who are themselves vegetarians.

7.1 Extent to which respondents take into account food labelling schemes when shopping

To examine the relative importance of a product being affiliated to a food labelling scheme, respondents were asked which of a list of nine factors they took into consideration when buying everyday produce. These nine factors included: the product's use by/ best before date, its price, the brand, its country of origin, its ingredients, the producer, any nutritional indications, the product's name as well as whether it was affiliated to a food labelling scheme. The question was asked for six products: minced beef, cheese, margarine, yoghurt, eggs and chicken fillets.

In this sub-section, after an initial summary, the data will be analysed for each product in turn, with the focus primarily being on the relative importance of food labelling scheme affiliation. Relevant comparisons of this factor's importance with other factors will also be made. As with other chapters the analysis will begin with first considering the variations at the EU15 and EU12 country grouping level before exploring the pertinent trends at an individual country level. Particular attention will also be paid to how those with food allergies or other dietary requirements use food labels. All data in this section (unless stated otherwise) is based on excluding those respondents who say they do not buy this product from the percentages that are reported on.

Substantial numbers of respondents take food labelling schemes into account when shopping. Of the nine factors surveyed it was the fifth most commonly cited factor across the six products. Food labelling affiliation is especially taken into account when buying chicken fillets (38% said they took lscheme affiliation into account), eggs (39%) and minced beef (41%). However, as the table below shows there are significant variations in the proportions of respondents taking scheme affiliation into account across the six products:

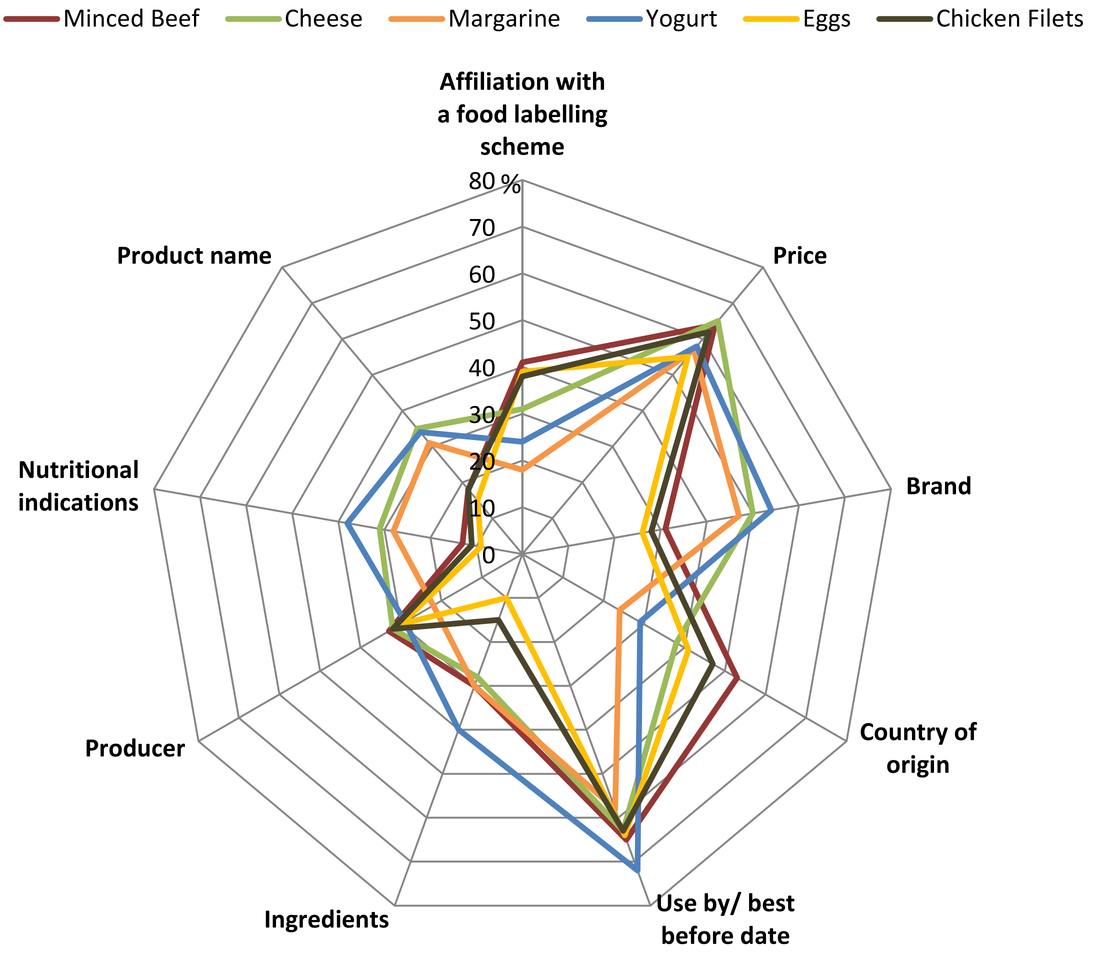
Table 28: The ranked relative importance of scheme affiliation by product

Factor	Minced beef	Cheese	Margarine	Yogurt	Eggs	Chicken filets
Affiliation to a food labelling scheme	4th	=7th	9th	9th	4th	4th
Use by/ best before date	1st	2nd	1st	1st	1st	1st
Price	2nd	1st	2nd	2nd	2nd	2nd
Brand	6th	3rd	3rd	3rd	6th	6th
Country of origin	3rd	4th	7th	=7th	3rd	3rd
Ingredients	7th	9th	5th	4th	8th	8th
Producer	5th	6th	8th	=7th	5th	5th
Nutritional indications	9th	=7th	6th	5th	9th	9th
Product name	8th	5th	4th	6th	7th	7th

Base: respondents who have bought these products: minced beef (16,252), cheese (18,808), margarine (14,537), yogurt (18,095), eggs (18,317), chicken filets (17,146)

Figure 86 graphically shows these variations in scheme affiliation's relative importance by product. Showing the data this way allows a rapid appreciation of each product's differences to be formulated. Each point on each of the products' lines represents the proportion of respondents who said they took that factor into account when buying that product.

Figure 86: The relative importance of scheme affiliation by product



Q2: Thinking about the food you have bought in the last 6 months, when buying the food products listed below, which of the following did you take into consideration?

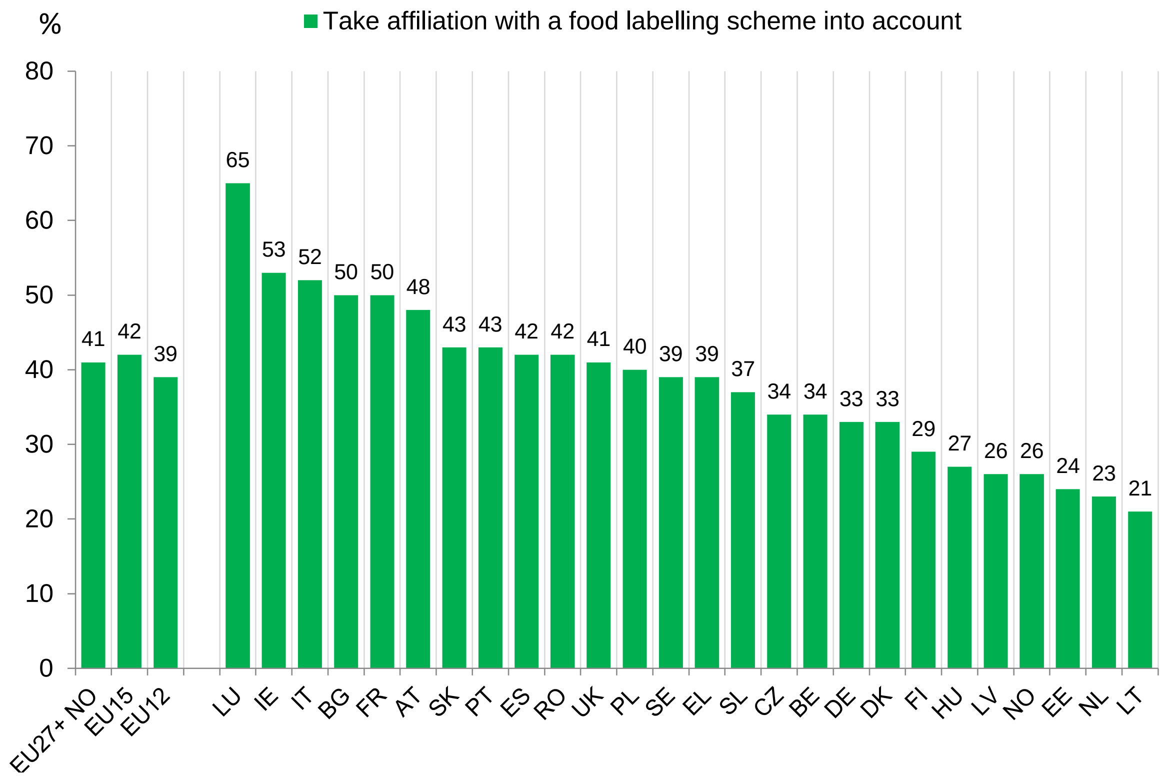
Base: respondents who have bought these products : minced beef (16,252), cheese (18,808), margarine (14,537), yogurt (18,095), eggs (18,317), chicken filets (17,146)

As this chart shows, whilst four in ten of those who buy eggs, minced beef or chicken fillets say they take food label affiliation into account, only 18% of those who buy margarine and 24% of those who buy yogurt say they also take them into account. The rest of this sub-section will consider these variations between the six products included in the survey.

Minced beef

As has been mentioned, minced beef is the product with the highest proportion of respondents saying they take scheme affiliation into account when buying it. Four in ten (41%) say they do this, compared with 65% who say they take the use by/ best before date into account and 64% who say they consider price. EU15 respondents are more likely to say they take scheme affiliation into account (42% compared with 39% of EU12 respondents). The figure below shows the varying degrees to which respondents in the surveyed countries take food labelling schemes into account when buying this product:

Figure 87: The extent to which respondents take scheme affiliation into account when buying minced beef



Q2.2: Thinking about the food you have bought in the last 6 months, when buying the food products listed below, which of the following did you take into consideration? Minced beef
Base: respondents who had bought minced beef (16,252), EU15 (13,097), EU12 (2,986)

As can be seen in the above chart, the EU15 higher relative average is primarily driven by four countries. These countries include France (50%), Italy (52%), Ireland (53%) and Luxembourg (65%). These four countries account for 41% of the EU15 respondents who say they would take this factor into account and so together are the main influence on the EU15 average. Within the EU15 grouping however, the Netherlands (23%) has a particularly low proportion of respondents saying they would take labels into account when purchasing minced beef.

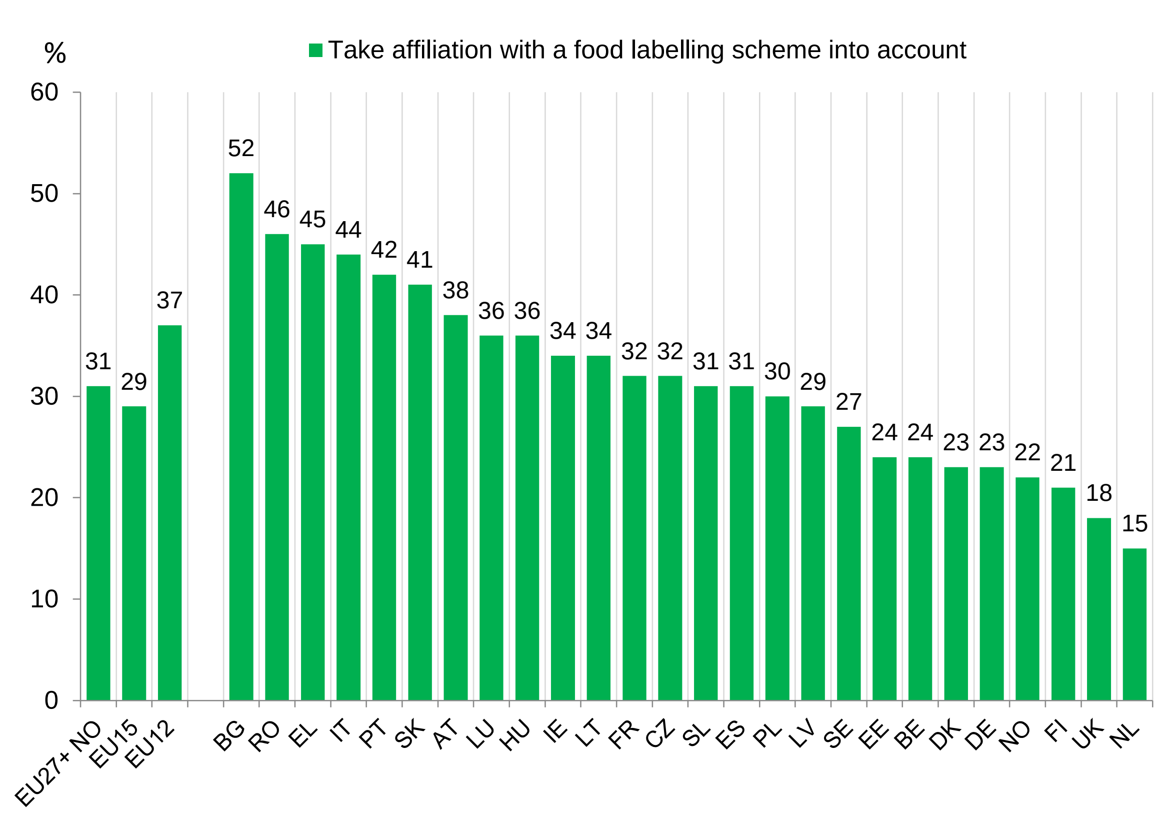
This lower proportion is mirrored in the EU12 by the three Baltic States Lithuania (21%), Estonia (24%) and Latvia (26%). These countries along with Hungary (27%) have the four lowest proportions of their respondents (among the EU12) saying they take scheme affiliation into account. However, Bulgaria (50%) has a proportion of its respondents saying they take scheme affiliation into account that is significantly above the EU27+NO average. The fact that it is the only EU12 country where this is the case is the primary reason behind the relatively lower average figure for this grouping.

EU12 respondents are more likely to take the producer (44% vs 31% in the EU15) and the product's ingredients into account (43% vs 28% in the EU15) when purchasing beef. The product's producer is especially likely to be taken into account by respondents in six EU12 countries, with proportions ranging from 40% in Latvia to 57% in Romania). Similarly, the product's ingredients are also particularly taken into account by six EU12 countries, with proportions ranging from 45% in Estonia to 56% in Bulgaria.

Cheese

Three in ten (31%) say they would take scheme affiliation into account when buying cheese. The top three factors taken into consideration are: price (65%), the use by/ best before date (63%) and brand (50%). EU12 respondents are more likely than those in the EU15 to say they would take scheme affiliation into account (37% vs 29%). The chart below demonstrates the variations by country:

Figure 88: The extent to which respondents take scheme affiliation into account when buying cheese



Q2.2: Thinking about the food you have bought in the last 6 months, when buying the food products listed below, which of the following did you take into consideration? Cheese
Base: respondents who buy cheese (18,808), EU15 (14,778), EU12 (3,851)

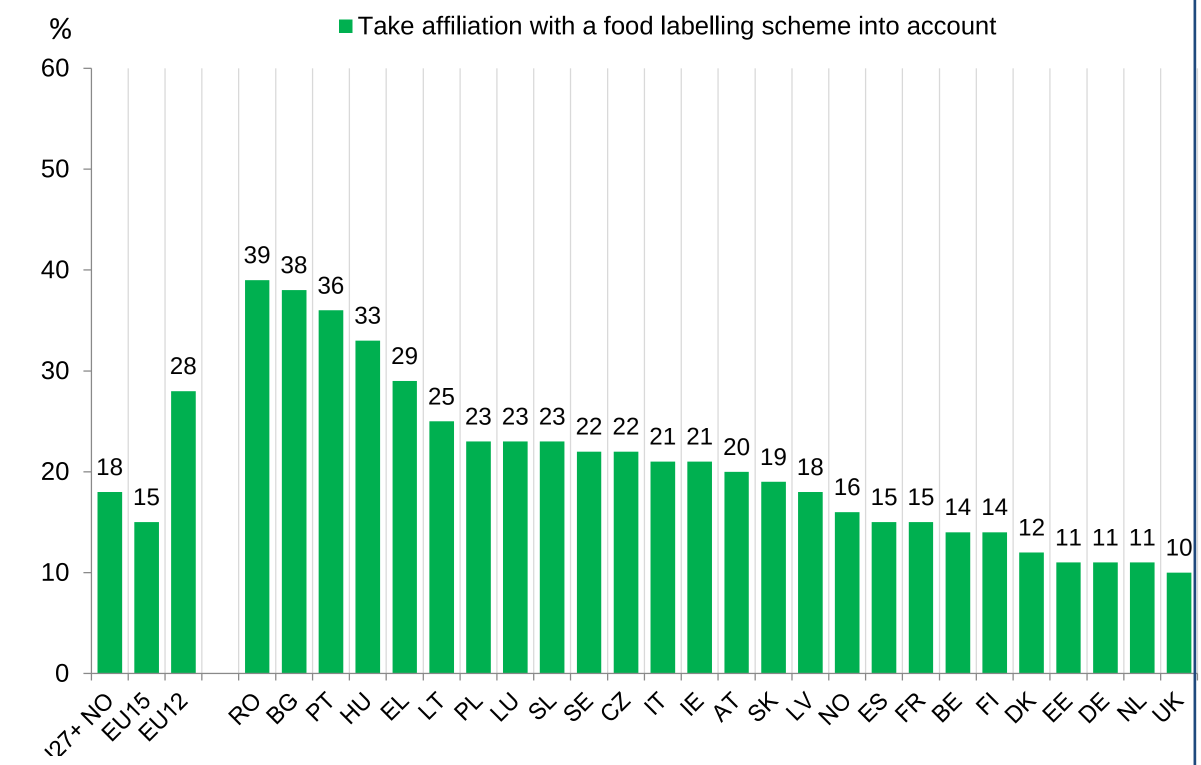
The EU12 higher average figure is primarily driven by five countries, all of which have significantly above average proportions of respondents saying they would take scheme affiliation into account when buying cheese. These countries include: Bulgaria (52%- the only country with a majority), Romania (46%), Slovakia (41%), Hungary (36%) and Lithuania (34%). Indeed, no EU12 country has fewer than 24% of its respondents say they take labels into account.

Whilst the EU15 does have a group (of mainly southern European countries) that have relatively high proportions saying they take labels into account, such as Greece (45%), Italy (44%) and Portugal (42%), six countries in this grouping have less than 24% of their respondents saying they take scheme affiliation into account. Proportions are particularly low in two northern European countries; the Netherlands (15%) and the UK (18%). Both these countries have proportions of respondents saying they take price into account (73% for the UK and 68% for the Netherlands) that are significantly above the EU15 average.

Margarine

At 18%, margarine is the product which has the lowest proportion of respondents saying they take labels into account when buying it. EU12 respondents are much more likely to take labels into account (28% vs 15% of EU15 respondents). However, it should also be noted that EU15 respondents are also more likely to say they do not buy this product (27% vs 17% of EU12 respondents). The figure below shows the variations in the proportions of respondents saying they take food labels into account when buying margarine:

Figure 89: The extent to which respondents take scheme affiliationinto account when buying margarine



Q2.3: Thinking about the food you have bought in the last 6 months, when buying the food products listed below, which of the following did you take into consideration? Margarine
Base: respondents who buy margarine (14,824), EU15 (11,154), EU12 (3,223)

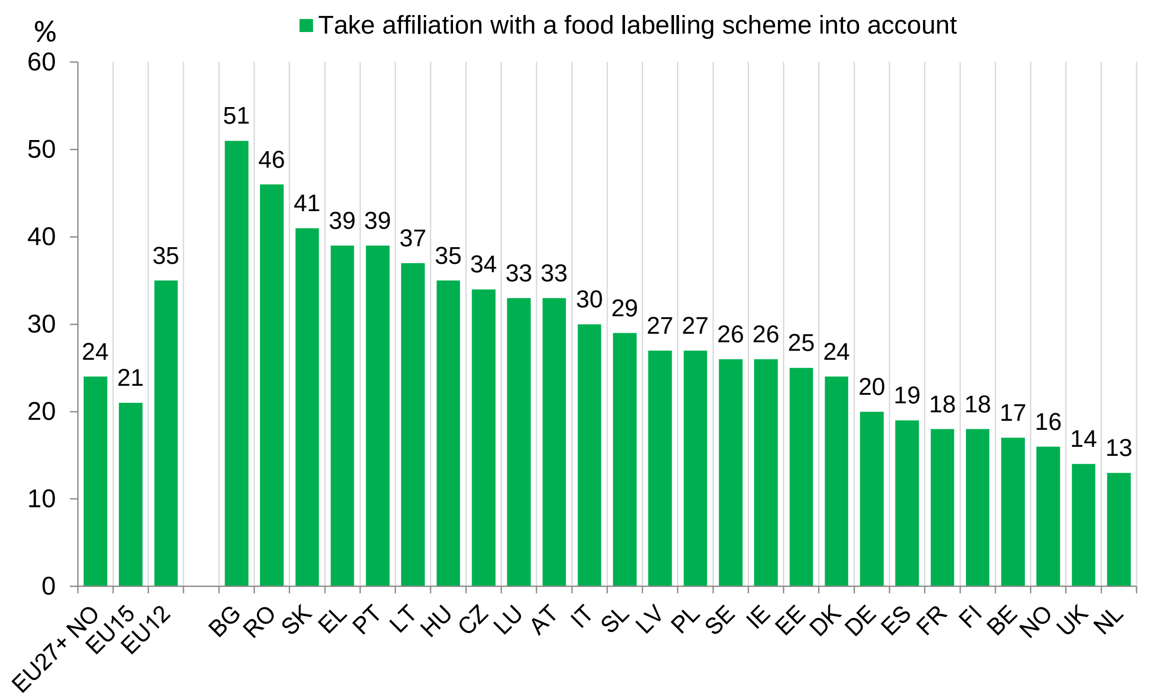
countries of Romania (39%) and Bulgaria (38%) as well as Hungary (33%). However, within this grouping the Baltic countries have smaller proportions of their respondents saying they take food labels into account. This is exemplified by Estonia (11%), Latvia (18%) and Lithuania (25%), all of which have similar proportions to many EU15 countries. In the websweep, the number of affiliation schemes found for margarine in these countries was limited. Only three were found in Hungary, one in Romania and none in Bulgaria. However eight were found in Poland and in the virtual online shopping exercise it was noticed that there were a particularly high number and wide range of margarine products in Poland compared to the other countries. Additionally, the proportion of respondents saying they do not buy this product is much lower in the EU12 (17%) than in the EU15 (27%). This proportion is particularly low in Hungary (8%). Therefore, the consumption of margarine seems much more prevalent in the EU12 than in the EU15 and this may be the main explanation behind the high proportion of respondents in the EU12 taking affiliation to a scheme into account when buying margarine.

Within the EU15, there are five northern European countries that act as the principal downward influence on the average proportion of EU15 respondents who say they take food labels into account when buying margarine. These include: France (15%), Denmark (12%) the Netherlands (11%), Germany (11%) and the UK (10%).Dutch and British respondents are more likely to cite price as a factor they take into account (59% of Dutch respondents and 67% of British respondents cited this factor). Respondents in the other three countries are not significantly more likely to say they take a particular factor into account than the EU27+NO average.

Yoghurt

After margarine, yoghurt is the product which attracts the lowest proportion of respondents saying they take food labels into account when buying it. The two most commonly cited factors by respondents that were taken into account when buying yoghurt are the use by/ best before date (72%) and the price (58%). Across the twenty six countries, 24% of respondents say they would take labels into account when buying yoghurt. This opinion is more heavily concentrated in the EU12 where over a third (35%) say they would, compared with a fifth (21%) of EU15 respondents. The figure below shows the individual country variations:

Figure 90: the extent to which respondents take scheme affiliationnto account when buying yoghurt



Q2.4: Thinking about the food you have bought in the last 6 months, when buying the food products listed below, which of the following did you take into consideration? Yogurt

Base: respondents who buy yogurt (18,119), EU15 (14,147), EU12 (3,796)

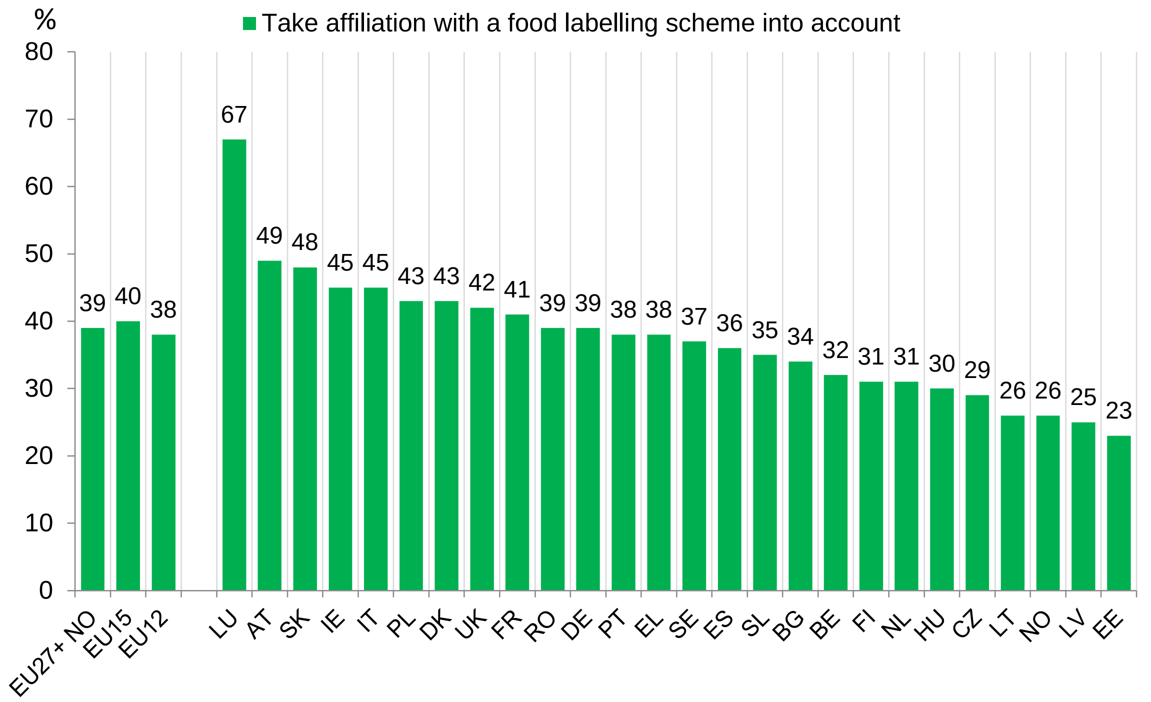
As this chart shows, the EU12's higher average figure is primarily driven by the fact that eight of the ten EU12 countries surveyed have significantly above average (i.e. above the EU27+NO figure) proportions of respondents saying they take labels into account when purchasing yogurt. Indeed, Bulgaria (51%) is the only country from among the twenty six which has a majority of its respondents expressing this opinion. In another seven EU12 countries, proportions for this opinion range from 27% in Poland to 46% in Romania. The two EU12 countries with lower proportions are the Baltic states of Latvia (27%) and Estonia (25%). Estonian respondents are more price conscious (71% cite this factor), whilst Latvian respondents are more likely to take ingredients (50%) and the producer (49%) into account.

These generally higher levels of respondents taking labels into account are mirrored by a group of southern European EU15 countries; namely, Greece (39%), Portugal (39%) and Italy (30%). However, northern European countries such as the Netherlands (13%), the UK (14%), Belgium (17%) and Finland (18%) all have relatively low proportions of their respondents saying they would take labels into account and this drives the EU15 average lower. Lower proportions in other populous countries like France (18%) and Germany (20%) also help to suppress this grouping's average.

Eggs

A substantial portion of respondents say they take labels into account when buying eggs. Indeed at 39%, this product has the second highest proportion of respondents saying they would take labels into account when buying it. Scheme affiliation is the fourth most often cited factor, behind country of origin (41%), price (55%) and use by/ best before date (64%). There is no statistically significant difference between the EU15 and EU12 groupings (this is the only one of two products in this survey where there is no statistical difference between these two groupings). Proportions across the two groupings taking scheme affiliation into account are broadly similar; 38% of EU12 consumers of this product said they would take scheme affiliation into account, along with 40% of EU15 respondents. The chart below demonstrates the variations between the countries included in the survey:

Figure 91: The extent to which respondents take scheme affiliation into accountwhen buying eggs



Q2.5: Thinking about the food you have bought in the last 6 months, when buying the food products listed below, which of the following did you take into consideration? Eggs
Base: respondents who buy eggs (18,178), EU15 (14,502), EU12 (3,638)

Proportions of respondents who take labels into account are particularly high (i.e. significantly above the EU27+NO average) in six countries, with proportions ranging from 43% in Poland, to 67% in Luxembourg. Four of these six countries are in the EU15 and the other two are in the EU12, thus helping to explain the slight slant towards the EU15 grouping when comparing the EU15's and EU12's averages.

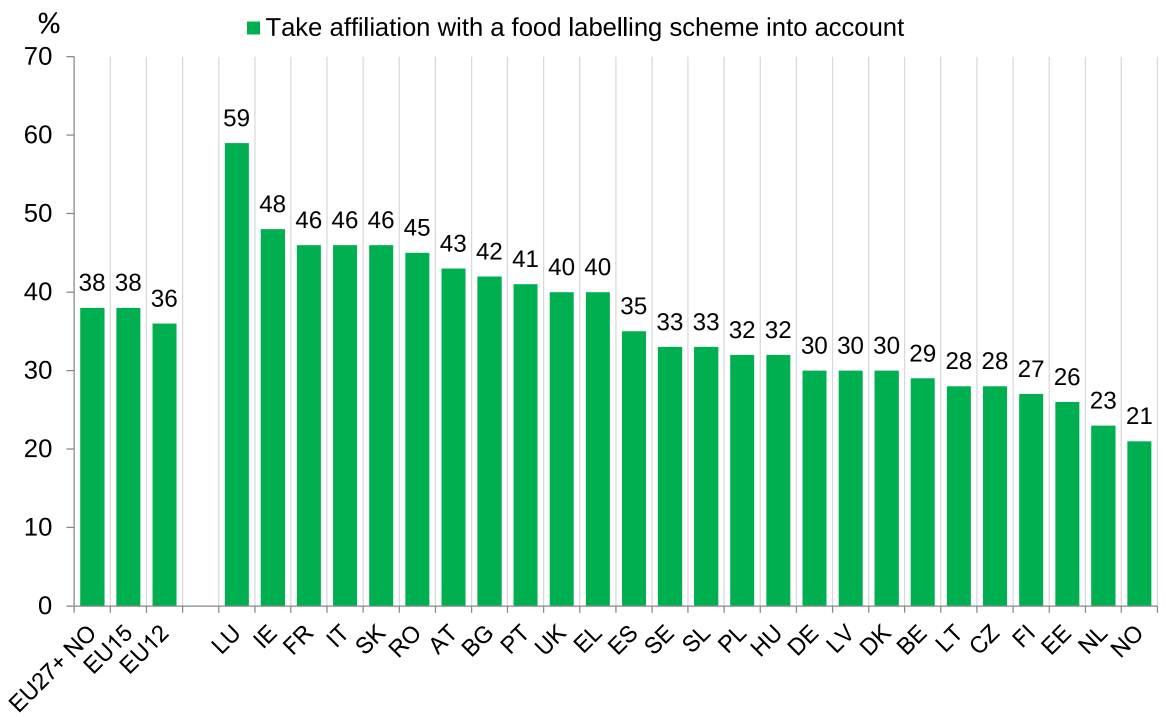
The proportion of respondents saying they would take labels into account does dip to around a quarter in three countries. All of which are in the Baltics. Estonia (23%), Latvia (25%) and Lithuania (26%) exemplify this trend and have the three lowest proportions of respondents saying they take labelling schemes into account when buying eggs, of all twenty six countries. These low figures could be partially explained by the fact that there seems to be higher numbers of respondents saying they would take price into account in these countries. Estonia (79%), Latvia (70%) and Lithuania (69%) all have significantly above average proportions of respondents saying they take this factor into account.

The websweep exercise does indicate that schemes relating to eggs are more prevalent in a number of the EU15 countries compared with EU12 countries. For example, there are 50 in Germany, 20 in in Austria, 15 in France and six of the 19 schemes in Ireland covered eggs. This may, partially explain why consumers in the EU15 are more likely to take this into account when buying eggs, but does not necessarily account for each individual country's results – in Luxembourg no schemes were found covering eggs.

Chicken fillets

Along with eggs, chicken fillets are the other product where there is no statistically significant difference between the proportions of EU12 and EU15 respondents taking scheme affiliation into account when purchasing. Across the twenty six countries, scheme affiliation is the fourth most common factor taken into account when buying chicken fillets. The use by/ best before date (63%), the price (62%), and the product's country of origin (47%) are taken into consideration more often. 36% of EU12 respondents say they would take this into account, compared with 38% of those in the EU15. However, EU12 respondents are more likely to take the use by/ best before date into account (68% vs 62%), the price (67% vs 60%), and the product's country of origin (52% vs 47%) as well as its producer (42% vs 29%). The chart below shows the variation among the surveyed countries in greater detail:

Figure 92: The extent to which respondents take scheme affiliation into account when buying chicken fillets



Q2.6: Thinking about the food you have bought in the last 6 months, when buying the food products listed below, which of the following did you take into consideration? Chicken filets
Base: respondents who buy chicken filets (17,146), EU15 (13,359), EU12 (3,622)

As can be seen from this chart, nine countries have proportions of their respondents saying they take scheme affiliation into account that are above the EU27+NO average. Figures in these countries range from 40% in Greece to 59% in Luxembourg, which also demonstrates a relatively wide geographical spread of these higher than average proportions.

However, these proportions dip below a quarter in six countries; again these are relatively widely geographically spread. Two are members of the EU12, three are part of the EU15 and the other is Norway. Proportions for this particular group range from 21% in Norway to 29% in Belgium (It's other members include the Czech Republic- 28%, Finland- 27%, Estonia- 26% and the Netherlands- 23%).In the websweep exercise, meat products had the highest number of schemes across Europe. The exercise didn't differentiate the type of meat. In Germany 67 schemes applicable to meat products were found, 33 in France, 12 in Ireland, 26 in the UK, 30 in Italy, 26 in Italy, 21 in Austria. As mentioned in the section about minced beef, only two labelling schemes for meat products were found in Bulgaria and one in Romania. However, as seen in section I, chapter 2, it is worth noting that in Romania only one food labelling scheme was found overall and five in Bulgaria.

The extent to which respondents take scheme affiliation into account when buying produce- from the point of view of those who have specific dietary requirements

Those living in a household with a food allergies sufferer are significantly more likely than those who don't to take food labelling scheme affiliation into account when buying every one of the products included in this study by the following margins:

- Minced beef: 45% vs 40%
- Cheese: 35% vs 30%
- Margarine: 22% vs 17%
- Yogurt: 27% vs 24%
- Eggs: 43% vs 39%
- Chicken filets: 41% vs 37%

Data collected as part of the web exercise corroborates these differences and illustrates the utility food allergy sufferers feel food labels have:

Deficiencies in food labelling worries allergists
There are deficiencies in food labelling. Sometimes there is no Swedish text on the food package, shows a control that Miljöförvaltningen in Malmö has done. It worries allergists who need to be sure of the content.

*Fortunately, more and more food manufacturers are aware of problems of people with celiac disease and try to obtain "**Znak przekreślonego kłosa"** certifications for their products…*
portalaktywni.pl forum

Fed up with politicians describing it as just a labelling issue. If you suffer from allergies then food labels are a health issue.#horsemeat

> *The other day I looked up on the website of Kalise the nutritional information about its yoghurts and it stated gluten free. So I ate one happily. And then I noticed that the label said that in the same factory they also produce products that contain gluten. So I wrote to them in outrage, telling them I have received an allergic reaction. […] What kind of a law allows you to label Gluten Free something that contains traces of gluten?*

> @TheFoodSnobUK i have a severe nut allergy, so accurate food labelling is very important to me!

> ***Other than the lack of clear labelling*** *I am loving my new vegetarian life*
> Cookveg.co.uk

A substantial proportion of these comments illustrate why accurate food labelling is particularly important to people with specific dietary requirements. However, some also show a level of frustration that can appear when products are incorrectly labelled, which can often more adversely affect this type of person than other members of the population.

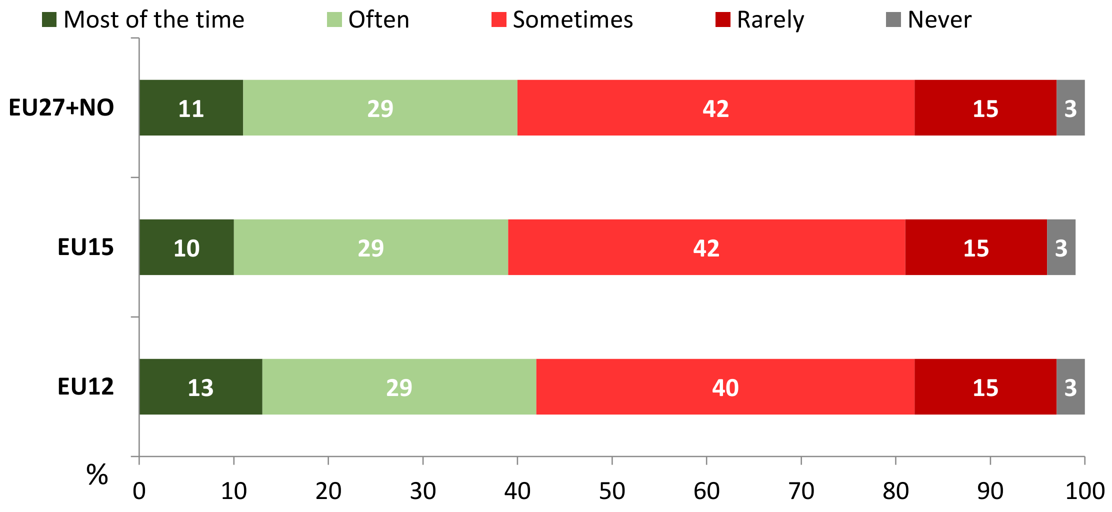
Whilst this section has dealt with how much of an influence the fact that products may or may not be affiliated to food labelling scheme can have on consumers' purchasing decisions, in the next sub-section, the report will move on to consider how frequently these products are bought in the surveyed countries.

7.2 Purchase frequency of products affiliated to food label schemes

Respondents were asked to place how often they bought scheme-affiliated products on a five point scale. Options ranged through from 'most of the time', to 'often', 'sometimes', 'rarely' to 'never'. Responses in the two options at either of the end of the scale were also grouped together. So respondents saying they bought these products 'most of the time' or 'often' will be described as 'frequent buyers', whilst those saying they buy them 'rarely' or 'never' will be described as 'seldom buyers'. Those who say they 'sometimes' buy these products will always be treated as a separate group. During the course of this section, 'seldom' and 'frequent' buyers will be referred to for the most part, with pertinent country-level trends in the individual response brackets discussed when appropriate.

The figure below shows the variations between the EU27+NO, EU15 and EU12 in the frequencies with which respondents buy scheme-affiliated products. The combination groups of 'seldom buyers' and 'frequent buyers' are also shown.

Figure 93: The frequency with which consumers buy scheme-affiliated products



Q6: In the last 6 months, how often would you say you have bought products affiliated to a food labelling scheme?
Base: all respondents (19,260), EU15 (11,847), EU12 (6,909)

Substantially more respondents (40%) fall into the frequent buyer grouping than those who form part of the seldom buyers group (18%). Indeed, across the 26 countries, only 3% of respondents say the never buy scheme-affiliated products. However, the largest group of respondents (42% a plurality) say they sometimes buy these products.

This mixed picture of buyers is supported by some of the data collected in the web listening exercise, with some saying they try to buy labelled products and others saying they do buy them, but not that often:

I always try to ***buy products with Fair trade label*** *or from* ***smaller organic farms****. For me it is important where my money goes.*
empatia.pl forum

I buy mostly our domestic products from farmers who themselves sell their crops. It sometimes happens that I buy something with ECO or BIO label but not very often.
dziecko-info.rodzice.pl forum

The relatively high number of respondents saying they buy these products frequently is fairly well split between the two country groupings. 42% of EU12 respondents are frequent buyers, compared with 39% of those in the EU15. EU12 buyers are more likely to buy these products most of the time (13% vs 10% of EU12 respondents).

Of the five countries who have majorities of their respondents saying that they frequently buy these products, four are in the EU15. These include Greece (52%), Luxembourg (also 52%), Portugal (56%) and Italy (at 59% the highest proportion of the countries surveyed). However, Greek, Luxembourger and Portuguese respondents only form 8% of total EU15 respondents for this question. So whilst these countries may have high proportions of their respondents identifying as frequent buyers, their relatively small populations suppress their impact on the wider EU15 average.

Romania (55%) is the only EU12 country where a majority of its respondents say they are frequent buyers. This is despite the fact that only one scheme was found to managed in Romania following the websweep. Two other EU12 countries also have above average proportions of their respondents saying they are frequent buyers. These are Slovakia (48%) and Bulgaria (49%). Slovakia has 14 schemes managed in its borders and Bulgaria has only 5. These three countries explain that slight difference in the proportions of frequent buyers between the two country groupings.

When it comes to buyers who seldom buy these products, numbers are similar across both groupings. 18% in both the EU15 and the EU12 say that they seldom buy these products. Moreover, reflecting this split between the two groupings, of the six countries with a quarter or more of their respondents saying they seldom buy these products, three are in the EU15 and three are in the EU12. Among the EU15 seldom buyers are particularly concentrated in the northern European countries of Denmark (25%), Belgium (28%), and the Netherlands (36%). This is despite Denmark (21 schemes) and Belgium (41 schemes) having more schemes managed in their borders than many of the EU12 countries which have high proportions of their respondents saying they buy products affiliated to a labelling scheme frequently. Meanwhile, within the EU12, proportions of seldom buyers are particularly high in the Czech Republic (25%) and the Baltic states of Estonia (32%) and Latvia (also 32%).

However, as was noted in the opening paragraph, relatively few respondents are in the 'never' bracket. Indeed, even among these six countries with higher levels of seldom buyers, the proportion of respondents saying they *never* buy these products does not exceed 10% (the Netherlands is highest with 9%). Therefore, most seldom buyers are to be found in the 'rarely' response bracket, with proportions for these six countries ranging from 22% in the Czech Republic to 27% in Estonia and the Netherlands.

As was also previously mentioned the largest proportion of respondents (42%) is found in the 'sometimes' response bracket. Again, similar proportions of respondents choosing this point on the scale are observable across the two country groupings, with 42% in the EU15 and 40% in the EU12 choosing this option (a difference that is not statistically significant). However six countries have above average proportions of their respondents in this bracket. Reflecting the geographical similarities, two are in the EU12, three are in the EU15 and the other is Norway. Proportions for these six countries range from 45% in Spain to 50% in Germany. These results are interesting as Spain (112 schemes) and Germany (181 schemes) were found to have the largest number of schemes operating in their borders following the web sweep. This would therefore perhaps imply that the market penetration rates in these two countries of scheme-affiliated products is not that high, despite the apparently high numbers of schemes operating in these two countries.

Frequency with which consumers buy scheme-affiliated products by demographic profile

- More women than men are frequent buyers of scheme affiliated products (42% vs 37% of men).
- People aged 65+ are the most likely to frequently buy scheme affiliated products (43% say they buy them often, compared with 37% of 18-24 year olds).
- Those living comfortably (43%), coping (42%) or finding it difficult (37%) are all more likely than those finding it very difficult (32%) to buy scheme affiliated products frequently.
- Similarly, those with medium and high levels of education (both 41%) are more likely than those with a low level of education (33%) to say that they buy these products frequently.
- Unsurprisingly, those respondents **living in a household where a vegetarian is present are twenty points more likely to say that they buy these products** frequently (57% vs 37% of those who live in meat-eater only households).
- Similarly, those respondents living in a household where a food allergy sufferer is present are more likely to say that they buy these products frequently (48% vs 38%).
- Shoppers who go to farmers/ producers are the most likely to say they buy these products frequently. 55% have this opinion compared with 40% of supermarket shoppers and 36% of discount store shoppers (the two groups with the lowest proportions).
- Respondents who feel they know enough about food labelling schemes are more likely to buy these products (52% vs 36% of those who feel they do not know enough).
- Similarly, those who trust the information on labels are also more likely to say that they buy these products frequently (51% vs 25% of those who say they do not trust this information).

7.3 Choice experiment analysis

The consumer choice experiment asked respondents to choose one of two products offered to them. Choices varied by type of product, whether or not the product carried a label showing affiliation with a food labelling scheme and by price. By observing participants' choices across different product/scheme label/price combinations, it is possible to estimate what proportion of respondents are willing to pay a premium for various products with scheme labels in the different product categories. The design of the experiment is discussed in the introduction section to this report.

The consumer experiment allows calculation of respondents' average willingness to pay (WTP) for a label showing affiliation with a food labelling scheme. This is defined as the extra amount consumers would pay for a product carrying such scheme labels as opposed to a product not carrying these scheme labels. This can be calculated by statistical analysis of the same experimental results. This was generated by means of a conditional logit regression model.

This method works by considering all of the choices made by participants between products affiliated with a food labelling scheme and products not affiliated with a food labelling scheme. By calculating the additional amount that participants were prepared to pay for the product affiliated with the labelling scheme, rather than the product without a scheme label, we derive a figure for the willingness to pay for a product with a scheme label. To calculate an overall average willingness to pay for the scheme labelled product for each country, we take an average across all of the decisions made by participants from each country. It is important to note, that scheme labels used in the experiment were not affiliated with any existing food labelling scheme. Generic scheme labels were used in the experiment to minimise biases that would have been introduced if we had used actual food labelling schemes. This could have arisen, for example, due to previous purchasing experience, media attention, marketing practices and other variables and conditions that could not be controlled in the experiment. It was important to maintain control in the experiment so that differences in willingness to pay for the different types of scheme labels across the different products could be isolated, measured and compared.

