



**Food supply chain issues and the horsemeat scandal  
– the consumer view**

**July 2013**

## Introduction

The Consumer Council have a statutory remit to promote and safeguard the interests of NI consumers and have specific functions in relation to energy, water, transport and food<sup>1</sup>.

In October 2011 the Consumer Council embarked on research to discover how rising food costs,<sup>2</sup> have impacted on NI households and in January 2013 we launched the findings in our report, “*Hard to Stomach – the impact of rising food costs for Northern Ireland consumers*,” at an event hosted by Patsy McGlone MLA, Chair of the Enterprise, Trade and Investment (ETI) Committee at Stormont Buildings.

In early February 2013, issues regarding food supply chains, in particular the discovery of horse DNA in some processed beef products began to surface in the media. The Consumer Council were invited to take part in a round table discussion on 15 March 2013 with representatives from Ulster Farmers’ Union (UFU), Livestock and Meat Commission (LMC), Northern Ireland Retail Consortium (NIRC) and Northern Ireland Independent Retailers’ Association (NIIRTA) to discuss how to respond to the horsemeat scandal and restore consumer confidence.

As the Consumer Council’s food costs research had been completed prior to the emergence of these food supply chain issues, we felt it necessary to test consumers on this specific topic.

The research consisted of a household survey of 1059 shoppers, (representative of NI 16+ population) which was completed in March 2013 and consumer panels held in Strabane, Belfast, Dungannon, Ballymena and Newcastle between 12 – 20 March 2013.

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<sup>1</sup> The Consumer Council undertakes its specific functions in relation to food recognising the role of the Food Standards Agency (FSA). The FSA has responsibility for the development of food policy and for the provision of advice, information and assistance, in respect to food safety or other interests of consumers in relation to food. To ensure good value and use of public money, the Consumer Council and FSA have a memorandum of understanding and the Council’s strategic focus on food is primarily in relation to food prices and customer experience.

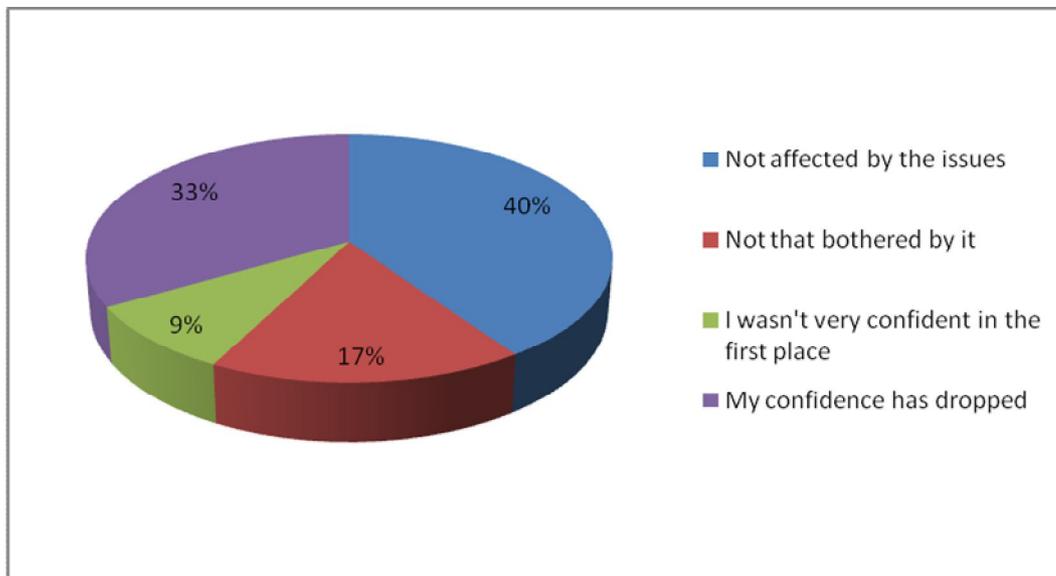
<sup>2</sup> Food prices have risen by 32 per cent between 2007 and 2012, Food Statistics Pocketbook 2012, Defra

## Key findings

### 1. Consumer reaction to horsemeat/supply chain issue

We wanted to check if consumers' confidence had changed when buying food after the horsemeat scandal was made public. This was to assess if consumers had changed their attitude or level of confidence when purchasing food.

