



FOCUS BALKANS NEWSLETTER



FOCUS
FOOD CONSUMER SCIENCE IN THE BALKANS



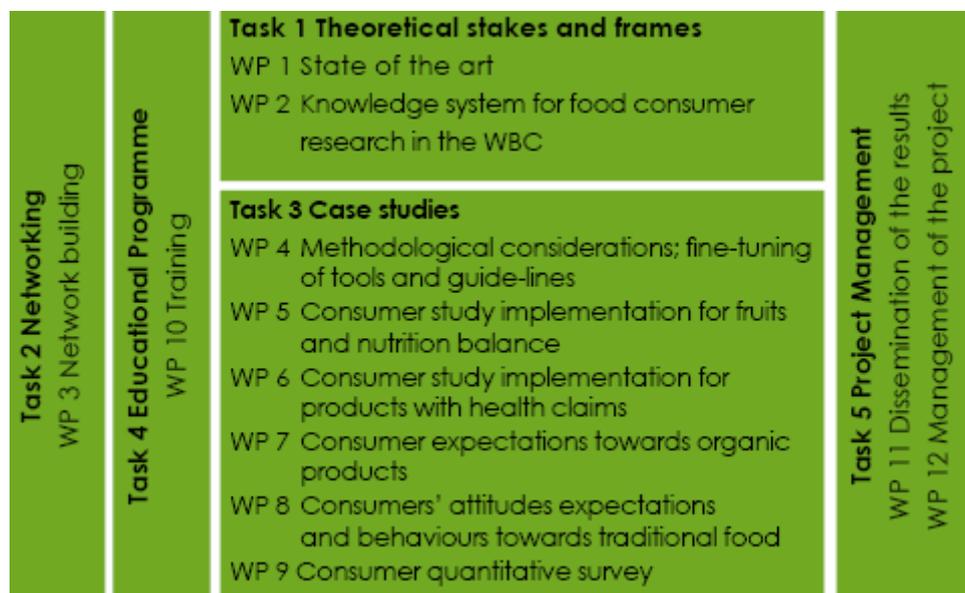
PROJECT DESCRIPTION

FOCUS-BALKANS is a small collaborative project financed by the 7th Framework Programme FP7. The general objective of the project is **to improve competencies and understanding in the field of consumer food science in the Western Balkan countries (WBC)**. The scientific results of the research will make important contribution to the public health and consumer protection and to the achievement of the objectives within the Framework Programme 7. The specific objectives are to:

- Develop the competences and understanding of public organizations, private enterprises and NGOs in the WBC countries regarding food consumer science (training);
- Develop a network of universities, institutes, high schools, consumer organizations, NGOs and private enterprises active in the field of food consumer science that are able to develop joint-research activities (networking);
- Have a better understanding of food consumers in the WBCs, with a focus on products with positive nutritional properties (fruits and health/Diet foods) and/or sustainability (organic and traditional food products).

Four studies on niche markets plus one quantitative survey are systematically being conducted by WBC organizations as a mechanism of learning-by-doing.

The project is divided in twelve work packages which are divided into five tasks.





WP 6 RESULTS: CONSUMER STUDY IMPLEMENTATION FOR PRODUCTS WITH HEALTH CLAIMS

Full report downloadable here: [DL 6.1 Study report on consumer motivations and behaviours for products with health claims](#)

The consumer study on products with health claims has been implemented.

The case study is linked with the Regulation of the EC on health claims 1924/2006.

Market segments targeted in this study are milk and yoghurt, juices, margarine and jam.

The objective is to identify the image and values of health food product by the local consumers.

The study addresses the following research questions:

- Do consumers in WBC associate products with claims with the specific benefits?
- Which factors influence WBC consumers' perception of the studied categories?
- What are companies' motives for launching and marketing products with Nutritional and Health claims?
- What strategies the policy makers' use to influence WBC Nutritional and Health claim products market development?
- What are consumers' perceptions of these products?
- What is the actual contribution of companies (both processors and retailers) operating in WBC on Nutritional and Health claim products market development?
- Does the form of product health benefit communication influence consumers' choice of food?

The starting point of the research is the fact that processors advertise their products with a growing use of a specific property with a healthy added value.

A strict regulatory criteria is used through the analysis of the relevant legislation in the WBC and in the European Union.