In general, willingness to pay for an object is the amount of money someone is willing to give up in order to own the object. In the context of this study the interest is not on how much respondents are willing to pay for yoghurt, minced beef or eggs, but how much *more* they would be willing to pay for the same product when it carries a label showing affiliation with a labelling scheme. Throughout the remainder of the study the term *willingness to pay for scheme labelled products* will be used to refer to the extra amount of money respondents are willing to spend in order to purchase the product carrying the scheme label as opposed to the same product not carrying the scheme label.

The average willingness to pay for scheme labelled products, as a percentage of base price, is summarised in Table 29 below. As can be seen in Table 29, average willingness to pay varies greatly between the surveyed countries and scheme labels category.

Table 29: Willingness to pay - overview (combined average for logo and text scheme labels), as a percentage of base price						
	Health		Origin		Animal welfare	
Country	Yoghurt	Margarine	Minced beef	Cheese	Chicken	Eggs
Austria	0%	5%	32%	28%	22%	28%
Belgium	10%	14%	23%	17%	22%	25%
Bulgaria	81%	49%	36%	47%	26%	32%
Czech Republic	15%	17%	33%	19%	17%	21%
Denmark	9%	0%	22%	17%	22%	29%
Estonia	15%	15%	22%	20%	9%	8%
Finland	21%	24%	24%	18%	18%	24%
France	0%	7%	38%	27%	24%	28%
Germany	0%	0%	30%	11%	25%	29%
Greece	27%	26%	36%	25%	27%	25%
Hungary	19%	23%	23%	21%	17%	18%
Ireland	17%	17%	28%	16%	20%	24%
Italy	16%	21%	43%	44%	34%	41%
Latvia	21%	23%	30%	23%	15%	15%
Lithuania	13%	15%	31%	21%	17%	18%
Luxembourg	0%	0%	45%	38%	37%	48%
Netherlands	17%	16%	13%	12%	17%	20%
Norway	16%	22%	18%	16%	14%	18%
Poland	29%	30%	30%	23%	26%	30%
Portugal	26%	25%	26%	29%	23%	21%
Romania	43%	37%	44%	41%	42%	49%
Slovakia	29%	31%	32%	25%	25%	27%
Slovenia	20%	27%	24%	25%	20%	23%
Spain	18%	28%	34%	22%	27%	30%
Sweden	13%	13%	36%	22%	32%	33%
UK	14%	14%	23%	15%	26%	25%
Total	19%	19%	30%	24%	23%	26%

Note: where highlighted, the willingness to pay is not statistically significant at the 10% level.
Source: consumer survey

In the sections that follow, the results for each type of labelling scheme will be outlined and discussed in greater detail.

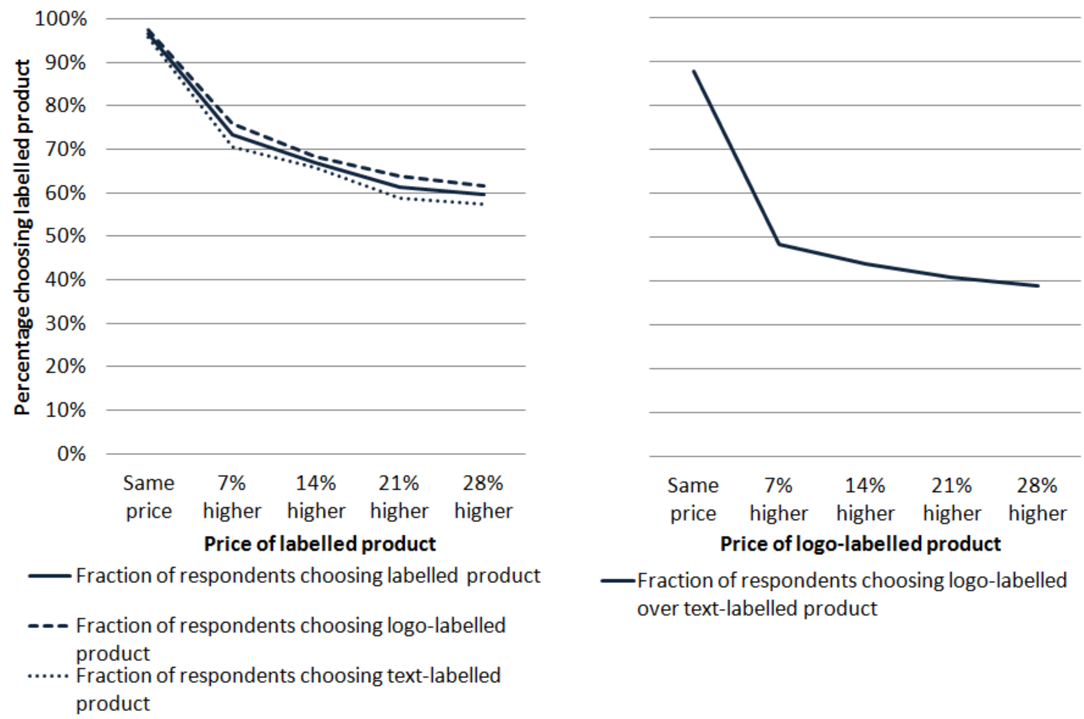
7.3.1 Origin scheme labels

Focusing on the origin labelling scheme first, the left-side graph in Figure 94 shows the results of experiments for origin scheme labelled minced beef where text- or logo-labelled products were compared to unlabelled products and consumers could choose to pay a premium for these labelled products. These graphs show three lines, where the middle line, called “labelled”, is an average of the other two. (The term “labelled” is used throughout this chapter to refer to scheme labels of either logo or text type as opposed to products showing neither). The right-side graph shows the results of experiments where consumers chose between scheme logo-labelled and scheme text-labelled minced beef. In these, the premium applied to the logo-labelled product.

Origin scheme labelled minced beef was very popular, even at the higher premium levels. The proportion of respondents choosing origin scheme labelled meat over unlabelled meat barely dropped below 60%, even at the highest premium. That is, even at a 28% price premium, the majority of respondents still selected the origin labelled minced beef.

Respondents to the survey also demonstrated a clear preference for logo labelled meat over text labelled meat with just fewer than 90% of all respondents selecting the logo labelled meat when offered a choice between the two products at the same price. However, even small increases in the price of the logo labelled option were sufficient to sway consumers towards selecting the text labelled product.

Figure 94: Proportion of respondents choosing scheme labelled beef versus the price premium, for different label types

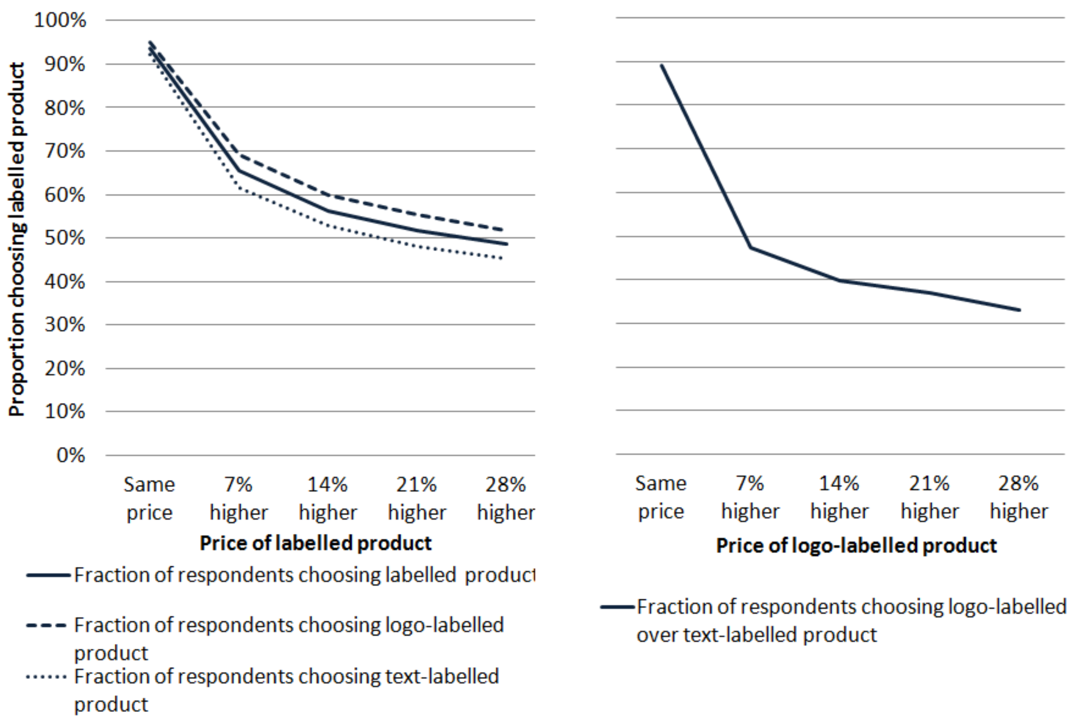


Note: Left graph shows label types versus unlabelled, right graph shows the two label types compared.
Source: consumer survey

The origin scheme labels on cheese were only slightly less popular than on minced beef. The proportion of consumers choosing these in preference to unlabelled products dropped to just below 50% at the highest price premium.

Once again respondents clearly preferred logo labelled products to text labelled products with roughly nine out of ten respondents selecting the logo labelled option when both were priced equally. However, as was the case with origin labelled minced beef, even small price increases of the logo labelled option lead to a large drop in respondents selecting this option.

Figure 95: Proportion of respondents choosing scheme labelled cheese versus the price premium, for different label types



Note: Left graph shows label types versus unlabelled, right graph shows the two label types compared.

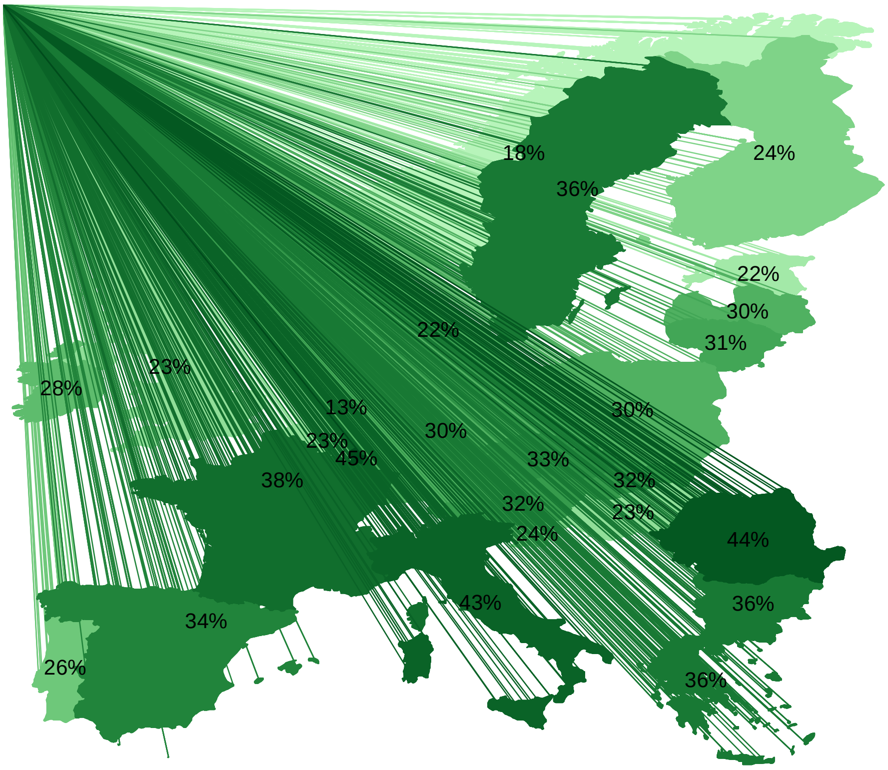
Source: consumer survey

Overall the findings on origin scheme labels in the experiment are in line with the existing literature. For example, a previous study on origin scheme labelled beef by Loureiro and Umberger (2003) also reported strong support in terms of willingness to pay for meat with origin scheme labels.

Similarly, a 2012 study by the European Consumer Organisation (BEUC), surveying consumers in four EU countries (Austria, France, Poland and Sweden) on their attitudes towards origin food scheme labels finds that generally around two thirds of consumers in these countries find origin to be an important factor in their purchasing decisions, potentially leading to higher willingness to pay.

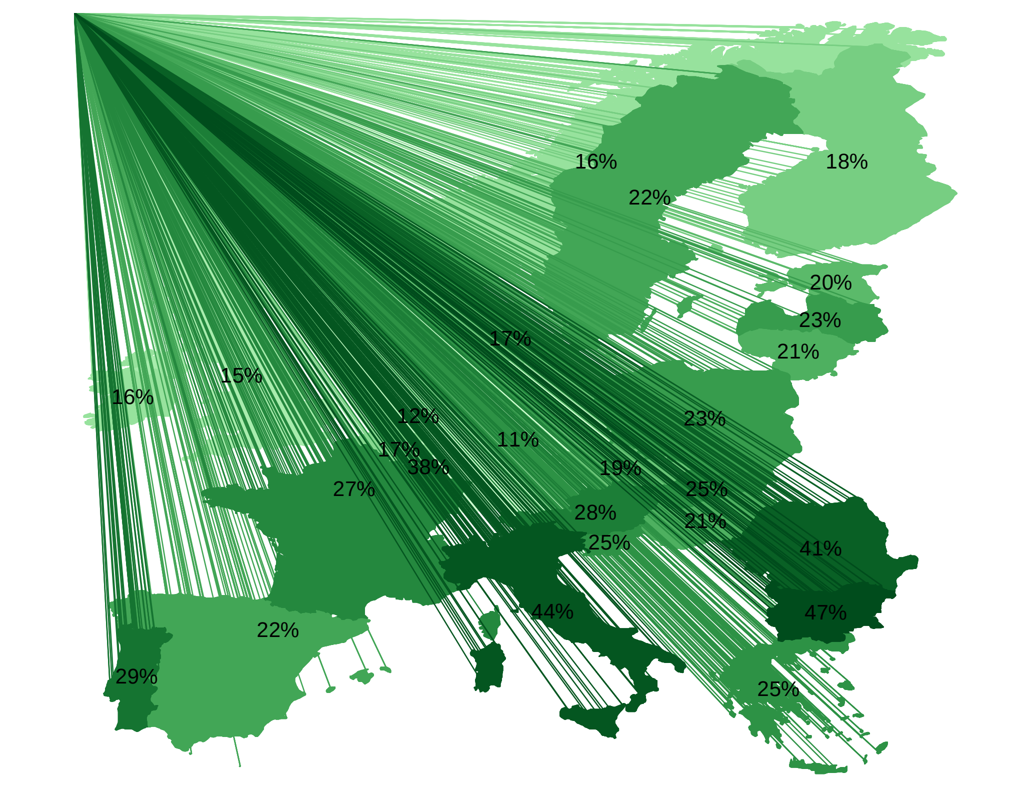
As we can see in the two maps below, our study finds that in the case of minced beef affiliated with a food labelling scheme respondents from Romania and Italy have the highest willingness to pay, while for cheese affiliated with a food labelling scheme respondents from Italy and Bulgaria have the highest willingness to pay, relative to the base price.

Figure 96: Map showing WTP for origin scheme labelled minced beef, as a percentage of base price



Note: All figures in this graph are statistically significant at the 10% level.
Source: consumer survey

Figure 97: Map showing WTP for origin scheme labelled cheese, as a percentage of base price



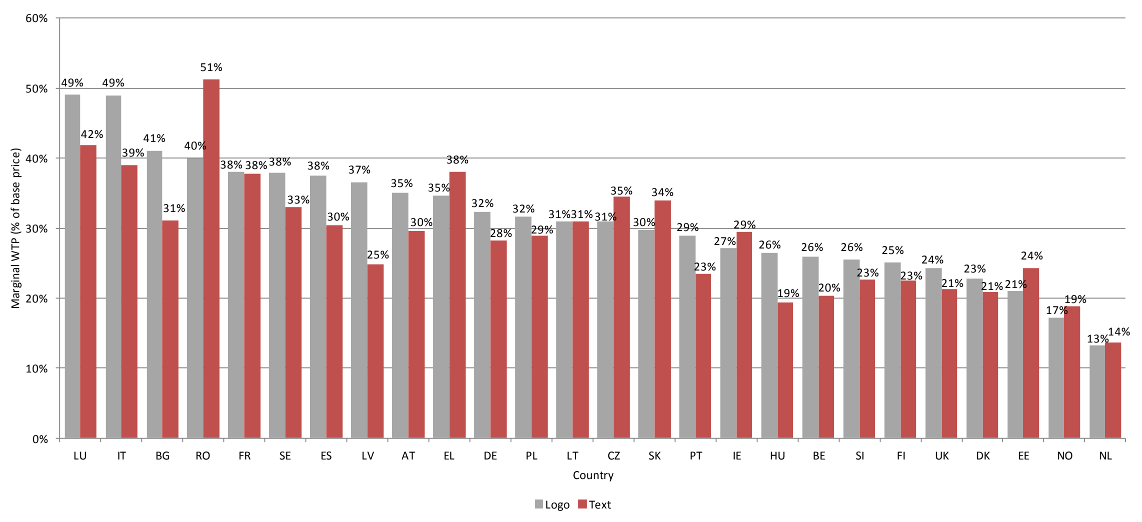
Note: All figures in this graph are statistically significant at the 10% level.
Source: consumer survey

EU labelling schemes of origin indication, which are most common in Southern Europe, have in particular been popularised and used as a means of product differentiation for otherwise often unbranded or generic agricultural products (Verbeke and Roosen, 2009). As they have tended to build on a long history of regional and traditional specialities, especially in southern European countries (Teuber, 2010) this may explain why in some of these countries consumers' have relatively higher willingness to pay for these products and their perception of them as being of high quality.

More generally, the importance of the identification of the product as local by a label has been confirmed by Suryanata (1999) in the American context for the case of pineapples and macadamia nuts in Hawaii. This factor is also shown to be an important determinant in a study by Loreiro and Hine (2001). Using a contingent valuation survey, the authors show that consumers in the state of Colorado were willing to pay most for "Colorado grown" potatoes. Similarly, Loureiro and McCluskey (2000) calculated the willingness to pay for fresh meat products, in this case 'Galician Veal' in Spain. They find that the PGI label works as a signal of high-quality that can, to some extent, obtain a premium. In a similar study, Jekanowski, Williams, and Schiek (2000) conducted a survey in Indiana about local products, showing that quality perceptions play an important role toward consumer acceptance of these products.

Willingness to pay for origin scheme labels on minced beef confirms the general trend and is displayed below in Figure 98. We observe eight cases where a higher willingness to pay exists for text-labelled products with logo-labelled products gaining a higher willingness to pay in the remaining 17 countries.

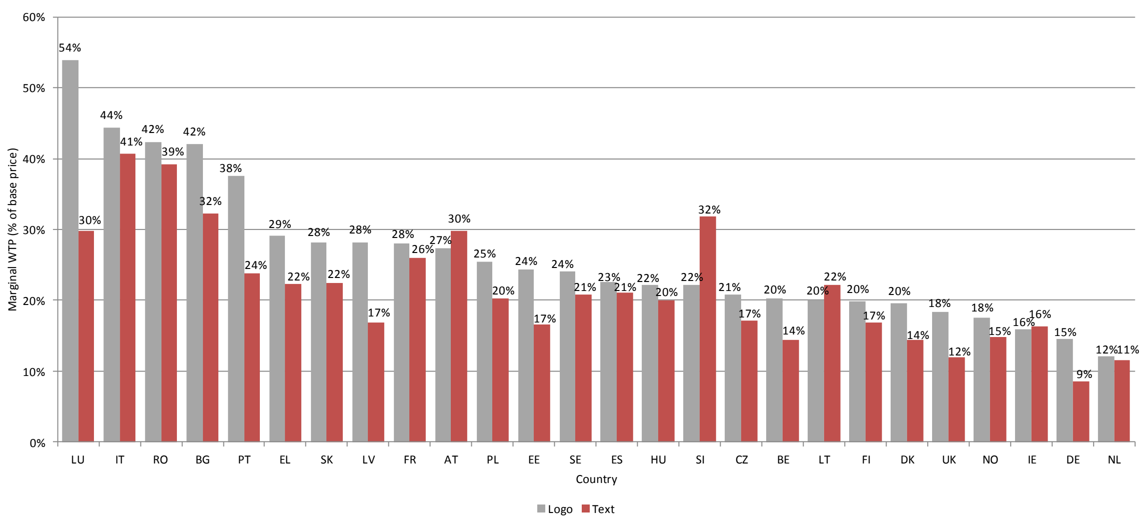
Figure 98: WTP for an origin scheme label on minced beef, by country (logo and text), as a percentage of base price



Source: consumer survey

In the case of cheese affiliated with an origin scheme label, we observe a similar pattern. That is, in all countries except Austria and Slovenia, willingness to pay for food scheme labels with a logo is greater than with text only.

Figure 99: WTP for an origin scheme label on cheese, by country (logo and text), as a percentage of base price



Note: All figures in this graph are statistically significant at the 10% level.
Source: consumer survey

7.3.2 Animal welfare scheme labels

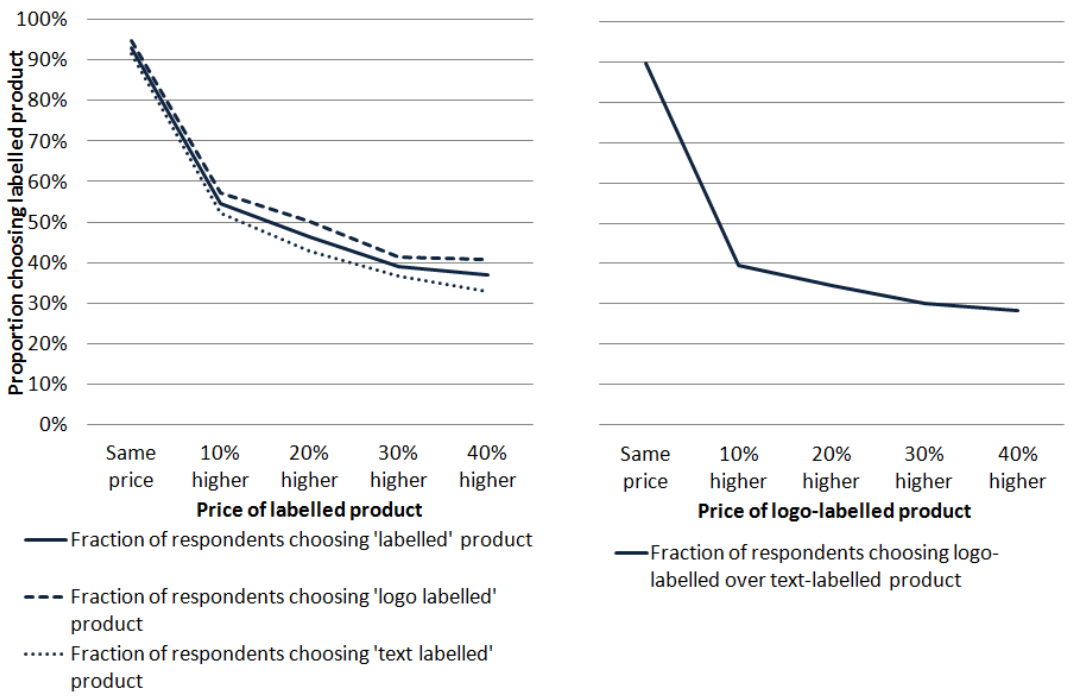
Figure 100 depicts the proportion of respondents willing to pay a premium for animal welfare scheme labelled chicken fillets as a function of the price premium.

It is important to note that the price premium increased more steeply for animal welfare scheme labelled chicken than it did for origin scheme labelled products. This steeper increase in price was implemented because the mark-up for animal welfare scheme labelled chicken in the market place tends to be significantly larger than the mark-up charged for origin scheme labelled products.

As a result of this steeper increase in price, fewer than 40% of all respondents still chose the animal welfare scheme labelled chicken fillet at the highest price premium. At a 20% price increase however, we see that again roughly half of all respondents still select the animal welfare labelled product, as was the case for origin labelled products.

As origin scheme labelled products, products with animal welfare scheme labels that include a logo are by far the more popular at equal price, but even small increases in price result in more than half of all respondents selecting the text labelled option..

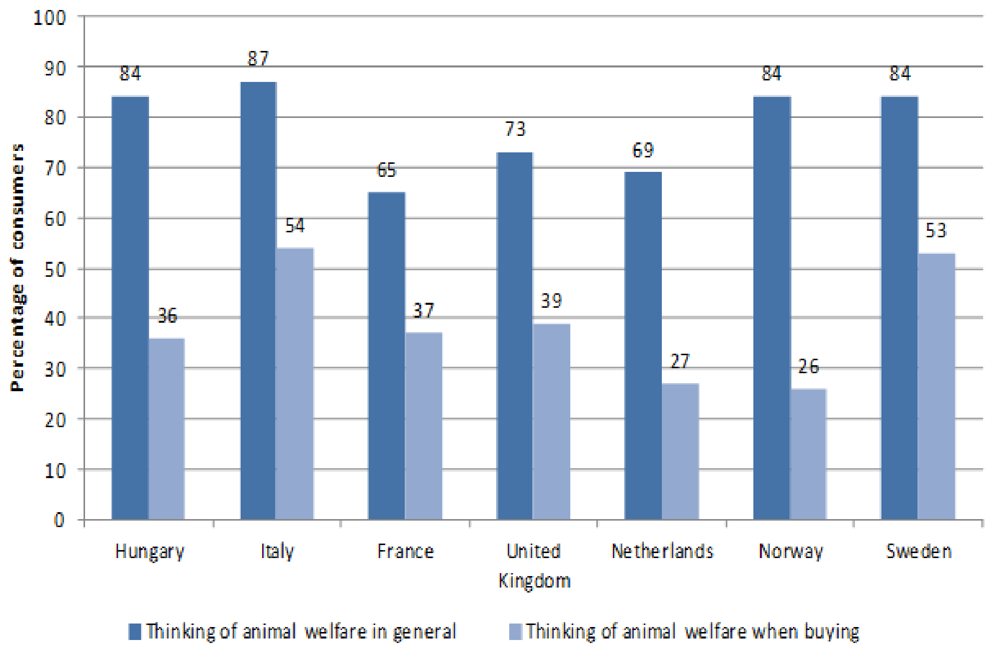
Figure 100: Proportion of respondents choosing scheme labelled chicken versus the price premium, for different label types



Note: Left graph shows label types versus unlabelled, right graph shows the two label types compared.
Source: consumer survey

Overall the numbers found here are in line with the existing literature we identified on animal welfare scheme labels. According to the special Eurobarometer 270 'Attitudes of EU citizens towards Animal Welfare' and the Welfare Quality Report 'Attitudes of Consumers, Retailers and Producers to Farm Animal Welfare' (2007) the majority of consumers reported animal welfare to be either important or very important. However, as shown in Figure 101 below, the same consumers who state they were interested in animal welfare in general do not necessarily think about animal welfare while shopping. Nonetheless, the survey found that between 26% and 54% of all respondents do think about animal welfare while shopping and these figures are in line with the 39% of respondents who are willing to pay a 40% premium.

Figure 101: General interest in animal welfare (among all) and thinking of animal welfare when buying meat (among those buying meat)

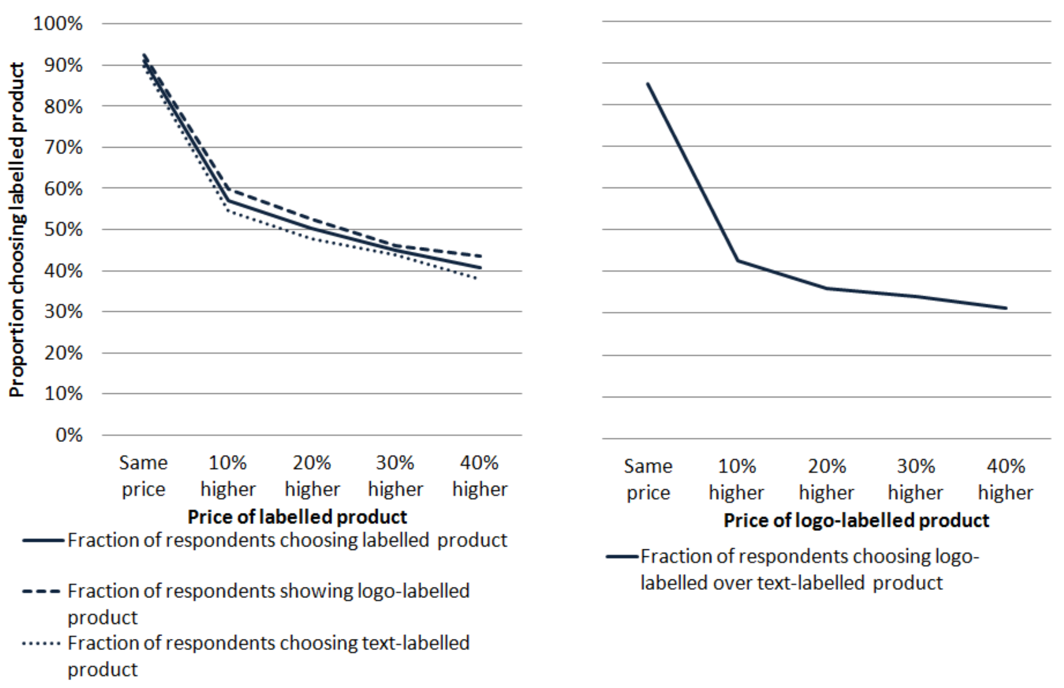


***Source:** Welfare Quality® population survey. Available at: http://www.animalwelfareplatform.eu/documents/ProjOutput-consumerconcerns.pdf*

Interestingly, a slightly higher proportion of respondents chose the more expensive, animal welfare scheme labelled eggs than picked the animal welfare scheme labelled chicken. There was a consistent difference of around three or four percentage points between these two animal welfare scheme labelled products.

However, it is also worth noting at this point that vegetarians were not shown the animal welfare scheme labelled chicken fillets, but they were shown the animal welfare labelled eggs. Considering that vegetarians are significantly more likely to pay more for animal welfare labelled products (more on this in Section 7.4) this finding may be due to a compositional effect.

Figure 102: Proportion of respondents choosing scheme labelled eggs versus the price premium, for different label types



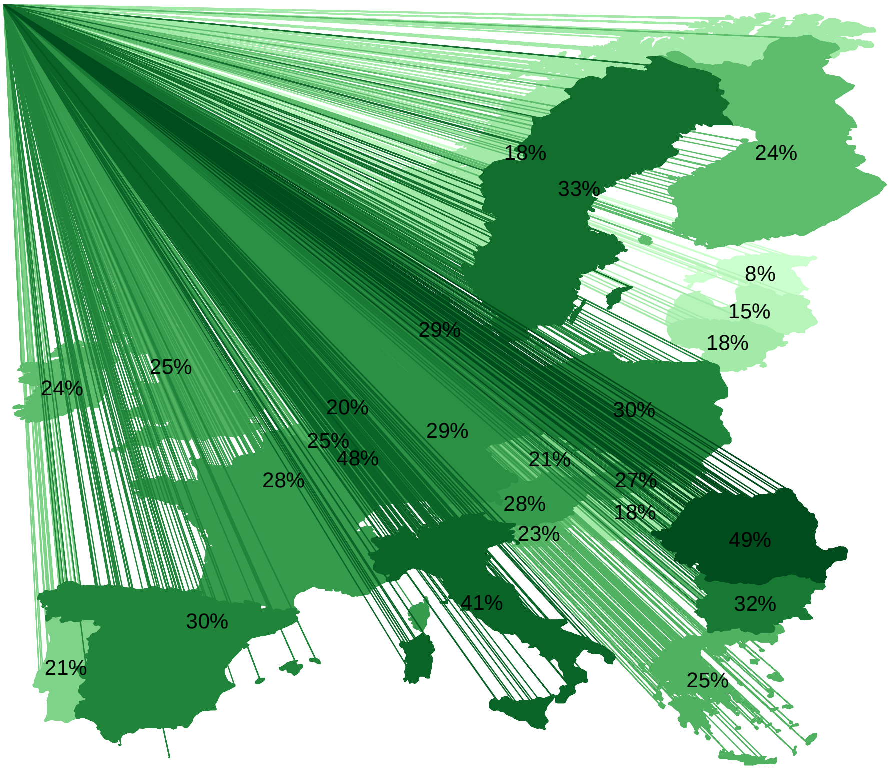
Note: Left graph shows label types versus unlabelled, right graph shows the two label types compared.
Source: consumer survey

To date there is relatively little evidence on how high a premium consumers would be willing to pay for animal welfare scheme labelled products. The '*Feasibility study on animal welfare labelling and establishing a Community Reference Centre for Animal Protection and Welfare'* commissioned by the European Commission DG SANCO analyses the possible effects of the introduction of EU wide animal welfare labels. The authors consider two different labelling options: mandatory labelling and requirements for the voluntary use of claims. This feasibility study came to the conclusion that labelling is likely to have the desired effects if consumers are a) adequately informed on the meaning of the label; b) the information provided is readily understandable; and c) consumers (or relevant subgroups) are in principle interested in having this information available for their purchasing decisions.

The special Eurobarometer 270 '*Attitudes of EU citizens towards Animal Welfare'* and the Welfare Quality Report '*Attitudes of Consumers, Retailers and Producers to Farm Animal Welfare'* (2007 mentioned previously also suggests that the majority of consumers are concerned about animal welfare (the majority considering it important or very important) which should translate into high willingness to pay.

However, what is illustrated by the map in Figure 103 is a rather varied trend in willingness to pay for animal welfare scheme labelled eggs, one of the products used with the animal welfare labelling scheme in the experiment. Highest WTP relative to the base price is displayed in Romania, Luxembourg and Italy.

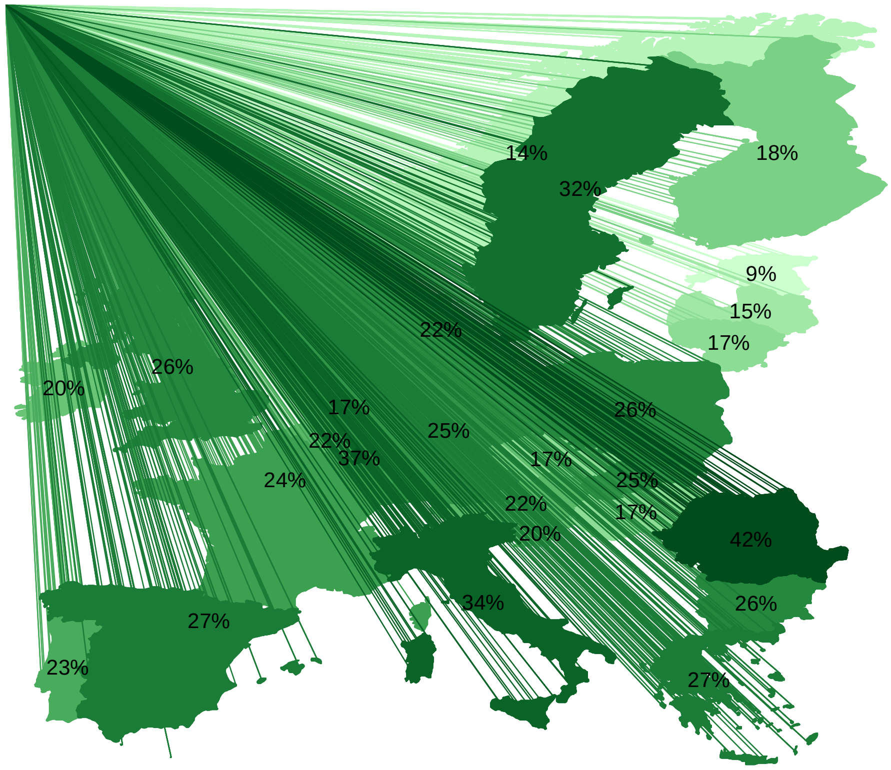
Figure 103: Map showing WTP for animal welfare scheme labelled eggs, as a percentage of base price



Note: All figures in this graph are statistically significant at the 10% level.
Source: consumer survey

In the case of chicken fillets affiliated with a food labelling scheme, the figure below shows that a similar picture emerges for chicken as for eggs, where we observe highest WTP relative to base price in Romania, Italy and Luxembourg.

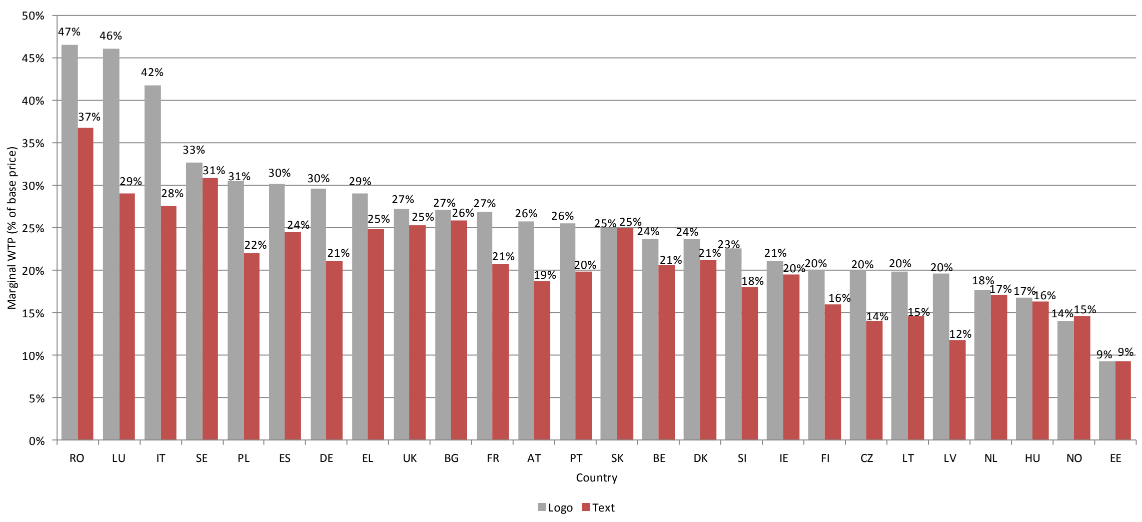
Figure 104: Map showing WTP for animal welfare scheme labelled chicken fillets, as a percentage of base price



Note: All figures in this graph are statistically significant at the 10% level.
Source: consumer survey

Willingness to pay for animal welfare scheme labels on chicken fillets split by logo and text labels displayed below again confirms the general trend that scheme labels that include logos attract higher WTP over text only scheme labels. However, an exception to this rule seems to be Norway as the only country whose respondents would pay more for a text scheme label than for a logo scheme label on animal welfare scheme labelled chicken. However, this difference is very small.

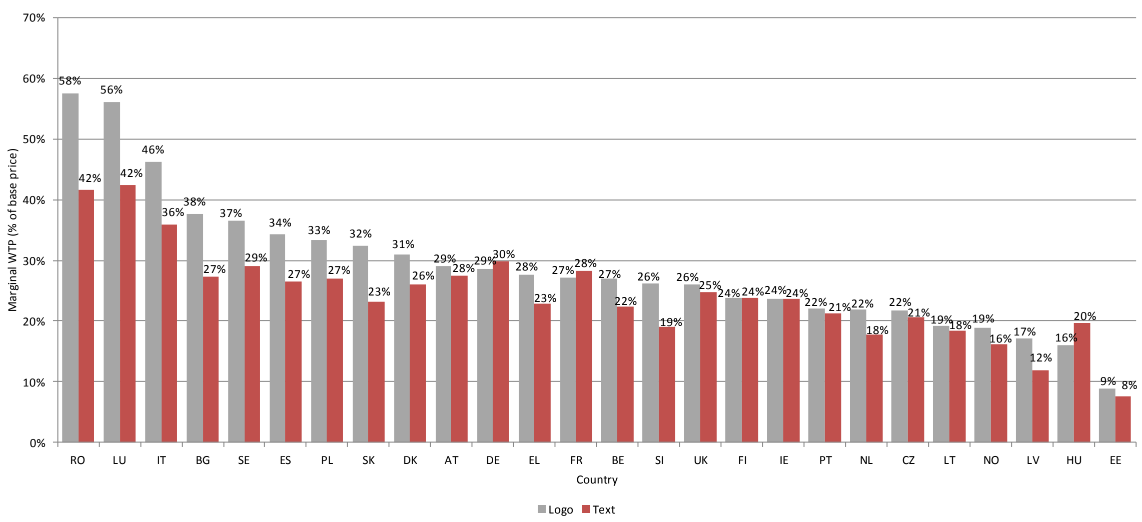
Figure 105: WTP for an animal welfare scheme label on chicken, as a percentage of base price



Note: All figures in this graph are statistically significant at the 10% level.
Source: consumer survey

For eggs affiliated with an animal welfare label scheme, we find that in all countries WTP for products with a logo scheme label is higher than that for a text scheme label except for Hungary.

Figure 106: WTP for an animal welfare scheme label on eggs, as a percentage of base price



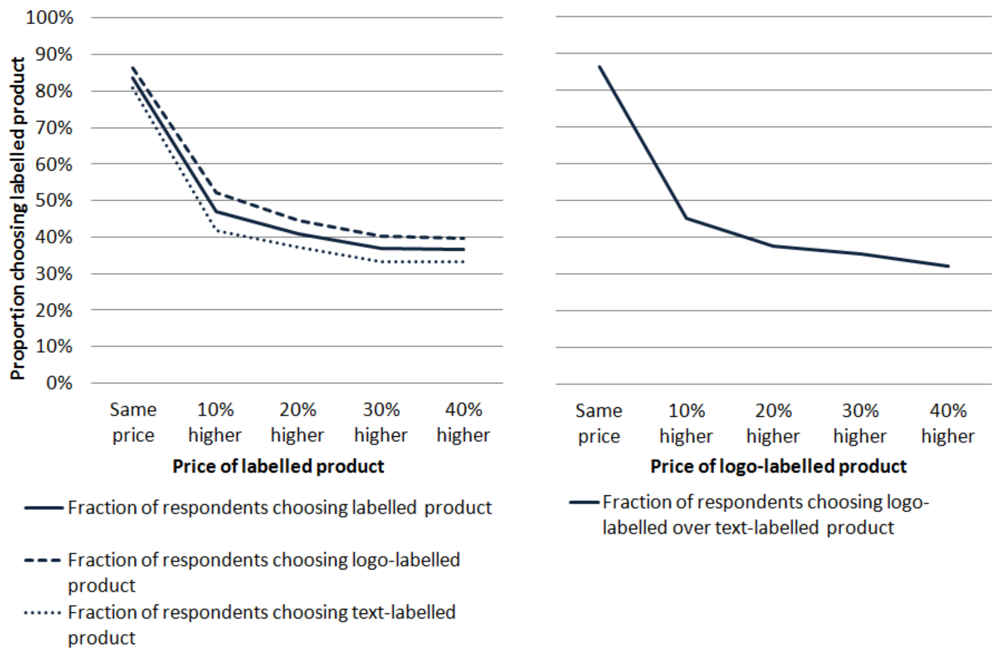
Note: All figures in this graph are statistically significant at the 10% level.
Source: consumer survey

7.3.3 Health scheme labels

Overall, fewer respondents were willing to pay a premium for products carrying health scheme labels in comparison with the other two type of scheme labels. However, once again it is important to note that the price increase for health scheme labelled products was steeper than for the origin labelled products (but identical to the price increase for animal welfare labelled products).

Health scheme labelled margarine in particular had a rather low popularity at the highest premiums. At the 40% premium, only 37% of respondents chose it in preference to an unlabelled product and at even the smallest price increase around half selected the unlabelled product.

Figure 107: Proportion of respondents choosing scheme labelled margarine versus the price premium, for different label types

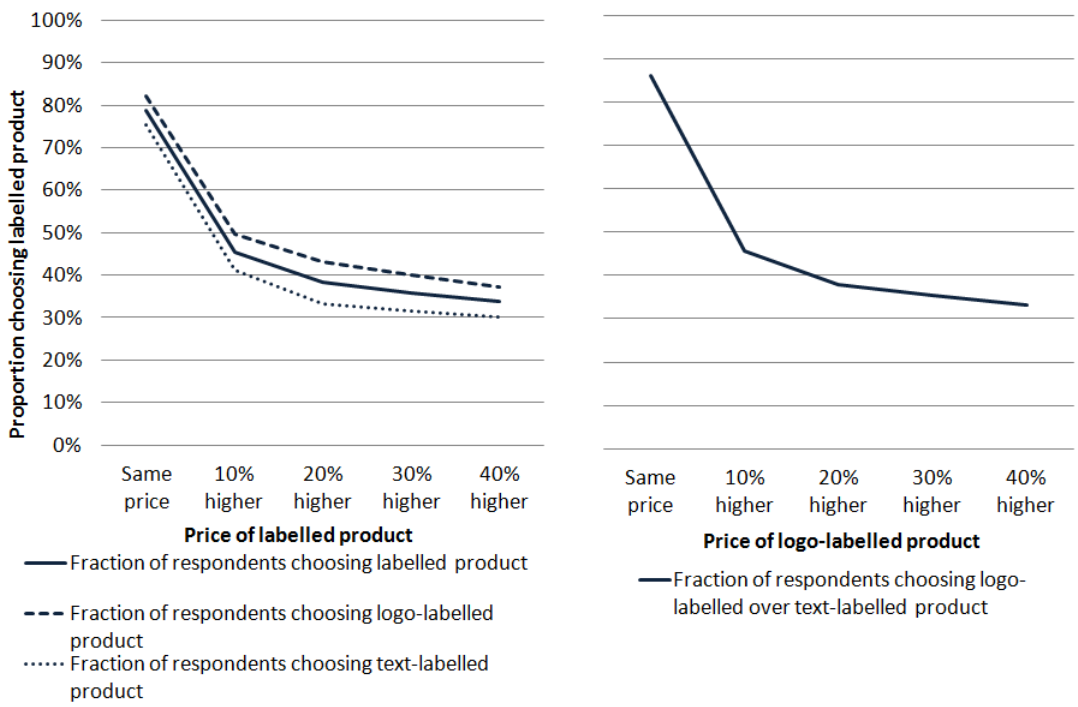


Note: Left graph shows scheme label types versus unlabelled, right graph shows the two scheme label types compared.
Source: consumer survey

As with margarine, the fraction of respondents selecting the scheme labelled yoghurt drops to less than half as soon as the price of the scheme labelled yoghurt is increased relative to the price of the unlabelled yoghurt. At the 40% price premium level only 34% of respondents opted for the health-labelled yoghurt.

