FOCUS BALCANS 3RD TRAINING MODULE
FEBRUARY 1-3, 2010.

BIOVEGA®

RESEARCHES OF ECOLOGICAL PRODUCTS ON CROATIAN MARKET

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RESEARCH ABOUT CITY POPULATION AWARENESS ABOUT ECOLOGICAL PRODUCTS

Sample (N): 1000

Research period: May/2008, October /2009

Research location: Croatia

Research method: personal household questionnaire

Gfk Croatia

Question 1: Have you ever heard about ecological/natural products produced in highly rigorous criteria of organic production?

Table1.

ANSWER	2008	2009
yes	83%	83%
no	17%	17%

Ignorance of these products, higher than average, has been present at:

- younger population aged 15-17 (35%),
- people older than 65 (36%),
- people with the lowest education (55%),
- population of north Croatia and Slavonia (25%).

Gfk Croatia

Question 2: Do you recognize ecological products on points of sale?

Table2.

ANSWER	2008	2009
yes	53%	53%
no	47%	47%

Higher level of recognition was noticed among:

- citizens of Zagreb together with suburbs (about 63 %)
- people with high education (64%).

Gfk Croatia

Question 3: On which basis do you recognize ecological products in shops?

Table3.

ANSWER	2008	2009
based on logo HRVATSKI EKOLOŠKI PROIZVOD (Croatian ecological product) on the package	38%	41%
based on special title "healthy product" or similar title on the package	36%	31%
based on known producer of ecological food	16%	25%
the product is the same like in specialized health food stores	23%	20%
based on product ingredients on declaration (no additives etc.)	22%	16%
other	11%	10%

Gfk Croatia

Question 4: Do you buy these products, and if you do, how often?

Table4.

ANSWER	2008	2009
yes, regularly	3%	4%
yes, often	11%	5%
sometimes	32%	24%
rarely	21%	23%
never	33%	43%

Research shows the decrease of customers' share from about 14% in 2008 to 9% in 2009.

At the same time the segment of occasional customers decreased from 32 to 24%.

Gfk Croatia

Question 5: Have you ever heard about genetically modified organisms (GMO)?

Table5.

ANSWER	2008	2009
yes	91%	91%
no	9%	9%

Ignorance of GMO is the highest among population:

- older than 65 (21%),
- with the lowest education (33%),
- with low income (29%).

Question 6: Genetically modified organisms/food are plants (vegetables and fruit/crops) obtained by using DNA molecules from different plants, which are combined into one molecule to create a new set of genes so this new plant would have some new/better ingridients, better yield, bigger products, better appearance, lower vitation and lower price. Are you personally prepared to buy this kind of products?

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Table6.

ANSWER	July/ 2005	May/ 2008	September /2009
yes, of course	8%	7%	6%
no, under no circumstance	67%	58%	51%
I do not know, I do not have a lot of information about GMO	16%	26%	29%
It is not important for me, I do not care about origin	9%	9%	14%

Question 7: Genetically modified food is still not market properly on the packages and points of sale. Do you think it is necessary to put some signs which would identified genetically modified food?

Table7.

ANSWER	2008	2009
yes, of course	90%	90%
no, it is not necessary	3%	3%
I do not know, I can not answer	7%	7%

