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WP6 Focus-Balkans project

WBC N&H PRODUCTS Statistics, Market Survey and FGD

Split, February 2010

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DELIVERABLE N°6.1 **CONSUMER MOTIVATIONS AND BEHAVIOURS** **FOR PRODUCTS WITH NUTRITION AND HEALTH** **CLAIMS**

February 2010
Draft version

**Ed. Zaklina Stojanovic, Galjina Ognjanov, Radmila Dragutinovic-Mitrovic,
Dragan Stojkovic, Iris Zezelj and Nebojsa Petrovic**

Deliverable lead beneficiary:
BEL – Faculty of Economics, University of Belgrade

D6.1 STUDY REPORT

CONSUMER MOTIVATIONS AND BEHAVIOURS FOR PRODUCTS WITH NUTRITION AND HEALTH CLAIMS

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Market survey methodology

Zaklina Stojanovic, Radmila Dragutinovic-Mitrovic and Martine Lainau

FGD methodology

Iris Zezelj, Nebojsa Petrovic and Martine Lainau

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Zaklina Stojanovic and Martine Lainau

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2. WBC approach to the nutritional and health labelling
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Zaklina Stojanovic, Radmila Dragutinovic-Mitrovic, Mirjana Gligoric

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– Integrative processors and retailers report

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LITERATURE

Annex 1. Shopcheck guideline

Annex 2. Market survey questionnaires

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FOCUS-BALKANS: Food Consumer Sciences in the Balkans: Frameworks, Protocols and Networks for a better knowledge of food behaviours

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Activity 2 Fork to farm

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Research concept – research questions

Do consumers in WBC associate products with N&H with specific benefits - such as nutritional knowledge improvement, better diet, social acceptability etc.?

What are consumers' perceptions about products with N&H claim in WBC? Does positive or negative perception towards products with additional health benefit exist?

Which factors influence WBC consumers' perception of studied categories? Does it depend on personal, social or cultural factors?

What is the actual contribution of companies (both processors and retailers) operating in WBC on N&H claim products market development?

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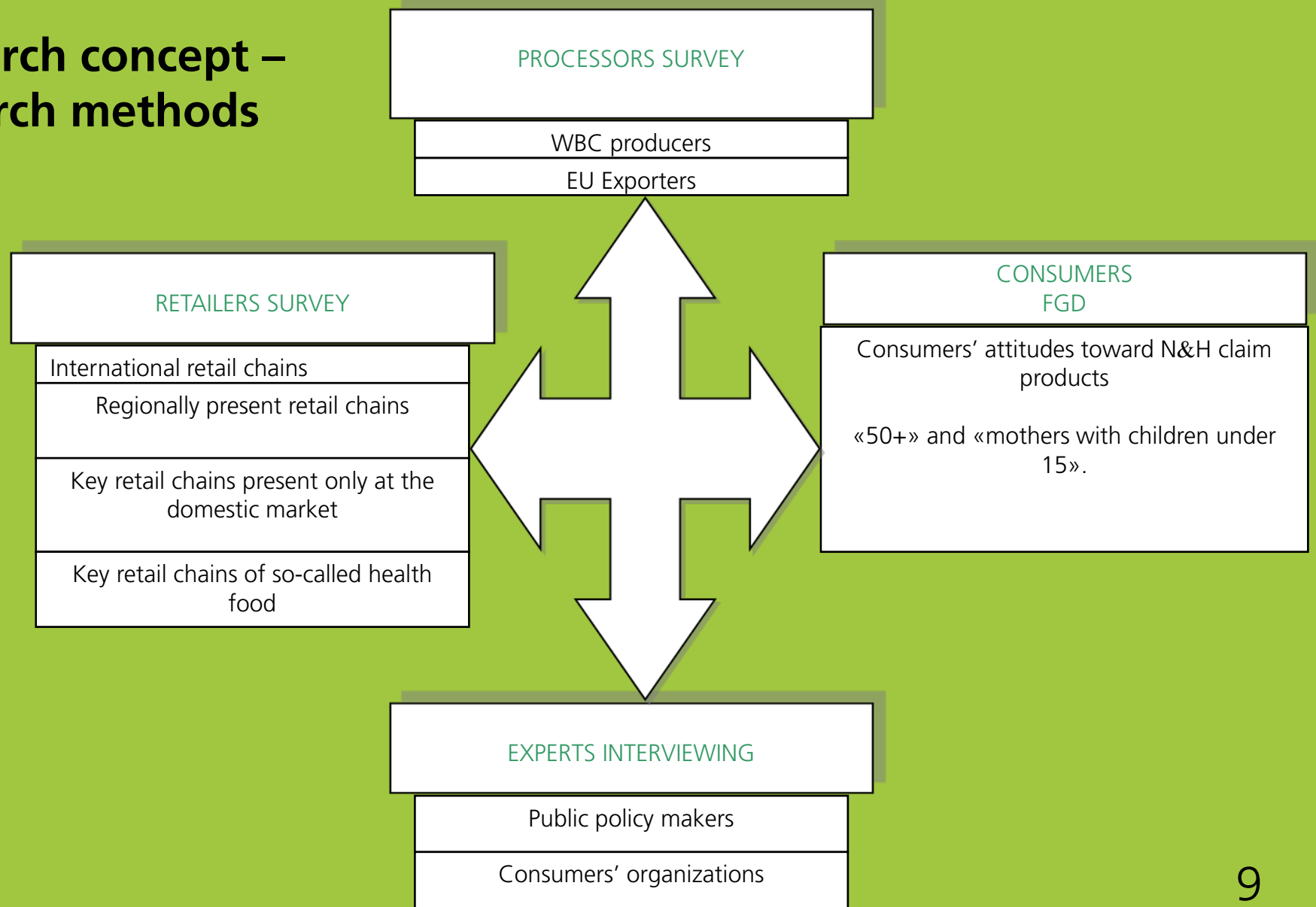
Research concept – research questions