Similarly, the proportion who stated they would pay 40% extra for a scheme label with a logo than for a scheme label with only text stood at 33%. The proportions choosing products with scheme labels where the prices were the same is also relatively low, at around 80% as opposed to over 90% for respondents choosing origin scheme or animal welfare scheme labelled products (discussed above).

Figure 108: Proportion of respondents choosing scheme labelled yoghurt versus the price premium, for different label types

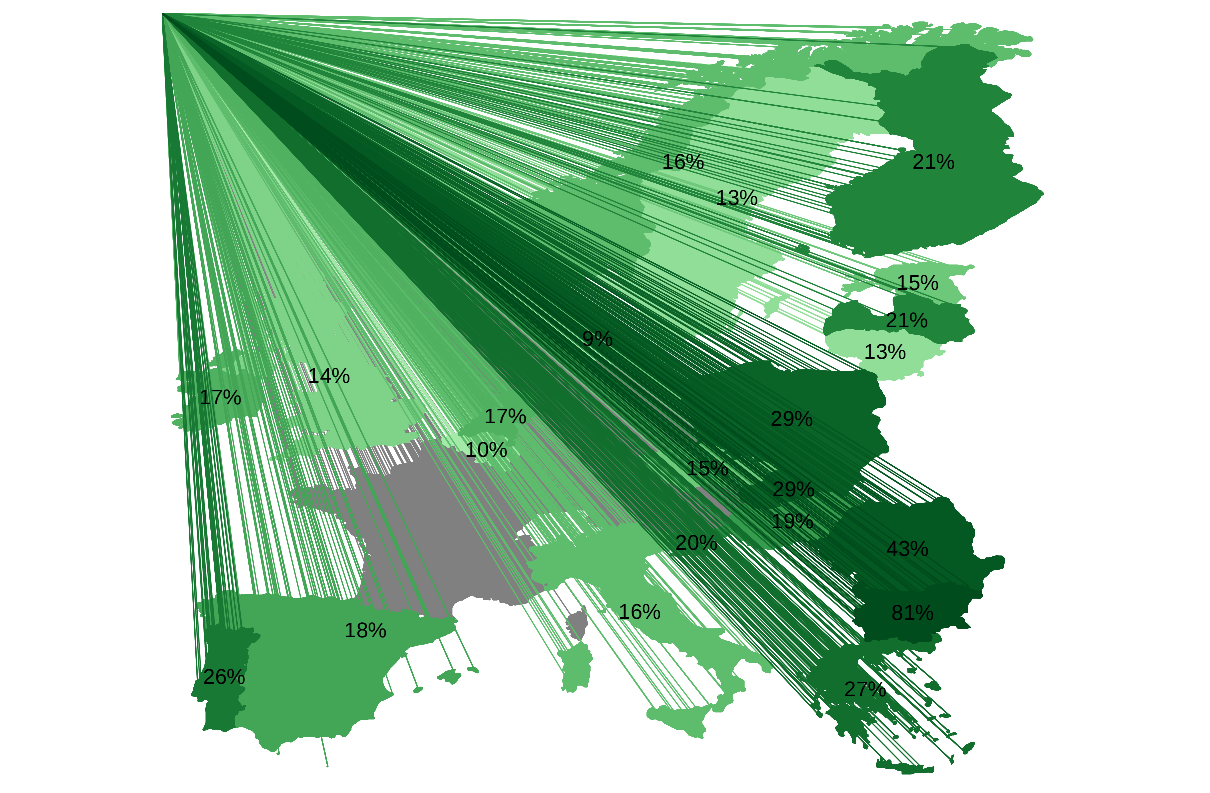


Note: Left graph shows scheme label types versus unlabelled, right graph shows the two scheme label types compared.
Source: consumer survey

The fact that health scheme labels were the least popular labels in all of the choice experiments also translated into a low WTP as a percentage of the base price (as shown in Table 29 above) of only 19% for both yoghurt and margarine in the EU overall. Values for willingness to pay, as a percentage of base price, for health labelled yoghurt range from 0% in Austria, Germany, France and Luxembourg to 81% in Bulgaria. Similarly, values for willingness to pay for margarine are between 0% in Denmark and Luxembourg and 49% in Bulgaria.

The geographical distribution of willingness to pay for health scheme labels on yoghurts is displayed on the map below. It shows that the highest levels of WTP, in terms of a percentage of the base price, occurred in Bulgaria and Romania. Generally the lower levels of WTP for products with the health labelling scheme occurred in Northern Europe.

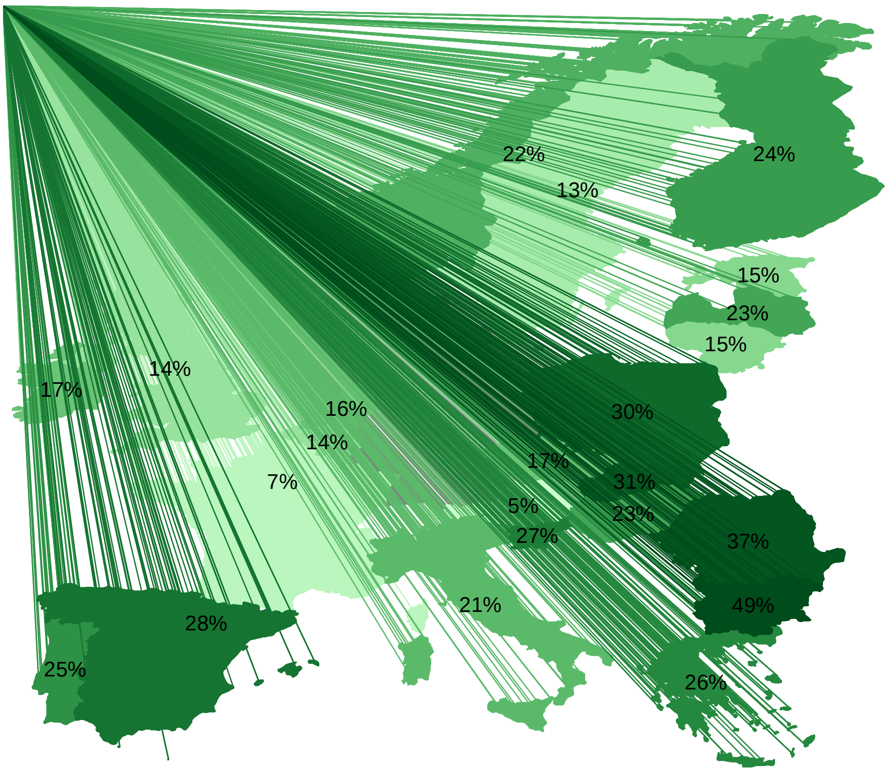
Figure 109: WTP for a health scheme label on yoghurt, as a percentage of base price



Note: Estimates of willingness to pay for health scheme labels on yoghurt were insignificant if the country is depicted in gray. All other results are statistically significant at the 10% level.
Source: consumer survey

For margarine, shown below, we find that WTP for products affiliated with a health food labelling scheme relative to base price is again highest in Bulgaria and Romania.

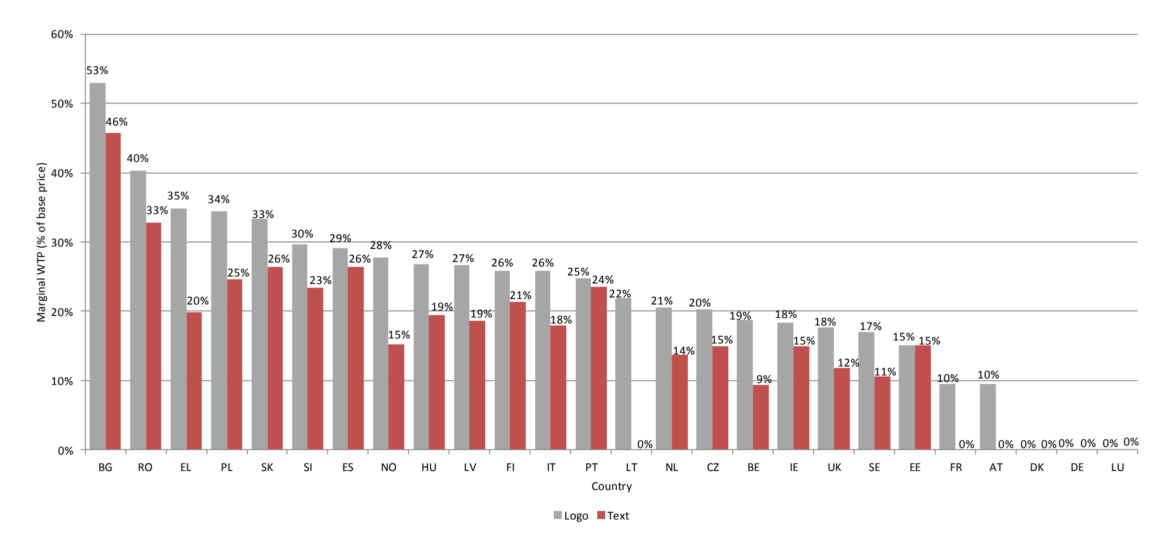
Figure 110: WTP for a health scheme label on margarine, as a percentage of base price



Note: Estimates of willingness to pay for health labels on yoghurt were insignificant if the country is depicted in grey. All other results are statistically significant at the 10% level.
Source: consumer survey

The figure below displays the willingness to pay for health scheme labels on margarine split by logo and text scheme labels. We can clearly observe a difference between WTP for logo scheme labelled and text scheme labelled products. The highest WTP, as a percentage of base price, for scheme labelled margarine is at 53% in Bulgaria, whilst the highest WTP is at 46% for a text-only scheme label (also in Bulgaria).

Figure 111: WTP for a health scheme label on margarine, as a percentage of base price

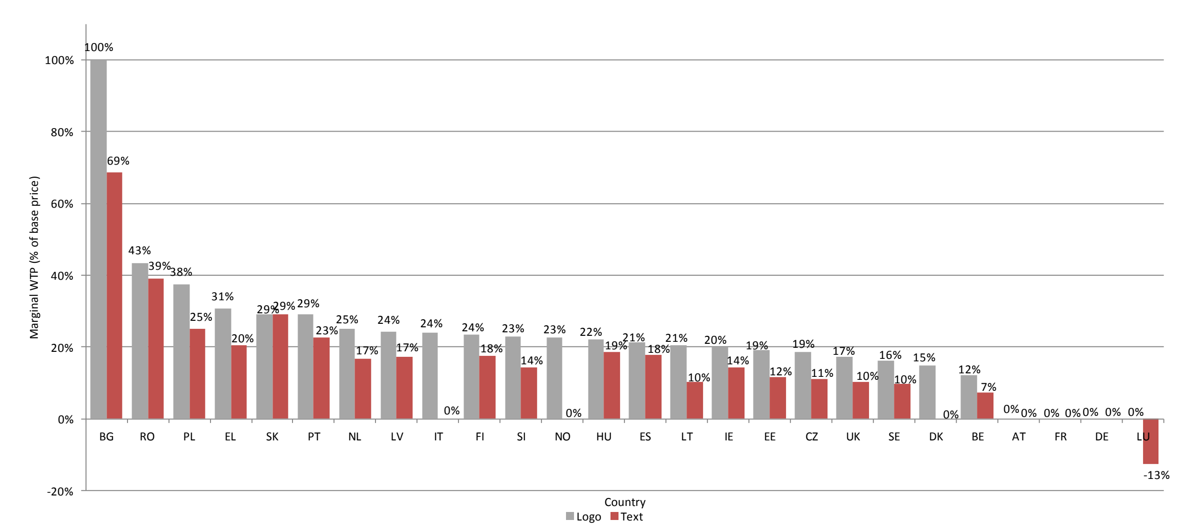


Note: coefficients on text labels for IT, LT, AT, LU, FR, DK, DE not statistically significant at the 10% level. For logo labels, DK, DE and LU not statistically significant.

Source: consumer survey

For yoghurt again we see that WTP relative to base price is higher for products carrying a logo over text. In Bulgaria this figure is 100%. In Lithuania, respondents clearly did not like the text scheme labelled product showing negative WTP for products with a text scheme label relative to the base price for the product.

Figure 112: WTP for a health scheme label on youghurt, as a percentage of base price



Note: Coefficients on text labels for IT, NO, DK, AT, FR and DE not statistically significant at the 10% level. For logo labels, AT, FR, DE and LU not statistically significant.

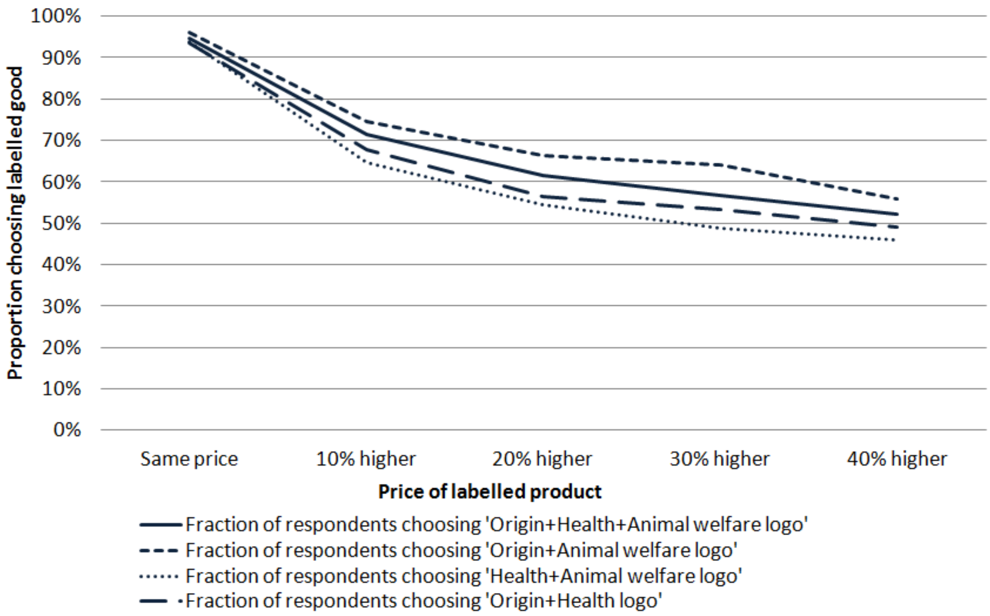
Source: consumer survey

7.3.4 Multiple scheme labels

The final choice sets showed scheme labels with logos on boxes of eggs with multiple claims on them. Some of the eggs were indicated to fulfil all three characteristics, while others presented each combination of two at a time. In each case, the products with scheme labels were displayed alongside unlabelled products.

Consumers were less likely to choose the products with three scheme labels than the most popular product with two scheme labels, which made claims related to origin and animal welfare.

Figure 113: Proportion of respondents choosing scheme labelled eggs versus the price premium, for different label types



Source: consumer survey

7.4 Barriers and drivers to purchasing products affiliated to food label schemes

This section examines to what extend socio-economic characteristics are associated with the likelihood of choosing a scheme labelled product. Characteristics considered here include personal attributes such as respondents' age, gender, level of education, and employment status. In addition, questions relating to food, such as whether respondents were vegetarian or had allergies were also included.

A logit regression was conducted and the key variables that were found to be statistically significant (after controlling for country effects) are discussed in this section. The results of this regression are reproduced in full in Annex 1. The following section reports the relationships between selected demographic variables and whether or not the respondent chose a product affiliated with a scheme logo. The analysis focuses on products with a scheme label versus unlabelled products, rather than splitting the scheme labels into the two categories of logo and text.

7.4.1 Demographic variables

The first finding is that an income effect seems to exist[36]. Figure 114 below depicts how the propensity to select the product with a scheme label varies by the respondents' self-assessment of their income. Respondents who are finding it difficult living on their present income are significantly less likely to pay a premium than respondents who are coping or living comfortably on their present income. Those who selected option 4 (very difficult) were particularly unlikely to choose products with scheme labels at a premium. At the top two income brackets on the other hand the income effect is not apparent which suggests that beyond a certain income level the willingness to pay for products with scheme labels no longer increases as income increases.

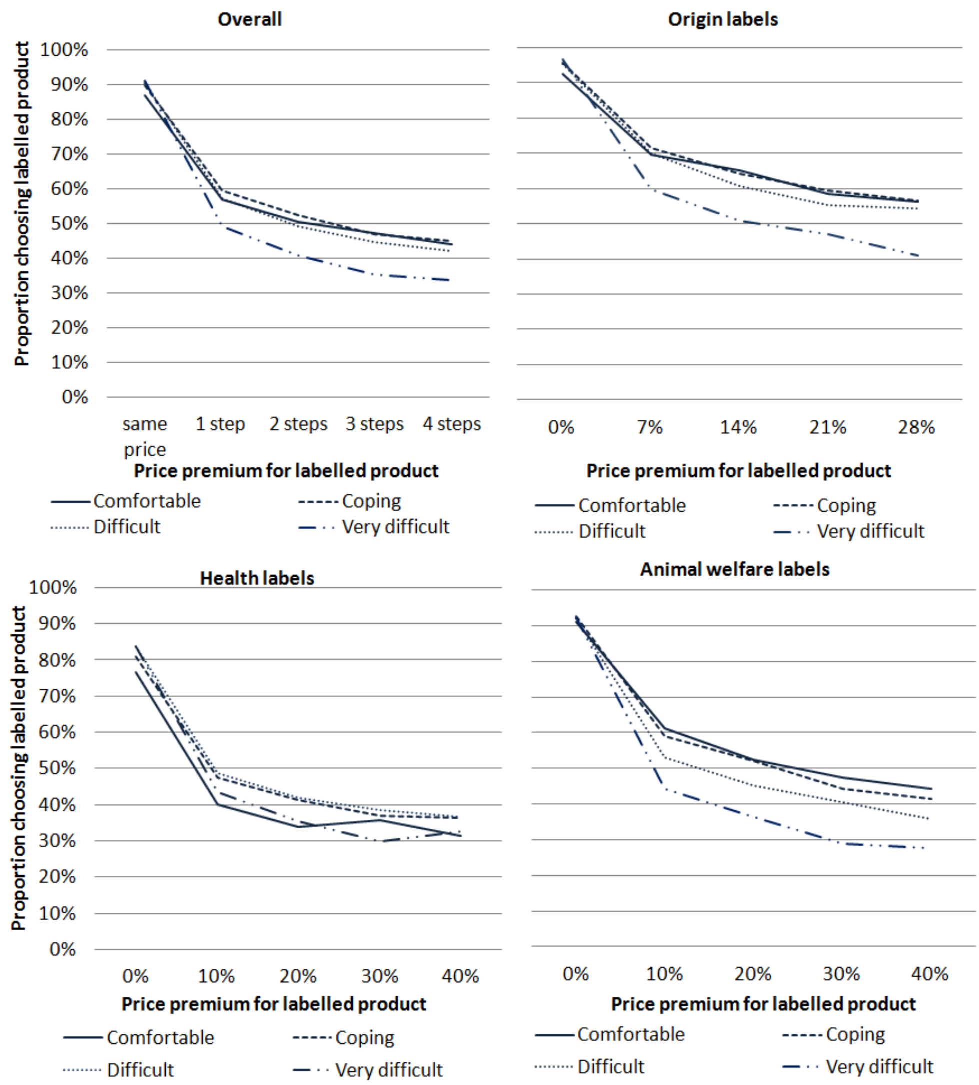
Interestingly, the experiment also shows that without the price difference, those rating their income situation as "very difficult" were the group most likely to choose products with a scheme label. Ninety-one per cent of the "very difficult" group chose the product with a scheme label, while only 87% of the "comfortable" group did so.

These findings confirm the findings of previous studies. For instance, a 2011 paper by Hainmueller, Hiscox and Sequiera that studied consumers' willingness to pay for fair trade coffee found that although consumers' willingness to pay for fair trade products exists, this is lower for consumers with lower incomes. Wang and Sun (2003) found that consumers' willingness to pay for organic apples and milk produced locally was greater for consumers who had higher household incomes. In Govindasamy and Italia's (1997) study on willingness to pay for organically-grown fresh produce this income effect was (only) found among females.

[36] The consumer survey asked respondents to rate their income rather than to state an actual number on a four-category scale. Their options were "comfortable", "coping", "difficult" and "very difficult", with a fifth option "no answer" which has not been plotted in the figure.

An anomaly to the general findings was presented by products with a health scheme label. Those finding it "difficult" were the most likely to pay for these, and those on comfortable incomes were among the least likely.

Figure 114: How responses vary by how comfortably respondents cope on their current income



Note: top-left graph combines average proportions across all label types. 1 step = an increment on base price of product of 7% or 10%; 2 steps = 14% or 20%; 3 steps = 21% or 30%; 4 steps = 28% or 40% for origin labels or health / animal welfare labels respectively.
Source: consumer survey

Another finding which emerged is that overall the proportion of respondents choosing scheme labelled products tended to rise with age. Figure 115 splits respondents into three age groups, each of which contained approximately a third of respondents.

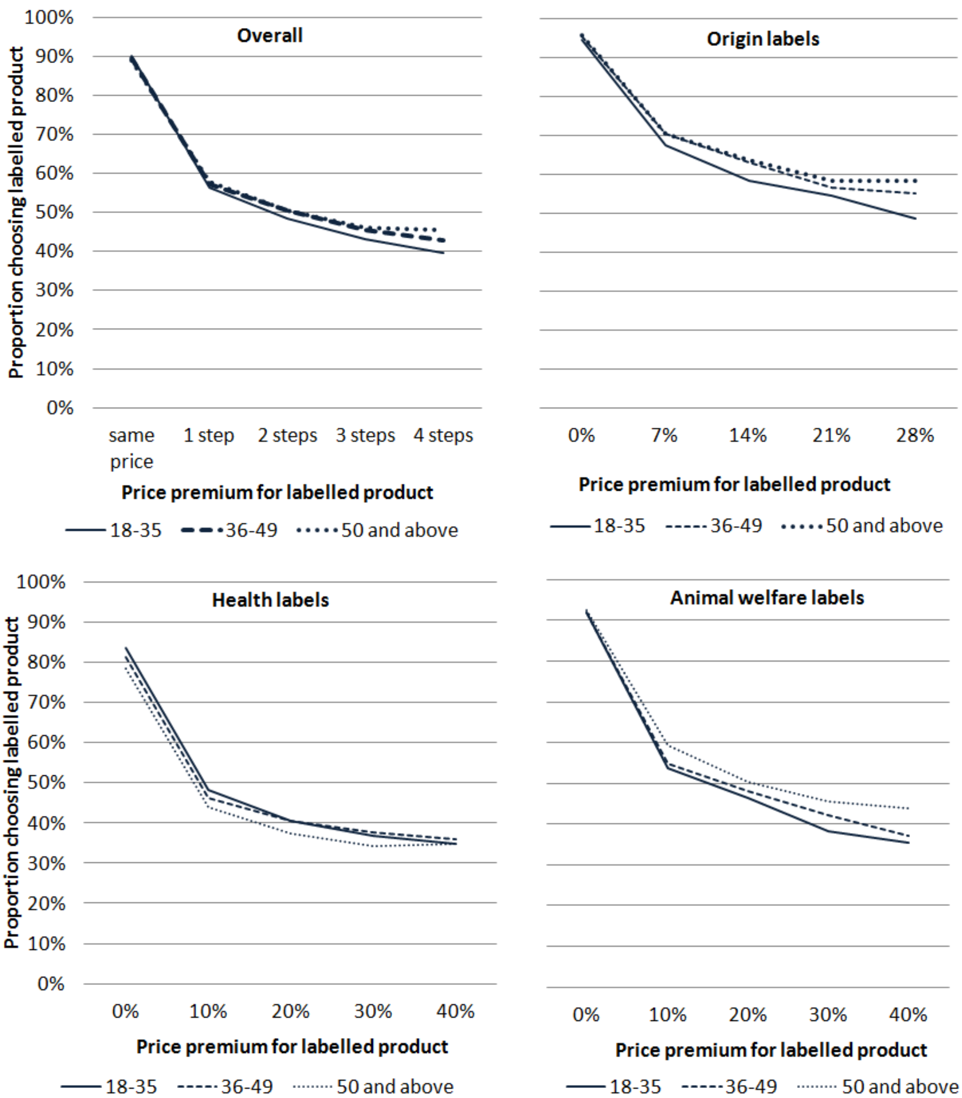
The observed divergence is particularly pronounced for "country of origin" scheme labels on beef and cheese, with the oldest age group, consisting of those 50 and above, being more likely by 10 percentage points to pay extra for these scheme labels at the highest price premium. For other types of scheme labels the difference is smaller. Animal welfare scheme labels exhibit a similar pattern, while health scheme labels are less popular in our experiment with the oldest age group than the younger two groups.

Comparing these findings to the existing literature, we note that a recent study by Verbeke et al (2012) on EU origin labelling also finds that awareness of food labels in general is higher among those aged over 50. Unfortunately, this study does not estimate their willingness to pay.

On the other hand, a number of US studies have found that in particular younger consumers tend to pay premiums for products with food scheme labels. Loureiro and McCluskey (2003) analysed consumer preferences for apples labelled as being produced by farm workers who enjoy fair and safe working conditions and estimated consumers' willingness to pay for these apples. They found that younger consumers were more likely to be willing to pay a premium for apples labelled as being produced under fair working conditions. Similarly, Wang and Sun (2003) further found that consumers' willingness to pay for organic apples and milk produced locally in Vermont and certified by the Northeast Organic Farming Association was higher than for products without the label, particularly if consumers were young. The previously mentioned study by Govindasamy and Italia (1997) on consumer behaviour at five grocery stores in New Jersey also found that willingness to pay for organically-grown fresh produce was higher for younger individuals.

It is important to note that the difference between the US studies and the findings from the present choice experiment may simply be due to the different product categories used. Organic food and fair trade may be issues that appeal more to younger people than to an older demographic. Whereas the US studies cited focused on fair trade and organic labels, these are not used in the present choice experiment.

Figure 115: How responses vary for different age groups

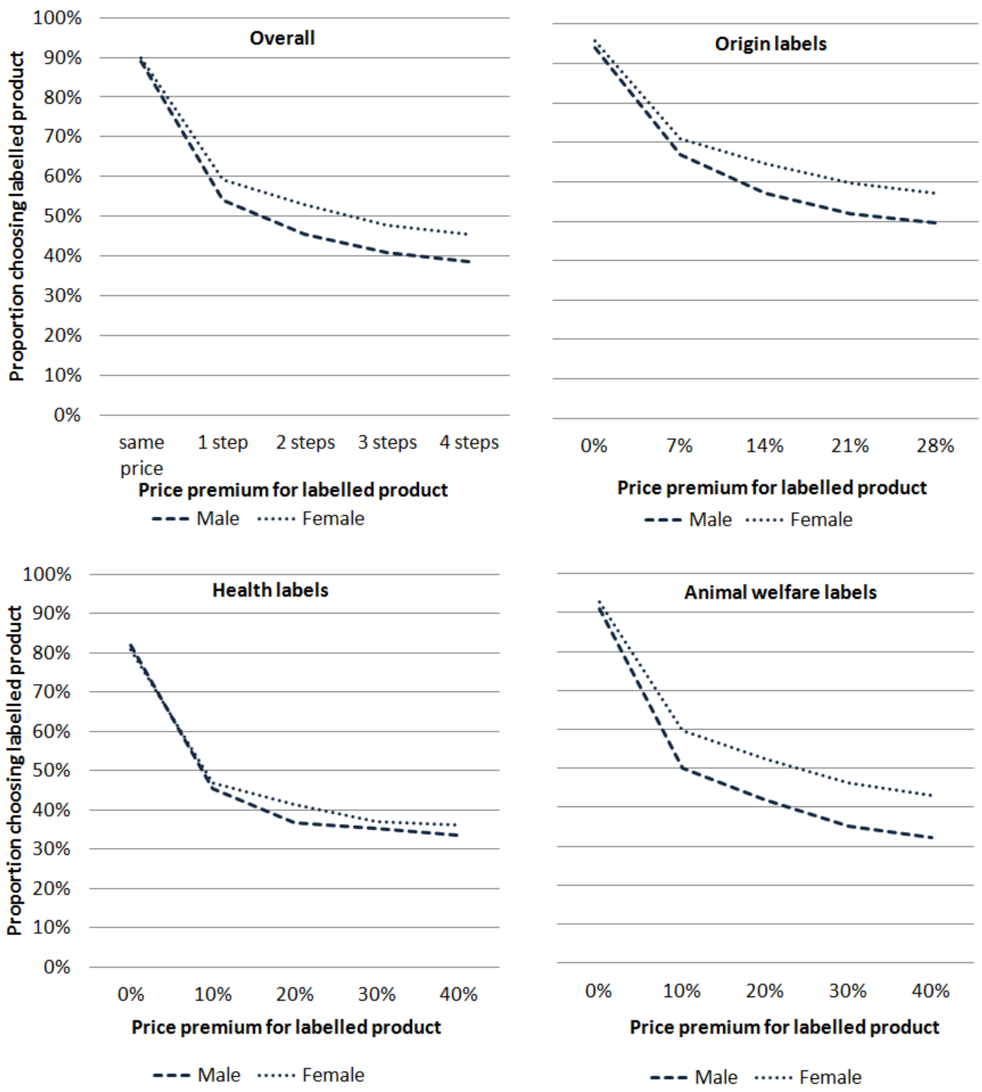


Note: top-left graph combines average proportions across all label types. 1 step = an increment on base price of product of 7% or 10%; 2 steps = 14% or 20%; 3 steps = 21% or 30%; 4 steps = 28% or 40% for origin labels or health / animal welfare labels respectively.
Source: consumer survey

Women were much more likely than men to pay a premium for the products with a food scheme label, and this was strongly statistically significant (at the 1% level). The marginal effect was between 0.02 and 0.04 percentage points, meaning that holding everything else constant women are more likely to select the product with the scheme label.

This confirms Umbergers findings (2003) who reported stronger support in terms of willingness to pay for country-of-origin scheme labelled beef among female buyers. This is also in line with other existing literature. For example, the previously mentioned Govindasamy and Italia (1997) study on willingness to pay for organically-grown fresh produce also reports WTP to be higher for females. However, this finding only applies to females with higher annual incomes and those who always or usually purchase organic products.

Figure 116: How responses vary by respondents' gender

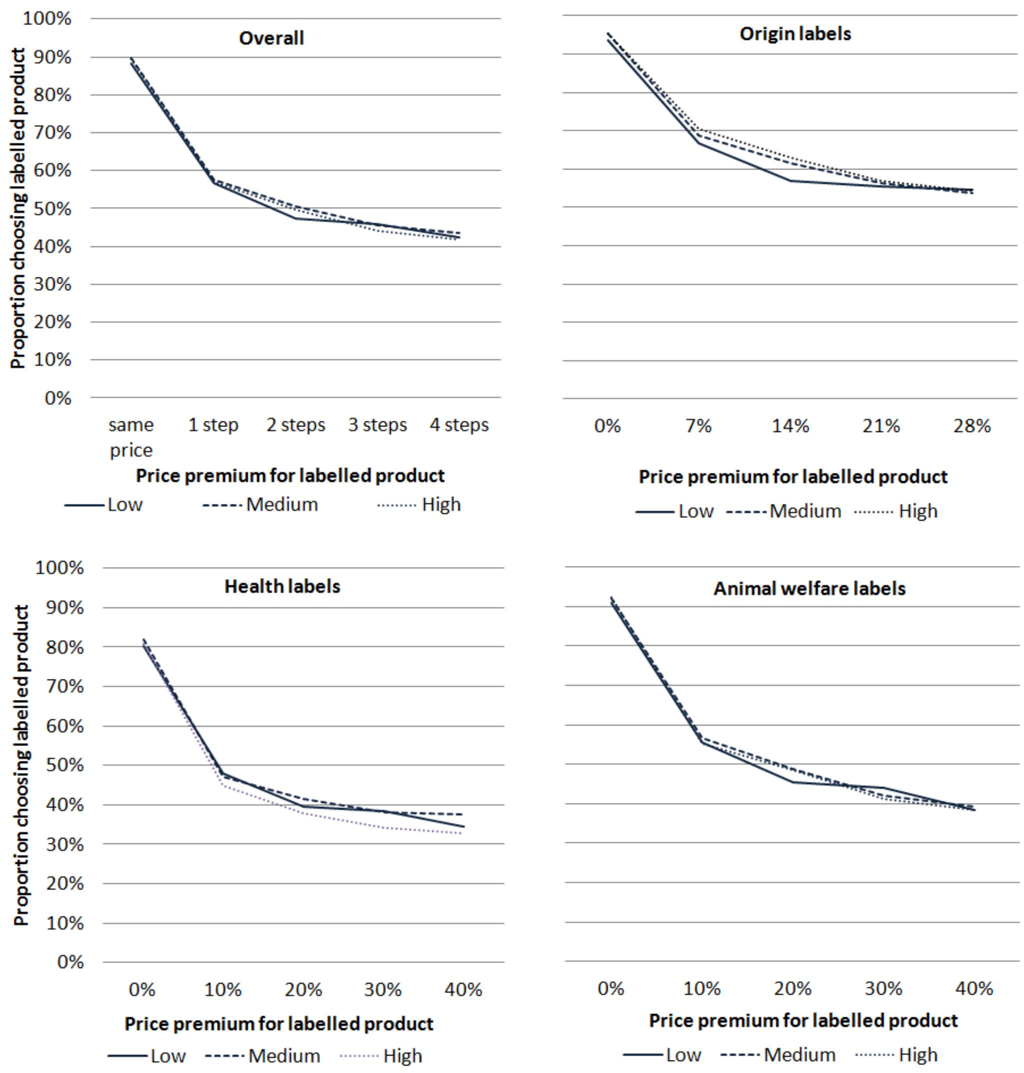


Note: Top-left graph combines average proportions across all label types. 1 step = an increment on base price of product of 7% or 10%; 2 steps = 14% or 20%; 3 steps = 21% or 30%; 4 steps = 28% or 40% for origin labels or health / animal welfare labels respectively.
Source: consumer survey

The effects for education on consumer choice are far more varied across the different scheme label categories than the previous respondent characteristics. The experiment's results indicate that respondents with different educational backgrounds ranked differently in propensity to choose scheme labelled products, but this also differed by the type of scheme label under consideration.

Figure 117 below depicts the proportion of respondents selecting the product with a scheme label by level of education. Those with high education tended to have a low propensity to choose health scheme labels, and those with a medium education level were more likely to pay for these. On the other hand, high-education respondents had the highest propensity to pay for origin scheme labels, at most levels of the price-premium.

Figure 117: How responses vary by respondents' education



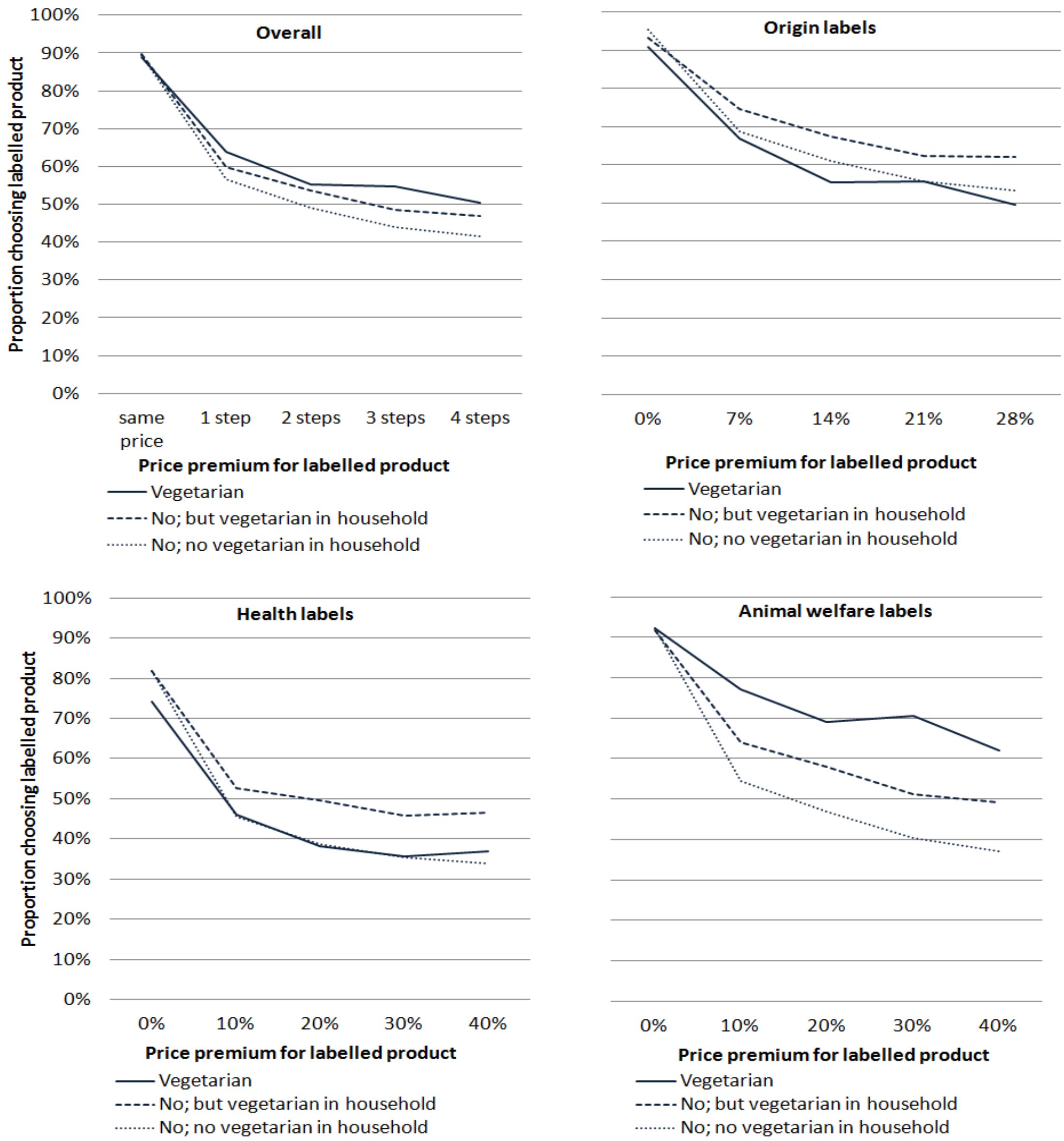
Note: top-left graph combines average proportions across all label types. 1 step = an increment on base price of product of 7% or 10%; 2 steps = 14% or 20%; 3 steps = 21% or 30%; 4 steps = 28% or 40% for origin labels or health / animal welfare labels respectively.
Source: consumer survey

Before taking part in the experiment, respondents were asked if they were vegetarians or if they lived with vegetarians. This question was then used to filter later questions in the survey, so that vegetarians were not given choices involving beef or chicken products for the choice experiment.

The chart below shows that there were clear differences in propensity to select the product with a scheme label by whether or not the respondent was a vegetarian or lived with vegetarians. Those who live with vegetarians were more likely to choose products with scheme labels than those who are themselves vegetarian.

Vegetarians were less likely to choose the origin scheme labels than non-vegetarians, whether the labelled product cost extra or not. On health scheme labels, the highest propensity to pay more was associated with non-vegetarians who lived with vegetarians. Animal welfare labels displayed more predictable behaviour here, with vegetarians likely to pay the most and non-vegetarians who did not live with vegetarians least likely to pay extra. However, it is important to note that for origin and animal welfare label scheme graphs, the lines for vegetarians are not directly comparable to the other two categories, as they include data for only one product for each scheme label (eggs for animal welfare and cheese for origin).

Figure 118: How responses vary by whether respondents (or a household member) are vegetarian



Note: Top-left graph combines average proportions across all label types. 1 step = an increment on base price of product of 7% or 10%; 2 steps = 14% or 20%; 3 steps = 21% or 30%; 4 steps = 28% or 40% for origin labels or health / animal welfare labels respectively.
Source: consumer survey

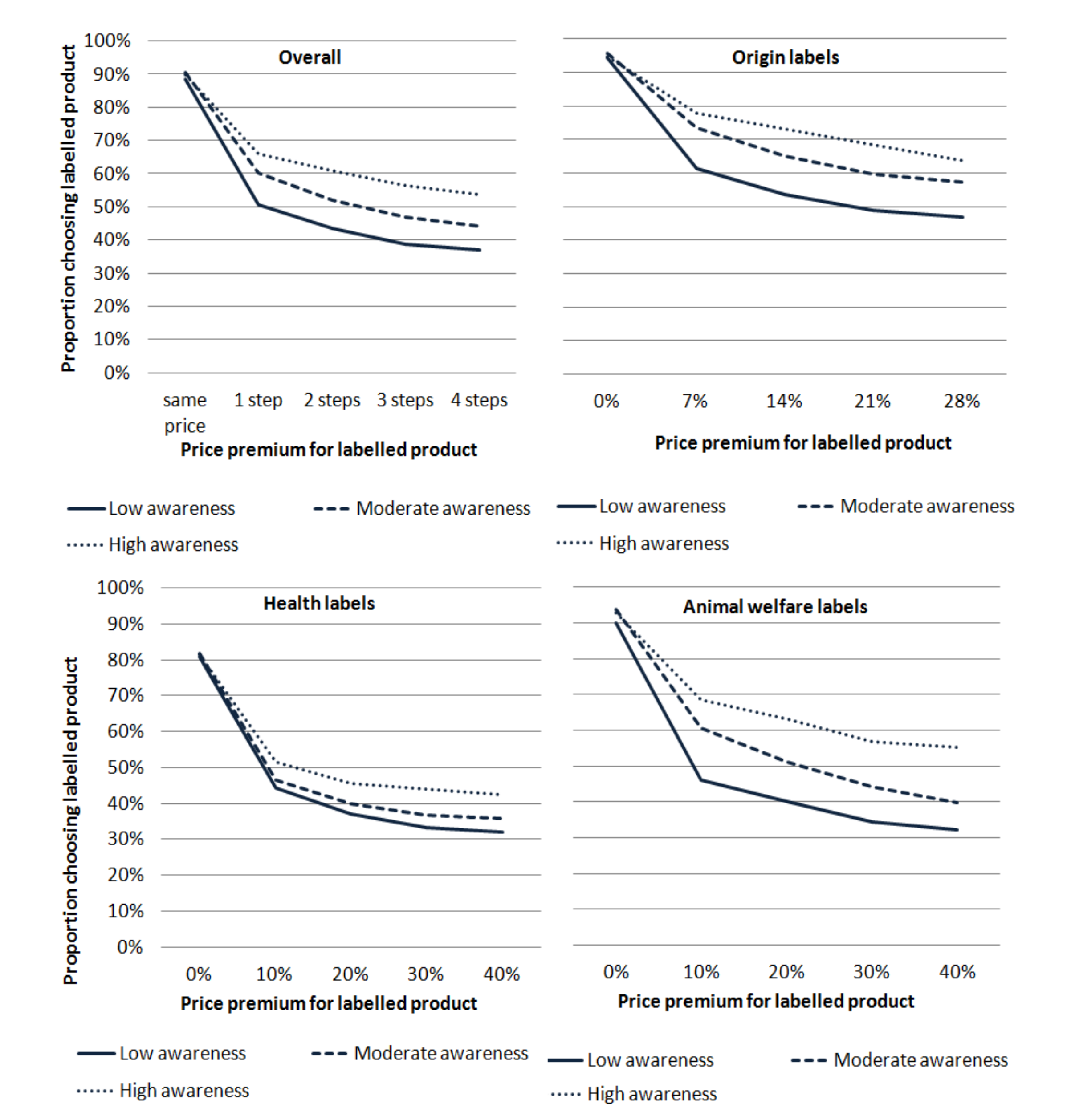
7.4.2 Awareness and knowledge of food labelling schemes

Consumer awareness and knowledge of food labelling schemes is another important characteristic which we consider here. A recent study undertaken on consumer awareness of origin labels using an online consumer panel in the European Union (in Italy, Spain, France, Poland, Belgium and Norway) by Verbeke et al (2012) finds that consumer awareness is very high in countries that have the longest tradition of using geographical indication labels, i.e in Southern Europe. Additionally, they also find that men and older consumers are more likely to be aware of origin labels which they understand to be a proxy for quality labels.

To test the relevance of awareness on choice of products with scheme labels, the consumer survey included a section where respondents were presented with 15 types of food scheme labels and asked to indicate which scheme labels they had seen in the past[37]. They were split into three categories: low awareness, medium awareness and high awareness. As to be expected, the awareness of these scheme labels was strongly associated with a tendency to choose the products with a scheme label in the experiment. The difference in overall propensity to choose products with a scheme label between the high and low groups was 17 percentage points for the largest level of the price premium.

[37] Based on this three "label awareness" groups were created. Those selecting between zero and five labels were classed as having low awareness, those that selected between six and 10 labels were put in a moderate category and the remainder – those selecting between 11 and 15 – were considered as having high awareness.