RESEARCH OF CROATIAN CONSUMERS OF ECOLOGICAL PRODUCTS

Sample (N): 1200

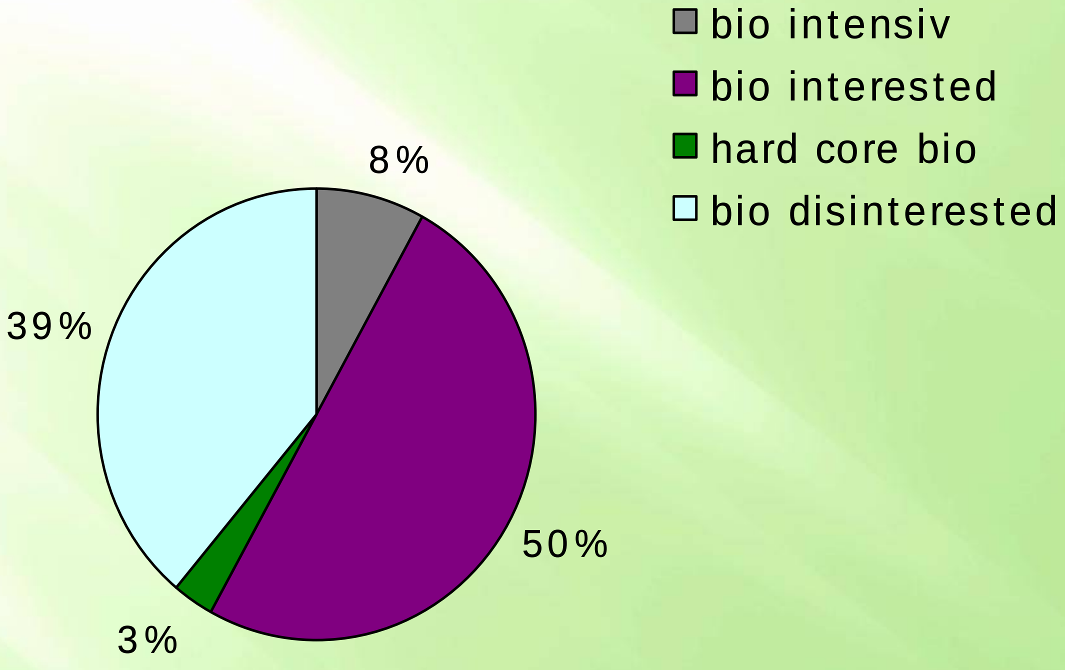
Research period: December /2007

Research location: Croatia

Research method: questionnaire in bio&bio shops

Project of The European *Bank* for Reconstruction and Development

A survey revealed the following indicators of the customer structure based on the intensity of purchasing:



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- **bio interested consumers**: 5% of their supplies are bio-products. They are interested in healthy and delicious foods. They tend to buy organic products if the price is acceptable and if those products are easily accessible. They buy only in conventional stores. The biggest bio-potential.

- **bio intensive customers**: Financially well off. They are interested in healthy and delicious food. They are strongly motivated to buy bio-products. They are buying in grocer's shops (approx. 25% of their needs) if those products are available there – if not, they purchase goods in specialized stores. Big potential – in Western European countries it is expected that the share of these customers will be 15% in 2012.

- **bio hard core customers**: 75% of goods they use are bio-products. Their preference to organic products is like a dogma, they refuse industrial products. They are mostly buying their goods in specialized shops. The smallest potential.

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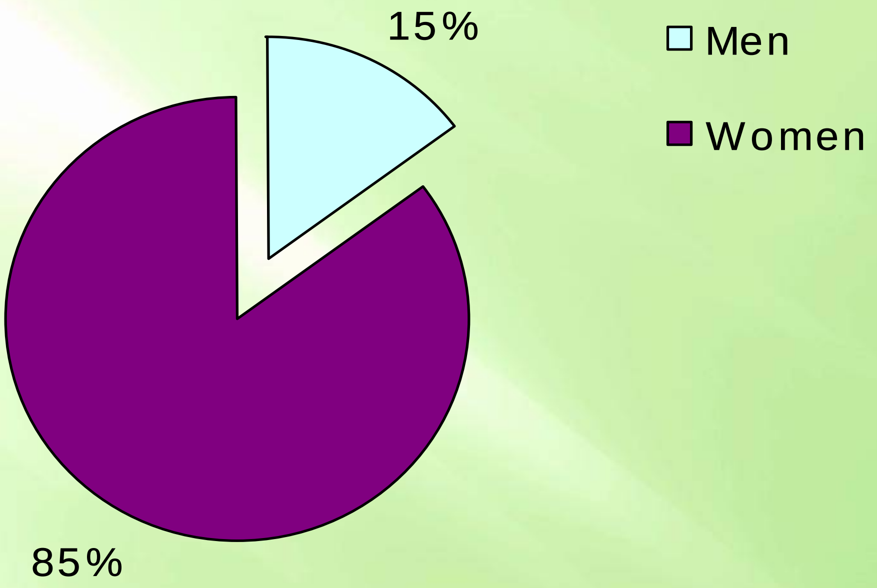
The structure of customers buying organic products