Does the form of product health benefit communication influence consumers' choice of food?

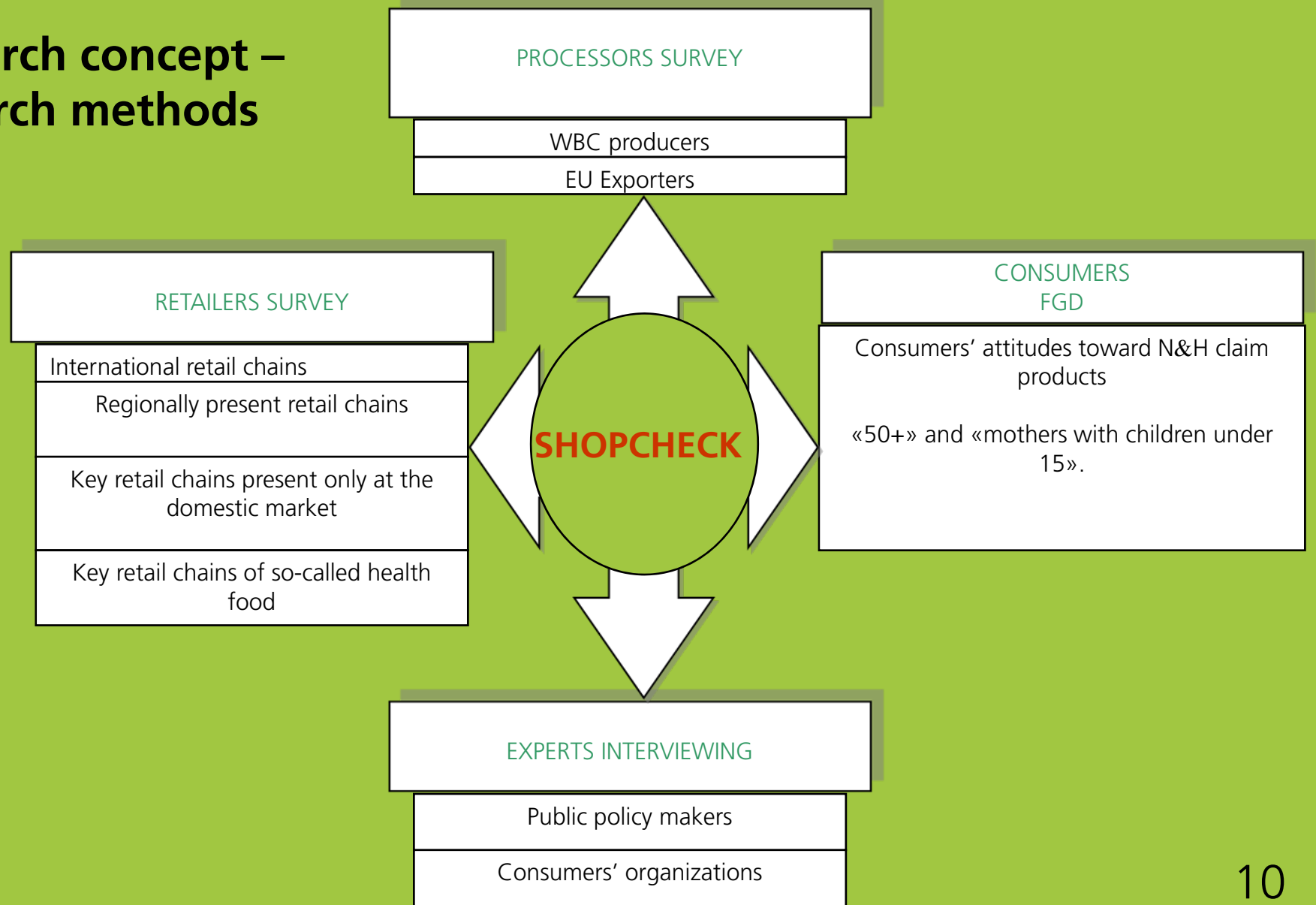
What are companies' motives for launching and marketing products with N&H claims? Does the health claims made on products creates value added to a company image and market position?

