

# Sustainability of food and agriculture: the consumer perspective



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# CONSUMER ATTITUDES TO SUSTAINABILITY



# WHAT 'SUSTAINABLE' MEANS TO CONSUMERS IN RELATION TO FOOD AND DIETS

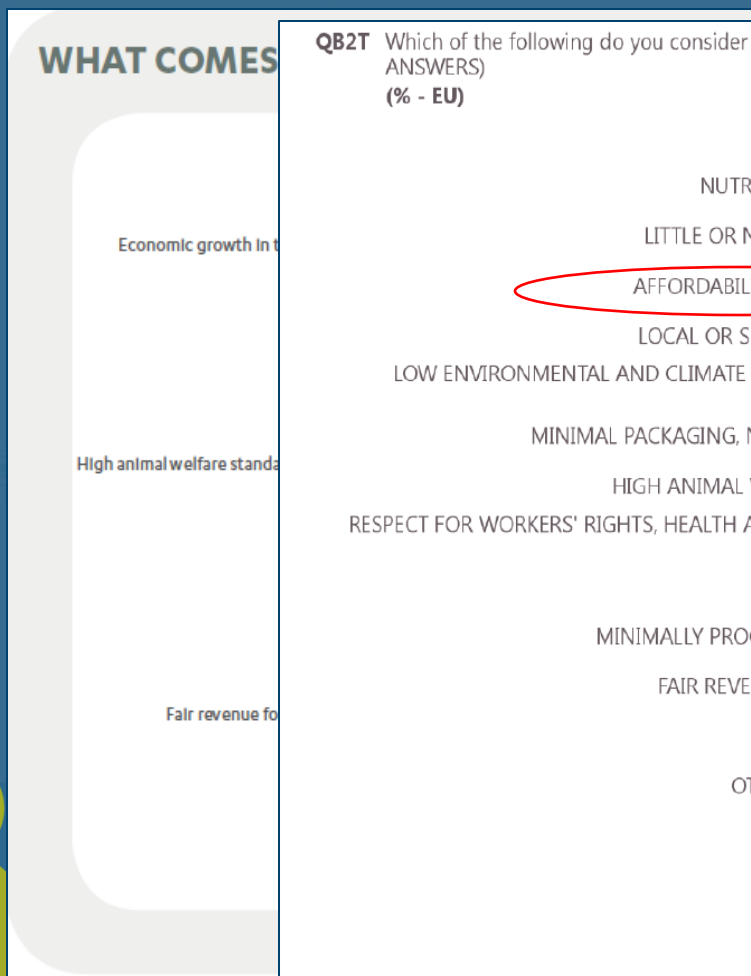
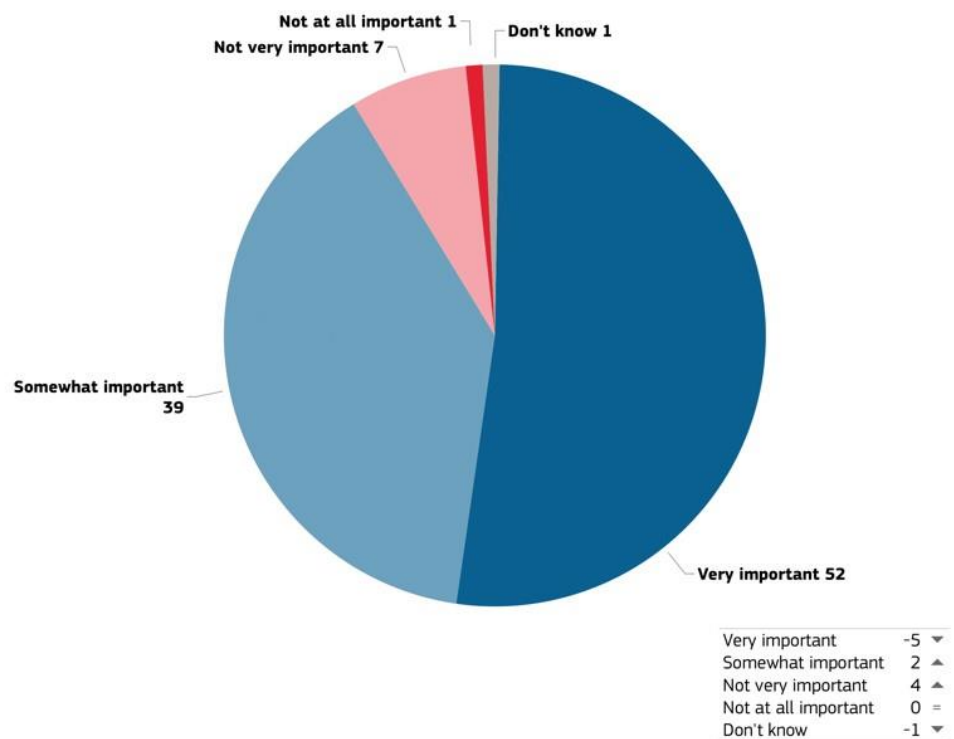