Figure 119: How responses vary by how aware respondents are of various types of food scheme labels



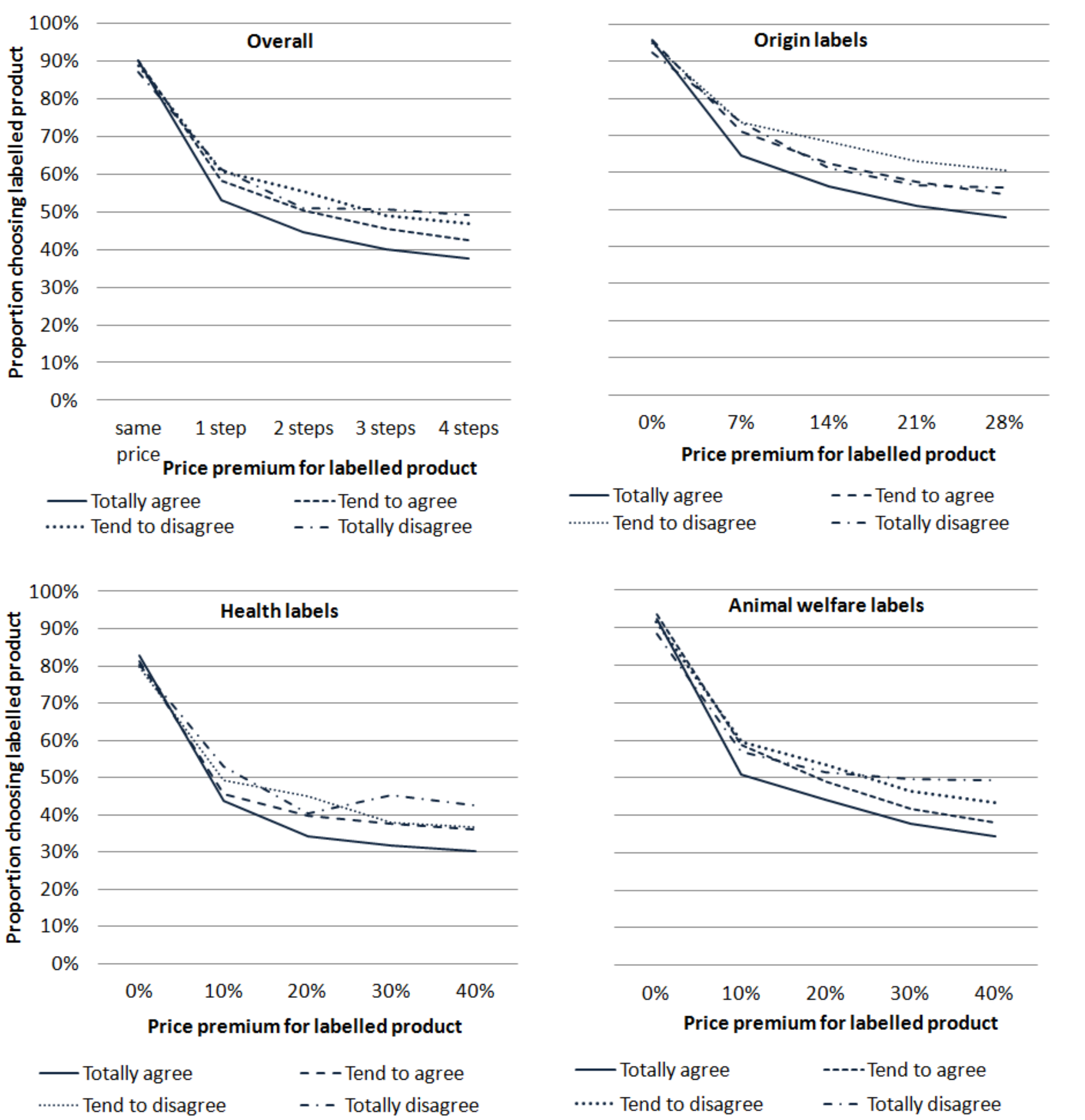
Note: Top-left graph combines average proportions across all label types. 1 step = an increment on base price of product of 7% or 10%; 2 steps = 14% or 20%; 3 steps = 21% or 30%; 4 steps = 28% or 40% for origin labels or health / animal welfare labels respectively.
Source: consumer survey

In addition, respondents who assessed themselves as not knowing enough about food labelling[38] were generally those most likely to choose the products with scheme labels in the experiment when there was no price premium; however as soon as the price was raised they became the least

[38] In order to test self-assessed knowledge of food labelling schemes, respondents were asked whether they agree with the statement "I don't know enough about food labelling".

likely group to choose the products with the scheme label. This pattern was observed across the range of label types and prices.

Figure 120: How knowledge (self-assessed) affects responses: how far do you agree with the statement "I don't know enough about food labelling"?



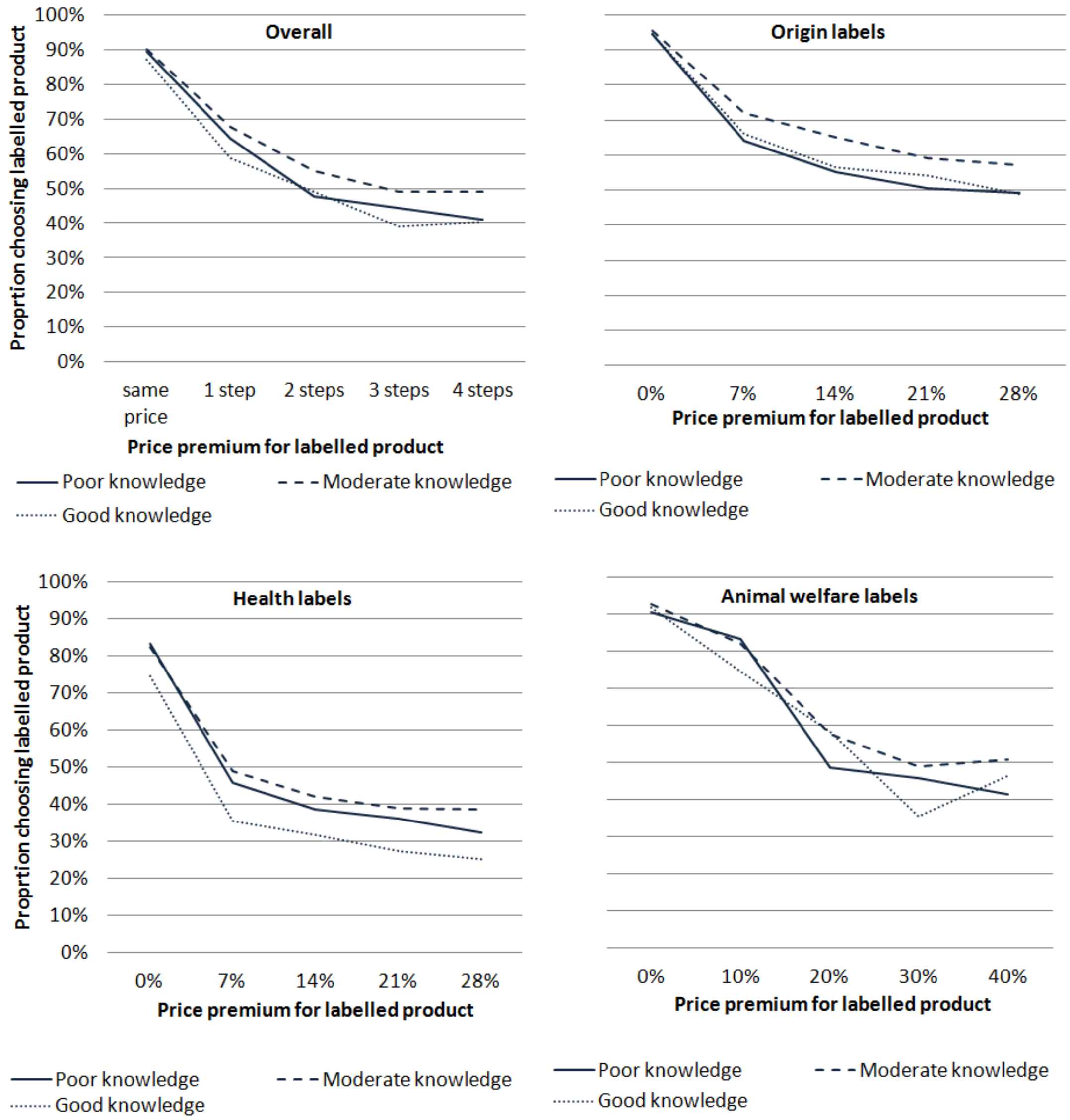
Note: Top-left graph combines average proportions across all label types. 1 step = an increment on base price of product of 7% or 10%; 2 steps = 14% or 20%; 3 steps = 21% or 30%; 4 steps = 28% or 40% for origin labels or health / animal welfare labels respectively.
Source: consumer survey

To verify respondents' actual knowledge of food labelling schemes, this was elicited by asking them a set of six true or false questions about food labelling schemes in general[39]. On average respondents answered 2.3 questions correctly. The score received on this positively and significantly correlates with the self-assessment of respondents' own knowledge.

Nonetheless, the relationship between elicited knowledge and choices made in the experiment did differ from the relationship between self-assessed knowledge and choices. Those with moderate knowledge had the highest propensity to choose products with a scheme label (Figure 121). The other two groups had similar likelihoods of choosing products with scheme labels, with the type of scheme label influencing the order.

[39] These are: 1. All food labelling schemes are certified by a third party organisation; 2. Food producers or retailers can establish their own food labelling schemes based on their own product standards; 3. Third party organisations that certify schemes have to be public bodies; 4. Products with a labelling scheme must fulfill certain requirements of that scheme; 5. Products with a labelling scheme have to be checked regularly against the requirements of that scheme; 6. There are legislative requirements for the production of a product labelled as organic. The odd-numbered statements are false, and the even-numbered ones true. Respondents who answered between zero and two questions correctly were classed as having **poor knowledge**, those who answered three or four were classed as having **moderate knowledge**, and those who answered five or six were classed as having **good knowledge**.

Figure 121: How knowledge of food labels affects responses

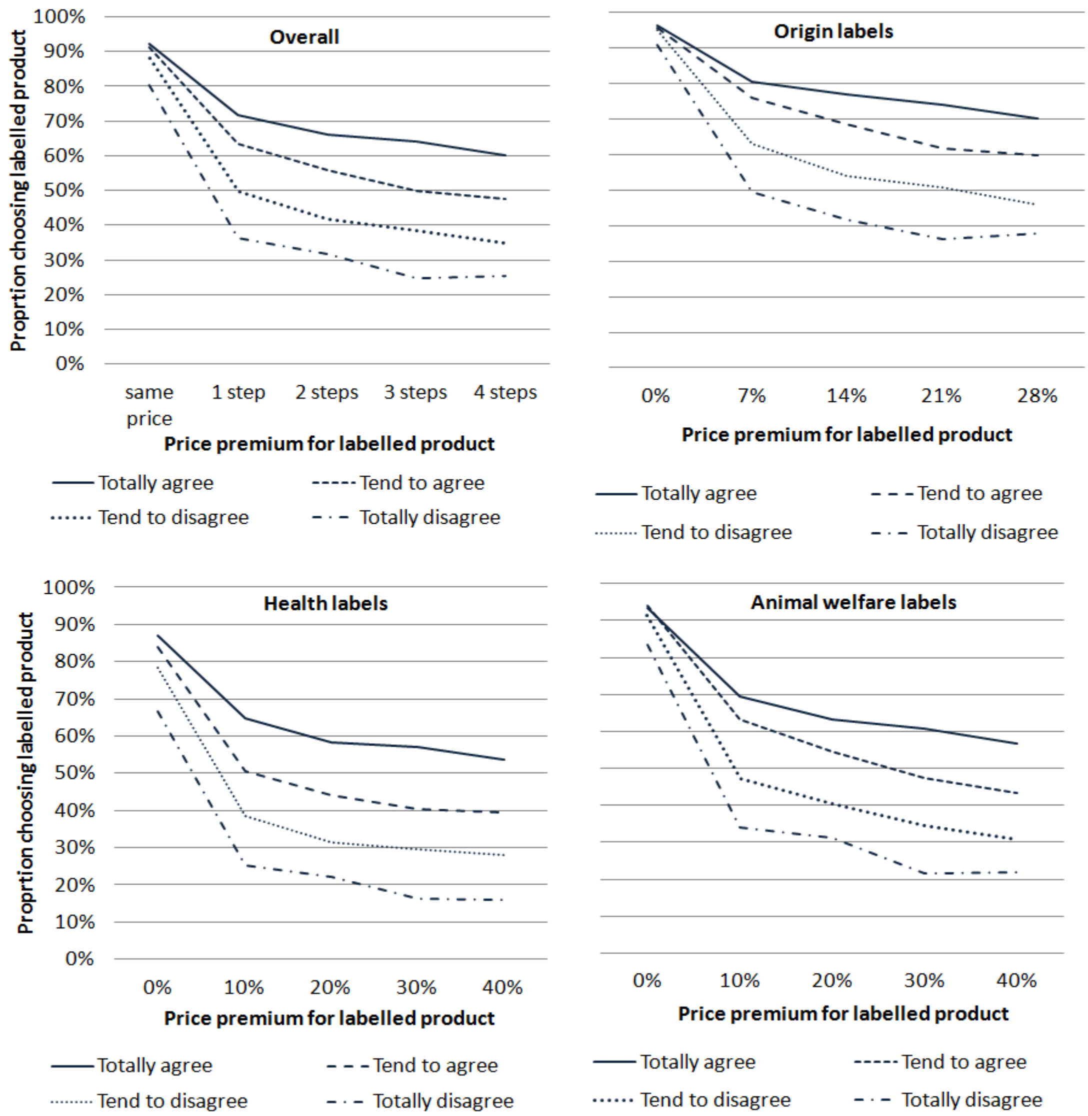


Note: Top-left graph combines average proportions across all label types. 1 step = an increment on base price of product of 7% or 10%; 2 steps = 14% or 20%; 3 steps = 21% or 30%; 4 steps = 28% or 40% for origin labels or health / animal welfare labels respectively.
Source: consumer survey

Even though awareness is an important prerequisite for food labelling schemes to be effective, trust in these scheme labels is another, perhaps more important, issue. As a result, the consumer survey also elicited the level of trust respondents have towards food labelling schemes in general.

The findings of the choice experiment indicate a clear relationship between trust and propensity to choose products with scheme labels: the more respondents agreed that they trust scheme labels, the more likely they were to choose the products with a scheme label, irrespective of label type or price premium. At the largest value of price premium for products with a scheme label overall, a gap of around 10-12 percentage points separated each group from the next group in the list.

Figure 122: How trust in labels affects responses: how far do you agree with the statement "I trust the information shown on food labels"?



Note: Top-left graph combines average proportions across all label types. 1 step = an increment on base price of product of 7% or 10%; 2 steps = 14% or 20%; 3 steps = 21% or 30%; 4 steps = 28% or 40% for origin labels or health / animal welfare labels respectively.
Source: consumer survey

Conclusions

Overview of food labelling schemes in Europe

The websweep has identified 901 voluntary food labelling schemes across Europe. The websweep shows that there is a wide variety of schemes focused on consumers and which would be considered labelling schemes from a consumer's view point. The most common form of schemes are origin schemes and this is due to a large number of regional schemes often covering meat, fruit and vegetables and wine and spirit products in countries such as Spain, Portugal and Germany. The majority of schemes identified in this study are certification schemes (78%) and the production processes most commonly covered are product and food processing, crop production and animal production.

The websweep was undertaken using a structured approach across all 30 countries, and was completed using a consumer focus. That is, the websweepers who did the exercise assessed the schemes from the point of view of a consumer.

While a structured approach in each country was taken, it is prudent to recognise the limits of the websweep. A websweep is an efficient way to identify and assess food labelling schemes across Europe. We cannot be 100% certain however that there may be some schemes that were not identified in the websweep. This may have arisen because, for example, the scheme does not have a website, it did not appear using the search terms systematically applied within each country or it did not clearly meet the definition of a voluntary food labelling scheme used for the purpose of this study.

Assessment of compliance with the 2010 Commission Guidelines

The assessment process used a multi-modal approach. This included the websweep of identified schemes, the scheme operator survey, and the survey of stakeholders.

The first point that arises is that awareness of the 2010 Guidelines is currently not very high amongst stakeholders and scheme operators surveyed.[40] While this may not be surprising as the guidelines have only been in operation since 2010, only 48% of scheme operators that responded to the survey stated they were aware of the guidelines, 29% of consumer organisations, and 40% of accreditation and certification bodies reported they were aware. Producer, farmer and retailer associations were most aware at 58% as an overall group. Of these retailer organisations were least aware at 40%, while producer and farmer associations were 67% and 60% respectively. Lack of awareness was also raised as a barrier to compliance with guidelines by scheme operators.

The assessment of compliance with the 2010 Guidelines finds that for the combined index, schemes score on average 58%, indicating that schemes meet over 50% the requirements in this index. For the websweep index, schemes on average receive a score of 48%, and for the websweep consumer index and the combined self-declaration index average scores for both indices is 54%.

[40] This is supported by the two face-to-face interviews conducted at EU level with the EUFIC and the BEUC, which indicated that awareness and knowledge of the guidelines at the EU level may be quite low.

Information from the websweep assessment and the scheme operator survey, finds that overall certification schemes perform better than self-declaration schemes. Perhaps this is not surprising as the guidelines are aimed at certification schemes. However, even when we assess both certification and self-declaration against criteria in the guidelines that both types of schemes can be reasonably expected to meet, we again find that in general certification schemes outperform self-declaration schemes in regard to meeting the guidelines.

Schemes in general provide their contact details clearly on their website, in a small number of instances identified schemes did not have a website. In addition, schemes provide clear and transparent information on their requirements, specifically making clear their objectives, linking their claims to their objectives, and clearly stating the scope of the scheme in terms of the products and processes they cover. However, when seeking more detailed information on scheme requirements and specifications these are not always easily accessible on scheme websites, and when they are available they can be difficult for the consumer to understand.

Schemes tend to perform more poorly against criteria in the guidelines that relate to the evidence base for scheme claims and requirements. In this regard, it is not always clear to the consumer if the scheme is based on objective and verifiable evidence; and, where these claims are made documentation may not always be easily accessible e.g. it is not available on the website.

Information on membership fees and fees for certification are not always easily accessible on websites.

Provisions enabling and promoting the participation of small scale producers are also often not provided by schemes.

Drivers and obstacles to complying with the 2010 Commission Guidelines

As part of the stakeholder consultation of scheme operators, consumer bodies, farmer, producer and retailer associations, and consumer organisations, representatives of these schemes and organisations were asked what they viewed the key drivers and obstacles were. These observations need to be interpreted with caution as the number of responses received was low. However, they do provide insights into the views of these different groups.

From the perspective of scheme operators, increased transparency and minimising consumer confusion was seen as one of the key drivers. This aligns with the consumer bodies' views that consumer trust was a key driver for compliance. Retailer associations also identified consumer trust as an important driver. This is supported by the majority of stakeholders agreeing that the guidelines increase scheme transparency and help avoid consumer confusion.

Improving the competitiveness of products, enabling producers to charge a premium and increasing profits was also identified as an important driver by scheme operators, producer associations and farmer associations.

Accessing markets in other EU countries, and internationally was also raised as drivers by scheme operators and retailer associations. This included retailers requiring compliance and facilitating cross-border sale of food products through a harmonised single market and greater product uniformity.

Lack of awareness was identified as a key obstacle for compliance by scheme operators and farmer associations. Administrative burden and cost of compliance was also identified by scheme operators, farmer associations, retailer associations and accreditation and certification bodies. The majority of farmer associations and scheme operators disagreed with the survey question 'these guidelines help reduce the financial burden on farmers and producers'.

Consumer understanding and perception of food labelling schemes

The consumer survey results show that awareness of food labelling schemes is relatively high and most respondents buy products affiliated to a labelling scheme frequently or sometimes. Surveyed consumers tend to take affiliation to a labelling scheme into account more often for meat and egg products. A substantial number are also more willing to pay a premium price for these products.

On the one hand consumers tend to believe that such products are better quality, healthier and safer to eat and that schemes' logos or text provide important information. On the other hand, many are unsure whether they should trust information provided by labelling schemes and noticeably more respondents think labels showing affiliation to a scheme are misleading than truthful.

There are also issues around understanding the information shown on scheme labels and some confusion exists about logos and symbols used. The meaning of scheme labels is not always clear to respondents, especially for the label showing affiliation to health schemes. The size of the text on scheme labels can also be an issue. Respondents tend to think these labels do not give enough information and their favoured way of getting more information would be on the packaging of the product itself, including on the product scheme label.

Another important issue is consumer lack of knowledge about rules and practices concerning food labelling schemes. This can be seen throughout the survey. Beyond the fact that the majority of respondents recognise they don't know enough about food labelling schemes, the level of 'don't know' responses is noticeably high for a number of questions. It is highest for questions related to scheme certification and scheme requirements but is also observed for questions asking respondent opinions on issues such as whether they think schemes are sufficiently regulated (22% gave don't know response) or whether they think there are too many food labelling schemes (23%).

Behaviour and purchasing decisions

In summary, the findings of the choice experiment are roughly in line with the findings of the existing literature on willingness to pay for products affiliated with food labelling schemes. Three different types of food scheme labels were tested on six different products: an origin scheme label was tested on minced beef and cheese, an animal welfare scheme label was tested on eggs and chicken fillet and a health scheme label was tested on yoghurt and margarine.

Overall, origin and animal welfare scheme labels command a higher premium than health scheme labels. In addition, consumers are more willing to pay a price premium for products with scheme labels that have a logo compared to scheme labels that have only text. However, as the price of the logo labels increase relative to labels with text only, consumers tend to switch to text only scheme labels quite quickly. Observing this price sensitivity is not surprising as price was consistently ranked as an important factor when choosing food products by respondents.

In terms of socio-demographic characteristics, we find that women are generally more likely to pay a premium for products affiliated with food labelling schemes (between 0.02 and 0.04 percentage points more likely) as are those respondents with higher incomes. Respondents above 50 years of age are more likely to pay a premium for origin and animal welfare scheme labelled products, while their willingness to pay for health scheme labelled products is generally lower than that of the younger generation.

Vegetarians are significantly more likely to select an animal welfare scheme labelled product, yet they are not more likely to pay a premium for any other food scheme label tested. In addition, we find strong evidence that awareness of food labelling schemes and trust in food labelling schemes are good predictors of willingness to pay more for a labelled product.

EU12 and EU15 comparisons

Generally, EU15 respondents are more sceptical toward food labelling schemes than EU12 respondents who may be particularly trusting. While some differences between the EU15 and the EU12 countries can be explained by their different demographic profiles, it is also important to consider the context of food labelling schemes in these countries. EU15 countries are quite mature markets with an abundance of food labelling schemes on products which can perhaps lead to some confusion. Food labelling schemes have been introduced decades ago and a number of food scandals (for example the recent horse meat scandal), may have also increased caution towards food labelling schemes among the general population. In the EU12, the number of food labelling schemes is limited and they have been introduced more recently making it maybe less of an issue for consumers.

However, the high level of trust and low level of knowledge of food labelling schemes observed among the EU12 respondents (and especially Bulgaria), may make them more likely to be misled by scheme labels. Considering that it was also found that Southern and Mediterranean countries (including many of the EU12 countries) tend to be more willing to pay extra for labelled products, this could make them particularly vulnerable to deceptive labelling schemes. The low number of schemes in some of these countries for the moment is probably limiting the issue but if the number of schemes should increase in the future in these countries, this could become a more important risk.

Recommendations

There is a low level of awareness amongst scheme operators and other stakeholders consulted as part of this study. Raising awareness of the 2010 Commission Guidelines amongst consumer organisations and industry associations for producers, farmers and retailers would potentially increase compliance with the guidelines, and promote the benefits of compliance amongst stakeholders. This could be done by initially promoting the guidelines at the EU level for example with the European Food Information Council (EUFIC) and the BEUC (the umbrella organisation for national consumer associations).

To improve compliance against specific guidelines the following could be explored:

- Encourage schemes to provide information on their requirements and specifications on their website and in a form that is easy for consumers to understand. Similarly improve access to documents, e.g. on websites, that provide evidence of claims made by schemes; and, where relevant, supporting scientific documentation.

- Encourage the provision of information on scheme websites in regard to membership fees and fees for certification.
- Promote the inclusion of provisions enabling and promoting the participation of small-scale procedures in schemes.

In addition, potentially explore methods to minimise the administrative burden and costs for producers and scheme operators in complying with the guidelines.

Educating EU12 consumers on the different types of labelling schemes and the meaning of the most common ones through an information campaign would be a good way of reducing the risk of being misled by scheme labels. Respondents' willingness to learn more about food labelling schemes is encouraging (only 6% say they would not look for information about food labelling schemes), and is likely to make these types of campaign successful. Information on packaging and on the internet is cited by respondents as the two main ways they would like to get information on the subject.

In the EU15, the scepticism toward food labelling schemes and the issues around comprehension of what they mean (especially among the older respondents) seems to call for more transparency from the labelling schemes and more clarity on the scheme labels. Respondents recognise their lack of knowledge and the majority are willing to get more information on food labelling schemes. An information campaign in the media could help people distinguish between the different types of schemes, increase their knowledge of regulations for schemes and help consumers make more informed choice. A database or other internet-based tool that is easy to access could also help consumers to inform themselves about the key characteristics of specific schemes. This database could include a description of a best practice scheme This could be a guide for consumers, scheme operators and scheme members to assess if a given scheme meets the key requirements of the 2010 Commission guidelines and other relevant rules.

More transparency about food labelling schemes would also help improve trust. Most respondents, especially in the EU15 group, think food labelling schemes are not regulated enough. So there may be regulatory means to reduce the risk of misleading claims and statements by labelling schemes; and, in turn, improve consumer and other stakeholder trust in food labelling schemes. Additionally, according to the majority of stakeholders, transparency is one of the most important requirements from the 2010 European Union guidelines. Increasing transparency towards consumers, retailers and other stakeholders is also cited as the main driver for scheme operators to comply with the 2010 EU guidelines. The experiment also finds a clear relationship between consumer trust in food labeling schemes and willingness to pay for products affiliated with food labeling schemes.

Most respondents would like to see more information on the scheme labels themselves and think adding information on the packaging of products is the best way of communicating information to them. This would help consumer understanding of schemes and reduce the proportion of those which think they are misleading. However, it is important to consider the size of the text/print on the scheme labels which appear to be an issue currently, especially for older respondents. One way to give access to more information on the scheme labels themselves, and limit too much small text on the labels, could be to include the web address of the scheme on the scheme label presented of the product. A clear indication on the scheme label about whether the scheme is public or private, certified or self-declared could also be an easy way of increasing scheme transparency without adding a lot of text to the label.

To improve understanding and access to information about food labelling schemes for all interested parties, a model scheme could include the following key elements.

- Clear statement of the scheme name and website on the label affixed to the product.
- Website with scheme contact details.
- Statement of the scheme objectives and the types of products and process it covers.
- Clear statement of the organisations or bodies that own and manage the scheme, including their contact information.
- If the scheme is endorsed by third parties, the names and contact details of the parties should be provided.
- Clear statement of whether the scheme is public or private, and certified or self-declared.
- If a certified scheme, the name of the certification body should be provided and clear and transparent information on the key certification processes and requirements for non-technical readers should be available.
- If the scheme covers areas where there are specific legal requirements, such as organic farming or animal welfare this should be clearly stated, and the extent to which the scheme goes beyond the relevant legal requirements should be understandable to non-technical audiences.
- Provision of clear guidance on how to meet the scheme main requirements for parties interested in joining the scheme. Contact details, question forms or other mechanisms to access assistance with understanding and meeting the requirements for membership should be available.

Annex 1: Logit regression output

Table 30: Marginal effects of demographic variables

VARIABLES	overall	beef	cheese	chicken	eggs	marg-arine	yoghurt
Premium	-0.58***	-0.62***	-0.75***	-0.64***	-0.53***	-0.52***	-0.49***
	(0.01)	(0.03)	(0.03)	(0.02)	(0.01)	(0.02)	(0.02)
Vegetarian	-0.00		-0.00		0.04***	-0.00	0.00
	(0.00)		(0.01)		(0.01)	(0.01)	(0.01)
Vegetarian in house	0.01**	-0.01	0.00	0.02**	0.01*	0.00	0.02**
	(0.00)	(0.01)	(0.01)	(0.01)	(0.01)	(0.01)	(0.01)
Allergy	-0.00	-0.01	-0.01	0.00	0.00	-0.00	-0.01
	(0.00)	(0.01)	(0.01)	(0.01)	(0.00)	(0.01)	(0.01)
Income self assessed	0.01***	0.01***	0.01***	0.01***	0.01***	0.01***	0.01***
	(0.00)	(0.00)	(0.00)	(0.00)	(0.00)	(0.00)	(0.00)
education	-0.01***	-0.00	-0.00	-0.01**	-0.00*	-0.03***	-0.02***
	(0.00)	(0.00)	(0.00)	(0.00)	(0.00)	(0.00)	(0.00)
Child	-0.00**	0.01	0.00	-0.00	-0.01***	0.00	-0.01*
	(0.00)	(0.01)	(0.01)	(0.01)	(0.00)	(0.01)	(0.00)
Age	0.00***	0.00***	0.00***	0.00***	0.00	0.00***	0.00
	(0.00)	(0.00)	(0.00)	(0.00)	(0.00)	(0.00)	(0.00)
Gender	0.02***	0.04***	0.01	0.04***	0.03***	0.01	-0.00
	(0.00)	(0.01)	(0.01)	(0.00)	(0.00)	(0.00)	(0.00)
Origin matters	0.03***	0.08***	0.06***	0.03***	0.04***	-0.01*	-0.00
	(0.00)	(0.01)	(0.01)	(0.01)	(0.00)	(0.01)	(0.01)
Scheme affiliation matters	0.02***	0.02***	0.03***	0.04***	0.03***	0.01	0.00
	(0.00)	(0.01)	(0.01)	(0.01)	(0.00)	(0.01)	(0.01)
Nutrition matters	0.00	-0.01	-0.01*	-0.00	-0.01	0.02***	0.01***
	(0.00)	(0.01)	(0.01)	(0.01)	(0.00)	(0.01)	(0.01)
Brand matters	0.01***	0.02***	0.01	-0.00	0.00	0.02***	0.01
	(0.00)	(0.01)	(0.01)	(0.01)	(0.00)	(0.01)	(0.01)
Ingredients matter	-0.00	-0.01	-0.01	0.00	0.00	0.00	-0.01
	(0.00)	(0.01)	(0.01)	(0.01)	(0.00)	(0.01)	(0.01)
Producer matters	0.02***	0.03***	0.03***	0.02***	0.02***	0.01	0.00
	(0.00)	(0.01)	(0.01)	(0.01)	(0.00)	(0.01)	(0.01)
Name matters	-0.00*	-0.01	-0.01	-0.01*	-0.01***	0.01**	0.02***
	(0.00)	(0.01)	(0.01)	(0.01)	(0.00)	(0.01)	(0.01)
Use by date matters	-0.01***	-0.02**	-0.02*	-0.02***	-0.01***	-0.00	0.00
	(0.00)	(0.01)	(0.01)	(0.01)	(0.00)	(0.01)	(0.01)
Others matter	-0.00	-0.02**	-0.01	0.00	-0.00	-0.01	0.00
	(0.00)	(0.01)	(0.01)	(0.01)	(0.00)	(0.01)	(0.01)
None of above matter	0.01	0.00	-0.00	0.01	0.01*	-0.01	-0.00
	(0.00)	(0.01)	(0.01)	(0.01)	(0.01)	(0.01)	(0.01)
Do not buy	0.01***	0.02***	0.01***	0.02***	0.02***	-0.02***	-0.02***
	(0.00)	(0.01)	(0.01)	(0.01)	(0.00)	(0.00)	(0.00)
Label awareness	0.00***	0.00*	0.00	0.00***	0.00***	0.00	-0.00
	(0.00)	(0.00)	(0.00)	(0.00)	(0.00)	(0.00)	(0.00)
Label knowledge	-0.00***	-0.00	-0.00	-0.00	-0.00	-0.01***	-0.01***
	(0.00)	(0.00)	(0.00)	(0.00)	(0.00)	(0.00)	(0.00)
Frequency buying labels	0.04***	0.04***	0.04***	0.05***	0.05***	0.03***	0.02***
	(0.00)	(0.00)	(0.00)	(0.00)	(0.00)	(0.00)	(0.00)
Label knowledge self assessed	0.00	-0.00	-0.00	-0.00	0.00	0.00*	-0.00
	(0.00)	(0.00)	(0.00)	(0.00)	(0.00)	(0.00)	(0.00)
Trust labels	0.02***	0.01***	0.02***	0.02***	0.02***	0.02***	0.03***
	(0.00)	(0.00)	(0.00)	(0.00)	(0.00)	(0.00)	(0.00)

Source: Consumer survey

Annex 2: Websweep search terms

This annex lists the search terms each websweeper used to identify food labelling schemes in the websweep. These terms were translated into the national language for each country by a native speaker.

- Voluntary food labels
- Certified food labels
- Self-certified food labels
- Food Eco-labelling scheme
- Food Organic farming scheme
- Food Environmental management scheme
- Food Supply chain scheme
- Food Farm assurance scheme
- Food Quality scheme
- Food Mountain product scheme
- Food Carbon footprint scheme
- Food Animal welfare scheme
- Food Animal health scheme
- Food Quality scheme
- Food Traceability scheme
- food Organic scheme
- Food Origin scheme
- Food Fairtrade scheme
- Food Healthy scheme
- Food Safety scheme
- Food Hygiene scheme
- Food Traceability scheme
- Food Climate scheme
- Food Traditional production methods scheme
- Food Quality scheme
- Food Religion scheme
- Food Vegetarian scheme
- Food Allergen free scheme
- Food Short supply chain scheme

Annex 3: Websweep instructions

This annex presents the instructions each websweeper used to complete the websweep of food labelling schemes.

Instructions for websweep

Thank you for your assistance in completing this study. This is an important study for the European Commission. The purpose is to understand the market for voluntary consumer food labelling schemes in the EU 27 plus Iceland and Norway. The information from the study will directly inform future EU policy in the area of food labelling for consumers.

You have been allocated one country and we would like you to complete a websweep of food labelling schemes in this country. This short document provides important instructions for completing the websweep.

Please read these instructions carefully. If you have any queries or questions please contact

Dr Charlotte Duke

Divisional Director London Economics

cduke@londecon.co.uk

+44 (0) 207 866 8193

Miriam Sinn

Economic Consultant

London Economics

msinnn@londecon.co.uk

+44 (0) 207 866 2177

Purpose: To identify **voluntary food labelling schemes** in your country and to complete the excel check list <u>one check list for</u> <u>each food labelling scheme</u> inputting all data requested.

You will need to go to the scheme's website to complete the check list. But, note, you may find a scheme using an indirect route such as consumer organisations. We have also provided you with an initial list of food labelling schemes for you to start with. You should complete the check lists for these schemes first.

Definition of voluntary food labelling schemes: Voluntary food labelling schemes have the following features.

- The most important feature that all food labelling schemes need to have is that the scheme provides information directly to the consumer when the consumer buys a food product. This is often in the form of a label attached to the product and/or a statement on the product that tells the consumer the food has certain attributes e.g. the food is produced in a certain geographic region, it is healthy for you or the food has been produced using animal welfare practices.
- The website will often include the scheme's label or statement, but not always. You need to read the website carefully and determine if the scheme is making claims about the products to consumers.
- If the scheme is providing information and claims to consumers then it is included in the websweep.
- The schemes need to be voluntary in your country. Some food labels are required by law for example, ingredient lists, a statement such as 'product may contain nuts', use by or best before dates, and recommended dietary intake. These labels/information aspects are not included in this study.

What is not a food labelling scheme: In general, competitions are not considered to be a food labelling scheme, although the winner often has the permission to affix a label to their products. However, there are important exceptions to this as some food labelling schemes operate under what looks like a competition. For example, a number of wine labelling schemes give out "gold medal" labels for all wines which receive a certain number of points for quality. As a result, this is not a competition, but a quality labelling scheme and **should be included.**

Before you start the websweep it is important that you read the definitions document attached to these instructions. Please refer back to the definitions document as you do the websweep. If you have any questions about the definitions please contact Charlotte or Miriam.

Search words to use to find consumer food labelling schemes:

On the second sheet in the excel file you will find the words you should use to search for the schemes in your country. Some of these words may not translate directly into your national language. As a native speaker of the national language please translate these words appropriately and please write the translation you use for each word in the spreadsheet so that we can accurately trace the search process.

In addition to the search words we provide, please consider other search words appropriate to your country. Please write these search words in your national language and provide an English translation.

We require you to send one e-mail:

To confirm some information. Your will see in the check list two (2) questions that are listed under "Unfair Commercial Practices". If you answer yes to [QX] "Does the scheme state that it is endorsed by a public or other body?, you will need to send an e-mail to this body (there may be more than one body and you need to send an e-mail to all bodies that endorse the scheme). Note this body <u>is not the scheme itself</u>.

In these instructions you will find <u>the text you should include in your **confirmation e-mail**</u>. You also have a <u>letter of confirmation</u> that must be attached to all e-mails you send.

You have been allocated a London Economics consultant e-mail address which you will use to send the e-mail.

When you have answered all questions please make sure <u>you click the insert checklist data</u> button at the end of the questions. If you do not click this button your information will not be saved.

However, please note that the logo will not be inserted automatically. Please enter the logo manually into the correct field in "Sheet 2" of the excel spread sheet. This is the sheet into which the data of the checklist is stored.

Checking your search: London Economics' senior staff will complete a check of your search once you have completed the websweep. If we have any questions about your websweep we will contact you directly by e-mail.

Definitions for websweep

Please read these definitions before starting the websweep. Please refer back to them during the websweep.

1. **Certified scheme**

   As stated in the EU best practice guidelines 2010, the main defining feature of certification schemes is that they rely on a *<u>third-party attestation procedure</u>*.

   Attestation is defined in the Guidelines as, *issue of a statement based on a decision following review that fulfilment of specified requirements has been demonstrated*.

   For the purposes of this definition a third-party is a *certification body* that issues the certificate or statement on the fulfilment of the scheme's specified requirements. The certification body does not, however, need to be an independent body that conforms to harmonized accreditation requirements.

   A third party cannot be the producer or retailer.

   However, the scheme operator can be accredited to certify a scheme. Therefore the scheme operator can certify that members of the scheme have fulfilled the specific requirements of the scheme.

2. **Self-declared scheme**

   Self-declaration schemes do not have third party attestation. Adherence to these schemes is done by either a) the scheme operator (in the case where the operator is not certified), or b) declaration by the producer or retailer.

3. **Policy area:** The policy area is the topic or claim that the scheme includes. Many schemes will have more than one policy area. Please read the website carefully and tick all policy areas that the scheme covers. The policy areas are the following:

   - **Food safety and hygiene:** Protection of human health and consumers' interests in relation to food covering all aspects of the food production chain from primary production up to and including sale and supply of food to the consumer. For example, make sure that the cold chain is respected, also includes 'GMO-free'.
   - **Traceability**: The ability to trace and follow food, feed, and ingredients through all stages of production, processing and distribution. For example, farm stamp on fresh meat, or code on laid eggs identifying the primary producer
   - **Animal health**: Animals involved in the production of the food were in good health. Includes physical health and biological functioning of animals. For example, check the vaccination of cattle
   - **Animal welfare**: The scheme ensures that the animals are not mistreated, that is they are not suffering unnecessarily, mutilated or poisoned and their destruction is made in an appropriate and humane manner. The assessment of animal welfare at all relevant stages of the value chain (mainly farming, transport and slaughter) is at the heart of all animal welfare schemes.
   - **Origin:** There is an objective and exclusive link between the features of the product and its geographical origin. Further all stages of the production process must take place in the defined region. For example, ensure that the meat comes from the specified country and has not travelled around the world, or ensure that cheese come from a particular region and, because of that, possesses particular qualities.
   - **Organic:** organic production and labelling of organic products. Examples include: Wide crop rotation as a prerequisite for an efficient use of on-site resources; Very strict limits on chemical synthetic pesticide and synthetic fertiliser use, livestock antibiotics, food additives and processing aids and other inputs; Absolute prohibition of the use of genetically modified organisms; Taking advantage of on-site resources, such as livestock manure for fertiliser or feed produced on the farm; Choosing plant and animal species that are resistant to disease and adapted to local conditions; Raising livestock in free-range, open-air systems and providing them with organic feed; Using animal husbandry practices appropriate to different livestock species.

- **Environmental management**: Commit to both evaluating and reducing environmental impacts and continuously improving environmental performance. reducing pollution, minimising water use in production, minimising chemical use
- **Climate change:** Minimises "the amount of carbon dioxide released into the atmosphere as a result of the activities of a particular individual, organization, or community" during the production process. This would include carbon footprinting.
- **Socio-economic producers:** The food is produced in an economically sustainable or equitable manner. Securing the rights of, marginalized producers and workers. For example, Fairtrade.
- **Traditional products or methods:** The product has been made following a traditional procedure Respecting some regional traditions for instance
- **Religious requirement:** Food produced according to religious requirements Halal or Kosher
- **Vegetarian/vegan:** Food suitable for consumers under vegetarian / vegan diet A vegetarian does not eat meat, poultry, game, fish, shellfish or crustacea, or by-products of slaughter
- **Allergen free**: Suitable for people with specific allergies The product does not contain gluten, mustard, egg or lactose for example
- **Health related**: The product is not harmful to the consumer's health and is recommended as part of a balanced diet Low cholesterol - it will be necessary to distinguish a scheme from a pure health/nutrition claim, such as low-fat.
- **Taste/smell qualities**: Relates to the sensory experience of consuming the food. For example it tastes and smells good.
- **Directly from the farm/short supply chain**: The product does not go through a long transportation process from place of production to point of sale to the consumer, farm gate products
- **Other:** e.g. Store management

4. **Production process:** The production process is the type of products or activities in the supply chain from primary production to the point of sale to the consumer that are covered by the scheme. Some schemes will include more than one production process. Please read the website carefully and tick all production processes that the scheme includes. The production processes are the following:

- **Crop production:** Schemes that cover the production of crops
- **Animal production**: Schemes that cover the production of animals
- **Product and food processing** : Schemes that deals with the whole supply chain
- **Storage and packaging**: Schemes that cover storage and packaging process
- **Distribution** schemes that cover transportation, wholesalers, warehouses, distribution centres

5. **Scheme/owner manager/developer:** Some schemes will have more than one type of owner, manager or developer. Please read the website carefully and tick all market actors that apply to the scheme.

- **Agricultural producers:** Organisations who produce agricultural output
- **Slaughterhouses**: Organisations slaughtering animals
- **Processing business:** Organisations processing the agricultural output for final consumption
- **Wholesalers:** Seller to businesses
- **Retailers**: Seller to consumers
- **Traders**: Traders
- **Civil society organizations**: non-governmental and non-profit entities that seek to bring about positive social and environmental change. These include advocacy groups as well as organizations operating at the field level. Civil society organizations can be "multi-national" and international in nature, or small grass-roots groups. The definition of civil society organizations used by the Global Compact does not include the private sector, academia, labour, or municipalities.
- **Consumers and consumer bodies: Consumer organisations, consumer representative organisations, consumer groups**
- **Public bodies**: Government departments and agencies
- **Certification bodies**: Bodies that provide certification
- Others

E-mail text for CONFIRMATION e-mail to send to the body that endorses the scheme.

Please translate into your national language. Make sure you attach the letter of confirmation to the e-mail.

Dear Sir/Madam,

As part of a study on food labelling in Europe for the European Commission Directorate General for Health and Consumers, I am completing a review of [INSERT SCHEME NAME]. On the scheme's website it claims that the scheme is endorsed by your organisation.

Could you please confirm by return e-mail if your organisation endorses this scheme.

I attach to this e-mail a letter from the European Commission confirming this study.

Kind regards

[INSERT YOUR NAME]

Annex 4: Websweep checklist

This annex presents the information collected for each identified scheme in the websweep.