#### Has your confidence in the food you buy changed as a result of the horsemeat scandal?



Base: All Shoppers n=1059

- In total just over half of shoppers felt they either weren't affected by the horsemeat/food supply chain issue (40 per cent) or weren't that bothered by it (17 per cent).

***I'm not particularly bothered by it to be honest with you; I think a lot of it is scaremongering".*** Male, Belfast

***"You only get what you pay for. Like value burgers if you get ten burgers for 80p or something you know it's not going to be a hundred percent beef".*** Male, Ballymena

- For most of the remainder confidence levels had dropped (33 per cent of all shoppers) while just under 1 in 10 (nine per cent) stated they weren't very confident in the first place.

***“No surprise, I suspected that processed foods could contain anything”.*** Male, Strabane

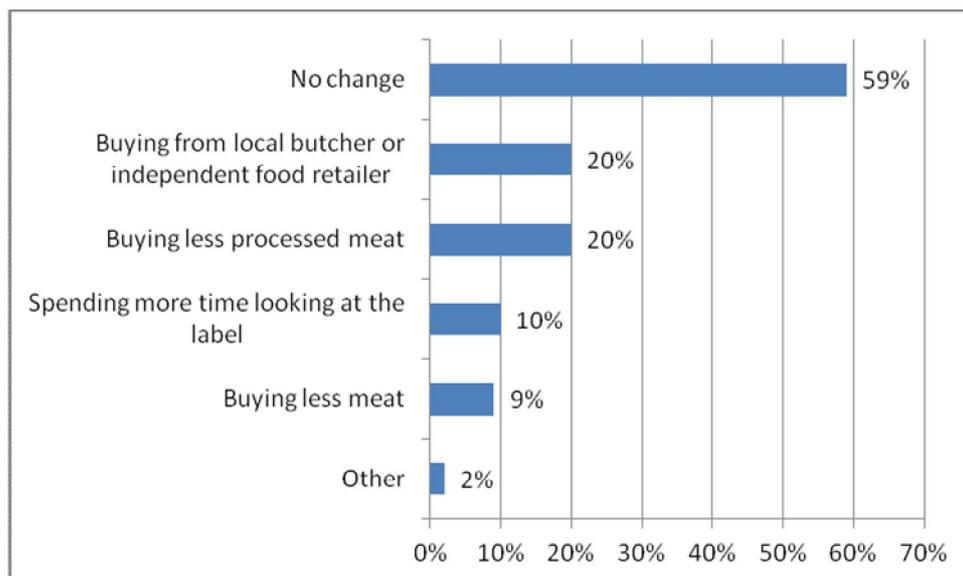
***“...what else is in the food that we don't know about that could possibly have long term effects, you know?”***

Female, Belfast

## 2. Changes to consumer buying behaviour

We wanted to test if and how consumers changed their food buying behaviour after the horsemeat scandal became public. This covered information on where consumers went to buy meat, the quantity that they purchased, how they make sense of what's in the product when looking at the labels and the type of meat products they bought.

**How has your food shopping behaviour changed as a result of the horsemeat scandal?**



Base: All Shoppers n=1059

- As a result of the recent horsemeat/food supply chain issues just over 4 in 10 (41 per cent) shoppers claimed to have changed their shopping behaviour.

***“I would have bought convenience food, not very often, but no convenience food, not now”.*** Female, Strabane

- 1 in 5 (20 per cent) shoppers are now buying their meat from a local butcher or independent retailer with a similar number reported buying less processed meat.

***“I’ve always bought meat from a butchers but I would have bought ready meals from places like Marksie’s but I haven’t since it all broke out”.*** Male, Belfast

- For others the changes have resulted in their shopping taking longer to do (26 per cent).
- A further 22 per cent report they are spending longer preparing meals from scratch.