Figure 5: Q3 – what comes to your mind when thinking about sustainable food and diets?

QB4 We often hear people talking about 'eating a variety of different foods'. What do you think "eating a variety of different foods" means? (MULTIPLE ANSWERS POSSIBLE) (% - EU)

EATING A VARIETY OF DIFFERENT TYPES OF FOODS  
HAVING A BALANCED DIET  
**EATING MORE FRUIT AND VEGETABLES**  
EATING SEAFOOD  
EATING MORE HOME-COOKED FOODS  
LITTLE OR NO PROCESSING  
AVOIDING WASTED FOOD  
AVOIDING OR DO NOT EATING FOODS HIGH IN FAT, SUGARS, AND SALT  
**EATING MEAT**  
EATING FISH  
EATING MORE WHOLEGRAIN, HIGH FIBRE FOODS  
NOT EATING TOO MUCH  
EATING ORGANIC FOODS  
EATING FOODS WITH A LOW CARBON FOOTPRINT  
EATING FOODS PRODUCED BY SMALL-SCALE FARMERS THAT PROTECT WORKERS' RIGHTS  
EATING VEGETARIAN OR VEGAN FOODS  
OTHER (SPECIFY)

QC2. In your opinion, how important is it to protect the welfare of farmed animals (e.g. pigs, cattle, poultry, etc.) to ensure that they have decent living conditions? (EU27) (%)



Mar. 2023

Base: all respondents (n= 27,237)

Source:  
BEUC, 2020

TABLE 28 – What comes to your mind when thinking about “sustainable” food?

	Belgium Resp % (Base: Count 748)	Italy Resp % (Base: Count 697)	Portugal Resp % (Base: Count 673)	Spain Resp % (Base: Count 725)	Austria Resp % (Base: Count 685)	Germany Resp % (Base: Count 729)	Greece Resp % (Base: Count 766)	Lithuania Resp % (Base: Count 696)	Netherlands Resp % (Base: Count 652)	Slovakia Resp % (Base: Count 719)	Slovenia Resp % (Base: Count 678)	Total Column Response % (Base: Count)
Low environmental impact	44.4%	61.4%	58.0%	60.7%	57.5%	54.6%	48.5%	42.3%	43.2%	30.3%	33.1%	48.6%
Use of pesticides and GMOs to be avoided	28.9%	40.2%	49.5%	45.5%	55.7%	49.3%	48.5%	38.3%	40.7%	40.1%	32.3%	42.6%
Local supply chains	46.2%	34.0%	21.7%	24.6%	59.3%	52.6%	10.4%	20.7%	32.0%	26.0%	49.2%	34.1%
Minimally processed, traditional	27.3%	22.7%	37.5%	21.7%	10.1%	10.4%	36.0%	37.0%	29.4%	18.5%	24.5%	25.0%
Availability and affordability of food	19.8%	14.3%	19.2%	18.7%	17.7%	16.4%	21.0%	19.1%	15.1%	45.8%	31.4%	21.7%
Healthy	20.3%	16.5%	27.6%	17.7%	13.7%	12.9%	25.6%	33.4%	15.9%	28.7%	21.5%	21.3%
Fair revenue for farmers	30.5%	20.7%	18.5%	21.4%	26.8%	27.3%	12.3%	7.8%	33.8%	19.7%	14.8%	21.2%
High animal welfare standards	17.7%	20.5%	19.1%	18.8%	28.2%	32.9%	22.3%	17.9%	29.3%	12.6%	8.2%	20.6%
Economic growth in the agri-food sector	8.7%	13.4%	6.8%	11.3%	3.9%	5.0%	8.2%	7.2%	11.0%	14.7%	16.1%	9.6%
Total	243.8%	243.6%	257.8%	240.2%	272.9%	261.3%	232.7%	223.7%	250.5%	236.3%	231.0%	244.7%

