

Chapter 3

SURVEY OF LABELLED GM- AND GM-FREE- PRODUCTS ON SALE

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Introduction

The objective for this part of the project was to record GM-foodstuffs on offer for sale in European groceries. The project participants were looking for co-operation with and receiving information from retailers about sales; they would also make their own sample surveys in a limited number of retail stores, checking for the presence of possible GMO-containing foodstuffs and noting the form of labelling, publicity and location on shelves.

Methodology, problems and modifications

Retailers were asked via a formal letter for a short interview. The project participants wished to inform them about the aim of the CONSUMERCHOICE project and their intention to log data on introduction of GM-foods on the European market. The priority was to determine what European consumers can actually find on sale but labelling, wording of labels, prices, and location on shelves were also important. A schedule of relevant questions was agreed by the project participants.

The reactions of supermarket chain managements to formal letter asking for their co-operation were variably positive in Estonia the Netherlands, Slovenia, Spain, Sweden and the UK, with some response also in Germany. Polish and Czech managements ignored the requests or promised an interview and then failed to deliver it. However, retailers in Greece, The Netherlands, Spain and the UK post statements about GM policy on their websites.

Such a lack of full cooperation was always anticipated as a possibility and the project methodology was modified accordingly. Policy statements were obtained from the websites of major retailers; assessments of products on sale became more dependent on in-store surveys.

Surveys of labelled GM-foods were conducted in various regions of each country, in small, medium and large towns, and in corner groceries as well as the larger supermarkets and hypermarkets (Table 1). Attempts were made to determine whether and how GM-foods were presented to consumers: how consumers were informed, whether there were special pricing policies for GM-foods and how food manufacturers labelled such products. Thus, we noted brands, manufacturers, styles of labelling, wording, positions of label on packages and the placement of GM-goods on the shelves as well as their prices and a rough quantitative comparison of GM-brand similar products derived from non-GM sources.

A similar approach was used for products labelled as “non-GMO”, “GM-free” or other wording for negative labelling.

In order to explore possible trends, data were divided into two groups: those collected in May 2006 - April 2007 and those in May 2007 - May 2008. With the experience gained from surveys in the first period, we eliminated some evaluation criteria because the prices and positions of products on the shelves were clearly not important. We also reduced the number of towns and shop visits. Results from the later period showed some changes in labelling, and manufacturers and retailers' policies towards GM-foods, as well as in the range of such products available on the EU market.

GM- and non-GM-labelled products in the European Union

A variety of conditions prevail in the various countries of this study: different national policies, cultures, attitudes to food and to innovation, influence of the environmental and organic lobbies and the impact of religion. The methods and approach were adapted to meet such dissimilarities:

- retail store visits were carried out in both project periods in all the participating countries except for Greece. The Association of Greek Retailers published a statement in March 2006 informing consumers that they are against GMO-products and would never allow them in their shops;
- GM-labelling in the earlier and later periods of the project was compared to identify changes and trends (Table 1, column 2). In most cases, no changes in retailers' GMO policies occurred except in the Czech Republic where labelling of cooking oils and many other products were altered. The former bold labelling of oils derived from GM-soya was changed to discreet notices using smaller typefaces. The number of products labelled as non-GM increased substantially; such products had not earlier been labelled. These new non-GM labels are often displayed prominently on the front of the package;
- products were sought in different distributions of retail stores in the various countries, reflecting the varying patterns of retail sales. In some countries participants visited shops in large cities, middle-sized towns or villages, with the total number of sites variable between countries: it rapidly became clear for some Member States that, while the range of products offered in retail stores of different sizes and serving different clienteles depended on their character and location, the overall variety did not. Only rarely were distinct varieties of products found in a limited number or in specialist shops (Table 1, column 3);
- as a consequence, the number of shops monitored differed significantly. In Poland and the Czech Republic there were 176 and 83 visits, respectively, much more than in other countries having more-or-less the same products everywhere; in those other countries the number of visits ranged from 14-28 (Table 1, column 4);
- the reactions of supermarket chain managements to formal letters asking for co-operation with the CONSUMERCHOICE project were variably positive in Estonia, the Netherlands, Slovenia, Spain, Sweden and the UK, with some response also in Germany. Polish and Czech managements ignored the requests or promised an interview and then failed to deliver it. However, retailers in Greece, the Netherlands, Spain, Sweden and the UK post statements on GM policy on their websites;
- in general, the location of GM- and non-GM-products on the shelves appears not to be significant either for consumer decision-making or for retail sales;
- non-GMO-labelled products were usually placed together with other similar foods,

sometimes on special shelves with products labelled “BIO”, “Organic” or “Healthy” (Table 1, column 5);

