
WP6 Focus Balkans project WBC Expert in-depth interviews

Sonja Stancic
Ipsos Strategic Marketing

February 2010



Methodology

- **Type Of Research:**

Qualitative research, in depth interviews, in face to face

- **Countries:**

Croatia, Slovenia, Montenegro, FYR Macedonia, Serbia and Bosnia and Herzegovina

- **Participants in each country:**

- 1 representatives of Ministry of health
- 1 representatives of Institute for public health (except B&H: 2 representatives)
- 1 representatives of Consumer organization.

All results shown represent opinion and estimates of respondents

Content

- 1. Consumer's demand for products with nutrition and health claims
- 2. Commercial offer and health claims
- 3. Public policy for nutrition
- 4. Trends and perspectives

Consumer's demand for products with nutrition and health claims

The main nutritional concerns

According to expert's opinions, the main nutritional concerns that consumers have been facing with in WBC are:

- Lack of correct and reliable information;
- Incomplete legal regulations and the fact that regulations are not implemented;
- Improper and insufficient product declaration;
- Unequal territorial availability of quality products;
- Uncertainty of consumers about hygienic, health and nutritional safety of food;
- Uncontrolled placement of products in stores
- Uncontrolled channels of products – fear of copies and fakes

Consumer's demand for products with nutrition and health claims

In general, consumers are not sufficiently aware of nutritional stakes

Some specific issues that consumers are not aware of:

- What is proper declaration of food;
- Which food additives are safe, and which ones are not (example E marking);
- The meaning of nutritional profile – primarily ingredients, fat content, salt content;
- Presence/absence of chemicals, pesticides, medicaments, etc. in food;
- What is the proper way to keep the products in sales establishments
- Origin of the products;
- Quality control – what it means and how this should be displayed on products;
- What is certification of products;
- Presence of agencies for analysis of quality and safety of food;

Perceived characteristics of the consumers of N&H claims products

- women
- people from 15 to 40 years old and 41 to 64 years old
- people with middle income and higher income
- people with higher/high education and secondary education
- people without health problems and with health problems
- population of urban areas



- Besides that, characteristics of the consumers of N&H claims products are also:
- well informed and who use Internet and other means of public communication,
 - open to changes and who learn fast and accept novelties,
 - live a dynamic life and have a lot of obligations.

Perception of consumers' demand for N&H claims products

Demand for products with N&H claims are the most affected by :

- Offer – the market is „*overwhelmed*“ by products with N&H claims
- Information
 - Positive - constant advertising of particular products increases consumers' interest and need for education in this area.
 - Negative - due to extensive number of different information that consumers are exposed to they become confused
- Price – high prices have a direct effect on purchase of (un) safe food

Commercial offer and health claims

Variety and nutritional quality of the offered product

- Commercial offer of products with N&H claims is very big (particularly in Slovenia)
- Diversity of offered product categories with N&H claims is also big
- It is difficult to assess the quality of these products – control of quality of the products placed on the market is insufficient (particularly in case of new products) .

In experts' opinion, messages with nutrition and health contents on products are:

Stimulating - to a great extent, they are made to attract consumers, and they make consumers buy products without actually knowing what their real content is.

Misleading - they make consumers confused and misled to a great extent

Croatia: „Let's say that 20% is fine, while I think that 80% of claims on these products are not functional, they mislead consumers from the real nature of food they eat and expectations from it”

Regulations and compatibility with EU legislative

Opinion of majority of experts is that laws, bylaws and regulations are being adapted to EU laws at a good pace.

—However, what experts consider a problem is **poor implementation of the existing laws.**

General experts' evaluation is that compliance with EU is good and that it brings a lot more order in the market.

There are some negative domains, regarding:

1st EU legislative – doubt if EU laws are of better quality than old ones

2nd Implementation of EU laws and harmonization with EU markets -

Problem of implementation due to specificities of local market

9

Public programs of communication to promote better food habits

In all countries are programs conducted in terms of increasing the level of awareness about healthy nutrition and nutrition habits

- The most organized programs are conducted in Slovenia.
- In other countries, programs are conducted sporadically and insufficiently

The obstacles for realization of these programs:

- Lack of financial means,
- Lack of well designed programs,
- Insufficient understanding of decision makers and relevant institutions which approve financial means for such projects.

Trends and perspectives

Main priorities and long-term objectives of Balkan countries' Government policies related to food should take the following direction:

- Conduct common work of line ministries, in order to develop healthy nutrition policy on national level as comprehensively as possible;
- Accomplish objectives defined by the action plan for safety of food and nutrition;
- Conduct intervening programs for early detection of risk factors for mass non-infectious diseases among children (such as obesity);
- Form training centers for promotion of healthy nutrition and organize continuous educations;
- Promote Counseling Offices;
- Plan and conduct labeling of products in supermarkets ('traffic light' for easier understanding).

Trends and perspectives

Main factors which will affect changes in food consumption in the future are:

- Information and awareness of prevention related to nutrition;
- Health status of citizens;
- Economic situation;
- World trends - progressing in the direction towards „healthy nutrition“;
- Precise legal regulations about ingredients of products with nutritional and health claims;
- Writing declarations and claims on products using language which average consumer understands.



Demand for products with nutritional and health claims will grow

12

Thank you for your attention!

13