Base: full sample weighted – S-7  
MULTIPLE RESPONSE ANSWER

Most prevalent answer / 2° most prevalent answer / 3° most prevalent answer

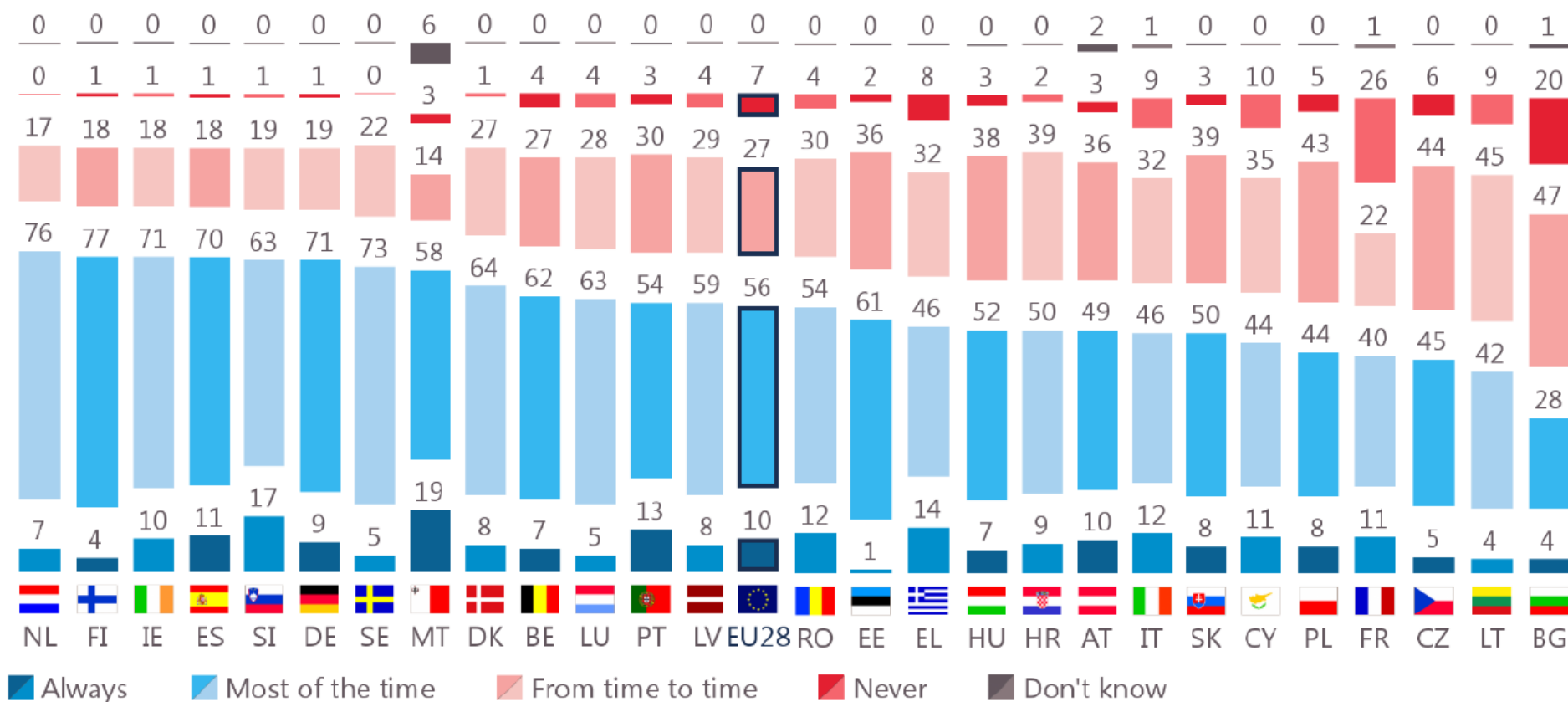
# CONSUMERS TEND TO UNDERESTIMATE THE IMPACT OF THEIR EATING HABITS

- Slightly over 10% agree that what they eat has a negative impact on the environment (BEUC, 2020).
- Most Europeans (but replies vary by country) say that they eat a healthy and sustainable diet most of the time (56%) or always (10%) (Special Eurobarometer 501, 2020).
- Over half of consumers say that sustainability influences their eating habits (BEUC, 2020).
- Yet they prioritize taste, food safety and cost (Special Eurobarometer 501, 2020).