The list of studied products is defined through shop check method and selection, with a repartition by family of products:

- *Milk enriched with vitamins or minerals;*
- *Yoghurt with probiotics;*
- *Jam for persons suffering from diabetes;*
- *Low fat margarine;*
- *Juices enriched with vitamins or minerals.*

REGULATIVE ASPECTS

In most WBC the regulation is not fully harmonized with related EU regulative, but there is a significant correlation in lawfully permitted claims.

Nutrition claims are allowed and clearly specified.

In other WBC, health claims stating illness risk reduction cannot be used. Additionally, advertising by using pictures, signs or text which may mislead consumers in the context of content, characteristics and purpose of food cannot be used.

Structure and function claims, on the other hand, are not forbidden.



Table 1 - Research methods and results

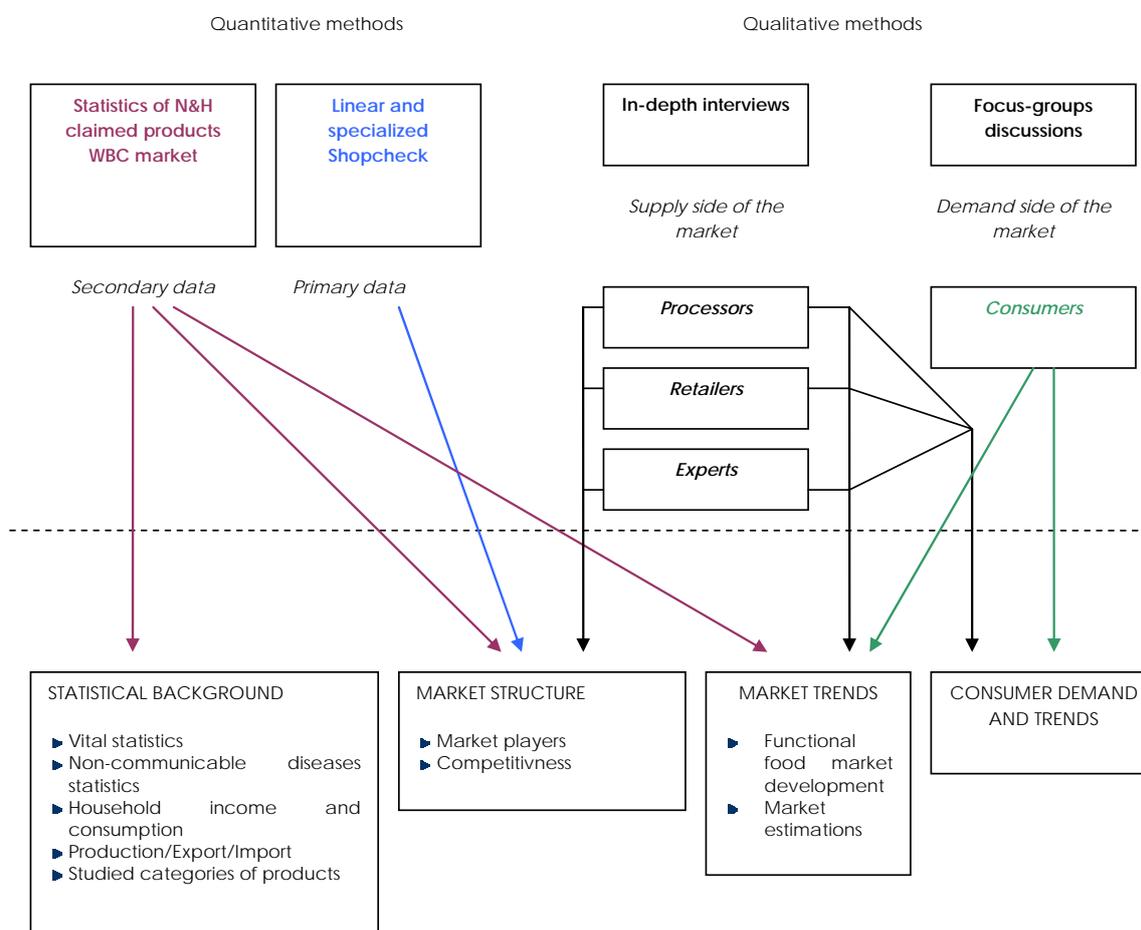


Table 2 - WBC Nutritional and Health market background – The selected primary data collected by shop check