- 85% of customers are women 25-55 years of age
- 15% of customers are men (partially for their own needs, and partially buying for others/women)

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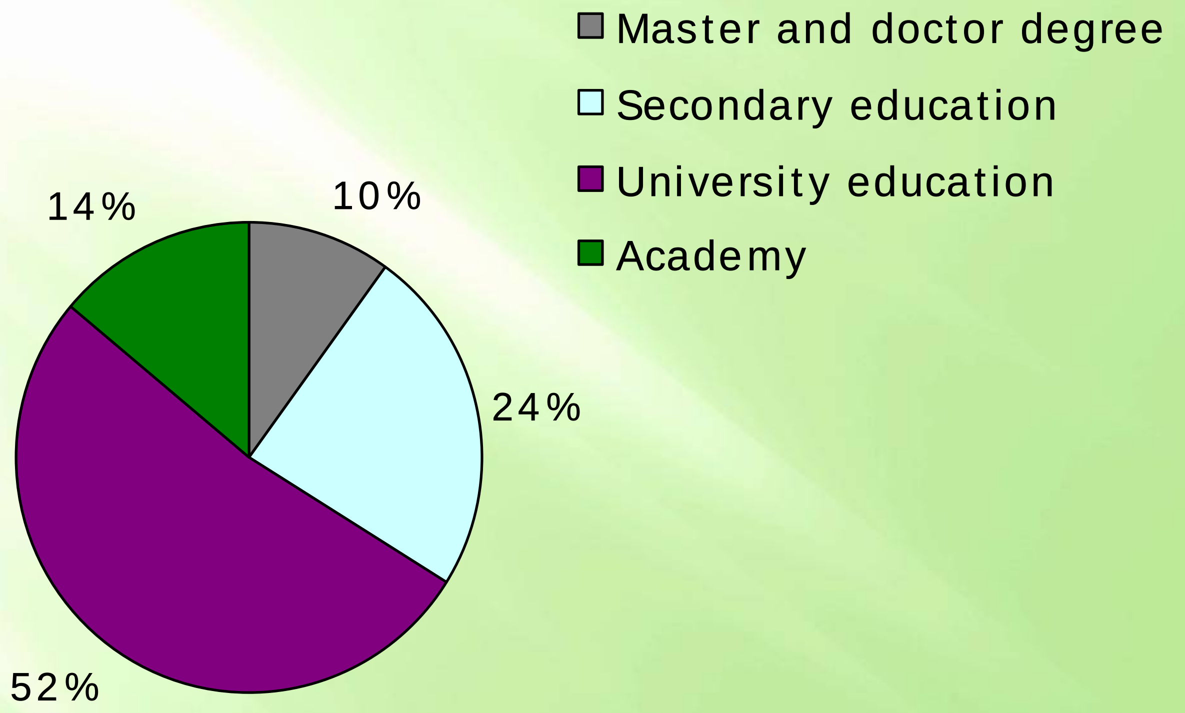
Level of education of customers buying organic products



Research of IPSOS PULS for OKOMITO (done for communication strategy for bio&bio shops in 2009)

