An analysis of the Consumer Behaviour of Organic Products in Cyprus

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Abstract

The given project is dedicated to the development of the organic product market in Cyprus, which is indeed growing very fast all over Europe and across the world. The aim of the paper is to explain what organic production is, to show how it has been developing until now and what is the situation in Cyprus today. This paper will analyse the consumer behaviour of these products through a quantitative research approach and more specifically through a personal survey. It is safe to conclude that the organic sector in Cyprus is gradually developing. The consumers are aware of this type of products and there is purchasing intention despite the higher prices. The research findings indicate that the main reason that motivates customers to buy organic products is health reasons, and the barriers are product availability, the limited choice and price. In this important time of climate change, organic farming and consumption is one of the ways to protect our environment.

Keywords: organic production, price, quality, consumer behaviour

Introduction

"Organic" or "biological" products are becoming very popular among consumers in many countries across the world. The levels of development of organic production are highly increasing every year. Organic products have started to take quite a large place in the international food market, and it is important to review constantly organic farming in different countries in order to detect common successful strategies and mistakes causing problems on its development. This research project is dedicated to the development of organic production in one of the European countries, which is Cyprus.

Almost everyone knows the word "organic", but not everyone understands the exact meaning of this word. In reality the explanation of it is very complicated. All the definitions, related to the organic farming, are given in the texts of the EU Regulations (European Commission, 1991, 1992, 2007, 2012c). Like that the organic production defined as "an overall system of farm management and food production that combines best environmental practices, a high level of biodiversity, the preservation of natural resources, the application of high animal welfare standards and a production method in line with the preference of certain consumers for products produced using natural substances and processes" (European Commission, 2007, p 1).

According to Neubauer (2012) all negative what non-organic agriculture do is the following:

> Threatens our environment, destroys soils, generates local and global imbalances in agro-ecosystems, creates economic and sanitary problems for farmers and the wider population, decreases the resilience capacity of agro-ecosystems, makes live multinational companies, raises concerns about the quality of food, creates animal suffering.

Therefore a whole system was developed for organic production, which includes the production rules, conversion rules, inspection and certification system and many other things (European Commission, 1991, 1992, 2007, 2012c).

Actually if to review the development period of organic farming in the past, before it was officially recognized, then it is possible to divide it on the three following stages:

1. Biodynamic agriculture, the founder of which was Rudolf Steiner (1920);
2. Organic farming, when Albert Howard wrote “Agricultural Testament” (1940);
3. Biological agriculture, which was developed by Hans-Peter Rusch and Hans Muller (Switzerland) (European Commission, 2000; Schmid et al., 2008).

At that time there was no clear definition of organic production, there was no any structure and organization at all, even though the popularity of organic food was constantly increasing. What was at that time is a strong necessity for some system and common rules and standards regarding organic production on the international level (European Commission, 2000). As a result the European Commission and the governments of EU countries came to the common decision to create the exact definition for organic product, to set up the standards for organic farming and to take the production and sales of organic food under the EU control.

Beginning from 1980 European Commission together with the governments of European countries and numerous organizations were working on improvement of the rules of organic farming with the purpose to cover all the areas of this sector, to create clear and well organized standards in order to support, develop and control organic production. As the result of those efforts the legislation on organic production nowadays plays an increasingly important role in the agricultural policy framework and is closely related to the developments on the agricultural markets (European Commission, 2007).

Regarding Cyprus there is almost no research on organic farming and consumption even though this sector is growing every year. Therefore this paper will attempt to cover the existing gap in the literature and describe the development of organic consumption in Cyprus.

Based on the above it is possible to define the following objectives:

1. To describe shortly the organic market in Europe.

2. To show development of organic production in Cyprus and to describe the present situation regarding it.
3. To define existing problems in Cyprus regarding the organic product, analyse them and to offer possible solutions to these problems.

Organic Market

Nowadays the popularity of organic product is constantly growing and together with this is also growing the awareness of the people about this type of product. "Since 1991, organic farming has developed from a marginal sector, restricted to the local market, into a sector of national, Community and international trade, with mass distribution outlets"(European Commission, 2000, p. 24). In 2007 there were 32.2 million hectares of organic agricultural land around the world with more than 1.2 million producers, and in 2009 the number has increased up to 37.2 million hectares with 1.8 million producers. In Europe specifically there were at about 9.3 million hectares of organic land (Häring et al., 2004; Willer and Kilcher, 2009).