Country	Regulative	No.products surveyed	Max claims per prod.	Dominant type of food	Share	Dominant-producers	Share	Share of health claims
Slovenia	Yes	100	3	Milk and yoghurt and dietetic food	30-31%	EU	54.50%	19%
Croatia	Yes	94	3	Dietetic food	38.30%	EU	52.60%	20%
Serbia	No	166	7	Milk and yogurt and dietetic food	33-33%	SRB	58.40%	17%
Bosnia and Herzegovina	No	105	4	Juices	33%	WBCs	47.60%	14%
Montenegro	No	52	6	Milk and yogurt	36.50%	WBCs	75%	20%
Macedonia	No	140	7	Milk and yogurt	37.10 %	WBCs	41.40%	26%



MARKET ANALYSIS THROUGH PROCESSORS RETAILERS AND EXPERTS INTERVIEWS

Processors, retailers and experts were asked about:

- Overall attitude toward consumers demand;
- Main criteria and restraints for consumer's choice;
- Perceived consumers' characteristics;
- Each stakeholder cross-perception;
- Nutritional and Health claims market current status, trends and perspectives.

Processors and retailers were asked to provide insights about studied categories (general presentation and market estimation).

Expert's point of view was more concentrated on following issues:

- Nutritional concerns and consumer awareness;
- Variety and nutritional quality of the offered product;
- Regulations and compatibility with EU legislative;
- Public programs of communication to promote better food habits;
- Priorities and the main governmental objectives.

EXPERTS IN-DEPTH INTERVIEWS

Statement	Min	Max	Average
Nutrition and health claims improve consumer awareness on the importance of food.	1	5	2.85
Nutrition and health claims help consumers improve consumer dietary habits.	1	5	3.35
Nutrition and health claims are suited to the main health concerns seen by health officials.	1	5	2.5
Nutrition and health claims on food products improve public health.	1	5	2.85
The claims made on food products in our country are truthful.	1	5	2.42

The experts think that their consumption of Nutritional and Health products will be influenced by:

- The truthfulness of nutrition and health claims;
- Understanding of these claims;

Marketing campaigns for the products with nutrition and health claims.

ATTITUDES TOWARDS PRODUCTS WITH HEALTH CLAIMS: FOCUS GROUPS DISCUSSIONS

- Respondents: who was targeted?
 - ELDERLY (people over fifty)

Because it was expected them to have more health related problems, due to their age. This should result in more attention to healthy diet.

- MOTHERS of children up to 15 years of age

Because they should be more awareness of healthy nutrition in this group, since they are in charge of their children's eating.

- Methodology

Two or three recruiters per country. Recruitment was done face to face or by telephone interview. The number of participants per group varied from 6 to 11.

Blind recruitment procedure (participants were not informed about the discussion topic) in order to avoid self-selection according to interest in food and healthy food in particular.

- Nutritional labels: what do they tell to the consumers ?

Detailed nutritional information: is seen as a quality guarantee. It indicates it has been properly analyzed. It is important for it to be translated in local language. But there is no habit of reading and no understanding of



nutritional labels. If nutritional labels are read, they are scrutinized for **NEGATIVE INFORMATION**: dangerous additives or preservatives.

Detailed scrutinizing of nutritive labels exists only for **SOME** products and **SOME** populations:

Only for a few products, consumers know what to look for content-wise, they are aware of quality indicators (e.g. percentage of cocoa in chocolate).

Specific subpopulations (Chronically ill, allergy prone, on special dietary regiment) are forced to be informed about nutritive content: percentage of fat, sugar, allergens.

- *Products with health claims: motives for purchase*
 - Innovative, scientific;
 - Specific ingredient (familiar health claim);
 - Prior experience;
 - Word of mouth;
 - Trend.
- *Products with health claims: barriers for purchase*
 - Doubt in added ingredients: vitamins, minerals, Q10 and other enzymes- they are untraceable;
 - Some adding is unnatural and unnecessary;
 - Health claim doesn't communicate to consumers;
 - Products perceived as products for specific groups. Part of the population doesn't view themselves as potential consumers.
- *Conclusions*

We cannot automatically assume that consumers will accept novel foods if there is a concrete and tangible consumer benefit associated with them, which implies that functional foods would quickly be accepted.