***“You’re thinking maybe at the weekend maybe I’ll cook something to last a few days, you know, and at the same time it might be a bit healthier, you know, at least you know what’s in it”.*** Male, Dungannon

### **3. Increase to cost of shopping**

Food prices have risen by 32 per cent since 2007.<sup>3</sup> In our ‘Hard to Stomach,’<sup>4</sup> report we show that NI household budgets are already stretched, causing a great deal of anxiety and uncertainty for consumers, in the face of rising food costs. We wanted to find out from consumers how changes they had made to their shopping habits after the horsemeat scandal had affected them in relation to cost.

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<sup>3</sup> Food Statistics Pocketbook 2012, Department for Environment, Food and Rural Affairs (Defra).

<sup>4</sup> Hard To Stomach. The Consumer Council. January 2013.

We asked 'How have your changes in shopping behaviour affected you?'

- Almost half (45 per cent) of consumers who have made changes to their shopping habits report that this has led to an increase in the cost of their shopping.

***“The negative side is that you will pay a bit extra but at the end of the day you are getting something that is tasty and not mass produced”.*** Male, Newcastle

- Lower income groups were even more likely to report an increase to the cost of their shopping as a result of buying from the local butcher or independent retailer and/or buying less processed meat.

***“Not everybody can afford to do it because the prices are always that wee bit higher... Not everyone has a job, not everybody can afford to fill their shopping basket in a local shop, that’s just the way it is”.*** Male, Belfast

## **Paying extra**

We also used the consumer panels to ask if consumers thought they should pay a bit more to ensure the quality of the product. Responses varied:

***“Why should it be dearer when all along you’ve been told it was 100% beef?”*** Male, Strabane

***“Depends how much more we would have to pay, I mean that’s what it all boils down to really, cost”.*** Male, Belfast

***“You wouldn’t mind paying a wee bit extra”.*** Female, Strabane

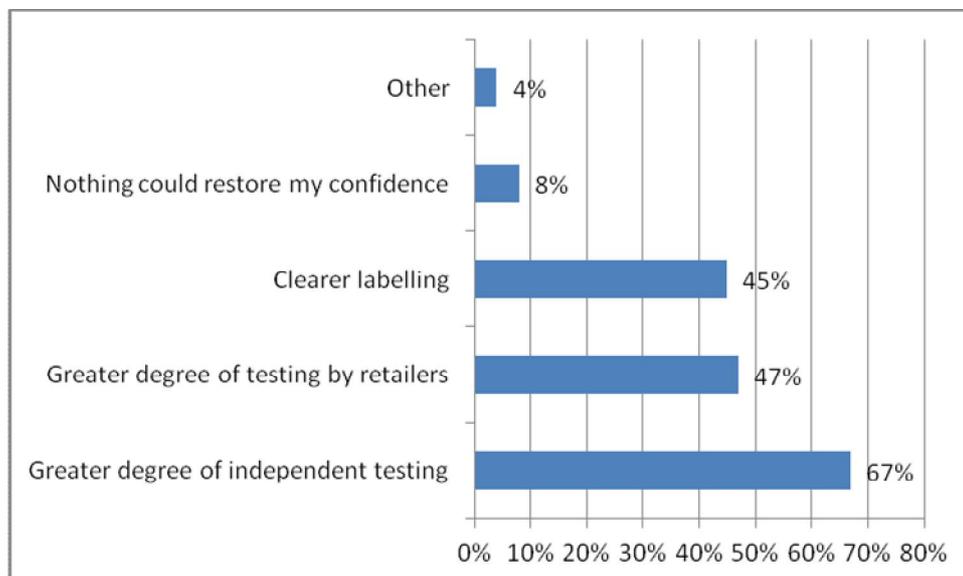
## 4. Product testing

We wanted to find out from consumers if they felt that testing, if done by the retailer themselves or by an independent would make them feel more confident about the products they were buying. We also explored how clearer labelling would help instil confidence.

‘Two thirds (67 per cent) of those who feel their confidence has been affected thought a greater degree of independent testing would restore their confidence whilst almost half (47 per cent) thought a greater degree of testing by retailers would help restore their confidence.