- the range of products offered showed greater variety depending on the size of the grocery shop rather than the region of the country. In some countries the district is important; thus, in the UK, GM-soya cooking oil appears to be favoured by the Asian community so that outlets catering for them tend to be the ones stocking those products;
- there were substantial differences between individual countries both in the variety of GM-foods on sale and number of GM-food products on sale. While 21 and 27 brands of GM-foods were on sale in Czech Republic in the earlier period and later periods, respectively, there were 18 GM-products in the Netherlands, 13 in Estonia, 6 in Spain and 2 or 4 in the UK. No GM-foods was on sale in grocery stores in Greece, Sweden or Slovenia (Table 1, column 7);
- the most common GM-labelled product was soya cooking oil labelled as “containing GMO”, “made from genetically modified soya (or GM raw material)”, or something similar. GM-labelled foods included various other products containing soya oil, soya proteins as well as maize oil and other products. (Note that such oils will actually contain no detectable GM-material but as they are “derived from GM sources” they must be labelled. It is a moot point as to what proportion of consumers will know that “containing GMO” material need not actually mean that.);

Table 1. Store visits, products and retailers

1	2	3	4	5	6	7	8
country	frequency of visits	number of towns	number of store visits	special shelves for non-GM?	retailers: information sources	no. of GM-foods	no. of GM-free products
CZ	yes, 2x	3+3+3	83	BIO, healthy	requests for interviews ignored	21 / 27	41 /75
DE	yes, 2x	1+2+1	20	no special	interviews promised	1/1	various soy milk products)
EE	yes, 4x	2+2+1	28	no special	interviews	9/13	6/17
ES	yes, 2x	1 (4 districts)	14	no special	interviews	6	21
GR					statements against GMOs on websites	0	0
NL	yes, 2x	2+0+1	5 chains	restricted GM	interviews; website	18	1 restr.
PL	yes, 2x	3+0+12	176	special in major	requests for interviews ignored	1 (in various sizes)	various
SE	yes, 4x	1+2+1	52	conventional equivalents/low lactose	14 answers	1 beer	63
SL	yes, 2x	3+3+3	26	no special	55 answers websites +	0	10/13
UK	yes, 2x	2+1+1	7 chains +	for "organic" products	interviews + partial sets of answers to questions	3	5

- the use of “non-GMO” or its equivalent as a food label is restricted in the Netherlands and Germany, and is not used in Greece. In other countries manufacturers and retailers use such “negative labelling” with various wordings. By the close of the inquiry we had found 75 brands labelled as “product does not contain GM-raw material” or similar in the Czech Republic, 60 brands in Sweden, 23 in Slovenia, 21 in Spain, 17 in Estonia and about 20 in Poland. Most were derived from soybeans and included soya drinks, soya milk, meat, etc. Other brands were vegetarian foods, dried fruits, products from corn, sunflower and rapeseed oils. A few such items (5) were found in UK; 1 non-GM product (eggs) was found in The Netherlands despite the restriction (Table 1, column 8).

Conclusions

Consumers in the ten EU Member States contributing to this study have limited choice for buying GM-labelled foods. Retailers offer some GM-labelled products in six of them but none at all in Greece, Slovenia or Sweden (save for the beer). Quite a wide range of GM brands were found in the Czech Republic, Estonia and the Netherlands. In the UK, GM-soya oil is available primarily in stores serving the Asian community. In total, in-store investigations revealed 68 products labelled as genetically modified for which the basic raw material for GM-foods was soybeans as approved under EU regulations. Some products labelled as “non-GM” were found on the shelves in most of the countries.