Figure 123: Food scheme label websweep checklist

Scheme Database

Instructions: Please first collect the information below on the main features/characteristics of the scheme. Then please complete the assessment check. If you are uncertain as to the answer to any question please make an informed judgement but add to the notes section at the end this sheet any uncertainties you have so that these can be cross-checked

		Notes
Name of person Checking		
e-mail contact of person checking		
Date check completed		
Country of scheme origin		
Name of scheme		
Is it a cross-country scheme?		
If yes, what other countries does it operate in?		
Website address		
Email address		
Phone number		
Postal address		
Type of scheme		*A certified scheme is one where a third party has verified the product meets the scheme requirements. A self-declared scheme is one where there is no third party verification. Meeting a self-declared scheme requirements can be by the product*
If it is a certified scheme, are the contact details of the certifying body provided?		
Public or private scheme		*A scheme is not considered public unless it explicitly states this on the website and if it is operated by a public body*
Scheme Logo. Please paste here		*Please manually insert it in the datasheet after pressing the "insert" button below.*

Products covered *Please check all that are relevant*	Meat products ☐	Milk Products ☐	Egg products ☐	Fish products ☐	Fruit and vegetable products ☐	Cereal products ☐	Oils and fat products ☐
	Sugar and confectionary products ☐	Wine and spirits products ☐	Other ☐	No information provided ☐			
Policy area(s) *Please check all that are relevant*	Safety/Hygiene ☐	Traceability ☐	Animal health ☐	Origin ☐	Animal welfare ☐	Organic farming ☐	Environmental management ☐
	Climate change ☐	Socio-economic producers conditions ☐	Taste/smell qualities ☐	Traditional products or methods ☐	Religious requirement ☐	Vegetarian ☐	Allergen free ☐
	Health related ☐	Directly from the farm - short supply chain ☐	other ☐	No information provided ☐			
Production process *Please check all that are relevant*	Crop production ☐	Animal production ☐	Product and food processing ☐	Storage and packaging ☐	Distribution ☐	Other ☐	No information provided ☐
Scheme owner/manager *Please check all that are relevant*	Providers of farm services ☐	Agricultural producers ☐	Slaughterhouses ☐	Processing business ☐	Wholesalers ☐	Retailers ☐	Traders ☐
	Civil society organizations ☐	Consumers/consumer bodies ☐	Public bodies ☐	Certification bodies ☐	Others ☐	No information provided ☐	

Figure 124: Food scheme label websweep checklist

Scheme Checklist		
Scheme participation and Development		
Are the criteria (if any) transparent and non-discriminatory and open to all willing and able to comply?		*This means that the specifications for complying with the scheme can easily be found. The criteria for complying with the scheme requirements are stated on the website in a transparent way (even if technical language is used in some instances). The criteria do not discriminate against participates who are wiling to participate and could meet the criteria.*
Are there mechanisms for other stakeholders to contribute to the development of the scheme? That is, can individuals or groups interested in the development or operation of the scheme make a contribution to these processes.		*Stakeholders include: farmers, food traders, food industry, wholesalers, retailers, consumers, members of the scheme etc.*
Is it clear what these mechanisms are?		
Is there a feedback form for comments on the website?		
Requirements and corresponding claims		
Does the scheme clearly state the **objectives?**		
Are claims and **requirements clearly linked** to the objectives?		
Is the **scope** of the scheme (i.e. The type of products or processes it covers) clear?		
Are the scheme requirements/specifications available on the website for free?		
Please paste link		
Are the specifications clear and **understandable?**		
Are the specifications sufficiently **detailed** for consumers to understand the requirements for producers to enter the scheme?		
Evidence of claims and requirements		*Note. This will not apply to all schemes. For example, some orgin schemes will not have scientific documentation*
Does the scheme claim to be based on objective and verifiable evidence and **scientifically sound documentation**?		
Are the documents on which the claims are based freely available on the schemes website?		*Are documents on the website which provide evidence for why the requirements and claims of the scheme are important.*
Does the scheme indicate to what extent their requirements go **beyond the relevant legal requirements**?		
Certification and inspections		*These questions only apply to certified schemes*
Does the website provide clear and documented procedures for **inspections** of scheme participants ?		
Are the guidelines, checklists and plans for inspections of scheme participants publically available either on the website or other means?		
Does the scheme state **how many control bodies** can perform controls for the scheme?		
Costs		
Are membership fees publicly available?		*Note. Not all schemes will have membership fees*
Are fees for certification public?		*This question is relevant only for certification schemes*
Are fees for inspection public?		*This question is relevant only for certification schemes*
If there are different fees for different participants, is it explained why this is the case?		
Overlap with other schemes		
Is there a mutual recognition and/or benchmarking with other schemes?		
Does the website link to other relevant schemes?		
Unfair commercial practices		
Does the scheme state that it is endorsed by a public or other body?		
Is this actually the case?		*Please send off an email to the relevant body*
General Questions		
Does the scheme state that consumers or consumer bodies were involved in making of the rules for the scheme?		
Does the scheme state the **number** of the scheme's members?		
If the scheme refers to a geographical origin, does the claimed place of provenance **really exist**?		*If unsure, please check Google/googlemaps*
Is the scheme targeted at a **particular group** of consumers, e.g. children, elderly people, women?		
In case there are specific **legal requirements** on the subjects covered by the scheme, e.g. organic farming or animal welfare, does the scheme make reference to these requirements ?		
Does the scheme refer to the **origin of meat** used as an ingredient?		
If the scheme refers to a **geographical origin**, does it refer to the EU, the country or the region?		
If the scheme refers to animal welfare, does it refer to the **stunning of animals**?		
If the scheme refers to a geographical origin, does it refer to the **mountain farming**?		
Any other comments		

Annex 5: Inconsistencies between answers to the scheme operator survey and websweep

This annex illustrates where there were differences between the answers provided by scheme operators and those provided by the websweepers. For the four questions shown below, answers were provided using both methods. In cases where the answers differed, the most favourable answer was selected for use in the compliance indices. For example, in Austria, 6 scheme operators answered the questionnaire. In the case of the question 'Does the scheme claim to be based on objective and verifiable evidence and scientifically sound documentation?', 2 provided different answers to those provided by the websweepers.

Table 31: Inconsistencies between answers to the scheme operator survey and websweep

Country	Are there mechanisms for stakeholders to contribute to the development of the scheme?	Does the scheme claim to be based on objective and verifiable evidence and scientifically sound documentation?	Does the scheme state that consumer or consumer bodies were involved in making of the rules of the scheme?	Total number of schemes responding to scheme operator survey
Austria	6	2	2	6
Belgium	5	5	2	9
Bulgaria	1	0	1	1
Czech Republic	0	0	0	1
Denmark	0	0	0	2
Estonia	1	1	1	1
Finland	0	1	1	1
France	4	3	4	5
Germany	5	6	4	8
Iceland	1	0	1	2
International	1	2	1	2
Ireland	0	0	0	1
Italy	2	5	2	5
Lithuania	1	3	1	4
Norway	0	1	1	1
Poland	1	0	2	4
Portugal	1	1	2	7
Slovakia	0	1	0	2
Slovenia	1	2	0	2
Spain	10	11	12	19
Sweden	0	0	2	2
The Netherlands	0	2	1	3
United Kingdom	1	1	2	7
Total	41	47	42	95†

Note: There were no respondents to the scheme operator survey in the remaining countries. †: Two respondents to the scheme operator survey operate two and three schemes respectively.

Source: London Economics

Annex 6: Indices

This annex presents the different compliance indices, the questions used in the assessment and the relevant guideline each question refers to.

Figure 125: Combined index 2010 Guidelines

Section #	Guideline #	Criteria	Source		Points	Notes
Recommendations regarding scheme participation and development						
4	1	Are the criteria (if any) transparent and non-discriminatory and open to all willing and able to comply?	Websweep	x	1	
4	2	Are there mechanisms for other stakeholders to contribute to the development of the scheme?	Websweep	x	1	
4	2	Is it clear what these mechanisms are?	Websweep	x	1	
4	3	If yes, are these same mechanisms available in all countries in which your scheme operates? AND Are these mechanisms translated into the local language?	Scheme operator survey	x	1	**Guideline not applicable to the following schemes**: scheme operates only in one country
4	4	Were technical committees of experts involved in the development of the scheme's requirements? And were the scheme requirements submitted to a broad group of stakeholders for input?	Scheme operator survey	x	1	**Guideline not applicable to the following policy areas:** origin, religious requirements, vegetarian, allergen free, taste and smell qualities, short supply chain
4	5	Were stakeholders involved in the development of inspection criteria and checklist as well as in the determination of thresholds for sanctions?	Scheme operator survey	x	1	
4	6	Are any feedback mechanisms in place through which scheme participants can review the rules and requirements of the scheme?	Scheme operator survey	x	1	
4	8	Are there contact details on the website? OR is there a feedback form for comments on the website?	Websweep	x	1	
Recommendations regarding scheme requirements and corresponding claims						
5.1	1	Does the scheme clearly state the objectives?	Websweep	x	1	
5.1	2	Are claims and requirements clearly linked to the objectives?	Websweep	x	1	
5.1	3	Is the scope of the scheme (i.e. The type of products or processes it covers) clear?	Websweep	x	1	
5.1	4	Are the scheme requirements/specifications available on the website for free?	Websweep	x	1	
5.1	6	Are the specifications clear and understandable? Are the specifications sufficiently detailed for consumers to understand the requirements for producers to enter the scheme?	Websweep	x	1	
5.1	8	Does the scheme clearly state that it requires certification by an independent body and provides details of that body?	Websweep	x	1	
5.2	1	Does the scheme claim to be based on objective and verifiable evidence and scientifically sound documentation? And are the documents on which the claims are based freely available on the schemes website?	Websweep	x	1	**Guideline not applicable to the following policy areas:** origin, traditional methods, religious requirements, vegetarian, taste and smell qualities, short supply chain
5.2	2	Are the scheme's requirements adapted to local conditions in each country in which the scheme operates?	Scheme operator survey	x	1	**Guideline not applicable to the following schemes**: scheme operates only in one country
5.2	3	Does the scheme indicate to what extent their requirements go beyond the relevant legal requirements?	Websweep	x	1	**Guideline not applicable to the following policy areas:** religious requirements, vegetarian, taste and smell qualities
Recommendations regarding certification and inspections						
6.1	1	Is the certification of compliance carried out by a nationally or internationally accredited body?	Scheme operator survey	x	1	
6.1	2	Were any geographical restrictions in place when selecting the certification body?	Scheme operator survey	x	1	
6.2	1	Does the website provide clear and documented procedures for inspections of scheme participants?	Websweep	x	1	
6.2	1	Does the scheme state how many control bodies can perform controls for the scheme?	Websweep	x	1	
6.2	1	Is there a minimum inspection frequency of the scheme's participants?	operator survey	x	1	
6.2	2	Does the frequency of inspection depend on the previous inspection result?	Scheme operator survey	x	1	
6.2	3	How are inspection results evaluated?	Scheme operator survey	x	1	
6.2	4	Are there unannounced inspections and is notice given at short notice (e.g. within 48 hours)?	Scheme operator survey	x	1	
6.2	5	Are the guidelines, checklists and plans for inspections of scheme participants publically available either on the website or other means?	Websweep	x	1	
6.2	6	Are there clear and documented procedures to deal with non-compliance?	Scheme operator survey	x	1	
6.2	6	And are there well defined knock-out criteria which would lead to non-issue or withdrawal of the certificate?	Scheme operator survey	x	1	
6.3	1	Are membership fees publicly available and are fees for certification and inspection public?	Websweep	x	1	
6.3	2	If there are different fees for different participants, is it explained why this is the case?	Websweep	x	1	**Guideline not applicable to the following schemes**: membership fees do not differ
6.4	/	Are your auditors/inspectors required to have qualifications/accreditation or certifications?	Scheme operator survey	x	1	
6.5	/	Are any provisions in place enabling and promoting the participation of small-scale producers?	Scheme operator survey	x	1	
Recommendations regarding mutual recognition and benchmarking / overlap with other schemes						
7	1	Is there a mutual recognition and/or benchmarking with other schemes and does the website link to other relevant schemes?	Websweep	x	1	**Guideline not applicable to the following schemes**: no similar schemes exist
7	2	Do you accept (partially or totally) the inspections and audits carried out by other schemes?	Scheme operator survey	x		**Guideline not applicable to the following schemes**: no similar schemes exist
7	3	Do you carry out any combined audits with other schemes?	Scheme operator survey	x	1 for any of the three	**Guideline not applicable to the following schemes**: no similar schemes exist
7	4	Were any attempts made to harmonize the auditing protocols and documentation requirements with other schemes?	Scheme operator survey	x		**Guideline not applicable to the following schemes**: no similar schemes exist
				Maximum points:	33	

Figure 126: Websweep index 2010 Guidelines

Section #	Guideline #	Criteria	Source		Points	
Recommendations regarding scheme participation and development						
4	1	Are the criteria (if any) transparent and non-discriminatory and open to all willing and able to comply?	Websweep	x	1	
4	2	Are there mechanisms for other stakeholders to contribute to the development of the scheme?	Websweep	x	1	
4	2	Is it clear what these mechanisms are?	Websweep	x	1	
4	8	Are there contact details on the website? OR is there a feedback form for comments on the website?	Websweep	x	1	
Recommendations regarding scheme requirements and corresponding claims						
5.1	1	Does the scheme clearly state the objectives?	Websweep	x	1	
5.1	2	Are claims and requirements clearly linked to the objectives?	Websweep	x	1	
5.1	3	Is the scope of the scheme (i.e. The type of products or processes it covers) clear?	Websweep	x	1	
5.1	4	Are the scheme requirements/specifications available on the website for free?	Websweep	x	1	
5.1	6	Are the specifications clear and understandable? Are the specifications sufficiently detailed for consumers to understand the requirements for producers to enter the scheme?	Websweep	x	1	
5.1	8	Does the scheme clearly state that it requires certification by an independent body and provides details of that body?	Websweep	x	1	
5.2	1	Does the scheme claim to be based on objective and verifiable evidence and scientifically sound documentation? And are the documents on which the claims are based freely available on the schemes website?	Websweep	x	1	**Guideline not applicable to the following policy areas:** origin, traditional methods, religious requirements, vegetarian, taste and smell qualities, short supply chain
5.2	3	Does the scheme indicate to what extent their requirements go beyond the relevant legal requirements?	Websweep	x	1	**Guideline not applicable to the following policy areas:** religious requirements, vegetarian, taste and smell qualities
Recommendations regarding certification and inspections						
6.2	1	Does the website provide clear and documented procedures for inspections of scheme participants?	Websweep	x	1	
6.2	1	Does the scheme state how many control bodies can perform controls for the scheme?	Websweep	x	1	
6.2	5	Are the guidelines, checklists and plans for inspections of scheme participants publically available either on the website or other means?	Websweep	x	1	
6.3	1	Are membership fees publicly available and are fees for certification and inspection public?	Websweep	x	1	
6.3	2	If there are different fees for different participants, is it explained why this is the case?	Websweep	x	1	
Recommendations regarding mutual recognition and benchmarking / overlap with other schemes						
7	1	Is there a mutual recognition and/or benchmarking with other schemes and does the website link to other relevant schemes?	Websweep	x	1	**Guideline not applicable to the following schemes**: no similar schemes exist
Other criteria not included in the guidelines						
			Maximum points:		18	

Figure 127: Websweep index consumer

Section #	Guideline #	Criteria	Source	Points	
Recommendations regarding scheme participation and development					
4	8	Are there contact details on the website? OR is there a feedback form for comments on the website?	Websweep	1	
Recommendations regarding scheme requirements and corresponding claims					
5.1	1	Does the scheme clearly state the objectives?	Websweep	1	
5.1	2	Are claims and requirements clearly linked to the objectives?	Websweep	1	
5.1	3	Is the scope of the scheme (i.e. The type of products or processes it covers) clear?	Websweep	1	
5.1	4	Are the scheme requirements/specifications available on the website for free?	Websweep	1	
5.1	6	Are the specifications clear and understandable? Are the specifications sufficiently detailed for consumers to understand the requirements for producers to enter the scheme?	Websweep	1	
5.1	8	Does the scheme clearly state that it requires certification by an independent body and provides details of that body?	Websweep	1	
5.2	1	Does the scheme claim to be based on objective and verifiable evidence and scientifically sound documentation? And are the documents on which the claims are based freely available on the schemes website?	Websweep	1	**Guideline not applicable to the following policy areas:** origin, traditional methods, religious requirements, vegetarian, taste and smell qualities, short supply chain
5.2	3	Does the scheme indicate to what extent their requirements go beyond the relevant legal requirements?	Websweep	1	**Guideline not applicable to the following policy areas:** religious requirements, vegetarian, taste and smell qualities
Recommendations regarding certification and inspections					
Recommendations regarding mutual recognition and benchmarking / overlap with other schemes					
7	1	Is there a mutual recognition and/or benchmarking with other schemes and does the website link to other relevant schemes?	Websweep	1	**Guideline not applicable to the following schemes**: no similar schemes exist
Other criteria not included in the guidelines					
n.a.	n.a.	Does the scheme state that it is endorsed by a public or other body and is this actually the case? (One minus point if this is not actually the case, zero points otherwise)	n.a.	1	
n.a.	n.a.	If the scheme refers to a geographical origin, does the claimed place of provenance really exist?	n.a.	1	
n.a.	n.a.	Does the scheme state the number of the scheme's members?	n.a.	1	
n.a.	n.a.	In case there are specific legal requirements on the subjects covered by the scheme, e.g. organic farming or animal welfare, does the scheme make reference to these requirements ?	n.a.	1	Set to "." If not identified as "yes" and not concerned with animal welfare or organic farming
			Maximum points:	14	

Figure 128: Combined index 2010 Guidelines for criteria that can be fulfilled by self-declaration schemes

Section #	Guideline #	Criteria	Source		Points	
Recommendations regarding scheme participation and development						
4	1	Are the criteria (if any) transparent and non-discriminatory and open to all willing and able to comply?	Websweep	x	1	
4	2	Are there mechanisms for other stakeholders to contribute to the development of the scheme?	Websweep	x	1	
4	2	Is it clear what these mechanisms are?	Websweep	x	1	
4	3	If yes, are these same mechanisms available in all countries in which your scheme operates? AND Are these mechanisms translated into the local language?	Scheme operator survey	x	1	**Guideline not applicable to the following schemes**: scheme operates only in one country
4	4	Were technical committees of experts involved in the development of the scheme's requirements? And were the scheme requirements submitted to a broad group of stakeholders for input?	Scheme operator survey	x	1	**Guideline not applicable to the following policy areas:** origin, religious requirements, vegetarian, allergen free, taste and smell qualities, short supply chain
4	5	Were stakeholders involved in the development of inspection criteria and checklist as well as in the determination of thresholds for sanctions?	Scheme operator survey	x	1	
4	6	Are any feedback mechanisms in place through which scheme participants can review the rules and requirements of the scheme?	Scheme operator survey	x	1	
4	8	Are there contact details on the website? OR is there a feedback form for comments on the website?	Websweep	x	1	
Recommendations regarding scheme requirements and corresponding claims						
5.1	1	Does the scheme clearly state the objectives?	Websweep	x	1	
5.1	2	Are claims and requirements clearly linked to the objectives?	Websweep	x	1	
5.1	3	Is the scope of the scheme (i.e. The type of products or processes it covers) clear?	Websweep	x	1	
5.1	4	Are the scheme requirements/specifications available on the website for free?	Websweep	x	1	
5.1	6	Are the specifications clear and understandable? Are the specifications sufficiently detailed for consumers to understand the requirements for producers to enter the scheme?	Websweep	x	1	
5.2	1	Does the scheme claim to be based on objective and verifiable evidence and scientifically sound documentation? And are the documents on which the claims are based freely available on the schemes website?	Websweep	x	1	**Guideline not applicable to the following policy areas:** origin, traditional methods, religious requirements, vegetarian, taste and smell qualities, short supply chain
5.2	2	Are the scheme's requirements adapted to local conditions in each country in which the scheme operates?	Scheme operator survey	x	1	**Guideline not applicable to the following schemes**: scheme operates only in one country
5.2	3	Does the scheme indicate to what extent their requirements go beyond the relevant legal requirements?	Websweep	x	1	**Guideline not applicable to the following policy areas:** religious requirements, vegetarian, taste and smell qualities
Recommendations regarding certification and inspections						
6.2	1	Does the website provide clear and documented procedures for inspections of scheme participants?	Websweep	x	1	
6.2	1	Does the scheme state how many control bodies can perform controls for the scheme?	Websweep	x	1	
6.2	1	Is there a minimum inspection frequency of the scheme's participants?	Scheme operator survey	x	1	
6.2	2	Does the frequency of inspection depend on the previous inspection result?	Scheme operator survey	x	1	
6.2	4	Are there unannounced inspections and is notice given at short notice (e.g. within 48 hours)?	Scheme operator survey	x	1	
6.2	5	Are the guidelines, checklists and plans for inspections of scheme participants publically available either on the website or other means?	Websweep	x	1	
6.2	6	And are there well defined knock-out criteria which would lead to non-issue or withdrawal of the certificate?	Scheme operator survey	x	1	
6.2	7	How are inspection results evaluated?	Scheme operator survey		1	
6.3	1	Are membership fees publicly available and are fees for certification and inspection public?	Websweep	x	1	
6.3	2	If there are different fees for different participants, is it explained why this is the case?	Websweep	x	1	**Guideline not applicable to the following schemes**: membership fees do not differ
6.4	/	Are your auditors/inspectors required to have qualifications/accreditation or certifications?	Scheme operator survey	x	1	
6.5	/	Are any provisions in place enabling and promoting the participation of small-scale producers?	Scheme operator survey	x	1	
Recommendations regarding mutual recognition and benchmarking / overlap with other schemes						
7	1	Is there a mutual recognition and/or benchmarking with other schemes and does the website link to other relevant schemes?	Websweep	x	1	**Guideline not applicable to the following schemes**: no similar schemes exist
7	2	Do you accept (partially or totally) the inspections and audits carried out by other schemes?	Scheme operator survey	x	1	**Guideline not applicable to the following schemes**: no similar schemes exist
7	3	Do you carry out any combined audits with other schemes?	Scheme operator survey	x	1	**Guideline not applicable to the following schemes**: no similar schemes exist
7	4	Were any attempts made to harmonize the auditing protocols and documentation requirements with other schemes?	Scheme operator survey	x	1	**Guideline not applicable to the following schemes**: no similar schemes exist
Other criteria not included in the guidelines						
				Maximum points:	32	

Annex 7: Food labelling schemes awareness by scheme and by country

The table below provides food labelling awareness data by types of schemes and by country. The figures highlighted in green represent the country with the highest awareness and the figures in yellow show the country with the lowest awareness of a particular type of scheme.

Highest % per scheme   Lowest % per scheme

Figure 129: Food labelling schemes awareness by scheme and by country

	Organic labels	Health benefits	Allergen free	Animal health or animal welfare	Traceability	Local or regional labelling scheme	Fair trade labels	Traditional products or methods	Vegetarians or vegans	European PDO - PGI scheme	Short supply chain	Food safety and hygiene	Eco label	Religious requirements	Quality of taste or smell	overall awereness
All countries	69%	67%	61%	57%	51%	45%	44%	41%	37%	33%	32%	31%	24%	23%	23%	**43%**
IE	82%	84%	80%	73%	81%	47%	73%	35%	79%	16%	40%	56%	30%	26%	27%	**55%**
IT	79%	74%	75%	73%	79%	66%	38%	52%	34%	65%	56%	43%	35%	17%	25%	**54%**
UK	83%	82%	75%	79%	58%	37%	79%	35%	82%	14%	32%	36%	30%	40%	19%	**52%**
LU	83%	67%	71%	68%	68%	69%	74%	54%	48%	30%	40%	23%	24%	29%	12%	**51%**
FR	86%	76%	62%	63%	53%	65%	63%	43%	22%	40%	33%	20%	27%	57%	27%	**49%**
PT	74%	81%	68%	65%	49%	52%	28%	57%	41%	45%	37%	55%	34%	13%	25%	**48%**
EL	81%	79%	64%	64%	44%	38%	18%	50%	38%	44%	35%	55%	23%	8%	28%	**44%**
BE	74%	72%	60%	60%	42%	41%	54%	44%	40%	34%	24%	23%	18%	36%	25%	**43%**
SL	74%	79%	69%	72%	57%	40%	18%	35%	57%	34%	28%	24%	17%	16%	18%	**43%**
PL	68%	76%	60%	57%	54%	39%	21%	56%	28%	28%	29%	44%	20%	9%	41%	**42%**
RO	62%	59%	56%	49%	52%	47%	15%	57%	34%	43%	36%	46%	22%	11%	38%	**42%**
FI	77%	81%	73%	70%	55%	26%	65%	34%	35%	11%	24%	20%	24%	13%	17%	**42%**
SK	35%	74%	77%	61%	48%	41%	20%	58%	46%	29%	37%	35%	23%	10%	31%	**42%**
CZ	77%	68%	68%	51%	50%	41%	36%	55%	40%	24%	21%	21%	15%	13%	40%	**41%**
ES	67%	73%	73%	47%	39%	52%	34%	45%	32%	43%	29%	33%	17%	14%	22%	**41%**
LT	86%	67%	55%	41%	51%	45%	18%	53%	35%	30%	33%	31%	22%	16%	35%	**41%**
HU	61%	69%	62%	48%	52%	36%	19%	48%	35%	32%	30%	44%	25%	16%	30%	**41%**
EE	76%	80%	69%	44%	72%	41%	36%	29%	29%	17%	12%	18%	21%	9%	27%	**39%**
NO	71%	64%	58%	55%	49%	41%	51%	25%	29%	9%	34%	22%	13%	32%	22%	**38%**
SE	73%	62%	61%	56%	52%	26%	62%	26%	30%	14%	32%	11%	27%	27%	15%	**38%**
BG	39%	58%	55%	41%	48%	40%	10%	62%	34%	41%	27%	47%	22%	7%	29%	**37%**
AT	57%	41%	50%	49%	53%	48%	51%	28%	38%	33%	32%	16%	30%	12%	10%	**37%**
NL	65%	67%	53%	60%	29%	18%	60%	20%	42%	10%	12%	19%	13%	26%	14%	**34%**
LV	69%	58%	38%	34%	64%	37%	16%	44%	29%	15%	27%	23%	13%	10%	29%	**34%**
DK	60%	44%	38%	45%	32%	18%	46%	17%	12%	12%	22%	19%	18%	15%	16%	**28%**
DE	46%	36%	38%	34%	36%	33%	40%	24%	26%	25%	23%	14%	17%	10%	11%	**28%**

Source: Consumer Online survey, Q3. Have you ever seen the following type of logos or statement on food products? Ipsos

Annex 8: Country weights

The table below presents the weight applied to each country in European wide analysis. The first column lists all the countries included in the consumer opinion survey. The second column shows the country population and its proportion in the total population of the surveyed countries. The third column shows the number of completed interviews per country and its proportion among all the completed interviews in the survey. The fourth column indicates the number of interviews there should be per country so that the proportion of interviews from that country in the in the survey corresponds to the proportion of the country population in the total population of the surveyed countries (% of country population / total number of interviews in the survey X 100). The last column shows the weight that should be applied to the interviews of a specific country so that the proportion of its interviews in the survey is equal to the proportion of its population among the population of all surveyed countries (weighted population / unweighted population).

Table 32: Country weights applied to the consumer online survey data

	Country population Source: Eurostat (2012)		Survey population not weighted		Survey population weighted		country weight
Country	**n**	**%**	**n**	**%**	**n**	**%**	
Austria	6933027	1,69%	801	4%	326	1,69%	0,407
Belgium	8833123	2,16%	803	4%	415	2,16%	0,517
Bulgaria	6145784	1,50%	801	4%	289	1,50%	0,361
Czech Republic	8668155	2,12%	801	4%	407	2,12%	0,508
Denmark	4378227	1,07%	500	3%	206	1,07%	0,411
Estonia	1093225	0,27%	500	3%	51	0,27%	0,103
Finland	4319501	1,05%	502	3%	203	1,05%	0,404
France	49411191	12,06%	1001	5%	2322	12,06%	2,319
Germany	68438394	16,70%	1000	5%	3216	16,70%	3,216
Greece	9334532	2,28%	800	4%	439	2,28%	0,548
Hungary	8008829	1,95%	803	4%	376	1,95%	0,469
Ireland	3422606	0,84%	517	3%	161	0,84%	0,311
Italy	50588130	12,35%	1004	5%	2377	12,35%	2,368
Latvia	1690785	0,41%	500	3%	79	0,41%	0,159
Lithuania	2447007	0,60%	501	3%	115	0,60%	0,230
Luxembourg	415783	0,10%	502	3%	20	0,10%	0,039
Netherlands	13243577	3,23%	802	4%	622	3,23%	0,776
Norway	3867645	0,94%	504	3%	182	0,94%	0,361
Poland	31388459	7,66%	1002	5%	1475	7,66%	1,472
Portugal	8403044	2,05%	800	4%	395	2,05%	0,494
Romania	17470268	4,26%	1002	5%	821	4,26%	0,819
Slovenia	1701991	0,42%	501	3%	80	0,42%	0,160
Slovakia	4385500	1,07%	498	3%	206	1,07%	0,414
Spain	37878334	9,24%	1004	5%	1780	9,24%	1,773
Sweden	7563646	1,85%	802	4%	355	1,85%	0,443
United Kingdom	49733096	12,14%	1003	5%	2337	12,14%	2,330
Total	**409763859**	**100%**	**19254**	**100%**	**19254**	**100%**	

Annex 9: Sample profile

The following tables present the quota applied and the achieved proportion of respondents by gender, age and region in each country.

AUSTRIA				
Quotas defined at soft launch for main grocery shoppers aged 18-65 based on national representative sample				
Description	Quota		Achieved	
GENDER	n	%	n	%
Male	312	39%	325	41%
Female	488	61%	476	59%
AGE				
18-24	80	10%	88	11%
25-34	152	19%	159	20%
35-44	160	20%	164	20%
45-54	152	19%	157	20%
55-65	192	24%	170	21%
66+ (based on panel feasibility)	64	8%	64	8%
REGION				
Ostösterreich	424	53%	408	51%
Südösterreich	152	19%	160	20%
Westösterreich	232	29%	233	29%
Total	**800**	**100%**	**801**	**100%**

BELGIUM				
Quota generated for main grocery shoppers aged 18+ based on official statistics and panel information				
Description	Quota		Achieved	
GENDER				
Male	350	44%	341	42%
Female	450	56%	462	58%
AGE				
18-24	49	6%	36	4%
25-34	130	16%	137	17%
35-44	163	20%	165	21%
45-54	158	20%	161	20%
55+	300	38%	304	38%
REGION				
Centre (Bruxelles)	180	23%	185	23%
North (Flandre)	397	50%	399	50%
South (Wallonie)	223	28%	219	27%
Total	**800**	**100%**	**803**	**100%**

BULGARIA				
Quotas defined at soft launch for main grocery shoppers aged 18-65 based on national representative sample				
Description	**Quota**		**Achieved**	
GENDER				
Male	176	22%	175	22%
Female	624	78%	626	78%
AGE				
18-24	80	10%	70	9%
25-34	208	26%	208	26%
35-44	320	40%	326	41%
45-50	152	19%	154	19%
51+ (based on panel feasibility)	40	5%	43	5%
Description	**Nat rep 18-50***		**Achieved**	
REGION				
Severozapaden	86	11%	102	13%
Severen tsentralen	95	12%	83	10%
Severoiztochen	107	13%	89	11%
Yugoiztochen	116	15%	160	20%
Yugozapaden	235	29%	244	30%
Yuzhen tsentralen	162	20%	123	15%
Total	**800**	**100%**	**801**	**100%**

**Source: Eurostat 2011*

CZECH REPUBLIC				
Quotas defined at soft launch for main grocery shoppers aged 18-65 based on national representative sample				
Description	**Quota**		**Achieved**	
GENDER				
Male	384	48%	382	48%
Female	416	52%	419	52%
AGE				
18-24	16	2%	16	2%
25-34	144	18%	147	18%
35-44	224	28%	224	28%
45-55	352	44%	355	44%
56+ (based on panel feasibility)	64	8%	59	7%
REGION				
Center	216	27%	220	27%
South-West	104	13%	95	12%
North-West	96	12%	96	12%
North-East	104	13%	105	13%
South-East	112	14%	113	14%
East	168	21%	172	21%
Total	**800**	**100%**	**801**	**100%**

DENMARK				
Quotas defined at soft launch for main grocery shoppers aged 18-65 based on national representative sample				
Description	**Quota**		**Achieved**	
Description	**Targeted**		**Achieved**	
GENDER				
Male	170	34%	170	34%
Female	330	66%	330	66%
AGE				
18-24	30	6%	31	6%
25-34	65	13%	63	13%
35-44	70	14%	70	14%
45-54	130	26%	130	26%
55-65	150	30%	150	30%
66+ (based on panel feasibility)	55	11%	56	11%
REGION				
Jylland	135	27%	135	27%
Syddanmark	90	18%	90	18%
København	205	41%	205	41%
Sjælland	70	14%	70	14%
Total	**500**	**100%**	**500**	**100%**

ESTONIA				
Quotas defined at soft launch for main grocery shoppers aged 18-65 based on national representative sample				
Description	**Quota**		**Achieved**	
GENDER				
Male	150	30%	144	29%
Female	350	70%	356	71%
AGE				
18-24	75	15%	69	14%
25-34	150	30%	153	31%
35-44	165	33%	166	33%
45-50	80	16%	79	16%
51+ (based on panel feasibility)	30	6%	33	7%
Description	**Nat rep 18-50***		**Achieved**	
REGION				
Harju maakond	230	46%	219	44%
Hiiu maakond	5	1%	3	1%
Ida-Viru maakond	50	10%	18	4%
Jõgeva maakond	10	2%	8	2%
Järva maakond	10	2%	14	3%
Lääne maakond	10	2%	16	3%
Lääne-Viru maakond	20	4%	12	2%
Põlva maakond	10	2%	10	2%
Pärnu maakond	30	6%	38	8%
Rapla maakond	15	3%	17	3%
Saare maakond	10	2%	10	2%
Tartu maakond	65	13%	92	18%
Valga maakond	10	2%	9	2%
Viljandi maakond	15	3%	22	4%
Võru maakond	10	2%	12	2%
Total	**500**	**100%**	**500**	**100%**

**Source: Eurostat 2011*

FINLAND				
Quotas defined at soft launch for main grocery shoppers aged 18-65 based on national representative sample				
Description	**Quota**		**Achieved**	
GENDER				
Male	205	41%	208	41%
Female	295	59%	294	59%
AGE				
18-24	50	10%	50	10%
25-34	85	17%	85	17%
35-44	75	15%	75	15%
45-54	115	23%	117	23%
55-65	140	28%	139	28%
66+ (based on panel feasibility)	35	7%	36	7%
REGION				
Pohjois-Suomi	55	11%	56	11%
Itä-Suomi	75	15%	65	13%
Länsi-Suomi	105	21%	109	22%
Etelä-Suomi, Åland	265	53%	272	54%
Pohjois-Suomi	55	11%	56	11%
Total	**500**	**100%**	**502**	**100%**

FRANCE				
Quota generated for main grocery shoppers aged 18+ based on official statistics and panel information				
Description	**Quota**		**Achieved**	
GENDER				
Male	366	37%	367	37%
Female	634	63%	634	63%
AGE				
18-24	73	7%	73	7%
25-34	179	18%	179	18%
35-44	281	28%	281	28%
45-54	201	20%	202	20%
55-64	189	19%	189	19%
65+	77	8%	77	8%
REGION				
Ile de France	190	19%	192	19%
Nord Ouest	229	23%	225	22%
Nord-Est	229	23%	230	23%
Sud-Ouest	110	11%	112	11%
Sud-Est	242	24%	242	24%
Total	**1000**	**100%**	**1001**	**100%**

GERMANY				
Quota generated for main grocery shoppers aged 18+ based on official statistics and panel information				
Description	**Quota**		**Achieved**	
GENDER				
Male	449	45%	449	45%
Female	551	55%	551	55%
AGE				
18-24	99	10%	98	10%
25-34	146	15%	146	15%
35-44	198	20%	198	20%
45-54	179	18%	179	18%
55+	379	38%	379	38%
REGION				
Region (1) I	156	16%	157	16%
Region (2) II	217	22%	216	22%
Region (3) IIIa	136	14%	136	14%
Region (4) IIIb	130	13%	130	13%
Region (5) IV	148	15%	149	15%
Region (6) V(a&b)	44	4%	44	4%
Region (7) VI	85	9%	87	9%
Region (8) VII	82	8%	81	8%
Total	**1000**	**100%**	**1000**	**100%**

GREECE				
Quotas defined at soft launch for main grocery shoppers aged 18-65 based on national representative sample				
Description	**Quota**		**Achieved**	
GENDER				
Male	416	52%	416	52%
Female	384	48%	384	48%
AGE				
18-24	104	13%	105	13%
25-34	280	35%	281	35%
35-44	296	37%	297	37%
45-50	56	7%	56	7%
51+ (based on panel feasibility)	64	8%	62	8%
Description	**Nat rep 18-50***		**Achieved**	
REGION				
Anatoliki Makedonia, Thraki	40	5%	38	5%
Kentriki Makedonia	136	17%	130	16%
Dytiki Ellada	24	3%	48	6%
Thessalia	48	6%	33	4%
Ipeiros	24	3%	20	3%
Ionia Nisia	16	2%	13	2%
Dytiki Makedonia	56	7%	14	2%
Sterea Ellada	40	5%	14	2%
Peloponnisos	40	5%	23	3%
Attiki	296	37%	396	50%
Voreio Aigaio	16	2%	12	2%
Notio Aigaio	24	3%	22	3%
Kriti	40	5%	37	5%
Total	**800**	**100%**	**800**	**100%**

*Source: Eurostat 2011

HUNGARY				
Quota generated for main grocery shoppers aged 18+ based on official statistics and panel information				
Description	**Quota**		**Achieved**	
GENDER				
Male	349	44%	341	42%
Female	451	56%	462	58%
AGE				
18-24	49	6%	44	5%
25-34	155	19%	150	19%
35-44	141	18%	141	18%
45-54	166	21%	171	21%
55+	290	36%	297	37%
REGION				
Central Hungary	229	29%	231	29%
Transdanubia	247	31%	255	32%
North and The Great Plain	324	41%	317	39%
Total	**800**	**100%**	**803**	**100%**

IRELAND				
Quotas defined at soft launch for main grocery shoppers aged 18-65 based on national representative sample				
Description	**Quota**		**Achieved**	
GENDER				
Male	235	47%	203	39%
Female	265	53%	314	61%
AGE				
18-24	35	7%	38	7%
25-34	110	22%	118	23%
35-44	120	24%	141	27%
45-54	155	31%	121	23%
55-65	65	13%	81	16%
66+ (based on panel feasibility)	15	3%	18	3%
REGION				
Border, Midland and Western	130	26%	133	26%
Southern and Eastern	370	74%	384	74%
Total	**500**	**100%**	**517**	**100%**

ITALY				
Quota generated for main grocery shoppers aged 18+ based on official statistics and panel information				
Description	**Quota**		**Achieved**	
GENDER				
Male	390	39%	391	39%
Female	610	61%	613	61%
AGE				
18-24	32	3%	32	3%
25-34	149	15%	149	15%
35-44	208	21%	208	21%
45-54	179	18%	179	18%
55-65	147	15%	169	17%
66+	289	29%	267	27%
REGION				
Nord-Ovest	277	28%	279	28%
Nord-Est	191	19%	191	19%
Centro (I)	199	20%	200	20%
Sud	224	22%	225	22%
Isole	109	11%	109	11%
Total	**1000**	**100%**	**1004**	**100%**

LATVIA				
Quotas defined at soft launch for main grocery shoppers aged 18-65 based on national representative sample				
Description	**Quota**		**Achieved**	
Description	**Targeted**		**Achieved**	
GENDER				
Male	125	25%	125	25%
Female	375	75%	375	75%
AGE				
18-24	75	15%	75	15%
25-34	185	37%	181	36%
35-44	135	27%	136	27%
45-50	75	15%	75	15%
51+ (based on panel feasibility)	30	6%	33	7%
Description	**Nat rep 18-50***		**Achieved**	
REGION				
Riga region	165	33%	171	34%
Pieriga region	90	18%	97	19%
Vidzeme region	50	10%	60	12%
Kurzeme region	65	13%	66	13%
Zemgale region	60	12%	63	13%
Latgale region	70	14%	43	9%
Total	**500**	**100%**	**500**	**100%**

**Source: Eurostat 2011*

LITHUANIA				
Quotas defined at soft launch for main grocery shoppers aged 18-65 based on national representative sample				
Description	**Quota**		**Achieved**	
GENDER				
Male	165	33%	161	32%
Female	335	67%	340	68%
AGE				
18-24	55	11%	55	11%
25-34	150	30%	151	30%
35-44	190	38%	190	38%
45-50	75	15%	73	15%
51+ (based on panel feasibility)	30	6%	32	6%
Description	**Nat rep 18-50***		**Achieved**	
REGION				
Alytaus county	25	5%	24	5%
Kauno county	100	20%	101	20%
Klaipėdos county	55	11%	41	8%
Marijampolės county	25	5%	15	3%
Panevėžio county	40	8%	44	9%
Šiaulių county	50	10%	39	8%
Tauragės county	15	3%	12	2%
Telšių county	25	5%	15	3%
Utenos county	25	5%	13	3%
Vilniaus county	140	28%	197	39%
Total	**500**	**100%**	**501**	**100%**

**Source: Eurostat 2011*

LUXEMBOURG				
Quota generated for main grocery shoppers aged 18+ based on official statistics and panel information				
Description	**Quota**		**Achieved**	
GENDER				
Male	210	42%	210	42%
Female	290	58%	292	58%
AGE				
18-24	12	2%	12	2%
25-34	95	19%	79	16%
35-44	145	29%	141	28%
45-54	133	27%	142	28%
55-70	100	20%	101	20%
70+	15	3%	27	5%
REGION				
Sud	201	40%	200	40%
Est	77	15%	70	14%
Nord	86	17%	81	16%
Lux-Ville	67	13%	63	13%
Reste du Centre	71	14%	86	17%
Total	**500**	**100%**	**502**	**100%**

NETHERLANDS				
Quota generated for main grocery shoppers aged 18+ based on official statistics and panel information				
Description	**Quota**		**Achieved**	
GENDER				
Male	269	34%	255	32%
Female	531	66%	547	68%
AGE				
18-24	46	6%	25	3%
25-34	129	16%	132	16%
35-44	170	21%	174	22%
45-54	153	19%	160	20%
55+	302	38%	311	39%
REGION				
North & East & Center	247	31%	250	31%
West	379	47%	376	47%
South	174	22%	176	22%
Total	**800**	**100%**	**802**	**100%**

NORWAY				
Quotas defined at soft launch for main grocery shoppers aged 18-65 based on national representative sample				
Description	**Quota**		**Achieved**	
GENDER				
Male	290	58%	293	58%
Female	210	42%	211	42%
AGE				
18-24	40	8%	40	8%
25-34	100	20%	101	20%
35-44	135	27%	135	27%
45-54	105	21%	66	13%
55-65	90	18%	132	26%
66+ (based on panel feasibility)	30	6%	30	6%
REGION				
Nord-Norge, Trøndelag	80	16%	81	16%
Sør-Østlandet	115	23%	118	23%
Oslo, Akershus, Hedmark og Oppland	175	35%	177	35%
Agder og Rogaland	50	10%	51	10%
Vestlandet	80	16%	77	15%
Total	**500**	**100%**	**504**	**100%**

POLAND				
Quota generated for main grocery shoppers aged 18+ based on official statistics and panel information				
Description	**Quota**		**Achieved**	
GENDER				
Male	481	48%	477	48%
Female	519	52%	525	52%
AGE				
18-24	170	17%	157	16%
25-34	230	23%	236	24%
35-44	210	21%	218	22%
45-55	300	30%	306	31%
56+ (based on panel feasibility)	80	8%	85	8%
REGION				
Region centralny	204	20%	207	21%
Region poludniowy	215	22%	218	22%
Region wschodni	176	18%	177	18%
Region pólnocno-zachodni	161	16%	156	16%
Region poludniowo-zachodni	102	10%	102	10%
Region pólnocny	142	14%	142	14%
Total	**1000**	**100%**	**1002**	**100%**

PORTUGAL				
Quotas defined at soft launch for main grocery shoppers aged 18-65 based on national representative sample				
Description	**Quota**		**Achieved**	
GENDER				
Male	304	38%	305	38%
Female	496	62%	501	62%
AGE				
18-24	88	11%	88	11%
25-34	240	30%	242	30%
35-44	192	24%	192	24%
45-55	272	34%	275	34%
56+ (based on panel feasibility)	8	1%	9	1%
REGION				
Continente	768	96%	780	97%
Região Autónoma dos Açores	16	2%	15	2%
Região Autónoma da Madeira	16	2%	11	1%
Total	**800**	**100%**	**806**	**100%**

ROMANIA				
Quotas defined at soft launch for main grocery shoppers aged 18-65 based on national representative sample				
Description	**Quota**		**Achieved**	
GENDER				
Male	400	40%	402	40%
Female	600	60%	600	60%
AGE				
18-24	70	7%	69	7%
25-34	250	25%	247	25%
35-44	360	36%	364	36%
45-55	260	26%	280	28%
56+ (based on panel feasibility)	60	6%	42	4%
REGION				
BUCURESTI	130	13%	131	13%
CENTRU	200	20%	201	20%
NORD	290	29%	291	29%
SUD	380	38%	379	38%
Total	**1000**	**100%**	**1002**	**100%**

SLOVAKIA				
Quotas defined at soft launch for main grocery shoppers aged 18-65 based on national representative sample				
Description	**Quota**		**Achieved**	
GENDER				
Male	215	43%	214	43%
Female	285	57%	287	57%
AGE				
18-24	70	14%	71	14%
25-34	290	58%	291	58%
35-44	90	18%	90	18%
45-50	25	5%	25	5%
51+ (based on panel feasibility)	25	5%	24	5%
Description	**Nat rep 18-50***		**Achieved**	
REGION				
Bratislavský kraj	60	12%	82	16%
Západné Slovensko	170	34%	153	31%
Stredné Slovensko	125	25%	143	29%
Východné Slovensko	145	29%	123	25%
Total	**500**	**100%**	**501**	**100%**

**Source: Eurostat 2011*

SLOVENIA				
Quotas defined at soft launch for main grocery shoppers aged 18-65 based on national representative sample				
Description	**Quota**		**Achieved**	
GENDER				
Male	225	45%	225	45%
Female	275	55%	273	55%
AGE				
18-24	80	16%	71	14%
25-34	200	40%	205	41%
35-44	130	26%	132	27%
45-50	65	13%	65	13%
51+ (based on panel feasibility)	25	5%	25	5%
Description	**Nat rep 18-50***		**Achieved**	
REGION				
Vzhodna Slovenija	263	53%	281	56%
Zahodna Slovenija	237	47%	217	44%
Total	**500**	**100%**	**498**	**100%**

**Source: Eurostat 2011*

SPAIN				
Quota generated for main grocery shoppers aged 18+ based on official statistics and panel information				
Description	**Quota**		**Achieved**	
GENDER				
Male	377	38%	378	38%
Female	623	62%	626	62%
AGE				
18-24	50	5%	46	5%
25-34	189	19%	189	19%
35-44	216	22%	218	22%
45-54	181	18%	183	18%
55+	364	36%	368	37%
REGION				
North	208	21%	209	21%
Center & West	249	25%	249	25%
East	294	29%	296	29%
South	249	25%	250	25%
Total	**1000**	**100%**	**1004**	**100%**

SWEDEN				
Quota generated for main grocery shoppers aged 18+ based on official statistics and panel information				
Description	**Quota**		**Achieved**	
GENDER				
Male	364	46%	358	45%
Female	436	55%	444	55%
AGE				
18-24	64	8%	41	5%
25-34	146	18%	147	18%
35-44	169	21%	173	22%
45-54	155	19%	157	20%
55+	266	33%	284	35%
REGION				
Norrland	76	10%	74	9%
Mellansverige	203	25%	205	26%
Stockholm	176	22%	178	22%
Västsverige	157	20%	159	20%
Södra Sverige	188	24%	186	23%
Total	**800**	**100%**	**802**	**100%**

UNITED KINGDOM				
Quota generated for main grocery shoppers aged 18+ based on official statistics and panel information				
Description	**Quota**		**Achieved**	
Male	408	41%	412	41%
Female	592	59%	591	59%
AGE				
18-24	92	9%	89	9%
25-34	167	17%	168	17%
35-44	199	20%	199	20%
45-54	177	18%	178	18%
55-64	156	16%	157	16%
65+	209	21%	212	21%
REGION				
NORTH & YORKSHIRE	128	13%	124	12%
NORTH WEST	116	12%	106	11%
MIDLANDS	162	16%	150	15%
SOUTH WEST & WALES	138	14%	138	14%
SOUTH EAST & ANGLIA	236	24%	229	23%
LONDON	132	13%	121	12%
SCOTLAND	89	9%	81	8%
Total	**1000**	**100%**	**1003**	**100%**

Annex 10: Consumer opinion questionnaire

This annex presents the questions asked to consumers during the online consumer opinion survey.

