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DO EUROPEAN CONSUMERS BUY GM FOODS?

(“CONSUMERCHOICE”)

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Chapter 1

BRIEF SUMMARY

Following a decade of argument in Europe, the 2004 introduction by the EU of mandatory labelling for GM foods, the widespread importation into European countries of GM-animal feed, and the rapid development of GM agriculture and products in many parts of the world, it was pertinent to inquire how European consumers respond when offered the opportunity of buying GM-products in the familiar environment of their normal food shops.

In 10 EU countries, surveys were undertaken and retailers consulted to see which GM-labelled- and GM-free-labelled-products were on sale in the different types of grocery stores (see Chapter 3). We then asked what consumers actually did when they had the opportunity of buying GM- or GM-free products, not just what they said they would do. In six of those countries (the Czech Republic, Estonia, Netherlands, Poland, Spain and the UK) GM-labelled-products are currently on sale while in four (Germany, Greece Slovenia and Sweden), in which they are not, products labelled “GM-free” are widely available.

It is clear from checking data of actual purchases against answers to questions about their preferences and intentions *from the very same purchasers*, that most shoppers do not actively avoid GM-labelled-products. Responses given by consumers when prompted by questionnaires about GM-foods are not a reliable guide to what they do when shopping in grocery stores (see Chapter 6).

At the present time the public debate on GM issues in Europe generally is relatively subdued, although markedly more active in some countries (e.g. in the UK in the summer of 2008 and in France earlier that year). When asked about attitudes in surveys or focus group discussions, consumers in several countries raised ethical concerns, and pointed to environmental and health risks; they were generally less aware of possible benefits than of potential hazards (see Chapter 5).

In the participating countries, we looked at the pattern of media reporting (see Chapter 4), observed the political landscape, ran focus groups of consumers (not in the Czech Republic or Estonia) (see Chapter 5), asked retailers for information and recorded products on sale in grocery stores (see Chapter 3). We then ran market surveys comparing individuals' purchasing intentions with their actual behaviour (not in Estonia or Slovenia) (see Chapter 6) and sought responses to questionnaires directed to Europeans from Poland (see Chapter 12, pages 12-2 and 12-12) and the UK (see Chapter 16, pages 16-14 and 16-31) who visit North America where GM-products are widely used. Our findings showed that Europeans buy GM-foods when they are physically present on the shelves.

We conclude that a major factor in governing the purchase of GM-products by Europeans is the decision of retailers to make them available to consumers.

Thus, to the question “Do Europeans buy GM food?”, the answer is “yes – when offered the opportunity”.

EXECUTIVE SUMMARY

Following the 2004 adoption by the EU of compulsory labelling of all food products containing GM-content in any ingredient, it was uncertain how rapidly such products would appear on the shelves of retail grocery stores. They were by then already in growing use for animal feeds.

At the end of 2005, GM-crops were being cultivated commercially in the Czech Republic, France, Germany, Portugal, Romania, Slovakia and Ukraine; labelled GM-foods of one sort or another were on sale in Belgium, the Czech Republic, Estonia, France, Germany, The Netherlands, Poland, Slovakia, Spain, Sweden and the UK.

While at the present time the public debate on GM issues in Europe generally is relatively subdued, it is markedly more active in some countries (e.g. in the UK in the summer of 2008 and in France earlier in that year). However, when asked in surveys or focus group discussions, consumers raised ethical concerns, and pointed to environmental and health risks; they were generally less aware of potential benefits than they were of conceivable hazards.

In the past decade there have been innumerable debates and campaigns about genetically modified crops and their food products. There have also been many polls and some focus groups exploring public attitudes; for all the doubts about their reliability as accurate indicators of public opinion, those studies showed that much, probably a majority, of the public were in one way or another antipathetic to the technology as it applied to agriculture, with views ranging from some vigorously opposed, to most people largely uninterested, to a proportion enthusiastically in favour.

But those tests of public views were theoretical along the lines of “what would you do if you had the opportunity of buy GM-products?” There have been one or two small-scale experiments in which limited numbers of consumers were offered a product in two forms (actually identical), one labelled “GM” and the other “non-GM”, usually with a price differential in favour of GM. Never until the present project, as far as we are aware, have explorations been made of what consumers actually did when shopping for food in their normal way in familiar stores *which offered food labelled as containing or being derived from GM-ingredients* yet without the consumers’ attention being specifically drawn to that fact. It would be up to them, if they were interested, to find out by reading the labels and deciding for themselves what to do.