The governments of many countries understand the importance of organic production. Like that, the former Minister of Agriculture in Cyprus, Sofoclis Aletraris said during the Conference "Organic Days in Cyprus": "organic farming deserves our special attention and privileged treatment" (IFOAM EU Group, 2012b, p. 1).

The European Union every year invests heavily in different projects concerned with organic farming.

But still if to compare the amount of money spent for the organic and non-organic agriculture the difference is huge. The data is presented in the table below:

Table 1. Budget spent on Organic Agriculture (OA) from 1990 to 2006

Framework programme	Budget for research on OA in M€	Total budget of FPs in M€	% of budget spent on OA research

FP3 (1990-1994)	**5**	6600	0.08
FP4 (1994-1998)	**11**	13215	**0.22**
FP5 (1998-2002)	**33**	14960	**0.20**
FP6 (2002-2006)	**41**	17500	**0.23**

Source: Adapted from Neubauer (2012)

However, payment rates, eligibility conditions and requirements vary considerably between the European countries (Schmid et al., 2008).

Legislation

Regarding the legislation the final organic Council Regulation EC 834/2007 was adopted 28 of June 2007, and 20 of July 2007 it was published in the Official Journal (Mikkelsen and Schluter, 2009). Officially it came into force from the 1st of January 2009 (European Commission, 2007; IFOAM EU Group, 2012). The last regulation comparing to the previous one is more simple, clear and understandable; new definitions were introduced; the organic norms and standards were further developed and structured (European Commission, 2007; Mikkelsen and Schluter, 2009; IFOAM EU Group, 2012).

The Regulation 834/2007 (European Commission, 2007, p.5) covers many areas of organic farming regarding:

> Plant, livestock, and aquaculture production, collection of wild plants and seaweeds, rules on conversion (which means “the transition from non organic to organic farming within a given period of time”), during which the provisions concerning the organic production have been applied.

The Council Regulation 967/2008 was published afterwards, according to which the introduction of the EU logo was made on 1st of July 2010. “The design is often called «Euroleaf». “It symbolizes the marriage of Europe (the stars derived from the European flag) and Nature (the stylized leaf and the green colour)” (Kilcher et al., 2011, p. 86).

In addition the Commission Regulation (EC) No 889/2008 completed the standards with detailed production rules, labelling rules and control requirements;

Commission Regulation (EC) No 1235/2008 implemented the new import regime (IFOAM EU Group, 2012a). Also the first rules for yeast have been introduced, and a new system of import controls was implemented (IFOAM EU Group, 2012b). Regarding the production of organic wine "in early 2012 the legislation based on IFOAM EU's input was adopted. From now on, this is the binding legal standard for organic wine making" (IFOAM EU Group, 2012b, p. 7).

In the nearest future in 2013 the new CAP reforms are expected. As said the President of IFOAM Christopher Stopes (IFOAM EU Group, 2012b, p.3) during the Conference "Organic Days in Cyprus":

> The current CAP reform will shape the future of European agriculture. The reform, in particular the formulation of the new rural development programme, will be central to discussions at this conference.

All the news regarding the European laws and other documents are daily published in the Official Journal of the European Union, which exist as from 1952. Beginning from 1998 the electronic version in PDF format of the Journal is available. "It consists of two series: L (Legislation) and C (Information and Notices). E and A are Official Journals published as annexes to the C series" (European Commission, 2012b, p.1).

The development of the organic sector in EU is going gradually and requires a lot of work and time from the governments of all European countries and different organisations as well. It is not an easy process, therefore there were developed a lot of different Regulations and laws. But the understanding of the importance of organic food by the people and demand on the market are growing constantly together with the levels of the production. In the last years European countries put a lot more efforts in order to contribute to successful development of the organic sector. Nevertheless, in order to have a well organised system, which will be controlling and guiding the organic production, and will correspond to the interests of the producers and of the consumers at once, there are a lot more of work, time and financial sources are needed.