STANDARD PANEL INTRO

Thank you for your participation in our Ipsos Access Panels online surveys. Your opinions are very important to us.

It is very important that John client50 Doe completes the survey. If that person is not you please do not answer the survey in his/her name.

NEXT SCREEN

Thank you for taking part in this important study for the European Commission. The survey is about food labelling schemes and will ask you to compare different food products and to consider which ones you would choose to buy.

Qcountry:

1. Greece
2. Bulgaria
3. Slovenia
4. Slovakia
5. Estonia
6. Latvia
7. Lithuania
8. Czech Republic
9. Finland
10. Norway
11. Denmark
12. Portugal
13. Romania
14. Ireland
15. Austria
16. Italy
17. Spain
18. Belgium
19. Poland
20. Hungary
21. Netherlands
22. Sweden
23. Great Britain
24. France
25. Germany
26. Luxembourg

Qlanguage:

1. Greek
2. Bulgarian
3. Slovenian
4. Slovakian
5. Estonian
6. Latvian
7. Lithuanian
8. Czech
9. Finnish
10. Norwegian
11. Danish
12. Portuguese
13. Romanian
14. English
15. German Austrian
16. Italian
17. Spanish
18. French Belgium
19. Dutch Belgium
20. Polish
21. Hungarian
22. Dutch
23. Swedish
24. French

25. German
26. Luxembourgish
27. French Luxembourg

PRG: QUESTIONS ASKED TO ALL UNLESS SPECIFIED

SCREENING/DEMOGRAPHIC QUESTIONS

Firstly please tell us a few details about yourself. This is to ensure we are including a wide range of people in this research.

D1. How old were you at your last birthday?

Please enter your age - **PRG: NUMERIC QUESTION – RANGE 18 - 99**

RECODE INTO:

1. 18 - 24
2. 25 - 34
3. 35 - 44
4. 45 - 54
5. 55 - 64
6. 65+

D2. Are you a...

Please select one answer - **PRG: SINGLE ANSWER**

1. Man
2. Woman

D3. REGION

D4. Which of the following best describes your current work status?

Please select one answer - **PRG: SINGLE ANSWER**

	PRG: RECODE AS
1. Employed full-time	**1. ACTIVE**
2. Employed part-time	
3. Self-employed	
4. Unemployed but looking for a job	
5. Unemployed and not looking for a job / Long-term sick or disabled / Housewife / Househusband	**2. INACTIVE**
6. Retired	
7. Pupil / Student / In full time education	

PRG: ASK ONLY IF D4=1,2,3

D5. Which of following sectors do you work in?

Please select one answer - **PRG: SINGLE ANSWER**

1. Agriculture
2. Banks, insurance and financial services

3. Chemical, electronic and electrical industry
4. Construction and materials
5. Education
6. Food industry, food retailer or food authority– **PRG:SCREEN OUT**
7. Healthcare services
8. Hotel, restaurant, bars
9. Market research – **PRG:SCREEN OUT**
10. Media and telecommunications
11. Other industry
12. Public administration and public services
13. Retail
14. Other
15. None

D6. Which best describes where you live?

Please select one answer - **PRG: SINGLE ANSWER**

1. Rural area or village
2. Small or medium sized town
3. Large town

D7. Are you the main grocery shopper in your household? The Main Shopper is the household member who personally selects half or more of the items when shopping at supermarkets and food shops.

Please select one answer - **PRG: SINGLE ANSWER**

1. Yes
2. No **PRG: SCREEN OUT**

D8. Are you or is anyone in your household a vegetarian?

Please select one answer - **PRG: SINGLE ANSWER**

1. I am a vegetarian
2. I am not a vegetarian but someone in my household is
3. Neither me nor anyone in my household are vegetarian

D9. Do you or does any member of your household have food allergies?

Please select one answer - **PRG: SINGLE ANSWER**

1. Yes
2. No

GENERAL SECTION ABOUT GROCERY SHOPPING AND FOOD LABELLING SCHEME

Q1. Where do you usually do your food grocery shopping?
Please select all that apply- **PRG: MULTICODE**

1. Supermarkets, hypermarkets
2. Market places
1. Specialised shops (baker, fish monger, butcher etc...)
2. Small grocer's shops, corner shops, convenience store
3. Directly from farmers, small producers, etc.
4. Discount stores
5. Somewhere else

Q2_INTRO .

The following questions are about food labelling schemes.

Food labelling schemes are managed by various private or public organisations (such as groups of producers, retailers, NGOs, public authorities) to provide information to consumers about certain aspects of the food they buy or its production method. This is often in the form of a logo and / or a statement on the product that tells the consumer the food meets the standard of that scheme e.g. the food is produced in a certain geographic region, is organically produced, is good for the heart or has been produced in accordance to additional requirements relating to animal welfare. Food labelling schemes do not cover nutritional values, lists of ingredients, use by dates and should be distinguished from mandatory information about the country of production on certain products.

Q2. Thinking about the food you have bought in the last 6 months, when buying the food products listed below, which of the following did you take into consideration?
Please select all that apply for each type of food product- **PRG: MULTIPLE ANSWERS PER COLUMN**

	1.Minced beef	2.Cheese	3.Margarine	4.Yogurt	5.Eggs	6.Chicken filet
1. Brand						
2. Affiliation with a food labelling scheme (in a form of a logo or a trademark), guaranteeing for example the quality, the specific place of origin of the product, the environmental impact of the product etc...						

3. Nutritional indications (Calories or kilo-joules, colour or graphical system etc...)						
4. Ingredients						
5. Price						
6. Country of origin						
7. Producer						
8. Product name						
9. Use by date / Best before date						
10. Other						
11. None of these **PRG: SINGLE CODE PER COLUMN**						
12. I do not buy this product **PRG : SINGLE CODE PER COLUMN**						

Q3. Have you ever seen the following type of logos or statement on food products?

Please select one answer for each type of logo or statement - **PRG: SINGLE ANSWER PER ROW**

HEADER : Logo or statement....	1.Yes	2.No	3.Not sure/Don't know
1. indicating the product is part of a local or regional labelling scheme.			
2. indicating the product is part of the European Protected Designation of Origin scheme or of the Protected Geographical Indication scheme. **PRG: INSERT LOGO IN LANGUAGE OF EACH COUNTRY**			
3. containing messages about the health benefits that the product brings (for example, "Omega 3", "approved by the Heart Foundation").			
4. indicating a production method that gives particular importance to animal health or animal welfare (for example, free-range chicken).			
5. indicating the product has been organically produced (for example, organic labels).			
6. indicating that the producers/manufacturers/farmers have received a fair price for their goods (for example, fair trade labels).			
7. indicating food safety and hygiene.			
8. indicating the traceability of the product (for example, specifying from which farm or producer the product has come from).			
9. indicating the production method had a limited impact on the environment or climate (for example, with a low carbon footprint eco label).			
10. indicating traditional products or methods have been used (for example, products following a traditional procedure or regional traditions).			
11. indicating conformity with religious requirements (for example, Halal or Kosher).			
12. indicating the product is suitable for vegetarians or vegans.			
13. indicating the product is allergen free (for example, gluten free).			
14. indicating a quality of taste or smell.			

15. indicating a short supply chain (for example, the product is coming directly from the farm).			

EXPERIMENT

INTRO_EXP.

We are now going to ask you to choose between various food products. You will not be able to actually purchase anything on this survey. Nonetheless, we would like you to think about the choices as though you were actually shopping for these products in a supermarket or shop.

The choices we will ask you to make will look something like this:

PRG: SHOW THE FOLLOWING CARD ON SAME SCREEN

Best before date: 27.05.2013

Typical Values	100g contains
Energy	627kJ (151kcal)
Protein	12.5g
Carbohydrate	trace
Sugars	trace
Fat	11.2g
Saturates	3.2g
Salt Equivalent	0.4g

Animal Welfare Approved

10 eggs

Price = €1.20

○

Best before date: 27.05.2013

Typical Values	100g contains
Energy	627kJ (151kcal)
Protein	12.5g
Carbohydrate	trace
Sugars	trace
Fat	11.2g
Saturates	3.2g
Salt Equivalent	0.4g

Animal Welfare Approved

10 eggs

Price = €1.35

○

PRG: SHOW ON THE SAME PAGE AFTER THE CARD

Please simply select the option you would be more likely to purchase if you were actually shopping for eggs.

Overall we are going to ask you to make **twelve** such choices. Please keep in mind that you will not receive any of these products and you will not be asked to pay for anything.

PRG: IF CODE 1 AT D8 (VEGETARIAN) DO NOT SHOW COMBINATIONS WITH CHICKEN OR MINCE BEEF (SEE EXCEL FILE COLUMN B)

PRG: SHOW THE TWELVE COMBINATIONS PER RESPONDENT IN THE SAME FORMAT

PRG: SHOW THIS TEXT FOR EACH COMBINATION - Imagine you are shopping for **[PRG: INSERT PRODUCT],** which of these two options would you be more likely to purchase?

PRG: SHOW COMBINATION – ROTATE COMBINATIONS ON LEFT AND RIGHT SIDE OF SCREEN

PRG: **non-vegetarians:** ***no one respondent sees minced beef, cheese, margarine, yoghurt and chicken more than twice and no one respondent sees eggs more than 4 times.***

vegetarians: ***cheese, margarine, yoghurt to be seen not more than 3 times; eggs to be seen not more than 4 times***

UNDERSTANDING AND BEHAVIOURS TOWARD FOOD LABELLING SCHEMES

PRG: INSERT LABEL OF ORIGIN USED FOR THE COUNTRY - EXAMPLE FOR UK

Q4a. Which of the following, if any, do you think this logo means when placed on a food product? *Please select all that apply* - **PRG: MULTICODE**

1. A guarantee of specific flavour or taste
2. A guarantee of quality
3. The product has been produced, processed and prepared in **[PRG: INSERT COUNTRY]**
4. At least one of the stages of production, processing or preparation takes place in **[PRG: INSERT COUNTRY]**
5. A guarantee of traditional character
6. Purely for advertising purposes
7. A sign that stricter rules than the minimum required have been followed regarding safety for human consumption
8. A guarantee of an organic production
9. A sign of a healthy product
10. Something else
11. It does not mean anything **PRG: SINGLE CODE**
12. Don't know **PRG: SINGLE CODE**

PRG: INSERT LABEL OF ORIGIN USED FOR THE COUNTRY
PRG: ASK IF MORE THAN ONE CODE SELECTED AT Q4a
Q4b. And which ONE do you think is the main meaning of this label?
Please select one answer - **PRG: SINGLE CODE**

PRG: SHOW ALL CODES SELECTED AT Q4a AND DON'T KNOW (code 12)

PRG: INSERT HEALTH LABEL USED FOR THE COUNTRY - EXAMPLE FOR UK

Q4c. Which of the following, if any, do you think this logo means when placed on a food product?
Please select all that apply - **PRG: MULTICODE**

1. The product is suitable for people with health issues (diabetic, cholesterol etc...)
2. The product is intended to improve health
3. The product is particularly good for people with heart problems
4. A guarantee that the product is not harmful to health
5. The product is recommended as part of a balanced diet
6. A guarantee of quality
7. Suitable for people with specific allergies
8. Purely for advertising purposes
9. A guarantee of an organic production
10. Something else
11. It does not mean anything **PRG: SINGLE CODE**
12. Don't know **PRG: SINGLE CODE**

PRG: INSERT HEALTH LABEL USED FOR THE COUNTRY
PRG: ASK IF MORE THAN ONE CODE SELECTED AT Q4c
Q4d. And which ONE do you think is the main meaning of this label?
Please select one answer - **PRG: SINGLE CODE**

PRG: SHOW ALL CODES SELECTED AT Q4c AND DON'T KNOW

PRG: INSERT ANIMAL WELFARE LABEL FOR THE COUNTRY- EXAMPLE FOR UK

Q4e. Which of the following, if any, do you think this logo means when placed on a food product?
Please select all that apply - **PRG: MULTICODE**

1. A guarantee of an organic production
2. A guarantee that the animals are in good health, are well treated and are killed in an appropriate and humane manner
3. A guarantee of quality
4. A guarantee of better flavour or taste
5. A sign of higher than minimum standards for the animal's well-being
6. Purely for advertising purposes
7. A sign that animals are fed on safe and appropriate foods
8. A sign that stricter rules than the minimum required have been followed regarding safety for human consumption
9. A sign of a healthy product
10. Something else
11. It does not mean anything **PRG: SINGLE CODE**

12. Don't know **PRG: SINGLE CODE**

PRG: INSERT ANIMAL WELFARE LABEL FOR THE COUNTRY

PRG: ASK IF MORE THAN ONE CODE SELECTED AT Q4e

Q4f. And which ONE do you think is the main meaning of this label?

Please select one answer - **PRG: SINGLE CODE**

PRG: SHOW ALL CODES SELECTED AT Q4e AND DON'T KNOW

Q5. Please indicate whether you think each of the following statements is true or false.

Please select one answer for each statement- **PRG: SINGLE ANSWER PER ROW**

	1.True	2.False	3.Don't know
1. All food labelling schemes are certified by a third party organisation			
2. Food producers or retailers can establish their own food labelling schemes based on their own product standards			
3. Third party organisations that certify schemes have to be public bodies			
4. Products with a labelling scheme must fulfil certain requirements of that scheme			
5. Products with a labelling scheme have to be checked regularly against the requirements of that scheme			
6. There are legislative requirements for the production of a product labelled as organic			

Q6. In the last six months, how often would you say you bought products affiliated to a food labelling scheme?

Please select one answer- **PRG: SINGLE ANSWER**

1. Most of the time
2. Often
3. Sometimes
4. Rarely
5. Never

PERCEPTION OF FOOD LABELLING SCHEMES

Q7. To what extent do you agree or disagree with the following statements about food labelling schemes?
Please select one answer for each statement- **PRG: SINGLE ANSWER PER ROW**

SCALE :

1. Totally agree
2. Tend to agree
3. Tend to disagree
4. Totally disagree
5. Don't know

STATEMENTS :

1. Products affiliated to a food labelling scheme are of a better quality
2. Products affiliated to a food labelling scheme are more healthy
3. Products affiliated to a food labelling scheme are safer to eat
4. Products affiliated to a food labelling scheme have a better taste or flavour
5. I trust the information shown on scheme labels
6. Food labelling schemes are not regulated enough
7. I (would) trust certain food labelling schemes that are certified by a third party organisation for example a public body, a consumer organisation or a NGO
8. I (would) trust certain food labelling schemes that are self-declared by the producer or retailer
9. I don't know enough about food labelling schemes
10. There are too many food labelling schemes

Q8. Thinking in general about food labelling schemes, please position yourself on a scale ranging from 1 to 10 where 1 means you agree more with the opinion on the left and 10 means you agree more with the opinion on the right.
Please select one answer for each statement - **PRG: SINGLE ANSWER PER ROW**

PRG: PRESERVE THE DESIGN AS IN THE QUESTIONNAIRE

HEADER: Labels showing the affiliation of a product to a food labelling scheme....

1.	Are easy to understand	1 2 3 4 5 6 7 8 9 10 DK	Are hard to understand
2.	Are truthful	1 2 3 4 5 6 7 8 9 10 DK	Are misleading
3.	Are just a means of advertising	1 2 3 4 5 6 7 8 9 10 DK	Provide important information
4.	Are too expensive	1 2 3 4 5 6 7 8 9 10 DK	Are good value for money
5.	Give too much information	1 2 3 4 5 6 7 8 9 10 DK	Do not give enough information
6.	Have print/text that is big enough to easily read	1 2 3 4 5 6 7 8 9 10 DK	Have print/text that is too small to easily read
7.	Have clear logos/symbols	1 2 3 4 5 6 7 8 9 10 DK	Have confusing logos/symbols

8. Help people to make informed choices about the food they buy 1 2 3 4 5 6 7 8 9 10 DK Do not help people to make informed choices about the food they buy

SOURCE OF INFORMATION ABOUT FOOD LABELLING SCHEMES

Q9. How would you like to get information about food labelling schemes?
Please select all that apply - **PRG: MULTICODE**

1. On the internet
2. On TV
3. On the radio
4. In newspapers/ magazines
5. On the packaging of the product itself, including on the product label
6. Through apps on smart phone to use while shopping
7. From information points in stores
8. From leaflets in stores
9. From staff in stores
10. By approaching consumer organisations directly
11. By approaching NGOs directly
12. By approaching public authorities directly
13. I would not look for information about food labelling schemes **PRG: SINGLE CODE**

Q10. How easy do you think it is to find information about food labelling schemes?
Please select one answer- **PRG: SINGLE ANSWER**

1. Very easy
2. Quite easy
3. Not very easy
4. Not easy at all
5. Don't know

ADDITIONAL SOCIO_DEMO

D11. Which of the following statements best describes how you feel about your current level of household income?
Please select one answer- **PRG: SINGLE ANSWER**

1. Living comfortably on present income
2. Coping on present income
3. Finding it difficult on present income
4. Finding it very difficult on present income
5. No answer

D12. What is the highest level of education you have achieved?
Please select one answer- **PRG: SINGLE ANSWER**

PRG: INSERT LIST PER COUNTRY – BASED ON THE EXCEL FILE PROVIDED
ALL COUNTRIES RECODED INTO

1. Low
2. Medium
3. High

D13. Do you have any children aged 15 years or younger currently living in your household?
Please select one answer- **PRG: SINGLE ANSWER**

1. Yes
2. No

EXIT

Annex 11: Purchase by channel and proportion of vegetarian and food allergies in households.

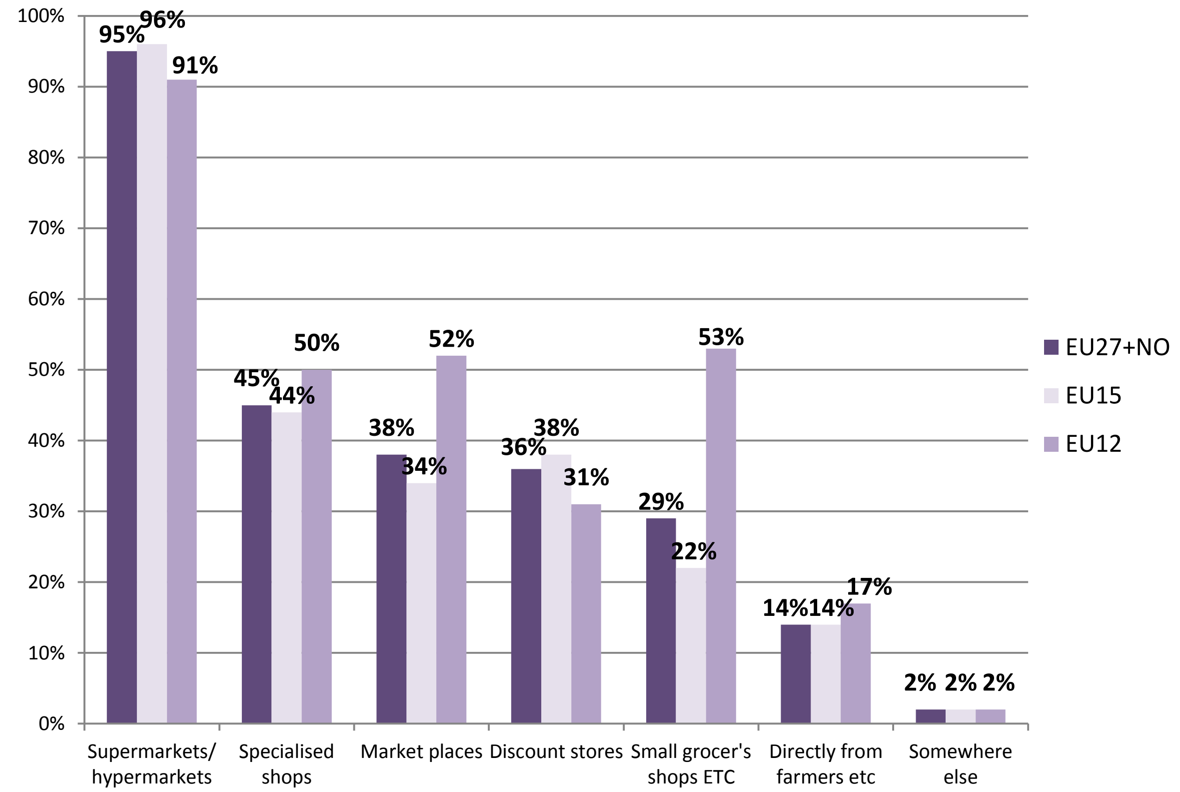
The following describes the proportion of respondents in the online consumer survey doing their grocery shopping by channel as well as the proportion of respondents who have food allergies or are vegetarians.

Purchase by channel

Respondents were asked where they usually buy their grocery shopping. The channels included were: supermarkets/ hypermarkets, specialised shops, market places, discount stores, corner shops as well as the producers themselves.

As the figure below indicates supermarkets/ hypermarkets are by the far the most commonly frequented channel by respondents, over 9 in 10 (95%) say they usually buy their groceries from this type of establishment. The second most popular channel is specialised shops (e.g. baker, fish monger, butcher etc), 45% say they use this particular channel. The third most commonly used channel is market places, just under four in ten (38%) say they buy their groceries using this channel. EU15 respondents tend to prefer supermarkets/ hypermarkets (96% vs 91% of the EU12) and discount stores (38% vs 31%). Whilst EU12 respondents tend to prefer the channels where smaller-scale establishments are more the norm with specialised shops (50% vs 44% of the EU15), market places (52% vs 34%) and small grocer’s shops, corner shops and convenience stores (53% vs 22%) all being channels that are used significantly more often by EU12 respondents than those from the EU15.

Figure 130: Where respondents buy their food- by channel



Q1: Where do you usually do your food grocery shopping?
Base: all respondents (19,260), EU15 (11,847), EU12 (6,909)

Proportions of respondents who have food allergies or are vegetarians

Across the EU27+NO, just under a fifth (18%) say either they have food allergies or live with someone who does. Proportions are broadly similar between the two country groupings, with 18% in the EU15 and 18% of EU12 respondents saying this. However, there is some variation between the individual countries, with proportions ranging from 31% in Finland to 11% in Denmark. The proportion of the youngest age group (18-24 year olds) saying they either have food allergies or live with someone who does is particularly high at 26%, double the 13% of 65+ year olds who say the same thing.

In a similar vein, 14% of respondents say that they are a vegetarian or live with someone who is. Again, proportions are broadly similar across the EU15 (15%) and EU12 (13%). Two southern European countries, Greece (27%) and Italy (24%) have the highest proportions of respondents saying this, whilst the Scandinavian countries of Denmark (3%), Sweden (3%) and Norway (3%) have the joint lowest. Again the youngest respondents are the most likely to say they are either vegetarian or live with someone who is; 23% of 18-24s say this, compared to 13% of 65+ year olds.

Annex 12 In-depth interviews with selected stakeholders on the functioning of voluntary food labelling in the European Union

In addition to the online stakeholder consultations discussed above, three in-depth face to face stakeholder interviews were conducted. These interviews were open-ended in nature, allowing the stakeholders to express their views on the functioning of food labelling schemes in Europe in general and in relation to the 2010 best practice guidelines.

The organisations interviewed are:

- The European Food Information Council (EUFIC);
- EuroCommerce; and
- The European Consumer Organisation (BEUC).

Each interview is summarised and discussed in turn below.

EUFIC

About EUFIC

The European Food Information Council (EUFIC) is a non-profit organisation which communicates science-based information on nutrition and health, food safety and quality, to help consumers to be better informed when choosing a well-balanced, safe and healthful diet. The interview was conducted with three representatives of EUFIC.

The functioning of food labelling schemes from the point of view of the consumer

The expertise of EUFIC lies mostly with nutrition and health related labelling and in this area they have found food labelling not to be effective in changing consumer behaviour unless the consumer already cares about healthy eating. The bottle-neck here is that consumer do not pay enough attention to labels in the shop (“less than 100 milliseconds on average”) and that some consumers simply lack the motivation to care about choosing products for their nutrition content.

The representatives of EUFIC also point out that there is a large attitude-behaviour gap, meaning that respondents in surveys tend to indicate that they value food labels and the information conveyed by them. However, this preference for food labelling generally does not translate into purchasing behaviour. Other factors, such as the price of the product, the taste, the colour of the box, whether or not the shopper is currently hungry, etc are all significantly more important in driving consumer choice.

In the experience of EUFIC, the level of knowledge and understanding of food labelling schemes varies significantly across Member States with some of the older schemes, or those widely spread, being better known by the consumers. In their experience, consumers are able to understand all current schemes, in the sense that they can use them to correctly rank products according to healthfulness.

Similarly levels of mistrust towards food labelling schemes vary significantly depending on the type of label and the Member State, often based on historic events in a country. As an example, the representatives of EUFIC mentioned organic food labelling in Germany which in recent years has seen a lot of negative media attention and as a result consumers' level of trust towards organic labels is relatively low.

The EU best practices guidelines

The representatives at EUFIC had not heard of the EU best practice guidelines prior to arranging the interview and therefore had no detailed knowledge on the guidelines. However, they outlined what points they would consider to be important components of any best practice guidelines for scheme operators:

- The most important criterion of any such guidelines should be transparency. The conditions to which scheme members have to comply in order to be certified should be publically available on the scheme's website.
- In addition to the detailed and comprehensive checklists and criteria, there should also be simple and easily understandable criteria which consumers can quickly understand. Consumers who want to know the technical details can follow up by reading the comprehensive list of criteria, but consumers who only want a quick overview should be able to do so quickly.
- There should be mechanisms for all stakeholders to provide input at all times and through all phases of development of the scheme.
- All national and cross-border schemes should come with an educational campaign. While word of mouth may be sufficient for small regional schemes, nation-wide food labelling schemes need information campaigns so that consumers are aware of them and know what to expect from products carrying a particular label. Ideally, information on the schemes should also be provided in the school as part of the school curriculum.

EUFIC's representatives also noted that there should be separate guidelines for self-declaration and certification schemes, with the above points relating to certification schemes only. Self-declaration schemes, in the eyes of EUFIC, are closer to a marketing tool than a tool aimed at informing consumers. As a result, they likely would require a very different set of guidelines.

In addition, different types of schemes (origin, organic, health, etc.) should all have different sets of guidelines since different elements will be relevant.

In addition, EUFIC's representatives pointed out that *prior* to designing guidelines or possible regulation on food labelling, it is important to agree on how to measure whether or not a scheme fulfils them. For example, the health claims regulation states that the health claim must be "understood by the average consumer", which can be interpreted in a number of ways: who is the average consumer? Clear to most consumers? How clear does it have to be in order to comply with the guidelines/legislation? The benchmark relative to which successful compliance with the guidelines can be measures has to be researched in discussion with all the stakeholders.

Once such metrics have been established, and guidelines have been published, schemes need to be regularly monitored and evaluated in regards to their performance relative to these guidelines.

EuroCommerce

About EuroCommerce

EuroCommerce represents retailers, wholesalers and other trading companies at the EU level. Its members include national commerce federations in 31 countries, Europe's 27 leading retail and wholesale companies, and federations representing specific sectors of commerce.

The functioning of food labelling schemes from the point of view of the consumer

The representatives from EuroCommerce were not able to make any general comments on the functioning of voluntary food labelling schemes in the EU, noting that this is a very diverse topic. Despite the fact that EuroCommerce is working on EU-wide issues related to the functioning of some food labelling schemes such as on animal welfare, detailed and specific information on consumer perceptions and actual appreciation of the schemes is only available at the level of the scheme owner.

The EU best practice guidelines

EuroCommerce identified the EU best practice guidelines as a helpful tool which establishes a common framework in which food labelling schemes can be assessed. Within this framework well functioning schemes now have added credibility towards consumers and consumer groups which is beneficial to both retailers and consumers. Although consumers themselves do not necessarily have to be made aware of the guidelines, the EuroCommerce representatives believe that consumer associations, consumer watchdogs and consumer protection bodies will be able to use these guidelines to inform consumers which food labelling schemes perform well.

An important advantage of the best practice guidelines identified by the EuroCommerce representatives is that they allow for enough flexibility for retailers to quickly respond to changes in consumer demand and consumer preferences. The retail industry in the EU is very competitive and retailers need to be able to respond to these changes in consumer demand very quickly. As a result, EuroCommerce is against any further intervention – and regulatory intervention in particular – in the food labelling industry.

The EuroCommerce representatives also noted that food labelling schemes in some areas are very well developed and that the market has a tendency to regulate itself. Trust in food labelling schemes (similar to trust in brands) is essential to the existence of the food labelling scheme as they fall and stand with their reputation. As a result, there are strong incentives for scheme operators not to mislead the consumers and to comply with the guidelines.

In addition, the EuroCommerce representative pointed out that the current regulatory framework in existence is sufficient and that the enforcement of the existing rules and regulations should be improved before further guidelines and rules are to be developed. An example of this is the recent horse meat scandal which has upset consumers throughout the European Union. This was a case of fraud: consumers were misled and they did not purchase what they believed they were purchasing. However, this was not a consequence of too little regulation, but a consequence of insufficient enforcement of the existing law. In this particular instance, early intelligence sharing across all parties involved was insufficient as early results should have been shared immediately.

EuroCommerce further notes that this is a difficult economic time for their members and we should therefore not interpret a low response rate as sign that retailers have no opinion on this matter but rather that issues which are not immediately relevant to their day to day activities so are given a lower priority.

BEUC

About BEUC

BEUC is an EU-wide umbrella organisation of consumer organisations with 41 members in 31 countries, lobbying for the interest of consumers at the European Union level.

The functioning of food labelling schemes from the point of view of the consumer

According to the BEUC representative we spoke to, consumer understanding of food labelling schemes is generally not very good, although there are clearly large variations across different types of food labelling schemes and across Member States. As an example, the representative cited a recent survey on consumer perception of food labelling schemes focused on the origin label.[41] This survey clearly indicated that consumers do not understand what "country origin" means. For example, some consumers believe that the origin of meat is the place of 'birth, rearing and slaughter', others believe it is the place of production and yet others think it is the place where the animal lived for most of its life.

According to the BEUC representative, the main shortcoming of food labelling schemes in the EU— and the main cause of consumer confusion— is that there are simply far too many of them. This proliferation of food labelling schemes leads to consumer confusion which in turn comprises the usefulness of each individual scheme. Consumers cannot possibly be informed about all food labelling schemes which can be found on each product and as a result consumers know very little about any of them. Often this proliferation is unnecessary and consumers would be better off with fewer, well known labels.

A good example of this is the EU organic logo: Although there is an EU wide logo for organic produce, many Member States have separate logos (sometimes used alongside the EU logo, sometimes used independently) and a consumer cannot be expected to know for each of these if they adhere to the same standards or not. This is certainly the case when a consumer in one Member State sees a product with an organic logo from another Member State.

As a result of this unnecessary consumer confusion the BEUC representative believes that more harmonization and consolidation of food labelling schemes across the European Union is needed. There should only be a small number of food labelling schemes which should be regulated at an EU-level. This would imply that there can be no overlap between schemes, no misunderstandings of what the schemes' objectives are and only schemes which truly add value to the consumer would exist.

---

[41] BEUC (The European Consumer Organisation) (2013) 'Where does my food come from? – BEUC consumer survey on origin labelling'.http://www.beuc.eu/BEUCNoFrame/Docs/1/AHFHMONDILFBLCJPPDKMFEKGPDW69DBDG69DW3571KM/BEUC/docs/DLS/2013-00043-01-E.pdf

These EU-wide food labelling schemes could then be promoted to consumers to inform shoppers of what each label means and what the criteria behind each label are. This would currently be impossible due to the sheer number of food labelling schemes, but with a smaller number of schemes, consumers may learn about each of them.

An additional benefit of further harmonization and consolidation would be improved cross-border competition as consumers could recognize these EU-wide labels. Currently, it is doubtful whether a consumer in one Member State knows whether or not the criteria behind an organic logo, an animal welfare logo or even a quality logo from one Member State are identical to that of the EU-wide logo or of that from other Member States.

This harmonization and consolidation could not be achieved with guidelines, but requires legislative measures. The criteria for each scheme need to be set in stone, so that consumers and consumer organizations can easily understand what each schemes' objectives are and more fundamentally there must be a clear need and purpose for a label, it should not simply be a marketing tool. In addition, clear enforcement mechanisms and well defined sanctions need to exist, to give a basis on which scheme operators, producers and retailers can be prosecuted if they fail to comply with the standards they claim to comply with. As a result, adequate controls at the Member State level are required.

The EU best practice guidelines

The BEUC representative had heard of the best practice guidelines, but had no concrete knowledge of what they contain or what aspects may be missing from them. However, she was happy to outline what points BEUC would consider to be important to be included in guidelines for scheme operators. These are the following:

- Consumer organizations should be involved with food labelling schemes from the outset. Food labelling schemes should be aimed at helping consumers make informed decisions and as a result the opinions of consumer organizations are vital. Nonetheless, some BEUC members feel that even if they are consulted during the development of food labelling schemes, this is often only to rubber stamp what has already been decided. As a result, some consumer organizations had to withdraw from the development process because their views were simply not taken into account. A scheme targeted at consumers should reflect the demands of consumer associations.
- Food labelling schemes should be certified. It is important that an independent third party, who holds no stake in the process other than wanting to inform consumers, issues certificates.
- Information provided to consumers should be simple and understandable. Displaying checklists used for inspections may be helpful, but often is too complex for the average consumer to understand or it would require too much time and effort to understand. As a result, consumers are currently poorly informed of what the schemes' criteria are, what its added value is etc. Simple, easily understandable information is needed in addition to detailed information.
- Before any scheme is established, careful consumer research should be undertaken to understand what consumers require of the scheme and whether or not the scheme is needed in the first place.

All schemes should be registered at the EU-level. The European Commission should establish a portal (similar to the health claims portal) where all schemes are listed along with their requirements and criteria they use. This single point of contact would allow consumers and consumer organizations to see what schemes operate in which countries and how they relate to each other. Hopefully consumers would not have to use this portal themselves, but for consumer organisations, having such a portal would be very helpful and the information could be passed on to consumers through these organisations. Another advantage of such a centralised portal is that when a Member State is considering setting up a new food labelling scheme, they can consult this portal first to see if a similar scheme already exists in another Member State. The benefits of this would be two-fold: not only would it make sure that the work that goes into the development of a scheme would not be unnecessarily replicated, it would also reduce unnecessary proliferation of more food labelling schemes.

Annex 13: Stakeholder questionnaires

This annex presents the questionnaires for each stakeholder group surveyed as part of this study.

The questionnaires were completed online using interactive options such as drop down selection menus. Further, not all respondents would have answered or seen all questions as there was streaming of respondents though certain questions based on their response to earlier questions.

Below we reproduce copies of all the questions for each stakeholder questionnaire.

Consumer bodies questionnaire

The following questionnaire was sent to consumer watchdogs and government consumer protection authorities.

European Commission Voluntary Food Labelling Study - Survey of Consumer Bodies

A Study for the European Commission by London Economics

Survey for Consumer Bodies
The survey you are about to complete forms an important part of a European Commission study on voluntary food labelling schemes. The results of this study will inform future European policy on the subject. **As a result, this is a unique opportunity for your organization to shape the development of the regulatory environment for voluntary food labelling in the European Union.**

We estimate that it should take no more than 20 minutes to complete the questionnaire. The majority of the questions are multiple choice questions based on your own knowledge, experiences and opinions.

All information received will be treated as strictly confidential. Only aggregated responses will be reported by London Economics and no individual opinion response data will be passed to the European Commisssion.

Should you have any questions regarding this survey, or any other comments regarding the functioning of food labelling schemes in the European Union, please do not hesitate to contact Miriam Sinn (+ 44 (0)20 7866 8191; Msinn@londecon.co.uk).

Thank you very much for taking the time to complete this survey.

There are 61 questions in this survey

SECTION ONE

About Your Organization

1 *

Please write your answer(s) here:

Name of organization	
Your Home Country	
Your name	
Your phone number	
Your email address	
Organization address	

SECTION TWO

About Your Involvement in Voluntary Food Labelling Schemes

2 Does your organization operate a food labelling scheme?

Please choose **only one** of the following:

- ◯ Yes
- ◯ No

3 Is your organisation a certification body for food labelling schemes?

Please choose **only one** of the following:

- ◯ Yes
- ◯ No

4 Did your organisation participate in the development of a food labelling scheme or its specifications?

Please choose **only one** of the following:

- ◯ Yes
- ◯ No

5 If you have any additional comments to add about your organization's involvement in voluntary food labelling schemes, please comment here.

Please write your answer here:

SECTION THREE

Consumer knowledge, trust, and behaviour.

6 How would you rate consumers' knowledge and recognition of the most important voluntary food labelling schemes in your country?

Please choose **only one** of the following:

- ○ Consumers know more than 75 % of all schemes
- ○ Consumers know between 50% and 75% of all schemes
- ○ Consumers know between 25% and 50% of all schemes
- ○ Consumers know less than 25% of all schemes

7 How would you rate consumers' understanding of the most important voluntary food labelling schemes in your country.

Please rate on a scale of 1 to 5, where 1 = Overall understanding is excellent, and 5 = Overall understanding is very poor.

Please choose **only one** of the following:

- ○ 1 Excellent Understanding
- ○ 2
- ○ 3
- ○ 4
- ○ 5 Poor Understanding

8 Do you agree with the following statement: "Consumers can easily distinguish between public and private voluntary food labelling schemes"?

Please rate on a scale of 1 to 5, where 1 = totally agree, and 5 = totally disagree.

Please choose **only one** of the following:

- ○ 1 Totally Agree
- ○ 2
- ○ 3
- ○ 4
- ○ 5 Totally Disagree

9 Do you agree with the following statement: "Consumers are can easily distinguish between voluntary self-declaration* and certification food labelling schemes"?**

Please rate on a scale of 1 to 5, where 1 = totally agree, and 5 = totally disagree.

Please choose **only one** of the following:

- ○ Totally Agree
- ○ 2
- ○ 3
- ○ 4
- ○ 5 Totally Disagree

* Self-declaration schemes are based on declaration by the producer/retailer, or by the scheme operator, unless the scheme operator is an accredited certification body.

**Certification schemes rely on certification by either a third party or by an accredited certification body. That is, a third body or an accredited certification body verifies if the requirements of the scheme are met by its participants

12 How would you rate consumers' level of trust towards public voluntary food labelling schemes?

Please rate on a scale of 1 to 5, where 1 = very high level of trust, and 5 = no trust.

Please choose **only one** of the following:

- ○ 1 Very high level of trust
- ○ 2
- ○ 3
- ○ 4
- ○ 5 No trust

13 How would you rate consumers' level of trust towards private voluntary food labelling schemes?

Please rate on a scale of 1 to 5, where 1 = very high level of trust, and 5 = no trust.

Please choose **only one** of the following:

- ○ 1 Very high level of trust
- ○ 2
- ○ 3
- ○ 4
- ○ 5 No trust

14 How would you rate consumers' level of trust towards voluntary certification* food labelling schemes?

Please rate on a scale of 1 to 5, where 1 = very high level of trust, and 5 = no trust.

Please choose **only one** of the following:

- ◯ 1 Very high level of trust
- ◯ 2
- ◯ 3
- ◯ 4
- ◯ 5 No trust

* Voluntary certification schemes rely on certification by either a third party or by an accredited certification body. That is, a third body or an accredited certification body verifies if the requirements of the scheme are met by its participants.

15 How would you rate consumers' level of trust towards voluntary self-declaration food labelling schemes?**

Please rate on a scale of 1 to 5, where 1 = very high level of trust, and 5 = no trust.

Please choose **only one** of the following:

- ◯ 1 Very high level of trust
- ◯ 2
- ◯ 3
- ◯ 4
- ◯ 5 No trust

* Voluntary self-declaration schemes are based on declaration by the producer/retailer or by the scheme operator, unless the scheme operator is an accredited certification body.

10

Do you agree with the following statement: "Consumers can easily distinguish between product schemes* and management schemes"?**

Please rate on a scale of 1 to 5, where 1 = totally agree, and 5 = totally disagree.

Please choose **only one** of the following:

- ◯ 1 Totally Agree
- ◯ 2
- ◯ 3
- ◯ 4
- ◯ 5 Totally Disagree

* Product schemes relate to the product itself
**Management schemes relate to the production process

11 How would you rate consumers' level of trust towards voluntary food labelling schemes in general?

Please rate on a scale of 1 to 5, where 1 = very high level of trust, and 5 = no trust.

Please choose **only one** of the following:

- ◯ 1 Very high level of trust
- ◯ 2
- ◯ 3
- ◯ 4
- ◯ 5 No trust

16 Do you agree with the following statement: "There is a clear need to improve consumer understanding of voluntary food labelling schemes"?

Please rate on a scale of 1 to 5, where 1 = totally agree, and 5 = totally disagree.

Please choose **only one** of the following:

- ◯ 1 Totally agree
- ◯ 2
- ◯ 3
- ◯ 4
- ◯ 5 Totally disagree

17 How could this be achieved? Please comment below.

Only answer this question if the following conditions are met:
° Answer was '3' or '2' or '1 Totally agree' at question '16 [15]' (Do you agree with the following statement: "There is a clear need to improve consumer understanding of voluntary food labelling schemes"? Please rate on a scale of 1 to 5, where 1 = totally agree, and 5 = totally disagree.)

Please write your answer here:

18 Do you believe consumers are willing to pay a premium for food products carrying a voluntary food label?

Please choose **only one** of the following:

- ◯ Yes, for all labels
- ◯ Yes, for most labels
- ◯ Yes, for some labels
- ◯ No, not for any labels

19 Do you agree with the following statement: " Voluntary self-declaration schemes pose a significant threat to consumer protection or empowerment" ?

Please rate on a scale of 1 to 5, where 1 = totally agree, and 5 = totallly disagree.

Please choose **only one** of the following:

- 1 Totally agree
- 2
- 3
- 4
- 5 Totally disagree

20 Please comment further on the kind of threat this could pose to consumer protection or empowerment.

Only answer this question if the following conditions are met:
° Answer was '3' or '2' or '1 Totally agree' at question '19 [18]' (Do you agree with the following statement: " Voluntary self-declaration schemes pose a significant threat to consumer protection or empowerment" ? Please rate on a scale of 1 to 5, where 1 = totally agree, and 5 = totallly disagree.)

Please write your answer here:

24 Do you agree with the following statement: "Auditors/inspectors of schemes are always completely independent and impartial" ?

Please rate on a scale of 1 to 5, where 1 = totally agree, and 5 = totally disagree.

Please choose **only one** of the following:

- 1 Totally agree
- 2
- 3
- 4
- 5 Totally disagree

25

Have you received any direct complaints that auditors/inspectors of schemes are not independent and impartial?

Please choose **only one** of the following:

- Yes
- No

26 How frequently do you receive such complaints?

Only answer this question if the following conditions are met:
° Answer was 'Yes' at question '25 [24]' (Have you received any direct complaints that auditors/inspectors of schemes are not independent and impartial?)

Please choose **only one** of the following:

- Very often
- Often
- Sometimes
- Rarely
- Never

27 Do you agree with the following statement: "Auditors/inspectors of schemes are always sufficiently skilled and qualified" ?

Please rate on a scale of 1 to 5, where 1 = totally agree, and 5 = totally disagree.

Please choose **only one** of the following:

- Totally agree
- 2
- 3
- 4
- 5 Totally disagree

28 Have you received any direct complaints that auditors/inspectors of schemes are not sufficiently qualified or skilled?

Please choose **only one** of the following:

- Yes
- No

29 How frequently do you receive such complaints?

Only answer this question if the following conditions are met:
° Answer was 'Yes' at question '28 [27]' (Have you received any direct complaints that auditors/inspectors of schemes are not sufficiently qualified or skilled?)

Please choose **only one** of the following:

- Very often
- Often
- Sometimes
- Rarely
- Never

21 Do you agree with the following statement: "The practice of voluntary self-declaration schemes should be supported by official guidelines or binding rules" ?

Please rate on a scale of 1 to 5, where 1 = totally agree, and 5 = totally disagree.

Please choose **only one** of the following:

- ○ 1 Totally agree
- ○ 2
- ○ 3
- ○ 4
- ○ 5 Totally disagree

22 Are there any schemes in your country which stand out as good examples of schemes which comply with the guidelines, and/or are particularly transparent, consumer friendly and well run?

Please choose **only one** of the following:

- ○ Yes
- ○ No

23 Please list a maximum of 3 schemes and include their website address where possible.

Only answer this question if the following conditions are met:
° Answer was 'Yes' at question '22 [21]' (Are there any schemes in your country which stand out as good examples of schemes which comply with the guidelines, and/or are particularly transparent, consumer friendly and well run?)

Please write your answer(s) here:

Scheme 1	
Scheme 2	
Scheme 3	

SECTION FOUR

Estimating market share of products by volume (e.g.in terms of items sold or kg)

30 Estimating market share of products by volume*.

What is your best estimate of the market share of products by volume which take part in any voluntary food labelling scheme in your country?

Please give your answer in terms of percentage e.g. 25%.

Please write your answer(s) here:

Meat products	
Milk products	
Egg products	
Fish products	
Fruit and vegetable products	
Cereal products	
Oils and fat products	
Sugar and confectionary products	
Wine and spirits products	
Other	

*Market share by volume being defined as the percentage of the overall volume of products (in terms of items sold or kg).

SECTION FIVE

Estimating market share of products by value (e.g.measured in Euros)

31 Estimating market share of products by value*.

What is your best estimate of the market share of products by value which take part in any voluntary food labelling scheme in your country?

