Deloitte.

Sustainable food
What Swiss consumers expect from companies and policymakers

Contents

A note on the methodology

This study is based on two online surveys, each of around 1,500 Swiss residents, conducted in late April and early May 2021. The samples were representative in terms of age, gender and region. Some questions were based on the “One bite at a time: Consumers and the transition to sustainable food” study carried out by the European Consumer Organisation[1] so that the findings for Switzerland could be compared with those for the European Union (EU). Because of rounding, percentages may not add up to 100.

The authors also conducted face to face interviews with experts from the following companies and organisations: Bio Suisse, Emmi, Haco Group, Mirai Foods, ORIOR, and Too Good To Go Switzerland.

1. Key findings

A large majority of the Swiss consumers surveyed (79%) say that sustainability concerns have some degree of influence on their eating habits. Compared with the average across the EU (59%), this means that Swiss consumers attach relatively high importance to sustainable food.

Almost two-fifths of respondents (39%) believe that the main responsibility for sustainable food and nutrition lies with food producers. Just under one-third (31%) believe that the main responsibility lies with the consumer – that is, themselves – while a considerably smaller proportion believe that it lies with retailers and wholesalers (16%), the state (12%) or the media (2%).

The major obstacle to eating (more) sustainably is the higher cost of sustainable food compared with conventionally produced food. On average, survey respondents are willing to pay 26 per cent more for sustainably produced food. One-fifth of respondents are willing to pay 50 per cent more or higher, but the same proportion are unwilling to pay any more for sustainable food.

Almost two-thirds of consumers (64%) believe that retailers should sell a wider range of sustainable food, while the vast majority (78%) are in favour of compulsory sustainability information on food labels.

Nearly half (45%) say they would be willing to replace meat with plant-based alternatives in future, though considerably fewer would be willing to eat meat grown in a laboratory or insects (17% and 13% of responses, respectively).

2. Background and aim of the study

Concerns about sustainability influence many areas of life and business. Food production and consumers' eating habits underpin sustainable development. The production and purchasing of food has a greater impact on sustainability than any other sector, accounting for 28 per cent of Switzerland's total environmental pollution, compared with 24 per cent for housing and 12 per cent for mobility.[2] The consumption of energy and resources extends across the value chain, from agricultural production and industrial processing to packaging, transport and, ultimately, waste disposal.

The trend towards more sustainable food and nutrition includes a wide range of areas. For example, the sustainable production, processing and consumption of food, along with prevention of waste, is one of the core aims of the European Green Deal.[3] Consumer demand is, meanwhile, prompting major retailers to make greater use of sustainability labels and to develop their own brands of sustainably produced food. Indeed, the number of organic agribusinesses in Switzerland has risen more than five-fold since 1993. And some consumers are turning away from less sustainable food, such as conventionally reared meat, or reducing their meat consumption, leading to a steady rise in the proportion of Swiss consumers who are vegetarian or vegan in recent decades.[4]

Despite the clear trend towards greater sustainability consumer attitudes vary, and those wanting to eat more sustainably face a number of obstacles. Switching to (more) sustainably produced food, for example, requires consumers adjust some of their shopping and eating habits. On average, sustainably produced food is also markedly more expensive than non-sustainably produced food, creating a financial barrier for some consumers.[5] In addition, the trend towards greater sustainability means that food producers, retailers and wholesalers are having to make tangible changes in the way they produce and sell food.

To explore the wide range of consumer attitudes surrounding sustainable food and nutrition, Deloitte conducted two representative online surveys of 1,500 people living in Switzerland. The findings form the basis for specific recommendations targeted at food producers, retailers and wholesalers, and policymakers.