Description of the organic market in Europe

The popularity of organic product and the levels of production and development in the other EU countries except Cyprus started growing much earlier and were developing much faster comparing to the island. It is possible to see from the table below the sales value for organic production in 2003:

Table 2. Retail sales value (RSV) estimates for organic products, 2003

	Billion Euro RSV	*% of total market*	*Medium term growth rate % (2002 forecast)*	*(2003 forecast)*
Germany	2.8-3.1	1.7-2.2	10-15	5-10
United Kingdom	1.6-1.8	1.5-2.0	15-20	10-15
Italy	1.3-1.4	1.0-1.5	10-20	5-15
France	1.2-1.3	1.0-1.5	10-15	5-10
Switzerland	0.7-0.8	3.2-3.7	10-15	5-10
Denmark	0.3-0.4	2.2-2.7	10-15	0-5
Austria	0.3-0.4	2.0-2.5	10-15	5-10
Netherlands	0.4-0.5	1.0-1.5	10-20	5-10
Sweden	0.4-0.6	1.5-2.0	15-20	10-15
Belgium	0.2-0.3	1.0-1.5	10-15	5-10
Other Europe	0.8-0.9			
Europe total	**10.0-11.0**			
USA	11.0-13.0	2.0-2.5	20	15-20
Global total	**23.0-25.0**			

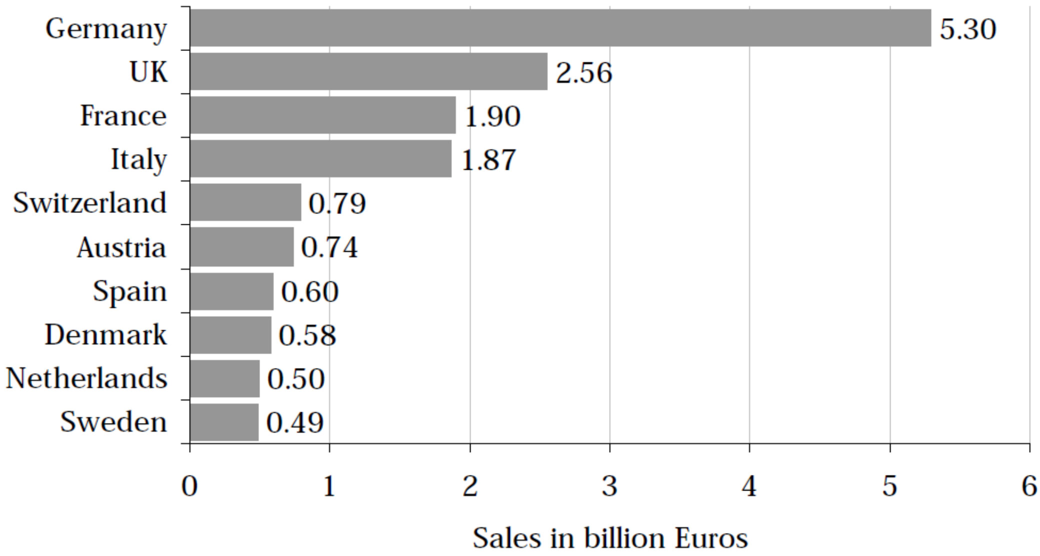
Source: Adapted from Lampkin and Dabbert (2003, p. 3)

All countries are different and have different economical and climate conditions. According to Lampkin, (Lampkin, N., Dabbert, S., 2003, p.8) the policies regarding successful development of organic farming can be developed on the next levels:

- Producer – focused support;
- Supply chain – focused support;
- Consumer – focused support.

The support, proper communication, flow of information should be applied to the whole food chain, and also partnership in all levels, mostly between stakeholders and government, is necessary. If to describe shortly the situation in the organic market generally in all EU countries, it is possible to indicate that they have many advantages comparing to Cyprus regarding the development of organic production in terms of their territory, favourable soil, weather conditions, borders with the other countries, number of population, etc.

Figure 2. European market for organic food: The ten countries with the highest sales



Source: Adapted from Willer and Kilcher (2009, p. 156)

The different European countries specialize on the different types of products. Like that, in Italy (241’430 hectares), Germany (181’000 hectares) and Spain (102’593 hectares) most of the cereals were grown. The vegetable area is particularly in the United Kingdom, Germany, France, Greece and Spain. Fruit and wine growing has more and more demand in many countries every year. Wine industry became very popular and at the same time profitable. Major areas can be found in Spain (53’841 hectares) and Italy (46’398 hectares), followed by France (9’648 hectares) and Germany (5’600 hectares). The citrus area has grown in all southern European countries and is at 28’000 hectares. Nearly seven percent of the olive area or 280’000 hectares are managed organically, with the major production countries being Italy (109’902 hectares), Spain (94’251 hectares) and Greece (52’552 hectares). (Willer, H. and Kilcher, L., 2009, p. 153)

EU represents many countries, and even though the European rules are common for all these countries, but there are some differences on the local level. In order to have detailed picture of the organic production development in the particular country it is necessary to review the details of organic production, government incentive schemes and legislation, producers, supply and distribution channels, main statistical indicators; control bodies, which are carrying out the inspection and certification in the field of organic farming in accordance with the provisions set out under the Regulation in force; finally consumers attitudes towards the organic products (European Commission, 2007, 2012a).