Please give your answer in % (e.g. 25%)

Please write your answer(s) here:

Meat products	
Milk products	
Egg products	
Fish products	
Fruit and vegetable products	
Cereal products	
Oils and fat products	
Sugar and confectionary products	
Wine and spirits products	
Other	

*Market share by value being defined as the percentage of the overall value of products (e.g.measured in Euros)

SECTION SIX

EU best practices

32 Before this questionnaire, were you aware of the 2010 "*EU best practice guidelines for voluntary certification schemes for agricultural products and foodstuffs*?"

Please choose **only one** of the following:

- Yes
- No

To view these guidelines in a new window, please right click the link below and select 'open in new tab'.

WARNING: if you do NOT right click this link, and double click on the link instead, you will be re-directed out of the survey and will have to start your response again.

http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=CELEX:52010XC1216(02):en:NOT

33 From the perspective of your organisation, what are the most important requirements of the guidelines?

Please write your answer here:

34 Have you observed a difference in performance between publicly and privately managed voluntary food certification schemes with regard to complying with these guidelines?

Please choose **only one** of the following:

- Yes, public schemes perform better
- Yes, private schemes perform better
- No difference between public and private schemes

35

To what extent do you agree with the statements below?

Please rate your agreement on a scale of 1 to 5, where 1 = totally agree, and 5 = totally *dis*agree.

36 These guidelines help avoid consumer confusion.

Please choose **only one** of the following:

- ○ 1 Totally agree
- ○ 2
- ○ 3
- ○ 4
- ○ 5 Totally disagree

Please rate your agreement on a scale of 1 to 5, where 1 = totally agree, and 5 = totally *dis*agree.

37 If not, why not? Please comment in the box below.

Only answer this question if the following conditions are met:
° Answer was '5 Totally disagree' or '4' or '3' at question '36 [34a]' (These guidelines help avoid consumer confusion.)

Please write your answer here:

38 These guidelines help increase scheme transparency.

Please choose **only one** of the following:

- ○ 1 Totally agree
- ○ 2
- ○ 3
- ○ 4
- ○ 5 Totally disagree

Please rate on a scale of 1 to 5, where 1 = totally agree, and 5 = totally *dis*agree

39 If not, why not? Please comment in the box below.

Only answer this question if the following conditions are met:
° Answer was '5 Totally disagree' or '4' or '3' at question '38 [35a]' (These guidelines help increase scheme transparency.)

Please write your answer here:

40 In your opinion, what are the main <u>drivers</u>* for food scheme operators to comply with the "EU best practice guidelines for voluntary certification schemes for agricultural products and foodstuffs" ?

Please write your answer here:

* 'Drivers' = any factors which cause scheme operators to comply with the EU best practices guidelines

41 In your opinion, what are the main <u>obstacles</u>* for food scheme operators to comply with the "EU best practice guidelines for voluntary certification schemes for agricultural products and foodstuffs" ?

Please write your answer here:

*' Obstacles' = any factors which prevent or hinder scheme operators from complying with the EU best practices guidelines.

42 If you have any additional comments to add about EU best practices, please comment here.

Please write your answer here:

SECTION SEVEN

Certified voluntary food labelling schemes

43 This part of the survey is about certified voluntary food labelling schemes only.

Certification schemes rely on certification by either a third party or by an accredited certification body. That is, a third body or an accredited certification body verifies if the requirements of the scheme are met by its participants.

44

To what extent do you agree with the statements below?

Please rate your agreement on a scale of 1 to 5, where 1 = totally agree, and 5 = totally *dis*agree.

45 "There are many problems with the functioning of voluntary certification food labelling schemes".

Please choose only one of the following:

- ○ **1 Totally agree**
- ○ **2**
- ○ **3**
- ○ **4**
- ○ **5 Totally disagree**

Please rate on a scale of 1 to 5, where 1 = totally agree, and 5 = totally *dis*agree

46 What are the areas that should be improved? Please comment below.

Only answer this question if the following conditions are met:
° Answer was '3' or '2' or '1 Totally agree' at question '45 [39]' ("There are many problems with the functioning of voluntary certification food labelling schemes".)

Please write your answer here:

47 How could these improvements be achieved? Please comment below.

Only answer this question if the following conditions are met:
° Answer was '3' or '1 Totally agree' or '2' at question '45 [39]' ("There are many problems with the functioning of voluntary certification food labelling schemes".)

Please write your answer here:

48 "The *2010 EU best practice guidelines for voluntary certification schemes for agricultural products and foodstuffs* are fulfilled by voluntary certification food labelling schemes".

Please choose only one of the following:

- ○ **1 Totally agree**
- ○ **2**
- ○ **3**
- ○ **4**
- ○ **5 Totally disagree**

Please rate on a scale of 1 to 5, where 1 = totally agree and 5 = totally *dis*agree.

49 "There are voluntary certification schemes in my country which falsely claim endorsement by public or other bodies".

Please choose only one of the following:

- ○ **1 Totally agree**
- ○ **2**
- ○ **3**
- ○ **4**
- ○ **5 Totally disagree**

Please rate on a scale of 1 to 5, where 1 = totally agree, and 5 = totally *dis*agree

50 "There are voluntary certification schemes in my country which present rights given to consumers by law as a distinctive features of their scheme".

Please choose only one of the following:

- ○ **1 Totally agree**
- ○ **2**
- ○ **3**
- ○ **4**
- ○ **5 Totally disagree**

Please rate on a scale of 1 to 5, where 1 = totally agree, and 5 = totally *dis*agree

51 "There are voluntary food certification schemes in my country which are misleading to consumers".

Please choose only one of the following:

- ○ **1 Totally agree**
- ○ **2**
- ○ **3**
- ○ **4**
- ○ **5 Totally disagree**

Please rate on a scale of 1 to 5, where 1 = totally agree, and 5 = totally *dis*agree

SECTION EIGHT

Self-declared voluntary food labelling schemes

52 This part of the survey is about self-declared voluntary food labelling schemes only.

Self-declaration schemes are based on declaration by the producer/retailer or by the scheme operator, unless the scheme operator is an accredited certification body.

53

To what extent do you agree with the statements below?

Please rate your agreement on a scale of 1 to 5, where 1 = totally agree, and 5 = totally *dis*agree.

54 "There are many problems with the functioning of voluntary self-declaration food labelling schemes".

Please choose only one of the following:

- ○ **1 Totally agree**
- ○ **2**
- ○ **3**
- ○ **4**
- ○ **5 Totally disagree**

Please rate on a scale of 1 to 5, where 1 = totally agree, and 5 = totally *dis*agree

55 What are the areas that should be improved?

Only answer this question if the following conditions are met:
° Answer was '3' or '2' or '1 Totally agree' at question '54 [46]' ("There are many problems with the functioning of voluntary self-declaration food labelling schemes".)

Please write your answer here:

56 How could these improvements be achieved?

Only answer this question if the following conditions are met:
° Answer was '3' or '2' or '1 Totally agree' at question '54 [46]' ("There are many problems with the functioning of voluntary self-declaration food labelling schemes".)

Please write your answer here:

57 "The 2010 *EU best practice guidelines for voluntary certification schemes for agricultural products and foodstuffs* for certified schemes is also fulfilled by voluntary self-declaration food labelling schemes."

Please choose only one of the following:

- ○ **1 Totally agree**
- ○ **2**
- ○ **3**
- ○ **4**
- ○ **5 Totally disagree**

Please rate on a scale of 1 to 5, where 1 = totally agree, and 5 = totally *dis*agree

58 "There are voluntary self-declaration schemes in my country which falsely claim endorsement by public or other bodies".

Please choose only one of the following:

- ○ **1 Totally agree**
- ○ **2**
- ○ **3**
- ○ **4**
- ○ **5 Totally disagree**

Please rate on a scale of 1 to 5, where 1 = totally agree, and 5 = totally *dis*agree

59 "There are voluntary self-declaration schemes in my country which present rights given to consumers by law as a distinctive features of their scheme".

Please choose only one of the following:

- ○ **1 Totally agree**
- ○ **2**
- ○ **3**
- ○ **4**
- ○ **5 Totally disagree**

Please rate on a scale of 1 to 5, where 1 = totally agree, and 5 = totally *dis*agree

60 "There are voluntary food self-declaration schemes in my country which are misleading to consumers".

Please choose only one of the following:

- ○ **1 Totally agree**
- ○ **2**
- ○ **3**
- ○ **4**
- ○ **5 Totally disagree**

Please rate on a scale of 1 to 5, where 1 = totally agree, and 5 = totally *dis*agree

SECTION NINE

Any other comments

61 If you have any additional comments to add about any aspect of voluntary food labelling, please comment here.

Please write your answer here:

Certification and accreditation bodies questionnaire

The following questionnaire was sent to certification and accreditation bodies.

European Commission Voluntary Food Labelling Study - Survey of Accreditation Certification Bodies

A Study for the European Commission by London Economics

Survey of Accreditation Certification Bodies
The survey you are about to complete forms an important part of a European Commission study on voluntary food labelling schemes. The results of this study will inform future European policy on the subject. **As a result, this is a unique opportunity for your organization to shape the development of the regulatory environment for voluntary food labelling in the European Union.**

We estimate that it should take no more than 20 minutes to complete the questionnaire. The majority of the questions are multiple choice questions based on your own knowledge, experiences and opinions.

All information received will be treated as strictly confidential. Only aggregated responses will be reported by London Economics and no individual opinion response data will be passed to the European Commission.

Should you have any questions regarding this survey, or any other comments regarding the functioning of food labelling schemes in the European Union, please do not hesitate to contact Miriam Sinn (+ 44 (0)20 7866 8191; Msinn@londecon.co.uk).

Thank you very much for taking the time to complete this survey.

There are 54 questions in this survey

SECTION ONE

About Your Organization

1 *

Please write your answer(s) here:

Name of organization	
Your home country	
Your name	
Your phone number	
Your email address	
Organization address	

SECTION TWO

General questions about certification of voluntary food labelling schemes

2 In general, do certification bodies publish costs associated with certification and inspection for scheme participants?

Please choose **only one** of the following:

- ◯ Yes
- ◯ No

3 Over the course of the last two years for how many publicly and privately managed food labelling schemes have you been issuing certificates?

Please write your answer(s) here:

Publicly Managed Schemes	
Privately Managed Schemes	

4 Over the course of the last two years, how often have you had to issue a warning to public and private food labelling schemes?

Please write your answer(s) here:

Publicly Managed Schemes	
Privately Managed Schemes	

5 Over the course of the last two years, how often have you had to withdraw a certificate from a public and private food labelling scheme?

Please write your answer(s) here:

Publicly Managed Schemes	
Privately Managed Schemes	

SECTION THREE

Questions about policy areas and food labelling schemes.

6

Safety/Hygiene = protection of human health along supply chain
Traceability = ingredients are tracked along supply chain
Animal health = animals are kept in good health
Animal welfare = care and destruction of animals ensures welfare is maintained
Origin = link between product features and production region
Organic farming = production meets requirements for organic methods
Environmental management = environmental impacts are minimised
Climate change = carbon gas emissions are minimised
Socio-economic producers conditions = production is economically fair to workers
Taste and smell qualities = sensory experience of consuming food is good
Traditional products or methods = produced using traditional practices
Religious requirements = production meets religious standards
Vegetarian = suitable for vegetarians
Allergen free = suitable for people with allergies
Health related = product is recommended as part of a balanced diet
Directly from farm/short supply chain = short transport from production to final sale
Other = any policy area not covered in the above definitions

7 Over the course of the last two years, for how many schemes in each of these policy areas have you been issuing food labelling certificates?

Please write your answer(s) here:

Safety/Hygiene	
Traceability	
Animal Health	
Animal Welfare	
Origin	
Organic Farming	
Environmental Management	
Climate change	
Socio-economic producers conditions	
Taste and smell qualities	
Traditional products or methods	
Religious requirements	
Vegetarian	
Allergen Free	
Health related	
Directly from the farm/short supply chain	
Other	

8 Over the course of the last two years, how often have you had to <u>issue a warning</u> to a food labelling scheme in each of these policy areas?

Please write your answer(s) here:

Safety/Hygiene	
Traceability	
Animal Health	
Animal Welfare	
Origin	
Organic Farming	
Environmental Management	
Climate change	
Socio-economic producers conditions	
Taste and smell qualities	
Traditional products or methods	
Religious requirements	
Vegetarian	
Allergen Free	
Health related	
Directly from the farm/short supply chain	
Other	

9 Over the course of the last two years, how often have you had to withdraw a certificate from a food labelling scheme in each of these policy areas?

Please write your answer(s) here:

Safety/Hygiene	
Traceability	
Animal Health	
Animal Welfare	
Origin	
Organic Farming	
Environmental Management	
Climate change	
Socio-economic producers conditions	
Taste and smell qualities	
Traditional products or methods	
Religious requirements	
Vegetarian	
Allergen Free	
Health related	
Directly from the farm/short supply chain	
Other	

SECTION FOUR

Questions about product categories and food labelling schemes.

10 Over the course of the last two years, for how many food labelling schemes in each of these product categories have you been issuing certificates?

Please write your answer(s) here:

Meat products	
Milk Products	
Egg products	
Fish products	
Fruit and vegetable products	
Cereal products	
Oils and fat products	
Sugar and confectionary products	
Wine and spirits products	
Other	

11 Over the course of the last two years how often have you had to <u>issue a warning</u> to a food labelling scheme in each of these product categories?

Please write your answer(s) here:

Meat products	
Milk Products	
Egg products	
Fish products	
Fruit and vegetable products	
Cereal products	
Oils and fat products	
Sugar and confectionary products	
Wine and spirits products	
Other	

12 Over the course of the last two years how often have you had to withdraw a certificate from a food labelling scheme in each of these product categories?

Please write your answer(s) here:

Meat products	
Milk Products	
Egg products	
Fish products	
Fruit and vegetable products	
Cereal products	
Oils and fat products	
Sugar and confectionary products	
Wine and spirits products	
Other	

SECTION FIVE

EU best practice guidelines

13 Before this questionnaire, were you aware of the 2010 "*EU best practice guidelines for voluntary certification schemes for agricultural products and foodstuffs?*"

Please choose only one of the following:

- ◯ **Yes**
- ◯ **No**

To view these guidelines in a new window, please right click the link below and select 'open in new tab'.

Warning: if you do NOT right click this link, and double click on the link instead, you will be re-directed out of the survey and will have to start your response again.

http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=CELEX:52010XC1216(02):en:NOT

14 From the perspective of your organisation, what are the most important requirements of the guidelines?

Please write your answer here:

15

To what extent do you agree with the statements below?

Please rate your agreement on a scale of 1 to 5, where 1 = totally agree, and 5 = totally *dis*agree.

16

"All schemes in my country comply with these guidelines".

Please choose only one of the following:

- ○ **1 Totally Agree**
- ○ **2**
- ○ **3**
- ○ **4**
- ○ **5 Totally Disagree**

Please rate your agreement on a scale of 1 to 5, where 1 = totally agree, and 5 = totally *disagree*.

17 If not, why not? Please comment in the box below.

Only answer this question if the following conditions are met:
° Answer was '3' or '4' or '5 Totally Disagree' at question '16 [13a]' ("All schemes in my country comply with these guidelines".)

Please write your answer here:

18 "These guidelines help avoid consumer confusion".

Please choose only one of the following:

- ○ **1 Totally Agree**
- ○ **2**
- ○ **3**
- ○ **4**
- ○ **5 Totally Disagree**

Please rate your agreement on a scale of 1 to 5, where 1 = totally agree, and 5 = totally *dis*agree.

19 If not, why not? Please comment in the box below.

Only answer this question if the following conditions are met:
° Answer was '4' or '3' or '5 Totally Disagree' at question '18 [14a]' ("These guidelines help avoid consumer confusion".)

Please write your answer here:

20 "These guidelines help increase scheme transparency".

Please choose only one of the following:

- ◯ **1 Totally Agree**
- ◯ **2**
- ◯ **3**
- ◯ **4**
- ◯ **5 Totally Disagree**

Please rate on a scale of 1 to 5, where 1 = totally agree, and 5 = totally *disagree*

21 If not, why not? Please comment in the box below.

Only answer this question if the following conditions are met:
° Answer was '5 Totally Disagree' or '4' or '3' at question '20 [15a]' ("These guidelines help increase scheme transparency".)

Please write your answer here:

22 "These guidelines help reduce the financial and administrative burden on farmers and producers".

Please choose only one of the following:

- ◯ **1 Totally Agree**
- ◯ **2**
- ◯ **3**
- ◯ **4**
- ◯ **5 Totally Disagree**

Please rate your agreement on a scale of 1 to 5, where 1 = totally agree, and 5 = totally *disagree*.

23 If not, why not? Please comment in the box below.

Only answer this question if the following conditions are met:
° Answer was '5 Totally Disagree' or '4' or '3' at question '22 [16a]' ("These guidelines help reduce the financial and administrative burden on farmers and producers".)

Please write your answer here:

24 "These guidelines offer guidance on how to ensure compliance with EU internal market rules and principles of certification".

Please choose only one of the following:

- ○ **1 Totally Agree**
- ○ **2**
- ○ **3**
- ○ **4**
- ○ **5 Totally Disagree**

Please rate your agreement on a scale of 1 to 5, where 1 = totally agree, and 5 = totally *dis*agree.

25 If not, why not? Please comment in the box below.

Only answer this question if the following conditions are met:
° Answer was '4' or '3' or '5 Totally Disagree' at question '24 [17a]' ("These guidelines offer guidance on how to ensure compliance with EU internal market rules and principles of certification".)

Please write your answer here:

26 In your opinion, what are the main drivers* for food scheme operators to comply with the "EU best practice guidelines for voluntary certification schemes for agricultural products and foodstuffs" ?

Please write your answer here:

* 'Drivers' = any factors which cause scheme operators to comply with the EU best practices guidelines

27 In your opinion, what are the main obstacles* for food scheme operators to comply with the "EU best practice guidelines for voluntary certification schemes for agricultural products and foodstuffs" ?

Please write your answer here:

*' Obstacles' = any factors which prevent or hinder scheme operators from complying with the EU best practices guidelines.

28 In your opinion, are there any schemes in your country which stand out as good examples of compliance with the guidelines, or are particularly transparent, consumer friendly, and well run?

Please choose only one of the following:

- ○ Yes
- ○ No

29 Please list a maximum of 3 schemes and include their website address where possible.

Only answer this question if the following conditions are met:
° Answer was 'Yes' at question '28 [20a]' (In your opinion, are there any schemes in your country which stand out as good examples of compliance with the guidelines, or are particularly transparent, consumer friendly, and well run?)

Please write your answer(s) here:

Scheme 1	
Scheme 2	
Scheme 3	

30 Have you observed a difference in performance between publicly and privately managed voluntary food certification schemes with regard to complying with these guidelines?

Please choose only one of the following:

- ○ Yes, public schemes perform better
- ○ Yes, private schemes perform better
- ○ No difference between public and private schemes

31 If you have any additional comments to add about EU best practices, please comment here.

Please write your answer here:

SECTION SIX

Consumer Protection

32

To what extent do you agree with the statements below?

Please rate your agreement on a scale of 1 to 5, where 1 = totally agree, and 5 = totally *dis*agree.

33 "Consumers can easily distinguish between public and private voluntary food labelling schemes".

Please choose only one of the following:

- ○ **1 Totally Agree**
- ○ **2**
- ○ **3**
- ○ **4**
- ○ **5 Totally Disagree**

Please rate on a scale of 1 to 5, where 1 = completely agree, and 5 = completely disagree.

34 "Consumers can easily distinguish between voluntary self-declaration* and certification** food labelling schemes".

Please choose only one of the following:

- ○ **1 Totally Agree**
- ○ **2**
- ○ **3**
- ○ **4**
- ○ **5 Totally Disagree**

*** <u>Self-declaration</u> schemes are based on declaration by the producer/retaile,r or by the scheme operator, unless the scheme operator is an accredited certification body.**

****<u>Certification</u> schemes rely on certification by either a third party or by an accredited certification body. That is, a third body or an accredited certification body verifies if the requirements of the scheme are met by its participants**

35 " Voluntary self-declaration schemes pose a significant threat to consumer protection or empowerment".

Please choose only one of the following:

- ○ **1 Totally Agree**
- ○ **2**
- ○ **3**
- ○ **4**
- ○ **5 Totally Disagree**

Please rate on a scale of 1 to 5, where 1 = completely agree, and 5 = completely disagree.

36 Please comment further on the type of threat this could pose to consumer protection or empowerment.

Only answer this question if the following conditions are met:
° Answer was '3' or '2' or '1 Totally Agree' at question '35 [25a]' (" Voluntary self-declaration schemes pose a significant threat to consumer protection or empowerment".)

Please write your answer here:

37 "The practice of voluntary self-declaration schemes should be supported by official guidelines or binding rules".

Please choose only one of the following:

- ○ **1 Totally Agree**
- ○ **2**
- ○ **3**
- ○ **4**
- ○ **5 Totally Disagree**

Please rate on a scale of 1 to 5, where 1 = completely agree, and 5 = completely disagree

SECTION SEVEN

Certified voluntary food labelling schemes

38 This part of the survey is about certified voluntary food labelling schemes only.

Certification schemes rely on certification by either a third party or by an accredited certification body. That is, a third body or an accredited certification body verifies if the requirements of the scheme are met by its participants.

39 Do you agree with the following statement: "There are many problems with the functioning of voluntary certification food labelling schemes" ?

Please choose only one of the following:

- ○ **1 Agree Totally**
- ○ **2**
- ○ **3**
- ○ **4**
- ○ **5 Disagree Totally**

Please rate on a scale of 1 to 5, where 1 = totally agree, and 5 = totally *disagree*

40 What are the areas that should be improved? Please comment below.

Only answer this question if the following conditions are met:
° Answer was '1 Agree Totally' or '2' or '3' at question '39 [27a]' (Do you agree with the following statement: "There are many problems with the functioning of voluntary certification food labelling schemes" ?)

Please write your answer here:

41 How could these improvements be achieved? Please comment below.

Only answer this question if the following conditions are met:
° Answer was '1 Agree Totally' or '2' or '3' at question '39 [27a]' (Do you agree with the following statement: "There are many problems with the functioning of voluntary certification food labelling schemes" ?)

Please write your answer here:

42

To what extent do you agree with the statements below?

Please rate your agreement on a scale of 1 to 5, where 1 = totally agree, and 5 = totally *dis*agree.

43 "The 2010 *EU best practice guidelines for voluntary certification schemes for agricultural products and foodstuffs* are fulfilled by voluntary certification food labelling schemes."

Please choose only one of the following:

- **1 Agree Totally**
- **2**
- **3**
- **4**
- **5 Disagree Totally**

Please rate on a scale of 1 to 5, where 1 = totally agree, and 5 = totally *dis*agree

44 "There are voluntary certification schemes in my country which falsely claim endorsement by public or other bodies".

Please choose only one of the following:

- ○ **1 Totally Agree**
- ○ **2**
- ○ **3**
- ○ **4**
- ○ **5 Totally Disagree**

Please rate on a scale of 1 to 5, where 1 = totally agree, and 5 = totally *dis*agree

45 "There are voluntary certification schemes in my country which present rights given to consumers by law as a distinctive features of their scheme".

Please choose only one of the following:

- ○ **1 Totally Agree**
- ○ **2**
- ○ **3**
- ○ **4**
- ○ **5 Totally Disagree**

Please rate on a scale of 1 to 5, where 1 = totally agree, and 5 = totally *dis*agree

SECTION EIGHT

Self-declared voluntary food labelling schemes

46 This part of the survey is about self-declared voluntary food labelling schemes only.

Self-declaration schemes are based on declaration by the producer/retailer or by the scheme operator, unless the scheme operator is an accredited certification body.

47 Do you agree with the following statement: "There are many problems with the functioning of voluntary self-declaration food labelling schemes" ?

Please rate on a scale of 1 to 5, where 1 = totally agree, and 5 = totally *dis*agree

Please choose only one of the following:

- ○ **1 Totally Agree**
- ○ **2**
- ○ **3**
- ○ **4**
- ○ **5 Totally Disagree**

48 What are the areas that should be improved?

Only answer this question if the following conditions are met:
° Answer was '3' or '2' or '1 Totally Agree' at question '47 [31a]' (Do you agree with the following statement: "There are many problems with the functioning of voluntary self-declaration food labelling schemes" ? Please rate on a scale of 1 to 5, where 1 = totally agree, and 5 = totally disagree)

Please write your answer here:

49 How could these improvements be achieved?

Only answer this question if the following conditions are met:
° Answer was '3' or '2' or '1 Totally Agree' at question '47 [31a]' (Do you agree with the following statement: "There are many problems with the functioning of voluntary self-declaration food labelling schemes" ? Please rate on a scale of 1 to 5, where 1 = totally agree, and 5 = totally disagree)

Please write your answer here:

50

To what extent do you agree with the statements below?

Please rate your agreement on a scale of 1 to 5, where 1 = totally agree, and 5 = totally *dis*agree.

51 "The 2010 *EU best practice guidelines for voluntary certification schemes for agricultural products and foodstuffs* for certified schemes are also fulfilled by voluntary self-declaration food labelling schemes".

Please choose only one of the following:

- **1 Totally Agree**
- **2**
- **3**
- **4**
- **5 Totally Disagree**

Please rate on a scale of 1 to 5, where 1 = totally agree, and 5 = totally *disagree*

52 "There are voluntary self-declaration schemes in my country which falsely claim endorsement by public or other bodies".

Please choose only one of the following:

- **1 Totally Agree**
- **2**
- **3**
- **4**
- **5 Totally Disagree**

Please rate on a scale of 1 to 5, where 1 = totally agree, and 5 = totally *disagree*

53 "There are voluntary self-declaration schemes in my country which present rights given to consumers by law as a distinctive features of their scheme".

Please choose only one of the following:

- **1 Totally Agree**
- **2**
- **3**
- **4**
- **5 Totally Disagree**

Please rate on a scale of 1 to 5, where 1 = totally agree, and 5 = totally *disagree*

SECTION NINE

Any other comments

54 If you have any additional comments to add about any aspect of voluntary food labelling, please comment here.

Please write your answer here:

Producer Farmer and Retailer Questionnaire

Below is the questionnaire sent to producer, farmer and retailer associations.

European Commission Voluntary Food Labelling Study - Survey for Producers, Farmers & Retailers

A Study for the European Commission by London Economics

Survey of Producers, Famers & Retailers

Thank you very much for taking the time to take part in this survey. The survey you are about to complete forms an important part of a European Commission study on voluntary food labelling schemes. The focus of this study is only on voluntary food labels which excludes any mandatory food labelling required by national or European law.

The results of this study will inform future European policy on the subject. As a result, this is a unique opportunity for your organization to shape the development of the regulatory environment for voluntary food labelling in the European Union. We estimate that it should take no more than 20 minutes to complete the questionnaire. The majority of the questions are multiple choice questions based on your own knowledge, experiences and opinions.

All information received will be treated as strictly confidential. Only aggregated responses will be reported by London Economics and no individual opinion response data will be passed to the European Commission.

Should you have any questions regarding this survey, or any other comments regarding the functioning of food labelling schemes in the European Union, please do not hesitate to contact Miriam Sinn (+ 44 (0)20 7866 8191; Msinn@londecon.co.uk).

Thank you very much for taking the time to complete this survey.

There are 56 questions in this survey

SECTION ONE

About your organization

1 *

Please write your answer(s) here:

Name of organization	
Your home country	
Your name	
Your phone number	
Your email address	
Organization address	

SECTION TWO

This section is about all types of voluntary food labelling schemes

2 Does your organization operate a food labelling scheme?

Please choose only one of the following:

- ○ Yes
- ○ No

3 Is your organisation a certification body for food labelling schemes?

Please choose only one of the following:

- ○ Yes
- ○ No

4 Did your organisation participate in the development of a food labelling scheme or its specifications?

Please choose only one of the following:

- ○ Yes
- ○ No

SECTION THREE

Consumer knowledge, trust and behaviour

This part of the survey relates to all types of voluntary food labelling schemes

5 How would you rate consumers' knowledge and recognition of the most important voluntary food labelling schemes in your country?

Please choose only one of the following:

- ◯ Consumers know more than 75 % of all schemes
- ◯ Consumers know between 50% and 75% of all schemes
- ◯ Consumers know between 25% and 50% of all schemes
- ◯ Consumers know less than 25% of all schemes

6 How would you rate consumers' understanding of the most important voluntary food labelling schemes in your country.

Please rate on a scale of 1 to 5, where 1 = Overall understanding is excellent, and 5 = Overall understanding is very poor.

Please choose only one of the following:

- ◯ 1 Excellent Understanding
- ◯ 2
- ◯ 3
- ◯ 4
- ◯ 5 Poor Understanding

7 Do you agree with the following statement " Consumers can easily distinguish between public and private voluntary food labelling schemes"?

Please rate on a scale of 1 to 5, where 1 = totally agree, and 5 = totally disagree.

Please choose only one of the following:

- ○ 1 Totally Agree
- ○ 2
- ○ 3
- ○ 4
- ○ 5 Totally Disagree

8 Do you agree with the following statement "Consumers can easily distinguish between voluntary self-declaration* and certification food labelling schemes"?**

Please rate on a scale of 1 to 5, where 1 = totally agree, and 5 = totally disagree.

Please choose only one of the following:

- ○ 1 Totally Agree
- ○ 2
- ○ 3
- ○ 4
- ○ 5 Totally Disagree

* Self-declaration schemes are based on declaration by the producer/retailer or by the scheme operator, unless the scheme operator is an accredited certification body.
**'Certification schemes rely on certification by either a third party or by an accredited certification body. That is, a third body or an accredited certification body verifies if the requirements of the scheme are met by its participants.

9 Do you agree with the following statement "Consumers can easily distinguish between product schemes* and management schemes"?**

Please rate on a scale of 1 to 5, where 1 = totally agree, and 5 = totally disagree.

Please choose only one of the following:

- ◯ 1 Totally Agree
- ◯ 2
- ◯ 3
- ◯ 4
- ◯ 5 Totally Disagree

* product schemes relate to the product itself
**management schemes relate to the production process.

10 How would you rate consumers' level of trust towards voluntary food labelling schemes in general?

Please rate on a scale of 1 to 5, where 1 = very high level of trust, and 5 = no trust.

Please choose only one of the following:

- ◯ 1 Very high level of trust
- ◯ 2
- ◯ 3
- ◯ 4
- ◯ 5 No trust

11 How would you rate consumers' level of trust towards <u>public</u> voluntary food labelling schemes?

Please rate on a scale of 1 to 5, where 1 = very high level of trust, and 5 = no trust.

Please choose only one of the following:

- ◯ 1 Very high level of trust
- ◯ 2
- ◯ 3
- ◯ 4
- ◯ 5 No trust

12 How would you rate consumers' level of trust towards <u>private</u> voluntary food labelling schemes?

Please rate on a scale of 1 to 5, where 1 = very high level of trust, and 5 = no trust.

Please choose only one of the following:

- ◯ 1 Very high level of trust
- ◯ 2
- ◯ 3
- ◯ 4
- ◯ 5 No trust

13 How would you rate consumers' level of trust towards voluntary certification* food labelling schemes?

Please rate on a scale of 1 to 5, where 1 = very high level of trust, and 5 = no trust.

Please choose only one of the following:

- ○ 1 Very high level of trust
- ○ 2
- ○ 3
- ○ 4
- ○ 5 No trust

*Certification schemes rely on certification by either a third party or by an accredited certification body. That is, a third body or an accredited certification body verifies if the requirements of the scheme are met by its participants.

14 How would you rate consumers' level of trust towards voluntary self-declaration* food labelling schemes?

Please rate on a scale of 1 to 5, where 1 = very high level of trust, and 5 = no trust.

Please choose only one of the following:

- ○ 1 Very high level of trust
- ○ 2
- ○ 3
- ○ 4
- ○ 5 No trust

* Self-declaration schemes are based on declaration by the producer/retailer or by the scheme operator, unless the scheme operator is an accredited certification body.

15 Do you agree with the following statement "There is a clear need to improve consumer understanding of voluntary food labelling schemes" ?

Please rate on a scale of 1 - 5, where 1 = totally agree and 5 = totally disagree.

Please choose only one of the following:

- ○ 1 Totally agree
- ○ 2
- ○ 3
- ○ 4
- ○ 5 Totally disagree

16 How could these improvements be achieved? Please comment below.

Only answer this question if the following conditions are met:
° Answer was '1 Totally agree' or '2' or '3' at question '15 [14a]' (Do you agree with the following statement "There is a clear need to improve consumer understanding of voluntary food labelling schemes" ? Please rate on a scale of 1 - 5, where 1 = totally agree and 5 = totally disagree.)

Please write your answer here:

17 Do you have any information on how much more consumers are willing to pay for food products carrying avoluntary food label (the price premium).

Please choose only one of the following:

- ○ Yes
- ○ No

18 To the best of your knowledge, how high is the price premium on products carrying a food label?

Please express your answer in %

Only answer this question if the following conditions are met:
° Answer was 'Yes' at question '17 [15a]' (Do you have any information on how much more consumers are willing to pay for food products carrying avoluntary food label (the price premium).)

Please write your answer here:

19 Please provide any further information on consumers' willingness to pay more for food products carrying a label.

If you prefer, you may provide this information as a web link.

Only answer this question if the following conditions are met:
° Answer was 'Yes' at question '17 [15a]' (Do you have any information on how much more consumers are willing to pay for food products carrying avoluntary food label (the price premium).)

Please write your answer here:

20 Do you agree with the following statement: "Voluntary self-declaration schemes pose a significant threat to consumer protection or empowerment"?

Please rate on a scale of 1 - 5, where 1 = totally agree and 5 = totally disagree.

Please choose only one of the following:

- ◯ 1 Totally agree
- ◯ 2
- ◯ 3
- ◯ 4
- ◯ 5 Totally disagree

21 Please describe the type of threat this poses to consumers.

Only answer this question if the following conditions are met:
° Answer was '2' or '1 Totally agree' or '3' at question '20 [16a]' (Do you agree with the following statement: "Voluntary self-declaration schemes pose a significant threat to consumer protection or empowerment"? Please rate on a scale of 1 - 5, where 1 = totally agree and 5 = totally disagree.)

Please write your answer here:

22 Do you agree with the following statement: "The practice of voluntary self-declaration schemes should be supported by official guidelines or binding rules" ?

Please choose only one of the following:

- ◯ Yes
- ◯ No

SECTION FOUR

Estimating market share of products by volume (e.g.in terms of items sold or kg)

23 What is your best estimate of the market share of products by volume* which take part in any voluntary food labelling scheme in your country?

Please give your answer in terms of percentage e.g. 25%.

Please write your answer(s) here:

Meat products	
Milk products	
Egg products	
Fish products	
Fruit and vegetable products	
Cereal products	
Oils and fat products	
Sugar and confectionary products	
Wine and spirits products	
Other	

*Market share by volume = the percentage of the overall volume of products (in terms of items sold or kg).

SECTION FIVE

Estimating market share of products by value (e.g.measured in Euros)

24 What is your best estimate of the market share of products by value* which take part in any voluntary food labelling scheme in your country?

Please give your answer in terms of percentage e.g. 25%.

Please write your answer(s) here:

Meat products	
Milk products	
Egg products	
Fish products	
Fruit and vegetable products	
Cereal products	
Oils and fat products	
Sugar and confectionary products	
Wine and spirits products	
Other	

*Market share by value = the percentage of the overall value of products (e.g.measured in Euros)

SECTION SIX

EU Best Practices

25 Before this questionnaire, were you aware of the 2010 "*EU best practice guidelines for voluntary certification schemes for agricultural products and foodstuffs*"?

Please choose only one of the following:

- ○ Yes
- ○ No

To view these guidelines in a new window, please right click the link below and select 'open in new tab'.

WARNING: if you do NOT right click this link, and double click on the link instead, you will be re-directed out of the survey and will have to start your response again.

http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=CELEX:52010XC1216(02):en:NOT

26 From the perspective of your organisation, what are the most important requirements of the guidelines?

Please write your answer here:

27 Have you observed a difference in performance between publicly and privately managed voluntary food certification schemes with regard to complying with these guidelines?

Please choose only one of the following:

- ○ Yes, public schemes perform better
- ○ Yes, private schemes perform better
- ○ No difference between public and private schemes

28

To what extent do you agree with the statements below?

Please rate your agreement on a scale of 1 to 5, where 1 = totally agree, and 5 = totally *dis*agree.

29 These guidelines help avoid consumer confusion.

Please choose only one of the following:

- ◯ 1 Totally agree
- ◯ 2
- ◯ 3
- ◯ 4
- ◯ 5 Totally disagree

30

If not, why not? Please comment below.

Only answer this question if the following conditions are met:
° Answer was '3' or '4' or '5 Totally disagree' at question '29 [23a]' (These guidelines help avoid consumer confusion.)

Please write your answer here:

31 These guidelines help increase scheme transparency.

Please choose **only one** of the following:

- ◯ 1 Totally agree
- ◯ 2
- ◯ 3
- ◯ 4
- ◯ 5 Totally disagree

32

If not, why not? Please comment below.

Only answer this question if the following conditions are met:
° Answer was '3' or '4' or '5 Totally disagree' at question '31 [24a]' (These guidelines help increase scheme transparency.)

Please write your answer here:

33 These guidelines help reduce the financial and administrative burden of farmers and producers.

Please choose only one of the following:

- ◯ 1 Totally agree
- ◯ 2
- ◯ 3
- ◯ 4
- ◯ 5 Totally disagree

34

If not, why not? Please comment below.

Only answer this question if the following conditions are met:
° Answer was '3' or '4' or '5 Totally disagree' at question '33 [25a]' (These guidelines help reduce the financial and administrative burden of farmers and producers.)

Please write your answer here:

35 These guidelines offer guidance on how to ensure compliance with EU internal market rules and principles of certification.

Please choose only one of the following:

- 1 Totally agree
- 2
- 3
- 4
- 5 Totally disagree

36

If not, why not? Please comment below.

Only answer this question if the following conditions are met:
° Answer was '3' or '4' or '5 Totally disagree' at question '35 [26a]' (These guidelines offer guidance on how to ensure compliance with EU internal market rules and principles of certification.)

Please write your answer here:

37 In your opinion, what are the main <u>drivers</u>* for the food certification schemes operators to comply with the "*EU best practice guidelines for voluntary certification schemes for agricultural products and foodstuffs*"?

Please write your answer here:

* <u>Drivers</u> = any factors which cause scheme operators to comply with the EU best practices guidelines

38 In your opinion, what are the main <u>obstacles</u>* for the food certification schemes operators to comply with the "*EU best practice guidelines for voluntary certification schemes for agricultural products and foodstuffs*"?

Please write your answer here:

*<u>Obstacles</u> = any factors which prevent or hinder scheme operators from complying with the EU best practices guidelines.

39 If you have any further comments about the EU best practice guidelines, please comment below.

Please write your answer here:

SECTION SEVEN

Certified voluntary food labelling schemes

40 This part of the survey is about <u>voluntary certification schemes only</u>.

<u>Certification schemes</u> rely on certification by either a third party or by an accredited certification body. That is, a third body or an accredited certification body verifies if the requirements of the scheme are met by its participants

41

To what extent do you agree with the statements below?

Please rate your agreement on a scale of 1 to 5, where 1 = totally agree, and 5 = totally *dis*agree.

42 "There are many problems with the functioning of voluntary certification food labelling schemes."

Please choose only one of the following:

- ○ 1 Totally agree
- ○ 2
- ○ 3
- ○ 4
- ○ 5 Totally disagree

43 What are the areas that should be improved?

Only answer this question if the following conditions are met:
° Answer was '1 Totally agree' or '2' or '3' at question '42 [30a]' ("There are many problems with the functioning of voluntary certification food labelling schemes.")

Please write your answer here:

44 How could this be done?

Only answer this question if the following conditions are met:
° Answer was '1 Totally agree' or '2' or '3' at question '42 [30a]' ("There are many problems with the functioning of voluntary certification food labelling schemes.")

Please write your answer here:

45 "All voluntary certification food labelling schemes fully comply with *EU best practice guidelines for voluntary certification schemes for agricultural products and foodstuffs?"*

Please choose only one of the following:

- 1 Totally agree
- 2
- 3
- 4
- 5 Totally disagree

46 "There are voluntary certification schemes in my country which falsely claim endorsement by public or other bodies".

Please choose only one of the following:

- 1 Totally agree
- 2
- 3
- 4
- 5 Totally disagree

47 "There are voluntary certification schemes in my country which present rights given to consumers by law as a distinctive features of their scheme."

Please choose only one of the following:

- 1 Totally agree
- 2
- 3
- 4
- 5 Totally disagree

SECTION EIGHT

Self-declared voluntary food labelling schemes

48

This part of the survey is about <u>voluntary self-declaration food labelling schemes only</u>.

<u>Self-declaration</u> schemes are based on declaration by the producer/retailer or by the scheme operator, unless the scheme operator is an accredited certification body.

49

To what extent do you agree with the statements below?

Please rate your agreement on a scale of 1 to 5, where 1 = totally agree, and 5 = totally disagree.

50 "There are many problems with the functioning of voluntary self-declaration food labelling schemes."

Please choose only one of the following:

- ◯ 1 Totally agree
- ◯ 2
- ◯ 3
- ◯ 4
- ◯ 5 Totally disagree

51 What are the areas that should be improved?

Only answer this question if the following conditions are met:
° Answer was '1 Totally agree' or '2' or '3' at question '50 [34a]' ("There are many problems with the functioning of voluntary self-declaration food labelling schemes.")

Please write your answer here:

52 How could this be done?

Only answer this question if the following conditions are met:
° Answer was '1 Totally agree' or '2' or '3' at question '50 [34a]' ("There are many problems with the functioning of voluntary self-declaration food labelling schemes.")

Please write your answer here:

53 "All voluntary self-declaration food labelling schemes fully comply with the *EU best practice guidelines for voluntary certification schemes for agricultural products and foodstuffs*."

Please choose only one of the following:

- Totally agree
- 2
- 3
- 4
- 5 Totally disagree

54 "There are voluntary self-declaration schemes in my country which falsely claim endorsement by public or other bodies. "

Please choose only one of the following:

- Totally agree
- 2
- 3
- 4
- 5 Totally disagree

55 "There are voluntary self-declaration schemes in my country which present rights given to consumers by law as a distinctive features of their scheme."

Please choose only one of the following:

- Totally agree
- 2
- 3
- 4
- 5 Totally disagree

SECTION NINE

Any other comments

56 If you have any additional comments to add about any aspect of voluntary food labelling, please comment here.

Please write your answer here:

Annex 14: Scheme operator questionnaire

This annex presents the questionnaire distributed to scheme operators. As with the stakeholder questionnaires presented above, the scheme operator survey was conducted online and respondents were streamed through questions based on individual responses.

European Commission Voluntary Food Labelling Study - Survey of Scheme Operators

A Study for the European Commission by London Economics

Scheme Operators Survey
The survey you are about to complete forms an important part of a European Commission study on voluntary food labelling schemes. The results of this study will inform future European policy on the subject. **As a result, this is a unique opportunity for your organization to shape the development of the regulatory environment for voluntary food labelling in the European Union.**

We estimate that it should take no more than 20 minutes to complete the questionnaire. The majority of the questions are multiple choice questions based on your own knowledge, experiences and opinions.

All information received will be treated as strictly confidential. Only aggregated responses will be reported by London Economics and no individual opinion response data will be passed to the European Commission.

Should you have any questions regarding this survey, or any other comments regarding the functioning of food labelling schemes in the European Union, please do not hesitate to contact Miriam Sinn (+ 44 (0)20 7866 8191; Msinn@londecon.co.uk).

Thank you very much for taking the time to complete this survey.

There are 75 questions in this survey

SECTION ONE

About You

1 *

Please write your answer(s) here:

Name of scheme	
Home country of the labelling scheme	
Your name	
Your phone number	
Your email address	
Company address	

SECTION TWO

About Your Scheme

2 Is your scheme a self-declaration scheme* or a certification scheme**?

Please choose only one of the following:

◯ Self-declaration scheme*

◯ Certification scheme**

* 'Self-declaration" schemes are based on declaration by the producer/retailer or by the scheme operator, unless the scheme operator is an accredited certification body.

**'Certification' schemes rely on certification by either a third party or by an accredited certification body. That is, a third body or an accredited certification body verifies if the requirements of the scheme are met by its participants.

3 How many control bodies can certify on behalf of the scheme?

Please write your answer here:

[ ]

4 Do you consider yourself a privately or publicly owned or managed scheme?

Please choose all that apply:

☐ Privately owned scheme

☐ Publicly owned scheme

☐ Privately managed scheme

☐ Publicly managed scheme

5 Do you receive any public support?

Please choose only one of the following:

◯ Yes

◯ No

6

Please describe the form of public support you receive.

Only answer this question if the following conditions are met:
° Answer was 'Yes' at question '5 [4]' (Do you receive any public support?)

Please write your answer here:

7 Which category corresponds most closely to your organization?

Please choose only one of the following:

- ○ Agricultural producers
- ○ Slaughterhouses
- ○ Processing business
- ○ Wholesalers
- ○ Retailers
- ○ Traders
- ○ Civil society organizations
- ○ Consumers/consumer bodies
- ○ Public bodies
- ○ Certification bodies
- ○ Other (please specify)

8 Does your scheme operate in more than one country?

Please choose only one of the following:

- ○ Yes
- ○ No

9 Please list these countries.

Only answer this question if the following conditions are met:
° Answer was 'Yes' at question '8 [7]' (Does your scheme operate in more than one country?)

Please write your answer here:

10 Which policy area(s) does your scheme operate in?

Please choose all that apply:

- ☐ Safety/Hygiene
- ☐ Traceability
- ☐ Animal health
- ☐ Animal welfare
- ☐ Origin
- ☐ Organic farming
- ☐ Environmental management
- ☐ Climate change
- ☐ Socio-economic producers conditions
- ☐ Taste/smell qualities
- ☐ Traditional products or methods
- ☐ Religious requirement
- ☐ Vegetarian
- ☐ Allergen free
- ☐ Health related
- ☐ Directly from the farm - short supply chain
- ☐ Other (please specify):

11 Which product(s) does your scheme cover?

Please choose all that apply:

- ☐ Meat products
- ☐ Milk Products
- ☐ Egg products
- ☐ Fish products
- ☐ Fruit and vegetable products
- ☐ Cereal products
- ☐ Oils and fat products
- ☐ Sugar and confectionary products
- ☐ Wine and spirits products
- ☐ Other (please specify): ____________

12 If you have any additional comments to add about your scheme, please comment here.

Please write your answer here:

SECTION THREE

Estimating market share of products by volume (e.g.in terms of items sold or kg)

13 Estimating market share of products by volume*.

Thinking about the home country of your scheme, what is your best estimate of the market share of products by volume which take part in *your* scheme?