3. Understanding and importance of sustainable food

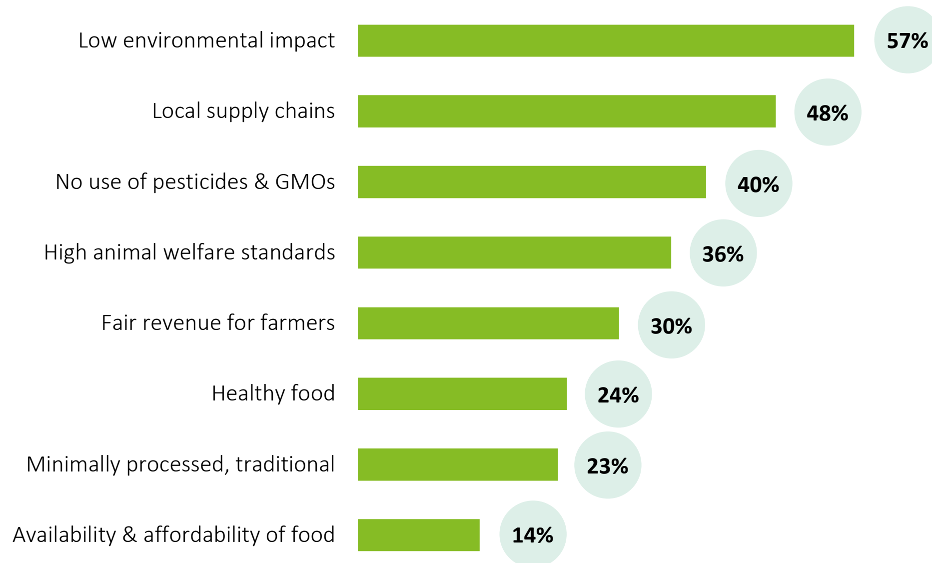
Focus on environmental sustainability

Determining the influence of sustainable food and eating requires defining "sustainability" in this context. There are three dimensions to the concept of sustainability: the environmental dimension, the economic dimension and the social dimension. Environmental sustainability means not taking more resources out of the environment than it can regenerate. Economic sustainability requires an economy to be able to afford citizens' lifestyles and behaviour over the long term. And social sustainability means reflecting the interests of the full range of social groups – including future generations.

Consumers are most concerned with the environmental dimension of sustainability in their choice of food and the way they eat. A majority of respondents (57%) understand sustainability to mean cutting environmental pollution, for example by cutting emissions and waste (see Chart 1). However, also local and regional supply chains (48%) and avoiding the use of pesticides and genetically modified organisms (GMOs) (40%) come to the mind of many consumers when thinking about sustainable food. Almost half of all respondents in the Swiss survey cite local and regional supply chains as an important aspect of sustainability, a markedly higher proportion than the average for all EU Member states (34%). One reason may be the Swiss population's strong identification with their country, along with their attachment to local agriculture and food production.

Chart 1. Understanding of sustainability in food and eating habits

Question: What comes to your mind when thinking about 'sustainable' food? (Up to three answers possible, n = 1,524)

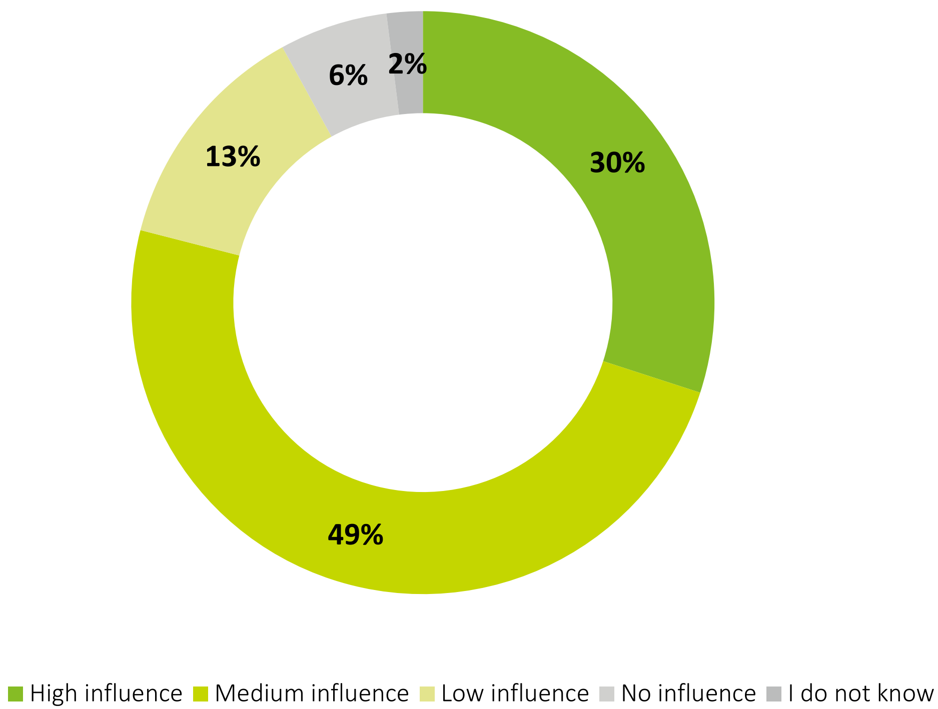


> The Bio Suisse organic label tries to take all these aspects into account: fair incomes, social responsibility, high animal welfare standards, products free from synthetic chemical pesticides. Overall, the label offers a high sustainability performance.