What forms the policy makers' use to influence on WBC N&H claim products market development? Is it depending only on the regulatory framework? Do they and how they use public programs for healthy eating habits promotion? If the regulatory framework does not exist, does it necessarily mean that N&H claim products market is underdeveloped too, and *visa versa*?

Research concept – research methods



Research concept – research methods



N&H PRODUCTS Shopcheck

- WBC N&H claims products market incapacity official statistical information
 - data are available only at the level of a family of products
 - products selected in the research study are recorded as part of the bigger groups of observation.
- Shopcheck objectives
 1. Identification of products with N&H claims,
 2. The products differentiation according to characteristics,
 3. The claims classification and
 4. The processors identification.
- N&H claims products database was crated by SMMRI/IPSOS
 - based on a questionnaire and
 - unique instructions given to interviewers in all countries

WBC Shopcheck results by studied categories – Milk enriched with vitamins and minerals CLAIMS

Structure of products in WBC by number of claims

| | 1 | 2 | 3 | 4 | 5 | Total |
|--------------|-----------|-----------|----------|----------|----------|-----------|
| WBC | 20 | 14 | 6 | 3 | 4 | 47 |
| EU+Swiss | 3 | 1 | 1 | 0 | 0 | 5 |
| Total | 23 | 15 | 7 | 3 | 4 | 52 |