Using seven pillars, the CONSUMERCHOICE project “Do European consumers buy GM foods?” explored public attitudes in the Czech Republic, Estonia, Germany, Greece, The Netherlands, Poland, Slovenia, Spain, Sweden and the United Kingdom by asking in various direct and indirect ways *what people actually do in grocery stores, not just what they say they might do*:

Pillar 1: questions put to the management of supermarket chains and to small shopkeepers sought information about GM-products on sale and the responses of consumers to their presence; in some cases information was asked about specific forms of GM-free labelling (see Chapter 3);

Pillar 2: repeated visits to a variety of food stores (from large supermarkets to corner stores) in major cities, large towns and small settlements/villages recorded the presence on the shelves of food products labelled as containing GM-ingredients in those countries where they are sold, and of labelled as “GM-free” in countries where that label is popular (see Chapter 3);

Pillar 3: analysis of the print and broadcasting media showed that, across the ten countries participating in the CONSUMERCHOICE project, the average frequency of articles was low, most of them being news reports (see Chapter 4); media interest in GM-food and related issues appeared limited in most countries. However, specific national or local events did evoke greater responses, mirrored for a short period of time by an increased number of articles and reports. Overall, the results make it clear that the public debate on GM-foods in the majority of participating countries was subdued.

Moreover, in most countries during much of the period of the project, the majority of published items were neutral or negative with respect to GMOs. However, it became increasingly clear beginning in the spring of 2007 – and gathering pace in the spring of 2008 – that an upsurge of interest was taking place, accompanied in some countries, especially in the UK but also to a lesser extent in Estonia, The Netherlands, Poland and elsewhere, by a remarkable change in the balance of reports on GM; favourable views became much more common, in some Member States constituting a clear majority (see Chapter 4 and Chapter 16, pages 16-10 and 16-25 *et seq.*). Some of this renewed interest was no doubt driven by the recent global rises in food prices, reinforced by reports of actual food shortages in many of the poorer countries and supported by claims and comments that GM-technology might contribute to lower food prices and to a resolution of what some people are calling a “world food crisis”.

Pillar 4: in eight of the ten participating countries, comparisons were made of actual purchases by members of a consumer panel (derived from an analysis of product barcodes) with their opinions and perceived behaviour as expressed via a focussed questionnaire (see Chapter 6). In addition, personal interviews with shoppers in some German supermarkets were able to pose specific questions (see Chapter 9, page 7 *et seq.*);

Pillar 5: responses of focus groups in some of the countries were explored with respect to matters relating to GM-foods (see Chapter 5);

Pillar 6: for Poland, a questionnaire about responses to the unlabelled presence of GM-ingredients in many foods in North America was answered by about 100 Poles now permanently or temporarily resident in the United States and Canada (see Chapter 12, pages 12-2 and 12-12);

Pillar 7: a questionnaire answered anonymously by more than 1,500 UK residents who are staff and students in eleven UK universities and who have visited the US and Canada in recent years, asked about their responses to the presence of unlabelled presence of GM-ingredients in many foods in North America (see Chapter 16, pages 16-14 and 16-31);

As supporting background information, there was an extensive analysis of media items relating to agricultural biotechnology and GM-foods, predominantly in the period July 1st, 2006 - March 15th, 2008. For each participating country, the number of media items per month was noted together with an evaluation of whether items were generally favourable, unfavourable or neutral towards the technology and its products. These data were correlated with major items of gene technology interest as they occurred in each country during the 21 months of media scrutiny and analysis (see Chapter 4).

Findings

1. The willingness of supermarkets to discuss the GM issue varied between individual companies as well as between countries. In the Czech Republic, Greece and Poland there was great hesitation in discussing any aspect of the issue. In The Netherlands companies were relatively relaxed, while in the UK some were quite willing to provide information and had no objection to its being published and attributed but others would do so only reluctantly and in confidence. Owners/managers of corner shops showed less reluctance. In Sweden, all supermarkets willingly answered all the questions put to them.

Some supermarket chains carried notices on their websites proclaiming that their own-label (private label) products were devoid of GM-content. On the other hand, there were also supermarkets with website statements in which they did not necessarily exclude the presence of GM-ingredients in their own-label products. Some chains noted that, unless they were labelled “organic”, their meat, dairy products and eggs did derive from cattle provided with GM-feed (but see below). Branded products were excluded from the requirement to be GM-free; there are also one or two retail food chains in which essentially all the products are own-label and hence all GM-free.