Development of Organic Sector in Cyprus

Regarding Cyprus the organic sector here is at the early developing stage now. At the moment "there are about 800 organic producers with cultivated area exceeding 4000 hectares, representing 3.1% of the total cultivated area" (IFOAM EU Group, 2012b, p.1). The Horticulture section of the Ministry of Agriculture is responsible for the implementation of Community and National legislation regarding organic production (Department of Agriculture, 2010).

According to the statistical data available from Eurostat, the statistical office of the European Union, the fully converted organic land appeared in Cyprus from 2004, and afterwards the number of Ha used has been increasing every year. The table below contains the information about the fully converted area in different European countries including Cyprus for the time period 2002 – 2009.

Table 3. Fully converted crop area in EU, 2002 – 2009

VARIABLE: Fully converted crop area (Ha) **LABEL:** Organic **CROPITEM:** Total crops

TIME	2002	2003	2004	2005	2006	2007	2008	2009
GEO								
European Union (27 countries)	:	:	:	:	:	3,997,440(s)	4,487,798(s)	3,761,884(s)
European Union (25 countries)	:	:	:	:	:	3,904,464(s)	4,411,965(s)	3,678,022(s)
European Union (15 countries)	:	:	:	:	:	3,166,499(s)	3,449,259(s)	2,997,829(s)
Belgium	24,820	16,176	19,853	19,764	21,754	23,842	27,376	29,778
Bulgaria	:	:	:	:	2,728	8,387	4,236	4,955
Czech Republic	:	195,216	208,000	226,209	216,319	224,373	232,939	267,483
Denmark	148,279(p)	149,106(p)	149,219	132,283	133,048	:	139,021	139,539
Germany (including former GDR from 1991)	:	:	:	:	:	:	:	:
Estonia	:	:	:	36,487	44,878	55,445	71,848	76,200
Ireland	:	:	24,568	23,533	:	:	:	37,662
Greece	65,555	192,190	202,799	206,205	182,848	174,724	266,745	293,644
Spain	314,640	374,001	430,900	470,832	605,296	640,536	691,196(p)	605,366
France	342,406	406,338	468,476	:	499,589	497,314	502,234	525,638
Italy	746,511	751,860	708,043	731,537	801,350	903,254	812,139	735,327
Cyprus	:	:	111	230	665	1,398	:	1,890(s)
Latvia	:	:	12,142	20,691	51,213	62,321	141,524	141,070
Lithuania	:	:	18,395	13,905	30,498	56,542	89,890	106,060
Luxembourg	1,019	2,130	2,741	:	:	2,721	:	3,245
Hungary	54,264	70,514	75,834	84,765	92,167	98,243	108,578	110,916
Malta	:	:	0	0	0	:	:	16(s)
Netherlands	38,340	40,681	46,137	46,877	47,045	45,463	46,895	47,450
Austria	:	:	:	:	:	:	:	:
Poland	:	:	37,724	38,609(s)	47,570(s)	135,815(s)	178,670	222,022
Portugal	35,364	54,480	75,143	110,370	:	:	:	:
Romania	:	:	:	:	65,111	84,590	71,597	83,862
Slovenia	:	:	14,354	15,985	20,151	23,560	26,125	25,816
Slovakia	:	35,302(s)	25,590(s)	27,247(s)	40,085(s)	80,268(s)	113,132(s)	111,466
Finland	135,434	142,054	148,183	135,223	130,940	133,543	134,820	143,033
Sweden	186,695	207,328	206,631	200,638	201,298	234,429	246,628	303,298
United Kingdom	536,866	629,482	635,495	527,836	489,108	510,673	582,205	607,940
Norway	25,255	30,883	34,957	36,510	38,881	40,096	40,376	43,986
Switzerland	:	:	:	:	:	:	:	:

Source: Adapted from Eurostat (2012)

The government of Cyprus is supporting farmers producing organic food through Rural Development Programme (RDP). There are some lectures supported by the government in order to educate farmers in terms how to convert into organic, how to grow organic vegetables and how to treat the animals. The purpose of the lectures is to explain to them what it is organic production and how it can benefit the farmers.