There is evidence that individuals are likely to differ in the extent to which they are likely to buy products with particular functional properties.

Understanding consumers' risk perceptions and concerns associated with emerging scientific innovations and their own health status may enable the development of information strategies that are relevant to wider groups of individuals in the population, and deliver real health benefits to people at risk of, or suffering from, different illnesses.

There can be two main causes to these barriers:

- **Knowledge**: majority of consumers are still uneducated when it comes to this type of product and express resistance towards interpreting complicated scientific claims;
- **Accepting innovation**: there is doubt and resistance to change (health claims that are longer present on the market are taken to be trustworthy, while the new ones are rejected).

KEY RESULTS

FGDs show that consumers coming from the more developed functional food markets (in WBC those are Slovenia and Croatia) express more doubt on health claims. Croatian consumers prefer domestic products, whose claims are verified by the local health agencies.

Serbian consumers accept functional products only when linked to traditional brands and show less awareness when it comes to this product type, this might indicate an earlier stage of functional food market development.

Montenegrin, Macedonian and Bosnia and Herzegovinas' consumers seem just to be starting to perceive this specific food category and its' links to health status.



- *What is an effective health claim, according to consumers?*



MARKET PERSPECTIVES RELATED TO N&H CLAIMS PRODUCTS

It is highly possible that Nutritional and Health claims products will go through a fashion product life-cycle stages – introduction, fast growth, short maturity and steep decline. The current target population covers young, well educated, high income, urban population, mostly females.

In the more developed WBC Nutritional and Health claims products market target population is even now expanding to mothers seen as “household gate keepers” and children.

Consequently, after the innovators and early adopters (young active female), elderly with high income might be also an interesting consumer group for the studied categories of products in near future, as well as sportsman and businessman (early majority).

It can be argued that this market segment is going through a multidimensional transition: from children to elderly people, from high income to middle income classes, from women to men. The market development will strongly depend on the public policy makers’ activities in promotion of healthy food concept and healthy diet in WBC.

NETWORKING MEETINGS

Bosnia and Herzegovina: November 2010
 Croatia: December 2010
 FYRo Macedonia: December 2010

Montenegro: December 2010
 Serbia: November 2010
 Slovenia: October 2010



PARTNERS IMPRESSION ABOUT FOCUS-BALKANS PROJECT



Tomica Lidija, Faculty of Agriculture in Banja Luka, Bosnia and Herzegovina

FOCUS BALKANS brought bright outlines of the food consumer science to Bosnia and Herzegovina. In Bosnia and Herzegovina this is a bright new area of work and there were no any experience nor data related to the field. At the moment being we already have valuable national reports and other relevant data collected at one place that were no existing before. Also a big network of local stakeholder was created and important contacts were established. Our project also gave all collaborators a good idea and sense about good project practices in making ideas becoming realistic through the well organized management.

I personally completely changed my perspectives related to the food consumption in connection to the environment protection. Project improved people consciousness and attitudes that will have a big influence for the coming generations.



Schaer Burkhard, ECOZEPT, Germany

Focus Balkans gives me the possibility to apply my experiences about the western European food markets to a region that I hardly knew before. I discover splendid countries and I'm so impressed by their immense (potential) agricultural richness. Looking at the food and agriculture sectors in WBC makes me question a lot my habitudes to classify and to analyze markets: Working with the WBC partners, our exchange on methods, on literature, our very open discussions, is truly enriching for me and I learn a lot.

I'm thinking more about vertical cooperation in food supply chains and about transparency towards the consumer. With regard to the food supply chains in WBC, I gather two main impressions: on the one hand, everything is so fresh and new and on the move. On the other hand, the strong influence of "western" processing industry and retailers makes me wonder whether the newfound structures can really correspond to the needs and wishes of the WBC people: do they want to modernize? Or do they just reluctantly accept process that seems like a take-over of their food sector by the "agrofood superpowers"?

FOCUS-BALKANS WEBSITE

The project website is now online in Bosnian, Croatian, English, Macedonian, Montenegrin, Serbian and Slovenian language. It is very important for the future of the project that all interested persons in the different WBC countries feel more concerned by this website.

Link: <http://www.focus-balkans.org>

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