## Source: Special Eurobarometer 501. Making our food fit for the future – Citizens' expectations, 2020

**QB6** Would you say that personally, you eat a healthy and sustainable diet...  
(%)





# WILLINGNESS TO CHANGE ... BUT SOME CHALLENGING STEPS



# BARRIERS TO SUSTAINABLE EATING





# PRICE, AVAILABILITY, KNOWLEDGE AND INFORMATION

- ✓ Only 19% of Europeans say they have changed their diets to incorporate more sustainable food (Special Eurobarometer, Attitudes of European citizens towards the environment, 2020).
- ✓ Price, lack of knowledge, the difficulty to identify sustainable food options as well as their limited availability are the main perceived barriers (BEUC, 2020).
- ✓ Making healthy and sustainable food more affordable (49%) and available where they usually shop (45%) would help Europeans most in adopting a healthy and sustainable diet – before information/labelling (41%) and education (29%) (Special Eurobarometer 501, 2020).

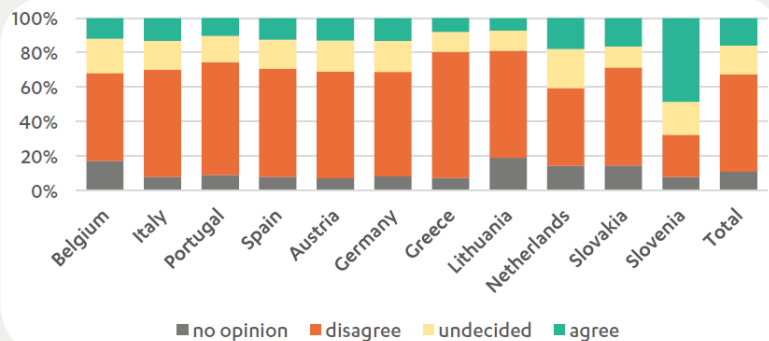


# WHO SHOULD PLAY A ROLE?

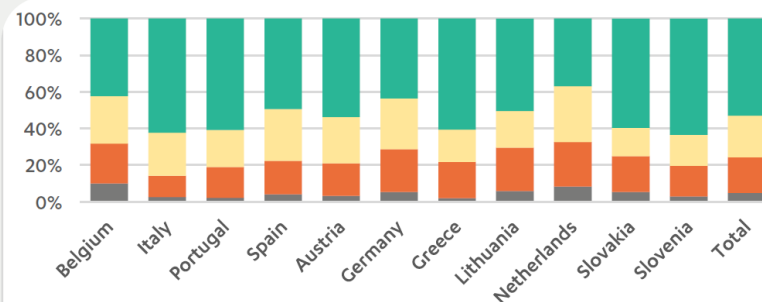


# SUSTAINABILITY AS A SOCIETAL CHALLENGE

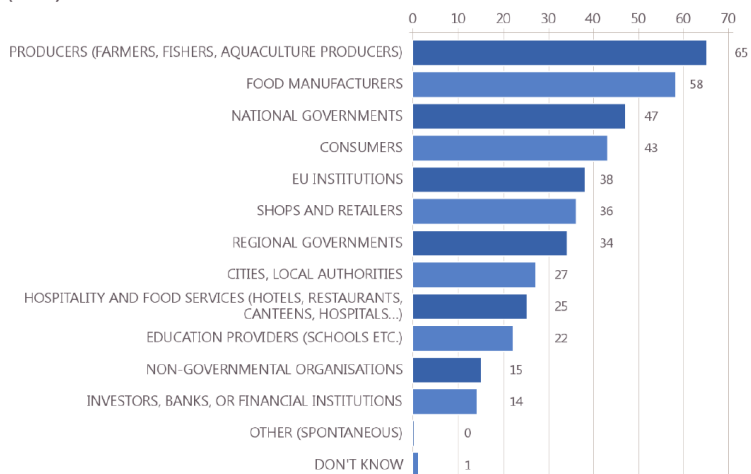