Theoretical Framework

The food consumers are considered to be one of the main figures in the organic farming because they are the products' target market and of course the final users of organic product. The main purpose of each type of selling is to achieve customer satisfaction. This paper is no exceptions; therefore it is very important to identify customer knowledge about the organic production, to understand their beliefs and purchasing intentions. Many researches in the different countries across the world are dedicated to this topic. Consumer behaviour can be analysed from many aspects. There are many sensitive areas which could be analysed in order to understand consumers' attitudes and needs, which include knowledge, health issues, price sensitivity, environmental protection, people's personal concerns, etc.

There are different ways to study the consumers' preferences. Some of the studies suggest dividing the consumers of organic products into groups and analyze their responses accordingly. Pino, Peluso and Guido from Italy (2012) in their survey divided all buyers on "regular" and "occasional". The authors presented two different figures, which show why consumers buy organic product:

Figure 4. Motivation of regular buyers

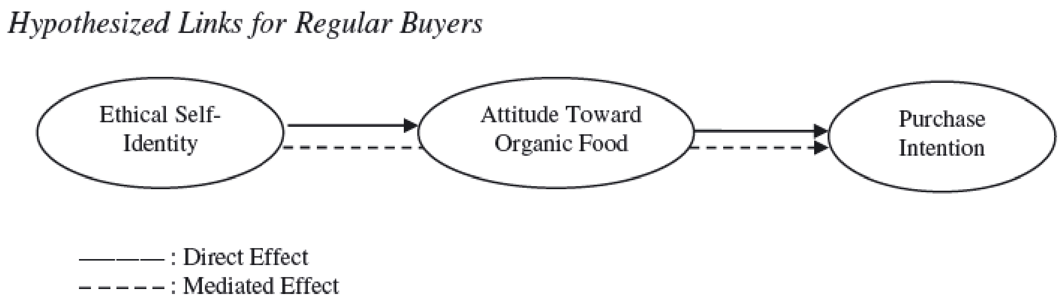
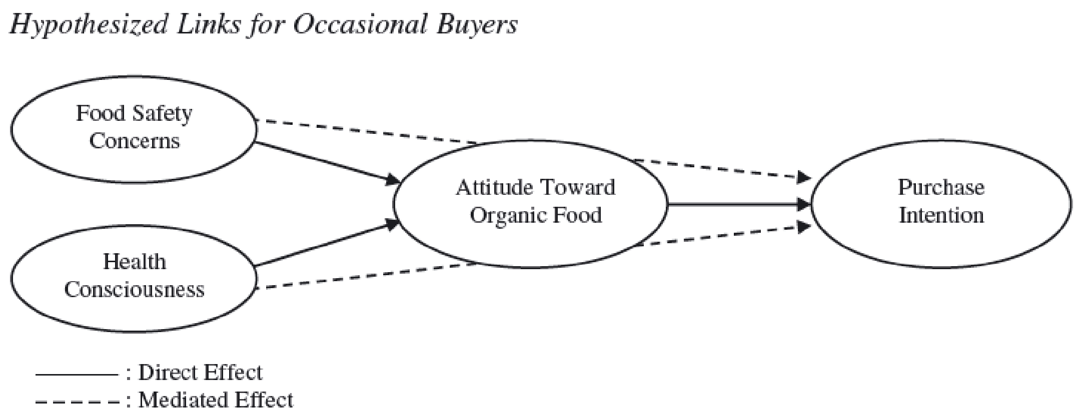


Figure 5. Motivation of occasional buyers



Source: Adapted from Pino, Peluso and Guido (2012, p. 160-161)

Harper and Makatouni from UK (2002) have chosen the similar strategy for their project. All the participants were parents of children 4-11 years old, and usually they were buying food for their families. Participants in first two groups belonged to the group of regular buyers of organic food, and the participants from the other two groups were occasional buyers or non-buyers.