Structure of products in WBC by nutrition claim type

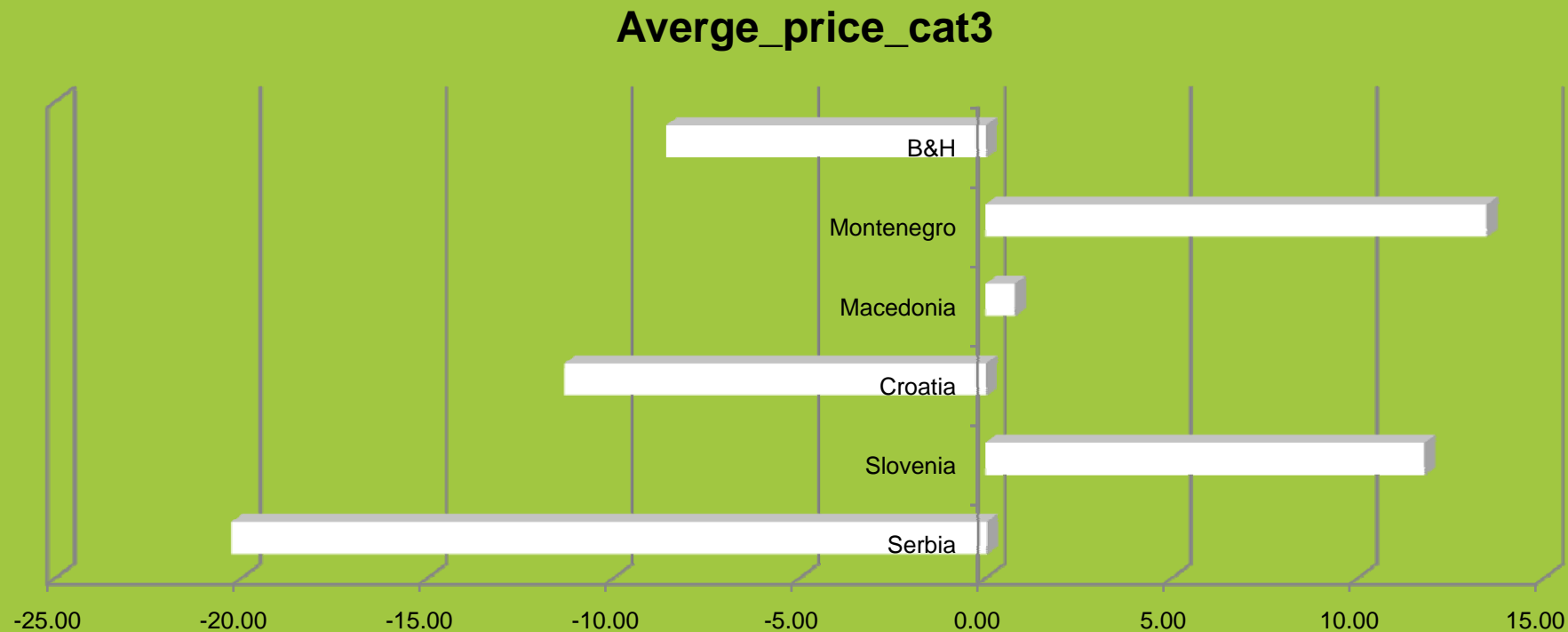
| Claim type | Number of products - Total | No. of EU products | No. of WBC products |
|------------|----------------------------|--------------------|---------------------|
| 0 | 7 | 1 | 6 |
| 1 | 1 | 0 | 0 |
| 4 | 28 | 2 | 27 |
| 5 | 1 | 0 | 0 |
| 14 | 1 | 0 | 0 |
| 18 | 10 | 1 | 9 |
| 18ad | 4 | 0 | 3 |
| 19 | 4 | 0 | 3 |
| 20 | 15 | 1 | 14 |
| 21 | 3 | 0 | 2 |

Structure of products in WBC by health claim type

| Country | No. of health claims | Type of health claim | | |
|--------------|----------------------|----------------------|----------------|------------------|
| | | 0 - general | 1 - functional | 2 - risk-disease |
| Serbia | 4 | 1 | 3 | 0 |
| Slovenia | 5 | 1 | 4 | 0 |
| Croatia | 2 | 1 | 1 | 0 |
| Macedonia | 8 | 5 | 3 | 0 |
| Montenegro | 0 | 0 | 0 | 0 |
| BIH | 1 | 1 | 0 | 0 |
| Total | 20 | 9 | 11 | 0 |



WBC Shopcheck results by studied categories – Milk enriched with vitamins and minerals PRICE