## THE GOVERNMENT IS DOING ENOUGH IN ENCOURAGING/ PROMOTING FOOD SUSTAINABILITY



## FARMERS SHOULD BE GIVEN INCENTIVES (E.G. THROUGH SUBSIDIES) TO PRODUCE FOOD MORE SUSTAINABLY

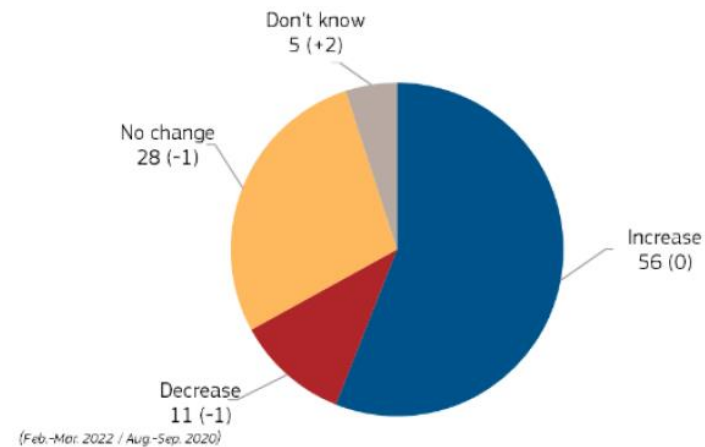


**QB5** According to you, which actors from the list below have a role to play in making our food systems sustainable? (MULTIPLE ANSWERS POSSIBLE)  
(% - EU)



Base: all respondents (n= 27,237)

**QA11** And over the next 10 years, would you like to see an increase, decrease or no change in EU financial support to farmers?  
(% - EU)



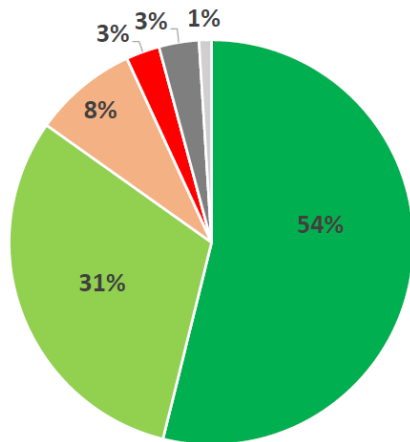
(Feb.-Mar. 2022 / Aug.-Sep. 2020)

# HAVE FARMERS' PROTESTS CHANGED CONSUMERS EXPECTATIONS?

The case of France

## LA CRISE AGRICOLE

Soutenez-vous le mouvement de contestation initié par les agriculteurs ?



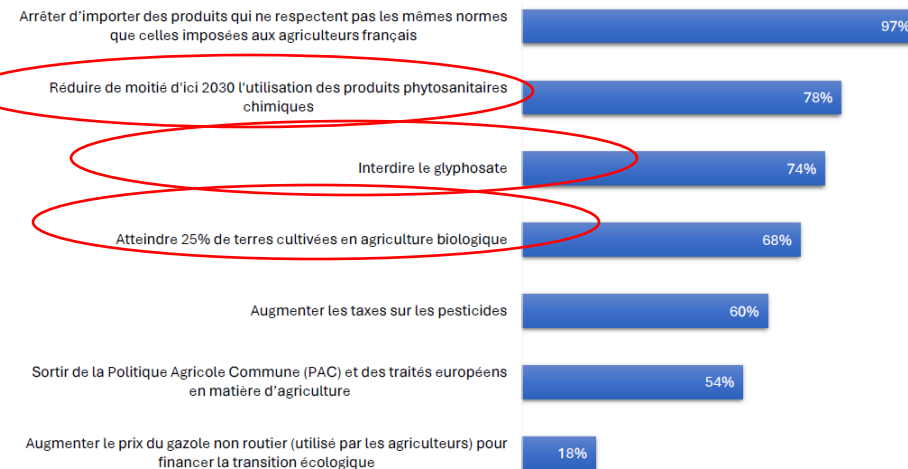
■ Oui, tout à fait  
■ Oui, plutôt  
■ Non, plutôt pas  
■ Non, pas du tout  
■ Vous n'avez pas d'opinion  
■ Vous n'en avez pas entendu parler

Sondage réalisé du 25 au 27 janvier 2024 sur un échantillon de 1414 personnes, représentatif de la population française

Cluster17

## LA CRISE AGRICOLE

A propos des propositions suivantes diriez-vous que vous êtes tout à fait d'accord, plutôt d'accord, plutôt en désaccord, tout à fait en désaccord, ou sans opinion ?