Please give your answer in terms of percentage e.g. 25%.

Please write your answer(s) here:

Meat products	
Milk Products	
Egg products	
Fish products	
Fruit and vegetable products	
Cereal products	
Oils and fat products	
Sugar and confectionary products	
Wine and spirits products	
Other	

*Market share by volume being defined as the percentage of the overall volume of products (in terms of items sold or kg).

14 Estimating market share of products by <u>volume</u>*.

Thinking about the home country of your scheme, what is your best estimate of the market share of products by volume which take part in *any* scheme?

Please give your answer in terms of percentage e.g. 25%.

Please write your answer(s) here:

Meat products	
Milk Products	
Egg products	
Fish products	
Fruit and vegetable products	
Cereal products	
Oils and fat products	
Sugar and confectionary products	
Wine and spirits products	
Other	

*Market share by volume being defined as the percentage of the overall volume of products (in terms of items sold or kg).

15 If you have any additional comments you would like to add regarding your own scheme, please comment here.

Please write your answer here:

SECTION FOUR

Estimating market share of products by value (e.g.measured in EUR)

16 Estimating market share of products by value*.

Thinking about the home country of your scheme, what is your best estimate of the market share of products by value which take part in *your* scheme?

Please give your answer in terms of percentage e.g. 25%.

Please write your answer(s) here:

Meat products	
Milk Products	
Egg products	
Fish products	
Fruit and vegetable products	
Cereal products	
Oils and fat products	
Sugar and confectionary products	
Wine and spirits products	
Other	

*Market share by value being defined as the percentage of the overall value of products (e.g.measured in Euros)

17 Estimating market share of products by value*.

Thinking about the home country of your scheme, what is your best estimate of the market share of products by value which take part in any scheme?

Please give your answer in terms of percentage e.g. 25%.

Please write your answer(s) here:

Meat products	
Milk Products	
Egg products	
Fish products	
Fruit and vegetable products	
Cereal products	
Oils and fat products	
Sugar and confectionary products	
Wine and spirits products	
Other	

*Market share by value being defined as the percentage of the overall value of products (e.g.measured in Euros)

18 If you have any additional comments you would like to add regarding your own scheme, please comment here.

Please write your answer here:

SECTION FIVE

EU best practices

19 Before this questionnaire, were you aware of the 2010 "*EU best practice guidelines for voluntary certification schemes for agricultural products and foodstuffs*?"

Please choose **only one** of the following:

- ◯ Yes
- ◯ No

To view these guidelines in a new window, please right click the link below and select 'open in new tab'.

WARNING: if you do NOT right click this link, and double click on the link instead, you will be re-directed out of the survey and will have to start your response again.

http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=CELEX:52010XC1216(02):en:NOT

20 From the perspective of your organisation, what are the most important requirements of the guidelines?

Please write your answer here:

21

To what extent do you agree with the statements below?

Please rate your agreement on a scale of 1 to 5, where 1 = totally agree, and 5 = totally *dis*agree.

22 "All schemes in my country comply with these guidelines".

Please choose **only one** of the following:

- ◯ 1 Totally Agree
- ◯ 2
- ◯ 3
- ◯ 4
- ◯ 5 Totally Disagree

Please rate your agreement on a scale of 1 to 5, where 1 = totally agree, and 5 = totally *dis*agree.

23

If you have any comments to add about scheme compliance in your country, please comment in the box below.

Please write your answer here:

24 "These guidelines help avoid consumer confusion".

Please choose **only one** of the following:

- ◯ 1 Totally Agree
- ◯ 2
- ◯ 3
- ◯ 4
- ◯ 5 Totally Disagree

Please rate your agreement on a scale of 1 to 5, where 1 = totally agree, and 5 = totally *dis*agree.

25

If not, why not? Please comment in the box below.

Only answer this question if the following conditions are met:
° Answer was '5 Totally Disagree' or '4' or '3' at question '24 [21a]' ("These guidelines help avoid consumer confusion".)

Please write your answer here:

26 "These guidelines help increase scheme transparency".

Please choose **only one** of the following:

- ◯ 1 Totally Agree
- ◯ 2
- ◯ 3
- ◯ 4
- ◯ 5 Totally Disagree

Please rate on a scale of 1 to 5, where 1 = totally agree, and 5 = totally *dis*agree

27 If not, why not? Please comment in the box below.

Only answer this question if the following conditions are met:
° Answer was '5 Totally Disagree' or '4' or '3' at question '26 [22a]' ("These guidelines help increase scheme transparency".)

Please write your answer here:

28 "These guidelines help reduce the financial and administrative burden on farmers and producers".

Please choose **only one** of the following:

- ○ 1 Totally Agree
- ○ 2
- ○ 3
- ○ 4
- ○ 5 Totally Disagree

Please rate on a scale of 1 to 5, where 1 = totally agree, and 5 = totally *dis*agree

29 If not, why not? Please comment in the box below.

Only answer this question if the following conditions are met:
° Answer was '5 Totally Disagree' or '4' or '3' at question '28 [23a]' ("These guidelines help reduce the financial and administrative burden on farmers and producers".)

Please write your answer here:

30 "These guidelines offer guidance on how to ensure compliance with EU internal market rules and principles of certification".

Please choose **only one** of the following:

- 1 Totally Agree
- 2
- 3
- 4
- 5 Totally Disagree

Please rate your agreement on a scale of 1 to 5, where 1 = totally agree, and 5 = totally *dis*agree

31 If not, why not? Please comment in the box below.

Only answer this question if the following conditions are met:
° Answer was '5 Totally Disagree' or '4' or '3' at question '30 [24a]' ("These guidelines offer guidance on how to ensure compliance with EU internal market rules and principles of certification".)

Please write your answer here:

32 In your opinion, what are the main drivers* for food scheme operators to comply with the "EU best practice guidelines for voluntary certification schemes for agricultural products and foodstuffs? "

Please write your answer here:

* 'Drivers' = any factors which cause scheme operators to comply with the EU best practices guidelines

33 In your opinion, what are the main obstacles* for food scheme operators to comply with the "EU best practice guidelines for voluntary certification schemes for agricultural products and foodstuffs? "

Please write your answer here:

*' Obstacles' = any factors which prevent or hinder scheme operators from complying with the EU best practices guidelines.

34 If you have any additional comments to add about EU best practices, please comment here.

Please write your answer here:

SECTION SIX

Scheme participation and development

35 Are there mechanisms in place for stakeholders (such as farmers, farmers' organizations, agricultural and agri-food traders, food industry wholesalers, retailers or consumers) to contribute to the development of your scheme and/or the decision making?

Please choose **only one** of the following:

- ◯ Yes
- ◯ No

36 Please explain what these mechanisms are.

Only answer this question if the following conditions are met:
° Answer was 'Yes' at question '35 [28]' (Are there mechanisms in place for stakeholders (such as farmers, farmers' organizations, agricultural and agri-food traders, food industry wholesalers, retailers or consumers) to contribute to the development of your scheme and/or the decision making?)

Please write your answer here:

37 Are these same mechanisms available in all countries in which your scheme operates?

Only answer this question if the following conditions are met:
° Answer was 'Yes' at question '35 [28]' (Are there mechanisms in place for stakeholders (such as farmers, farmers' organizations, agricultural and agri-food traders, food industry wholesalers, retailers or consumers) to contribute to the development of your scheme and/or the decision making?)

Please choose **only one** of the following:

- ◯ Available in all countries
- ◯ Available in some countries
- ◯ Only available in home country
- ◯ Not applicable. Scheme only operates in only one country.

38 Are these mechanisms translated into the local language?

Only answer this question if the following conditions are met:
° Answer was 'Yes' at question '35 [28]' (Are there mechanisms in place for stakeholders (such as farmers, farmers' organizations, agricultural and agri-food traders, food industry wholesalers, retailers or consumers) to contribute to the development of your scheme and/or the decision making?)

Please choose **only one** of the following:

- ◯ All are translated
- ◯ Some are translated
- ◯ None are translated
- ◯ Not applicable. Scheme operates in only one country

39 Were consumers or consumer bodies involved in the development of the scheme's requirements?

Please choose **only one** of the following:

- ◯ Yes
- ◯ No

40 Were technical committees of experts involved in the development of the scheme's requirements?

Please choose **only one** of the following:

- ◯ Yes
- ◯ No

41 Were the scheme requirements submitted to a broad group of stakeholders for input?

Please choose **only one** of the following:

- ◯ Yes
- ◯ No

42 Were stakeholders involved in the development of inspection criteria and checklist?

Please choose **only one** of the following:

- Yes
- No

43 Were stakeholders involved in the determination of thresholds for sanctions?

Please choose **only one** of the following:

- Yes
- No

44 Are any feedback mechanisms in place through which scheme participants can review the rules and requirements of the scheme?

Please choose **only one** of the following:

- Yes
- No

45 How many weeks notice are participants given if changes to the scheme are made?

Please write your answer here:

46 Are contact details included on all documentation in association with the scheme? (including the website?)

Please choose **only one** of the following:

- Yes
- No

47 What are the main types of organisations/food operators that participate in the scheme?

Please choose **all** that apply:

- ☐ Agricultural producers
- ☐ Slaughterhouses
- ☐ Processing business
- ☐ Wholesalers
- ☐ Retailers
- ☐ Traders
- ☐ Civil society organizations
- ☐ Consumers/consumer bodies
- ☐ Public bodies
- ☐ Certification bodies
- ☐ Other (please specify): ______

48 How many organizations (producers/food operators/traders/etc) participate in your scheme?

If you are unsure of the exact number, please give your best estimate.

Please write your answer here:

______

49

If you have any additional comments about scheme participation and scheme development, please comment here.

Please write your answer here:

______

SECTION SEVEN

Evidence of claims

50 Are all the claims made by your scheme based on objective and verifiable evidence and scientifically sound documentation?

Please choose **only one** of the following:

- Yes
- No

51 Are the scheme's requirements adapted to local conditions in each country in which the scheme operates? (e.g. Agro-ecological, socio-economic or legal conditions and common agricultural practices).

Please choose **only one** of the following:

- Yes
- No
- Not applicable. Scheme operates in only one country

52 If you have any additional comments about the evidence of claims made available by schemes, please comment here.

Please write your answer here:

SECTION EIGHT

Certification and inspection

53 Who carries out the certification of compliance?

Please choose **all** that apply:

- ☐ Nationally accredited body
- ☐ Internationally accredited body
- ☐ Non-accredited body
- ☐ No third party carries out the certification of compliance

54 Were any geographical restrictions in place when selecting the certification body?

Please choose **only one** of the following:

- ◯ Yes
- ◯ No

55 What is the minimum inspection frequency of the scheme's participants?

Please write your answer here:

56 Does the frequency of inspection depend on the previous inspection result?

Please choose **only one** of the following:

- ◯ Yes
- ◯ No

57 How are inspection results evaluated?

Please write your answer here:

58 How much notice is given to participants before inspection?

Please choose **only one** of the following:

- ○ No notice is given
- ○ 48 hours or less
- ○ More than 48 hours

59 Are your auditors/inspectors required to have qualifications/accreditation or certifications?

Please choose **only one** of the following:

- ○ Yes
- ○ No

60 Are there clear and documented procedures to deal with non-compliance?

Please choose **only one** of the following:

- ○ Yes
- ○ No

61 Are there well defined knock-out criteria* which would lead to non-issue or withdrawal of the certificate?

Please choose **only one** of the following:

- Yes
- No

*knock-out criteria are criteria based on which:
- the certificate is withdrawn or not issued to begin with

or
- the membership is withdrawn

or
- the institution will be reported to the relevant official enforecement body

62 What are these knock-out criteria?

Only answer this question if the following conditions are met:
° Answer was 'Yes' at question '61 [54]' (Are there well defined knock-out criteria* which would lead to non-issue or withdrawal of the certificate?)

Please write your answer here:

63 Are any provisions in place enabling and promoting the participation of small-scale producers?

Please choose **only one** of the following:

- Yes
- No

64 What are these provisions?

Only answer this question if the following conditions are met:
° Answer was 'Yes' at question '63 [56]' (Are any provisions in place enabling and promoting the participation of small-scale producers?)

Please write your answer here:

65 Are you aware of other schemes operating in the same sector, policy area and geographical region?

Please choose **only one** of the following:

- ◯ Yes
- ◯ No

66 What are these schemes?

Only answer this question if the following conditions are met:
° Answer was 'Yes' at question '65 [58]' (Are you aware of other schemes operating in the same sector, policy area and geographical region?)

Please write your answer here:

67 Were possibilities of mutual recognition for parts or all of the requirements with these schemes explored?

Only answer this question if the following conditions are met:
° Answer was 'Yes' at question '65 [58]' (Are you aware of other schemes operating in the same sector, policy area and geographical region?)

Please choose **only one** of the following:

- ◯ Yes
- ◯ No

68 Do you accept (partially or totally) the inspections and audits carried out by other schemes?

Only answer this question if the following conditions are met:
° Answer was 'Yes' at question '65 [58]' (Are you aware of other schemes operating in the same sector, policy area and geographical region?)

Please choose **only one** of the following:

- ◯ Yes
- ◯ No
- ◯ The possibility was not considered

69 Do you carry out any combined audits with other schemes?

Only answer this question if the following conditions are met:
° Answer was 'Yes' at question '65 [58]' (Are you aware of other schemes operating in the same sector, policy area and geographical region?)

Please choose **only one** of the following:

- ◯ Yes
- ◯ No

70 Were any attempts made to harmonize the auditing protocols and documentation requirements with other schemes?

Only answer this question if the following conditions are met:
° Answer was 'Yes' at question '65 [58]' (Are you aware of other schemes operating in the same sector, policy area and geographical region?)

Please choose **only one** of the following:

- ○ Yes
- ○ No

71 Are procedures in place for internal audits of your scheme?

Please choose **only one** of the following:

- ○ Yes
- ○ No

72 What is the frequency of these controls?

Only answer this question if the following conditions are met:
° Answer was 'Yes' at question '71 [64]' (Are procedures in place for internal audits of your scheme?)

Please write your answer here:

73 Has the scheme been advertised to consumers?

Please choose **only one** of the following:

- ○ Yes
- ○ No

74 If you have any additional comments about certification and inspection, please comment here.

Please write your answer here:

SECTION NINE

Final comments

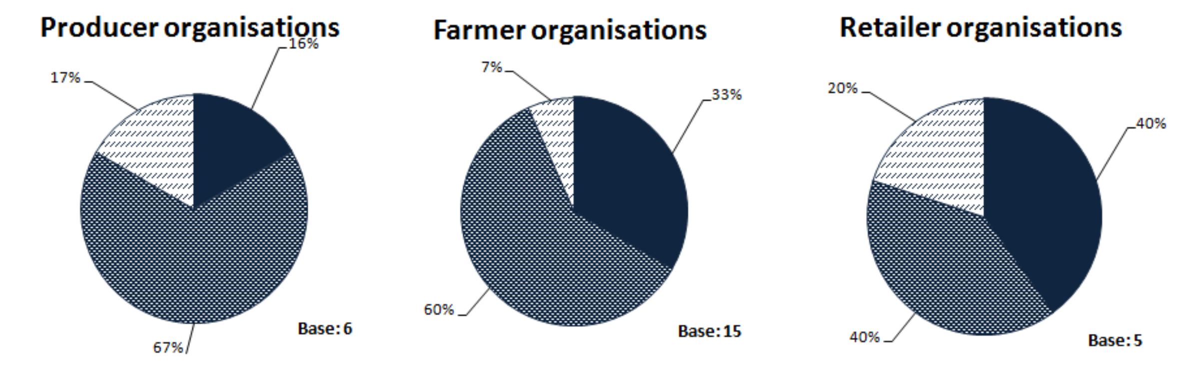
75 If you have any other general comments about voluntary food labelling schemes in the EU, please comment here.

Please write your answer here:

Annex 15: Stakeholder survey results separated by producer, farmer and retailer organisations

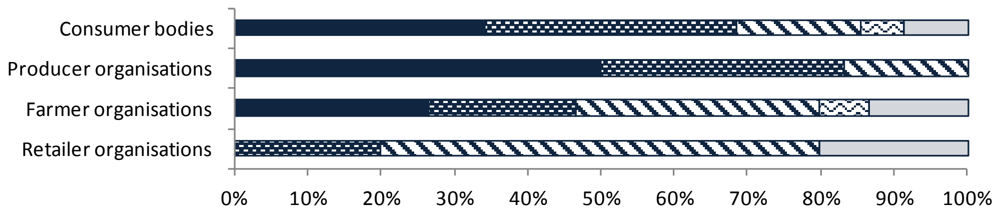
This Annex presents the findings of the stakeholder interviews separated by producer organisations, farmer organisations, and retailer organisations. In interpretation of these findings should be done with caution as the sample sizes are small.

Figure 131: Proportion of producer, farmer and retailer organisations that were aware of the guidelines before the survey



Source: Stakeholder survey

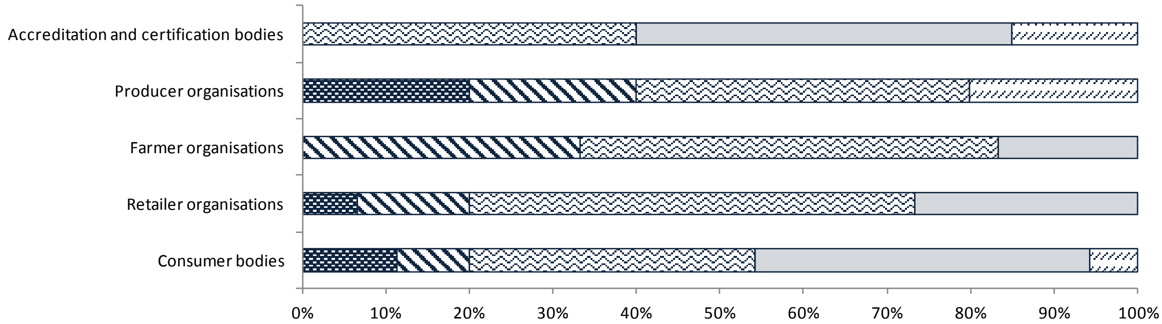
Figure 132: Stakeholders' assessment of consumer knowledge of food labelling schemes



	Retailer organisations	Farmer organisations	Producer organisations	Consumer bodies
Consumers know less than 25% of all schemes	0	4	3	12
Consumers know between 25% and 50% of all schemes	1	3	2	12
Consumers know between 50% and 75% of all schemes	3	5	1	6
Consumers know more than 75% of all schemes	0	1	0	2
No response	1	2	0	3

Source: Stakeholder and consumer body survey

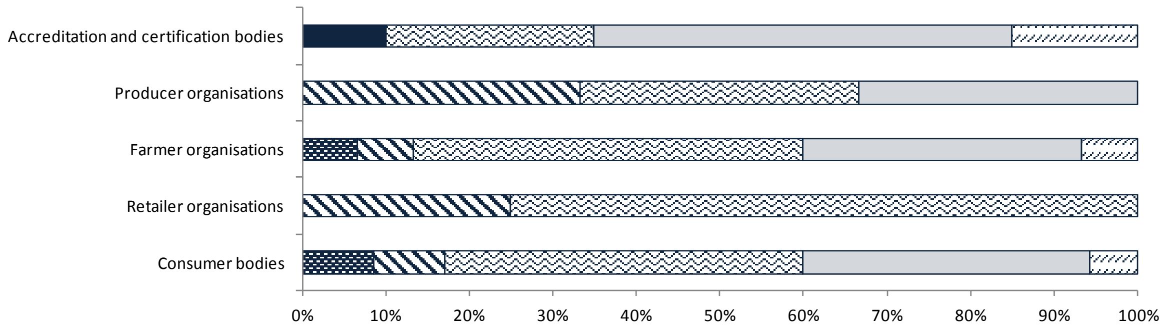
Figure 133: "Consumers can easily distinguish between public and private voluntary food labelling schemes"



	Consumer bodies	Retailer organisations	Farmer organisations	Producer organisations	Accreditation and certification bodies
1 Totally Agree	0	0	0	0	0
2	4	1	0	1	0
3	3	2	2	1	0
4	12	8	3	2	8
5 Totally Disagree	14	4	1	0	9
No response	2	0	0	1	3

Source: Stakeholder and consumer body survey

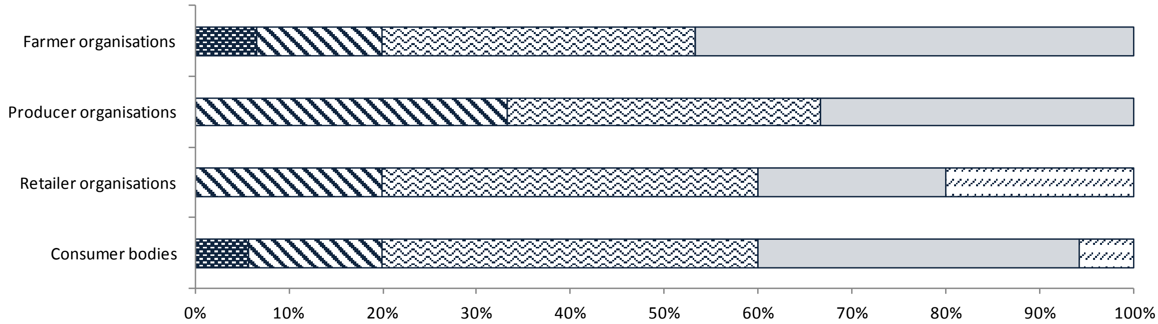
Figure 134: "Consumers can easily distinguish between voluntary self-declaration and certification food labelling schemes".



	Consumer bodies	Retailer organisations	Farmer organisations	Producer organisations	Accreditation and certification bodies
1 Totally Agree	0	0	0	0	2
2	3	0	1	0	0
3	3	1	1	2	0
4	15	3	7	2	5
5 Totally Disagree	12	0	5	2	10
No response	2	0	1	0	3

Source: Stakeholder and consumer body survey

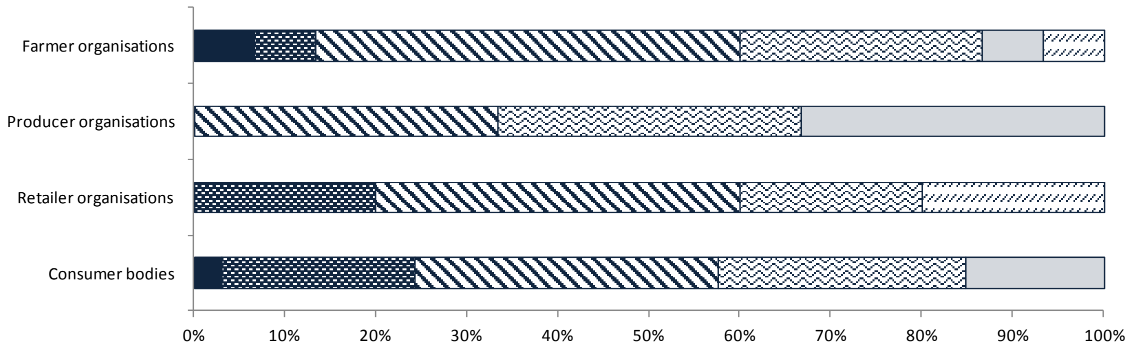
Figure 135: "Consumers can easily distinguish between product schemes and management schemes"



	Consumer bodies	Retailer organisations	Producer organisations	Farmer organisations
1 Totally Agree	0	0	0	0
2	2	0	0	1
3	5	1	2	2
4	14	2	2	5
5 Totally Disagree	12	1	2	7
No response	2	1	0	0

Source: Stakeholder and consumer body survey

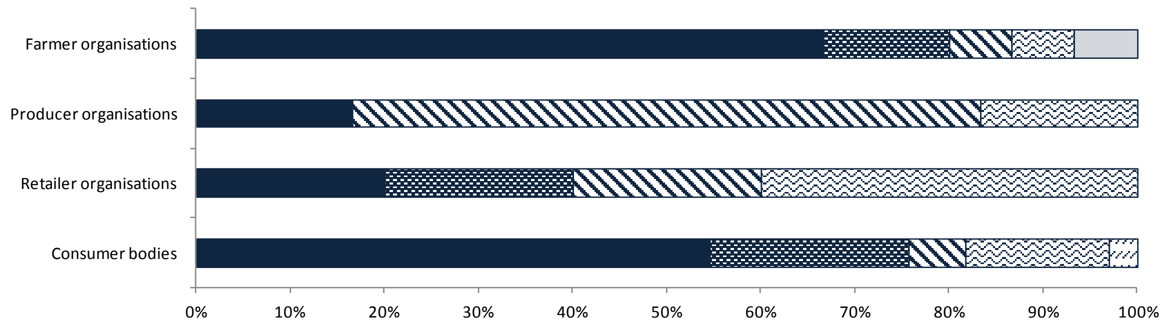
Figure 136: "How would you rate consumers' understanding of the most important voluntary food labelling schemes in your country"



	Consumer bodies	Retailer organisations	Producer organisations	Farmer organisations
1 Excellent Understanding	1	0	0	1
2	7	1	0	1
3	11	2	2	7
4	9	1	2	4
5 Poor Understanding	5	0	2	1
No response	0	1	0	1

Source: Stakeholder and consumer body survey

Figure 137: Do you agree with the following statement: "There is a clear need to improve consumer understanding of voluntary food labelling schemes"?

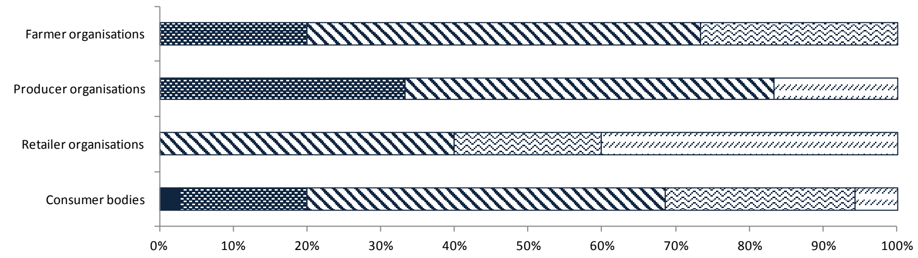


	Consumer bodies	Retailer organisations	Producer organisations	Farmer organisations
1 Totally agree	18	1	1	10
2	7	1	0	2
3	2	1	4	1
4	5	2	1	1
5 Totally disagree	0	0	0	1
No response	1	0	0	0

Source: Stakeholder and consumer body survey

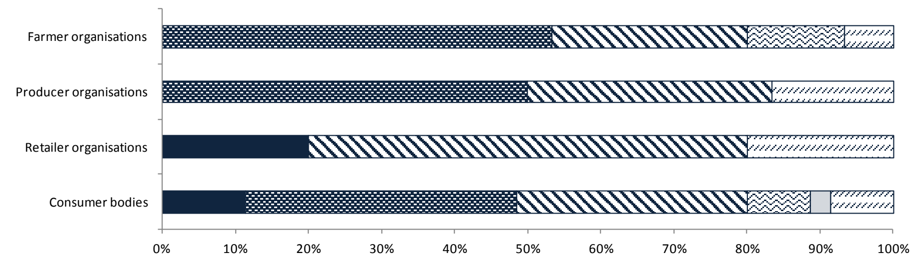
Figure 138: "How would you rate consumers' level of trust towards voluntary food labelling schemes?"

Trust towards food labelling schemes **in general**



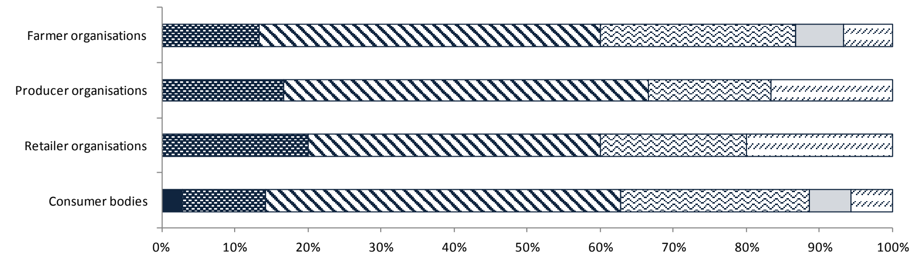
	Consumer bodies	Retailer organisations	Producer organisations	Farmer organisations
1 Very high level of trust	1	0	0	0
2	6	0	2	3
3	17	2	3	8
4	9	1	0	4
5 No trust	0	0	0	0
No response	2	2	1	0

Trust towards **public** food labelling schemes



	Consumer bodies	Retailer organisations	Producer organisations	Farmer organisations
1 Very high level of trust	4	1	0	0
2	13	0	3	8
3	11	3	2	4
4	3	0	0	2
5 No trust	1	0	0	0
No response	3	1	1	1

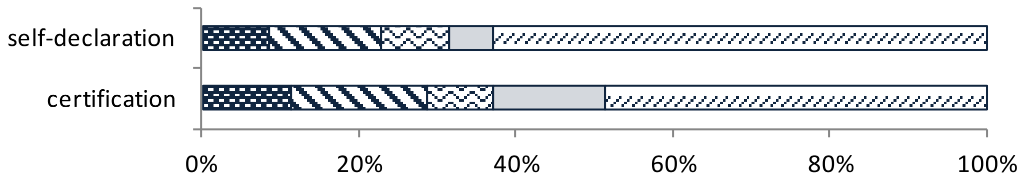
Trust towards **private** food labelling schemes



	Consumer bodies	Retailer organisations	Producer organisations	Farmer organisations
1 Very high level of trust	1	0	0	0
2	4	1	1	2
3	17	2	3	7
4	9	1	1	4
5 No trust	2	0	0	1
No response	2	1	1	1

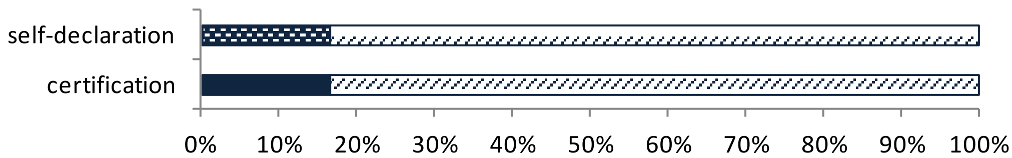
Figure 139: "There are voluntary schemes in my country which falsely claim endorsement by public or other bodies."

1) Consumer organisations



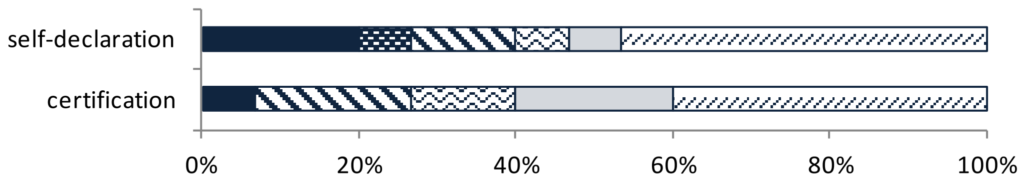
	certification	self-declaration
1 Totally agree	0	0
2	4	3
3	6	5
4	3	3
5 Totally disagree	5	2
No response	17	22

2) Producer organisations



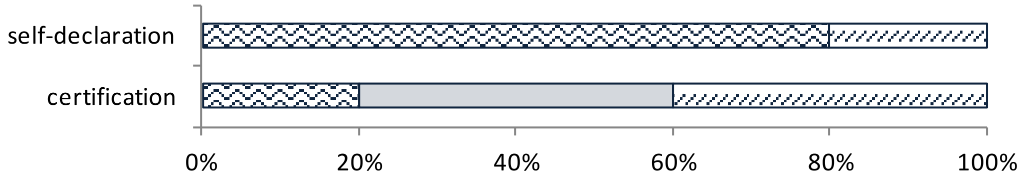
	certification	self-declaration
1 Totally agree	1	0
2	0	1
3	0	0
4	0	0
5 Totally disagree	0	0
No response	5	5

3) Farmer organisations



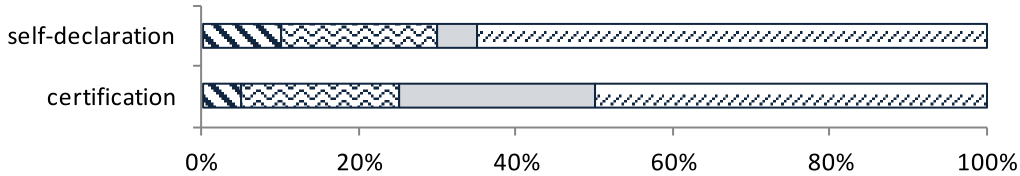
	certification	self-declaration
1 Totally agree	1	3
2	0	1
3	3	2
4	2	1
5 Totally disagree	3	1
No response	6	7

4) Retailer organisations



	certification	self-declaration
1 Totally agree	0	0
2	0	0
3	0	0
4	1	4
5 Totally disagree	2	0
No response	2	1

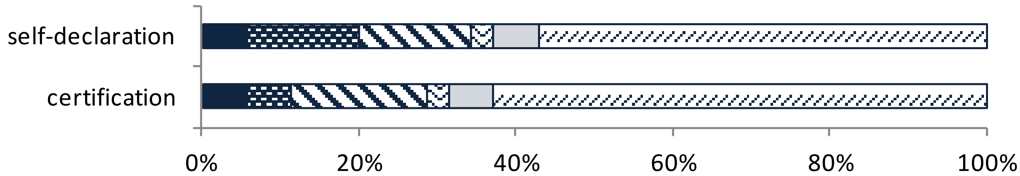
5) Accreditation bodies



	certification	self-declaration
1 Totally agree	0	0
2	0	0
3	1	2
4	4	4
5 Totally disagree	5	1
No response	10	13

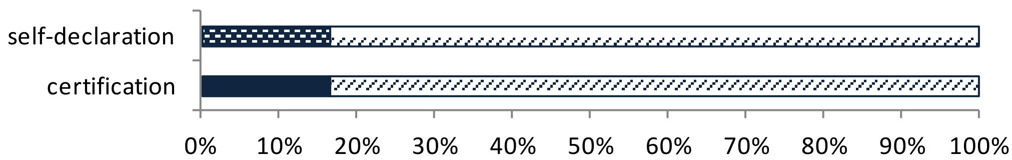
Figure 140: "There are voluntary schemes in my country which present rights given to consumers by law as a distinctive features of their scheme."

1) Consumer organisations



	certification	self-declaration
1 Totally agree	2	2
2	2	5
3	6	5
4	1	1
5 Totally disagree	2	2
No response	22	20

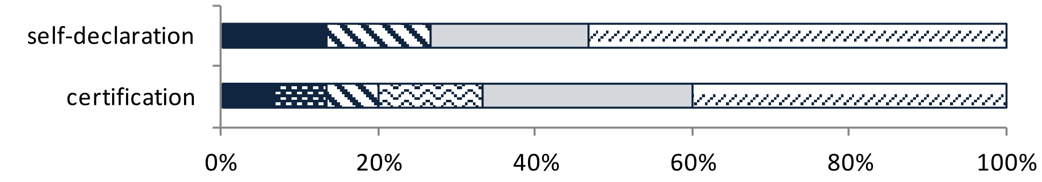
2) Producer organisations



	certification	self-declaration
1 Totally agree	1	0
2	0	1
3	0	0
4	0	0
5 Totally disagree	0	0
No response	5	5

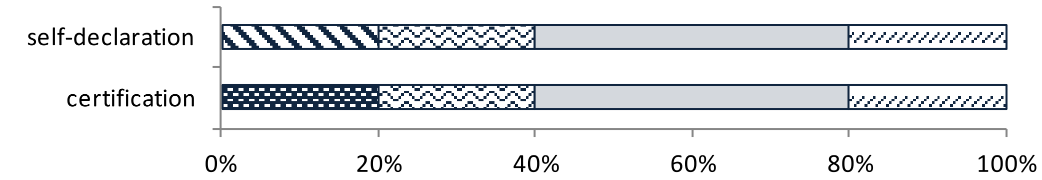
3) Farmer organisations

Figure 140: "There are voluntary schemes in my country which present rights given to consumers by law as a distinctive features of their scheme."



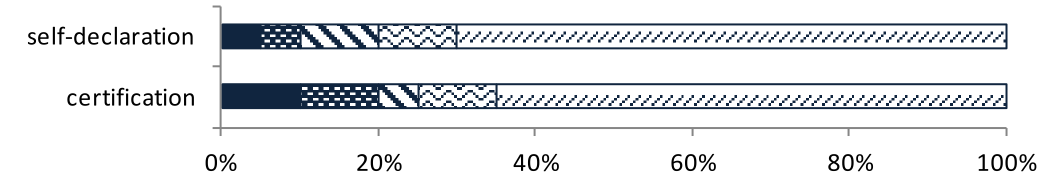
	certification	self-declaration
1 Totally agree	1	2
2	1	0
3	1	2
4	2	0
5 Totally disagree	4	3
No response	6	8

4) Retailer organisations



	certification	self-declaration
1 Totally agree	0	0
2	1	0
3	0	1
4	1	1
5 Totally disagree	2	2
No response	1	1

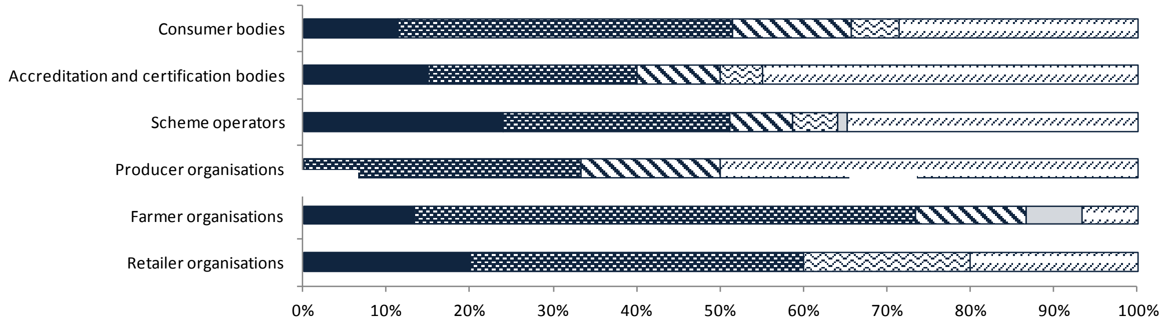
5) Accreditation bodies



	certification	self-declaration
1 Totally agree	2	1
2	2	1
3	1	2
4	2	2
5 Totally disagree	0	0
No response	13	14

Source: Stakeholder, consumer organisations and accreditation bodies survey

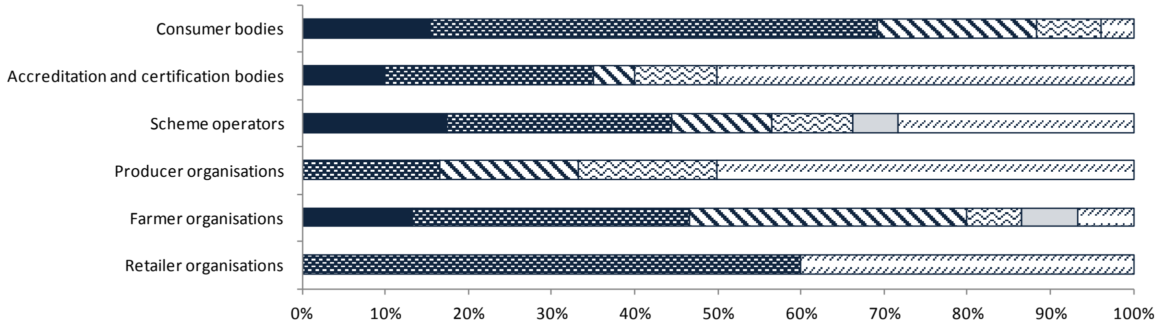
Figure 141: “These guidelines help increase scheme transparency”



	Retailer organisations	Farmer organisations	Producer organisations	Scheme operators	Accreditation and certification bodies	Consumer bodies
1 Totally Agree	1	2	0	22	3	4
2	2	9	2	25	5	14
3	0	2	1	7	2	5
4	1	0	0	5	1	2
5 Totally Disagree	0	1	0	1	0	0
No response	1	1	3	32	9	10

Source: Stakeholder and scheme operator survey

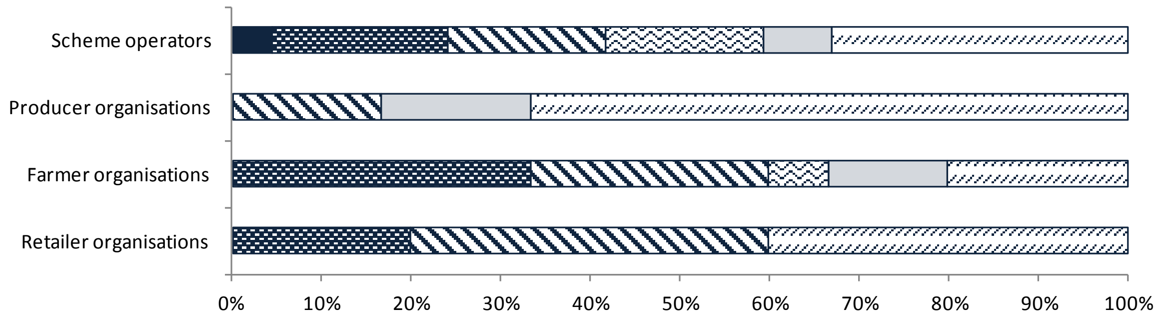
Figure 142: “These guidelines help avoid consumer confusion”



	Retailer organisations	Farmer organisations	Producer organisations	Scheme operators	Accreditation and certification bodies	Consumer bodies
1 Totally Agree	0	2	0	16	2	4
2	3	5	1	25	5	14
3	0	5	1	11	1	5
4	0	1	1	9	2	2
5 Totally Disagree	0	1	0	5	0	0
No response	2	1	3	26	10	1

Source: Stakeholder and scheme operator survey

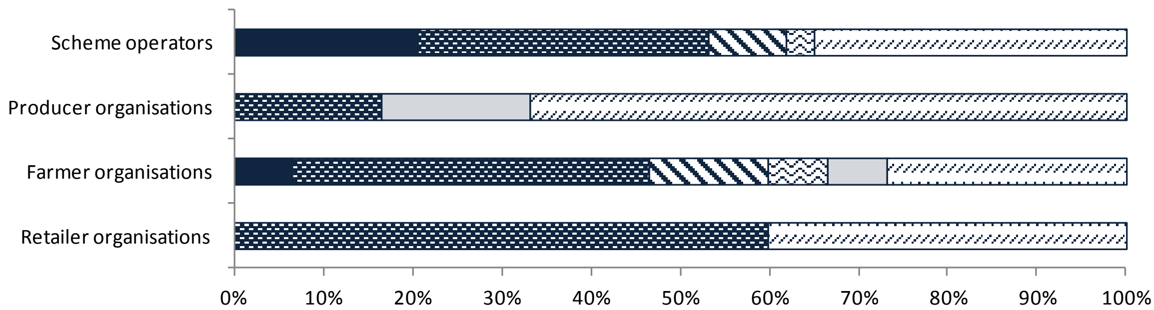
Figure 143: "These guidelines help reduce the administrative and financial burden on farmers and producers"



	Retailer organisations	Farmer organisations	Producer organisations	Scheme operators
1 Totally Agree	0	0	0	4
2	1	5	0	18
3	2	4	1	16
4	0	1	0	16
5 Totally Disagree	0	2	1	7
No response	2	3	4	30

Source: Stakeholder and scheme operator survey

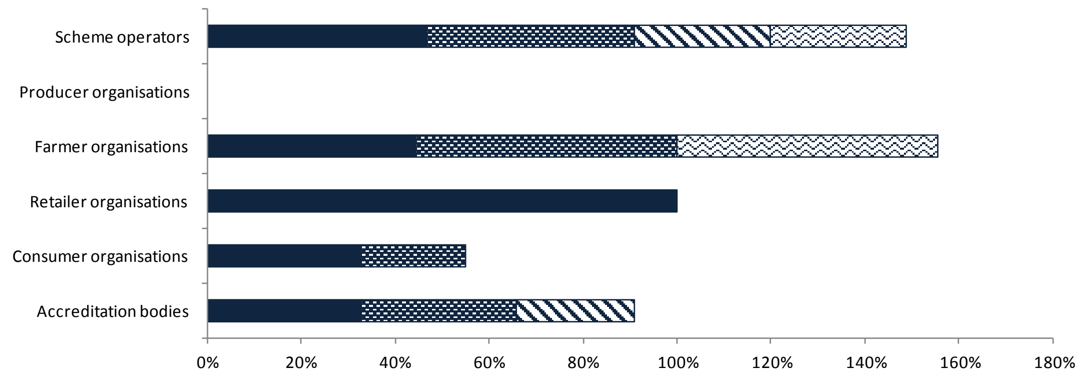
Figure 144: "These guidelines offer guidance on how to ensure compliance with EU internal market rules and principles of certification"



	Retailer organisations	Farmer organisations	Producer organisations	Scheme operators
1 Totally Agree	0	1	0	19
2	3	6	1	30
3	0	2	0	8
4	0	1	0	3
5 Totally Disagree	0	1	1	0
No response	2	4	4	32

Source: Stakeholder and scheme operator survey

Figure 145: "From the point of view of your organisation, what are the most important requirements of the guidelines?"



	Accreditation bodies	Consumer organisations	Retailer organisations	Farmer organisations	Producer organisations	Scheme operators
Transparency	33%	33%	100%	44%	0%	47%
Third party certification	33%	22%	0%	56%	0%	44%
Accreditation of the certifying body	25%	0%	0%	0%	0%	29%
Participation of the stakeholders	0%	0%	0%	56%	0%	29%