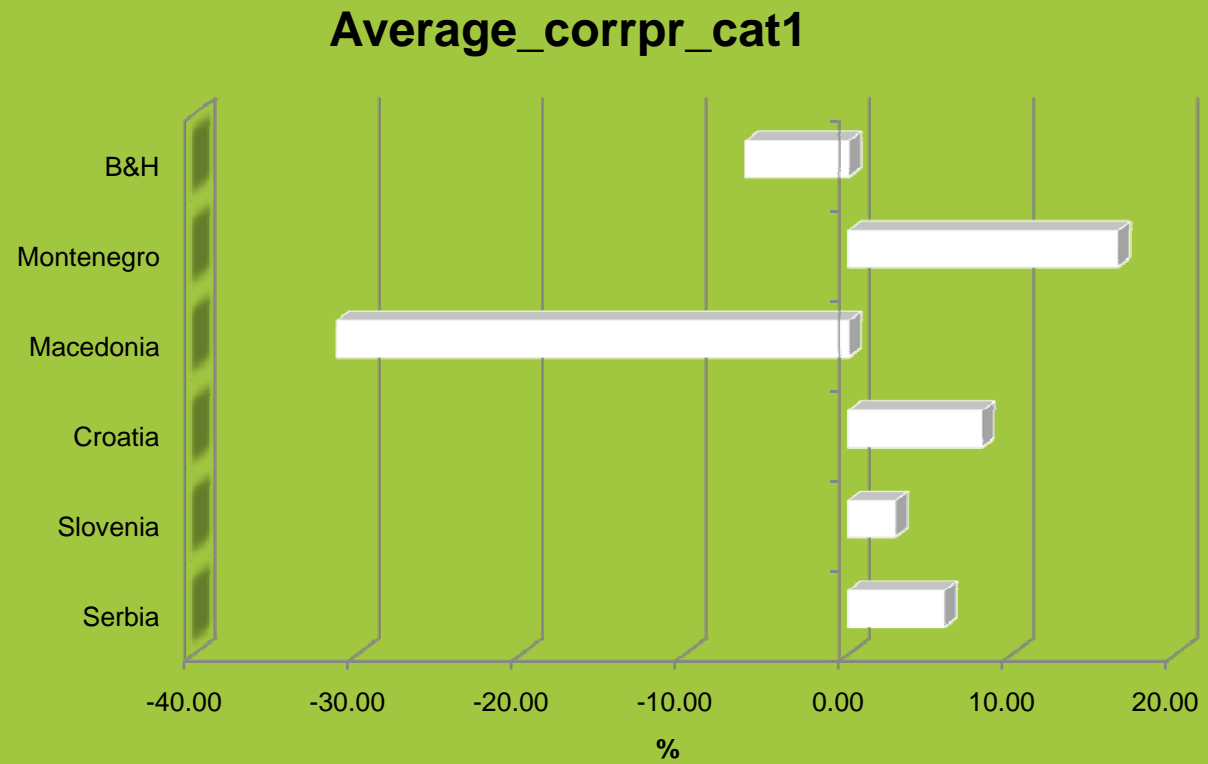


Source: IPSOS

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WBC Shopcheck results by studied categories – Dietetic jam



Source: IPSOS

WP6 IDI objectives

- To understand N&H claims products situation at WBC market seen from the key market player's point of view - both producers and retailers.
- To understand the reflections outside of the market itself, based on the expert's opinion regarding situation on the N&H claims products market at WBC.
- To obtain the data that will be used for further analysis during quantitative consumer survey.

The phases in the process of data collecting and analysis

- (1) controlling (pre-test of questionnaires);
 - (2) modification and final approve of questionnaires;
 - (3) coding of questionnaires;
 - (4) interviewing;
 - (5) entering the database;
 - (6) data organizing and statistical analysis.
- Questionnaires were essentially composed of open open-ended questions emphasizing the qualitative, in-depth aspects of issue.
 - Close-ended questions were used only as a part of already established open issues and only after the spontaneous response of the interviewees.
 - Different forms - dichotomous (yes or no) question, multiple choice question, rank order scaling and rating scales questions.

WP6 IDI research

Processors, retailers and experts were asked about:

- Overall attitude toward consumers demand,
 - Main criteria and restraints for consumer's choice,
 - Perceived consumers' characteristics and
 - Each stakeholder cross-perception
 - N&H claims market current status, trends and perspectives.
-
- Processors and retailers were asked to provide insights about studied categories (general presentation and market estimation).
 - Expert's point of view was more concentrated on following issues:
 - nutritional concerns and consumer awareness,
 - variety and nutritional quality of the offered product,
 - regulations and compatibility with EU legislative,
 - public programmes of communication to promote better food habits,
 - priorities and the main governmental objectives.

Table 1: N&H claim market survey structure

24 producers + 6 EU exporters

24 retailers

15 Experts IDI

98 product observations

85 observations within studied categories

| Criteria | Structure | No of interviews |
|---|--|------------------|
| Studied category of products with H & N claim | Jam for persons suffering from diabetes | 13 |
| | Yoghurts with probiotics | 16 |
| | Milk enriched with vitamins and minerals | 13 |
| | “Light margarine” with reduced fat content | 24 |
| | Fruit juice enriched with vitamins | 19 |
| | Other products | 13 |
| Stakeholder | Processor | 30 |
| | Retailer | 24 |
| | Expert | 15 |
| Country | Bosnia and Herzegovina | 12 |
| | Croatia | 9 |
| | Macedonia | 11 |
| | Montenegro | 11 |
| | Serbia | 16 |
| | Slovenia | 3 |
| | EU | 6 |

Part B/ WBC N&H CLAIMS PRODUCTS MARKET RESEARCH

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Part C / CONSUMERS ATTITUDES TOWARD N&H CLAIMS PRODUCTS

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THANK YOU FOR YOUR ATTENTION!

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