It became clear that some large supermarket chains did not track centrally all the GM-labelled items that might be on sale. Nor were small shopkeepers usually aware of the (transgenic) provenance of some of the products in their stores. However, none of them, large or small, reported any consumer reactions whatsoever.

A “GM-free” label is quite common in some countries (e.g. Poland, Germany) but prohibited in others (e.g. The Netherlands). In Sweden there were many products labelled “GM-free” although such labels are in fact not legally permitted. Two interesting examples of its use were by German and UK chains which introduced milk from cows fed non-GM-fodder, and which carried a label to that effect.

2. In those countries in which GM-labelled-foods were on sale, most were oils from GM-soya sold either as cooking oil or incorporated into other products such as margarine; however, some oil and other ingredients from GM-maize were also on sale. The number of different labels varied; in Estonia there were nine brands of GM-oils, in the UK only two; this probably reflected organisational differences among the supplying firms in different countries, and whether the items for retail sale were bottled and labelled domestically or imported from elsewhere. There appeared in some countries to be market segmentation for oil derived from GM-sources compared with oils from other sources.
3. Whatever they may have said in response to questions, most shoppers did not actively

avoid GM-products, suggesting they are not greatly concerned with the GM issue. Moreover, it is clear that, as far as buying GM-foods is concerned, the way people respond to prompting via questionnaires and polls is by itself not a reliable guide to what they will buy in a grocery store. In countries in which they are widely used, a “GM-free” label on the front of a package is more likely to influence shoppers than a “containing-GM” label in small print on the back.

4. Focus groups studies showed that GM-food is not uppermost in people’s minds when discussing food purchasing habits. Labelling was demanded by the participants yet few of them actually looked at the labels when buying food. Sceptical arguments were more dominant than consideration of benefits but it seems likely that, in the future, climate and population restraints to food availability may lead to more accepting attitudes towards GM-foods.
5. Attitudes towards GM-foods by Poles in North America: 91 questionnaires were returned out of more than 200 sent out. Of those who responded, 92% agreed that they knew the meaning of GM-food; 21% chose GM-food, 26% rejected it while 46% were indifferent.
6. The UK questionnaire was offered anonymously to the staff and students of eleven UK universities; 1,531 responses were received from all parts of the UK, from men and women, from people in the 18-40 age brackets as well as those aged 60 and over, with educational levels from high school to doctorates, and living in large towns, small towns and villages. Of those responding, 91.4% knew the meaning of genetic modification, 3.0% did not and 5.6% said they were unsure.

Asked whether they aware that in North America many processed foods and some whole foods are GM/GE or are derived from GM/GE sources, and are not labelled to show that, 55.8% said they were aware and 44.3% were not. Of those who are aware, 28.7% sought to identify products containing GM-ingredients, mostly (93.6%) in order to avoid them; 71.3% did not attempt to identify GM-containing products.

7. The German retailer who supplied CONSUMERCHOICE with the sales data on “GM-free” milk agreed to ask his customers why they purchased one or more of the seven varieties of milk carrying such a label. It is clear that, for 20% of consumers, the “GM-free” label was a strong motivation but more than 80% of the respondents had other reasons for buying the products.

Conclusions

1. Apart for personal preferences which we were for the most part not in a position to judge, the main external factor limiting the choice of European consumers with respect to their purchases of GM-foods is availability in the stores.
2. GM-products offered for sale are indeed purchased.
3. Europeans as represented by Poles living in and UK residents visiting North America were largely indifferent to the presence of GM-ingredients in food while they were in the United States and Canada.

4. It is clear that consumers want freedom of choice when buying foods and some of them say “yes” to GM when offered that freedom.
5. Overall, people seem not to be able to recognise GM-food in spite of the labelling requirements. But this does not appear to be a problem as people are in general are not careful to avoid these products, a conclusion supported by the scant attention paid to labels. However people do react differently towards GM-free-labelled products, suggesting that those products are chosen with greater thought on the part of consumers who want them.
6. In practice, shoppers frequently behaved differently from the way they say they would do. One third of the respondents were wrong in their perceptions about their GM-purchases while another third did not know what they had bought.