Sondage réalisé du 25 au 27 janvier 2024 sur un échantillon de 1414 personnes, représentatif de la population française

# WHAT ROLE FOR LABELS?





# CONSUMERS NEED CLEAR AND TRUSTWORTHY INFORMATION

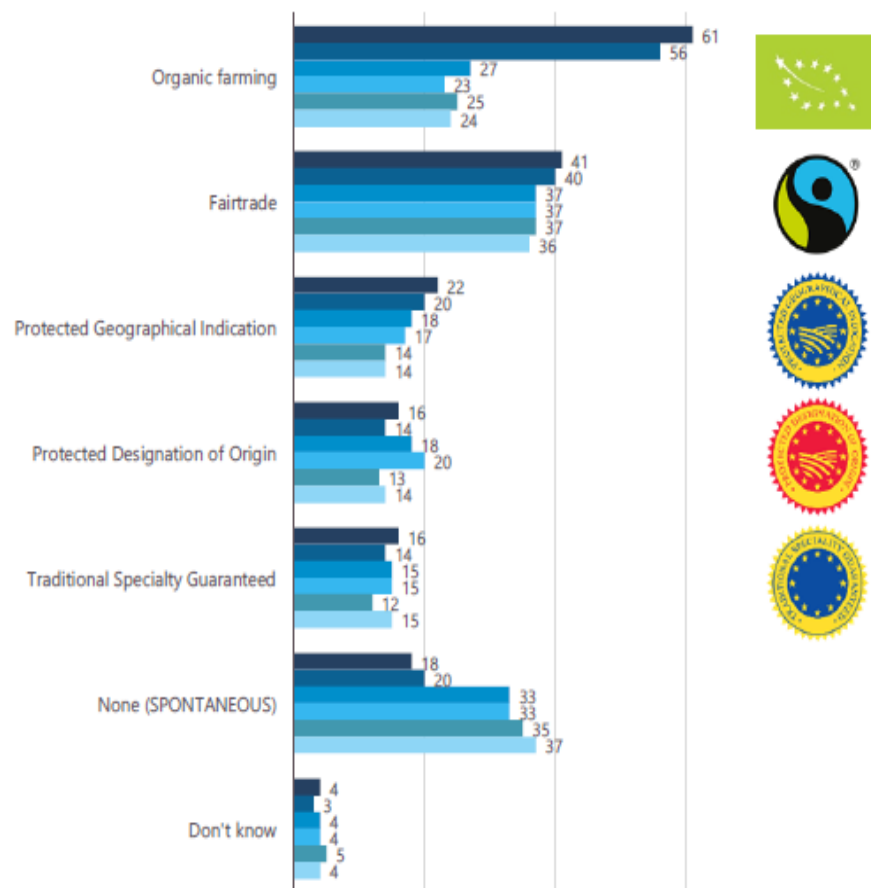
- 67% of consumers would use information on the sustainability of food ... (EIT Food, 2023).
- ... but they also feel there are too many labels and logos (EIT Food, 2023 & BEUC, 2023).
- Consumers trust public authorities more than companies when it comes to labelling & claims (BEUC, 2023).
- Avoid plethora of new initiatives (public and/or private).
- **Need for a harmonised, mandatory EU food sustainability label?**



# BEWARE THE LABELLING 'JUNGLE'

QA13 Which of the logos are you aware of? (MULTIPLE ANSWERS POSSIBLE)  
(% - EU)

■ Feb.-Mar. 2022 ■ Aug.-Sep. 2020 ■ Dec. 2017 ■ Oct. 2015 ■ Nov.-Dec. 2013 ■ Mar. 2012



## CONCLUDING REMARKS

- The direction of travel is clear; business-as-usual not an option.
- Discussion should not be on *whether* or *why*, but on **HOW**.
- Consumers increasingly expect food to be produced sustainably and are willing to change the way they eat, but they need a hand.
- The role of food environments: we need to collectively **design ways to 'unburden' the consumer and make sustainable, healthy food an easy and affordable choice** – so that demand for healthy and sustainable food drives/matches supply.



**BEUC** The European  
Consumer  
Organisation

The Consumer Voice in Europe

**Thank you** for your attention

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