***“I wouldn’t believe them (retailers); I wouldn’t believe that they could trace their meat from the original source”.*** Male, Belfast

### What would restore your confidence in the food supply chain?



Base: All whose confidence has been affected n=456

- Just under half (45 per cent) felt that clearer labelling would help them become more confident and almost 1 in 5 reported they have been left feeling confused by the labelling (in terms of content and provenance).

## 5. Quality Assurance logos

There have been advertising campaigns to promote food quality assurance schemes and explain to consumers how they work. We wanted to understand if consumers recognised these schemes and their level of confidence in them.

We used flashcards with the focus groups to find out what the Red Tractor and Farm Quality Assurance Scheme logos meant to them.

There was a small amount of recognition of the schemes, but little understanding of how they worked and if they could be trusted.

Red Tractor



***“Quality assurance or something like that, it’s like a British quality mark”*** Male, Dungannon

***“It sounds like they’re off. There are two O’s and an F in the centre of it”.*** Male, Strabane

***“The only thing it’s saying is food standards assured, it’s not actually telling you what it has passed, you know what I mean, what tests it has passed”.*** Male, Strabane

***“You think it’s been through vigorous testing and it’s passed it when you read something like that”.*** Female, Strabane

## Farm Quality Assured Scheme



***“Looks like it’s made in China. You know what I mean, it’s like wee Chinese writing, again it’s saying farm quality assured, but it’s not saying what to be assured of.”*** Male, Strabane

***“You can trace to the farm that it was reared on?”*** Female, Ballymena

***“Is that telling us the food is produced in Northern Ireland or is this a Northern Ireland body?”*** Male, Ballymena

### **6. Perception of farmers, producers, processors, butchers suppliers, supermarkets and retailers**

We wanted to find out what consumers’ perceptions are of the different parts of the food supply chain now comparing to how they felt before the horsemeat scandal became public. The information gathered shows how attitudes have changed. There are particular parts of the food chain that appear to now enjoy a more favourable opinion from the public since the horsemeat scandal, for example local butchers and local farmers and producers. This information may be useful for different organisations within the food supply chain to help understand the level of work to be done to restore the trust of consumers.

**How do you feel about these groups now compared to before the horsemeat scandal became public?**

	<b>Much less favourable</b>	<b>Slightly less favourable</b>	<b>Neither favourable nor unfavourable</b>	<b>Slightly more favourable</b>	<b>Much more favourable</b>	<b>Don't know</b>
<b>Local Farmers and Producers</b>	2%	3%	53%	18%	23%	1%
<b>Local Processors</b>	10%	18%	53%	11%	4%	5%
<b>Local Butchers</b>	1%	1%	49%	15%	32%	1%
<b>Local/ Independent Retailers</b>	3%	7%	61%	17%	9%	2%
<b>Supermarket Chains in NI</b>	28%	23%	44%	2%	1%	2%

**Base: All shoppers n=1059**

- Our survey revealed that consumer perceptions of supermarket chains operating in Northern Ireland have been negatively impacted as a result of the horsemeat/food supply chain issue with just over half of consumers (51 per cent) seeing them as less favourable now.
- On the other hand, local butchers are most likely to be seen in a more positive light, with almost half of consumers (47 per cent) seeing them as more favourable than before.
- This was followed by local farmers and producers (41 per cent), local or independent retailers (26 per cent) and local processors (15 per cent) being seen as more favourable now by consumers.

## **7. Conclusion**

The evidence that the Consumer Council has collected from consumers shows that some consumers have felt the need to change their shopping habits in relation to the horsemeat scandal. Those consumers that are willing and able to pay more for meat are showing a certain amount of trust in local butchers and retailers, food producers and farmers.

There is a need to restore confidence in the food chain, with consumers looking for clearer labelling and better communication on the quality of testing by retailers and independent testing that is taking place.

The Consumer Council will continue to work on the recommendations in our report 'Hard to Stomach' which was published in January 2013.



The Consumer Council

# ***Making the consumer voice heard and making it count***

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