Sample (N): 200

Research period: December / 2008, January / 2009

Research location: Zagreb, Split, Rijeka

Research method: personal household questionnaire

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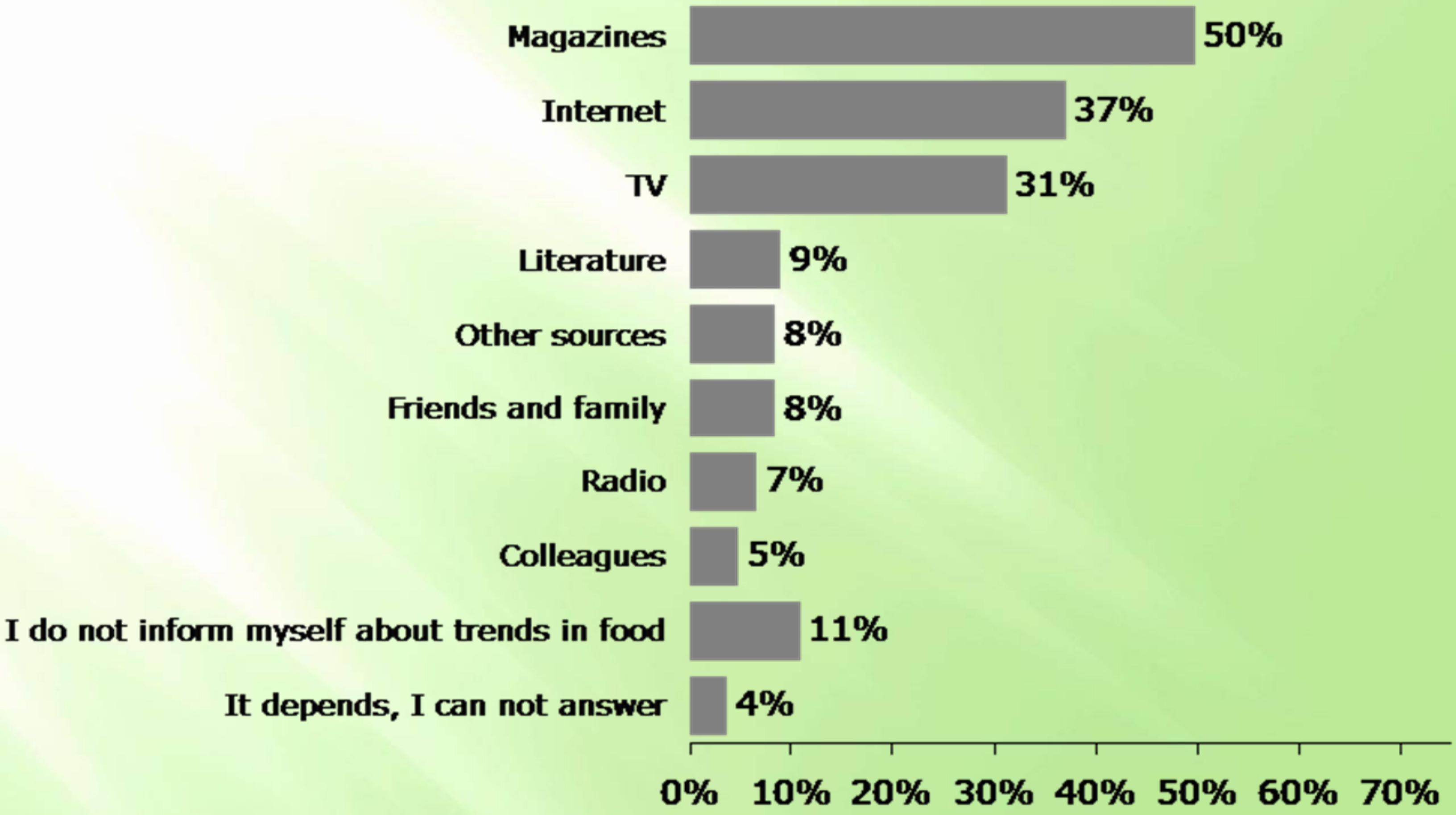
How people inform themselves about trends in food consumption?



OKOMITO BRAND DETECTOR™

IF YOU KNOW YOUR TAGET YOU KNOW WHOM AND HOW TO APPROACH.

Communication must go through:

- PRINT
media ideal for developing awareness and brand image.

- RADIO
media ideal for educating your target,
great support of promotional activities.

- INTERNET
media ideal for supporting print campaign and promotional activities.

- NEWSLETTER
introducing promotional activities and news.

- POINT OF SALE ACTIVITIES
tastings,
promotional activities.

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THANK YOU VERY MUCH FOR YOUR TIME!

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