In another study in the Netherlands, “the division of non-, light and heavy users was based on the number of purchase moments and average spending on organic food in Euros per month” (Bartels and Van Den Berg, 2011, p. 1343).

The author agrees with the division of the buyers on regular and occasional. In the researcher’s opinion the people who buy product regularly are more important for the study and therefore more attention should be given to their responses. Knowledge and understanding of the organic production is very important. In order to buy something new and keep on buying it in future customers should know what their benefits are. Nowadays people became aware about the existence of the organic product (Tsakiridou et al., 2008; Bartels and Van Den Berg, 2011). Maybe consumers do not know all in details about the organic farming, but they have general knowledge about it. Already more than 10 years ago Harper and Makatouni from UK (2002) underlined that all the participants in their research have shown knowledge about organic food, its content, production method and values. “It has been found that larger information on the organic food market … is important because it positively influences consumers’ attitudes towards organic food” (Tiziana de Magistris and Gracia, 2008, p. 929

Research Methodology

Regarding Cyprus there are almost no studies or surveys connected with the organic production. Actually there is also very little data available in all EU publications and reports regarding Cyprus. The review of the material available only shows that the growth of organic product in Cyprus is going very slowly. Therefore there is a need for the research regarding the organic farming. Descriptive research has been implemented through the use of a survey between the consumers in Cyprus in order to uncover information about their knowledge, understanding and consumption of organic products. Buyer behavior was also evaluated in order to identify their motives in buying these products.

The main method of data collecting for the survey was self-completed questionnaires. The data was collected through convenience sampling and the data collection process took place from December February 2013 to June 2013.

Analysis/Research Findings

The conducted survey revealed a lot of important information regarding consumers together with the existing problems. Based on the results of the survey it is possible to conclude that the consumers are aware about the meaning of organic product, and they have shown the appropriate knowledge regarding it. Even though 24.3% of the respondents, which is quite a lot, think that they need to know more about it. Therefore more attention should be given to the access of information by the public. Different types of communication, including brochures, leaflets, etc. could be used in order to inform the consumers why organic products are important and to motivate them to buy them regularly.

The potential organic buyer can be described as a female with or without children. 72,9 % of the respondents declared that they are occasionally buying organic food. Of course not all of the respondents are buying organic on a regular basis. According to the results, 28% of the respondents buy organic food just once a month, and only 20% - once a week. But in reality it should be done on regular basis, since the food is our every day need. Consumers are generally aware of organic products. The main reason for the respondents to buy organic products is health, even though they also indicated the lack of pesticides. The main barrier for consumers to buy organic products is price, the availability of products, and the limited choice. Regarding the price the respondents realize that it should be higher and agreed to buy a lot of items with the high price from the list offered to them. This means that the main problems here are availability of the product and choice. The most popular products between buyers they are vegetables, fruits, tea and olive oil. A minority has chosen pasta and breakfast cereals. Referring to other products that they are willing to buy the respondents indicated apart from the above mentioned, bread (38.3%), milk (36.4%), pork (33.6%), and poultry (29.9%). It is also important to pay attention to the fact that regarding food products, regular users of organic products have stated that only 20.6% have chosen olive oil, 16.8% have chosen breakfast cereals, and only

15% - pasta, while answering on the question about what they are willing to buy, 41.1 % of the participants have chosen olive oil, 31.8% have chosen pasta, and 28% - breakfast cereals. Additionally in the non users behaviour organic products do not taste so good comparing to the conventional food.

Why analyzing open ended questions we have identified that consumers are aware of the existence of the organic product. Maybe they do not know all the details, but nevertheless they understand the general meaning of organic production and its importance. The consumers are willing to buy organic products if they are available, but they wish to see reasonable prices and wide choice and of course better taste.

Conclusions

This research paper attempts to describe the organic sector in Cyprus and to reveal the existing problems. The society, farmers and government should be ready to meet the serious consequences of the climate change. Organic agriculture here "is the best approach for adapting to these serious challenges" (IFOAM EU Group, 2012, p. 33). It is one of the ways if not to improve the situation, but at least not to make it worse. Many European countries have already understood this and therefore a lot of support was given by their governments and also other organisations in order to successfully develop organic sector. In Cyprus even though this is a slow process there is still an increase in the last few years (Ministry of Agriculture, Natural Resources and Environment, 2012). The author supports the notion that organic production will increase substantially since local consumers are both aware and willing to buy organic goods..

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