Karin Nowack,
Project manager in strategic projects and research,
Bio Suisse

Chart 2. Influence of sustainability on eating habits

Question: To what extent would you say that your eating habits are influenced by sustainability concerns? (n = 1,524)



Sustainably produced food enjoys high status

The way consumers eat is a particularly revealing measure of the status of sustainably produced food. The vast majority of those surveyed (79%) report that sustainability has a medium or high influence on their eating habits (see Chart 2). Swiss residents attach a relatively high status to sustainable food: at 30 per cent, the proportion of respondents reporting a high influence is almost twice the EU average (17%). One possible reason for the difference may lie in Switzerland's relative level of prosperity, which is markedly higher than the EU average, enabling citizens to afford sustainable food.

In this context, vegans, vegetarians and 'flexitarians' – individuals who mostly eat vegetarian food but eat meat occasionally – are a relevant sub-group. Around half of this group report that sustainability has a high influence on the way they eat (48 per cent of those describing themselves as flexitarian and 53 per cent of those describing themselves as vegetarian or vegan). This is around twice as many compared to those who do not restrict their diet in any way (24%).

> "In Switzerland, the advantage is that sustainable farming methods and labels emerged and became known very early – brands such as Bio-Knospe or Demeter are known to consumers. In addition, the purchasing power in Switzerland is high and allows people to spend a little more money on sustainable food."

Deborah Huber, Corporate Sustainability Manager, ORIOR

Supply-side responsibility

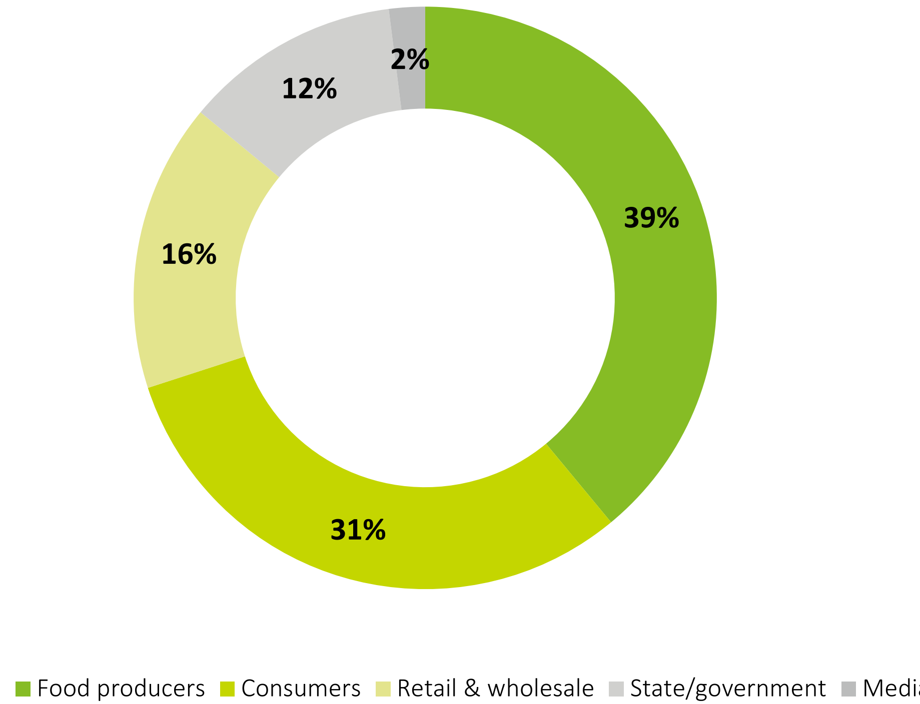
Public debate around sustainability often focuses on the issue of responsibility. Where does responsibility lie? And who should ensure that sustainable development is achieved in the area of food and nutrition?

Respondents give a clear answer to both these questions, with 39 per cent believing that food producers bear the main responsibility (see Chart 3). A further 31 per cent believe that consumers are primarily responsible, with much smaller numbers attributing the main responsibility to retailers and wholesalers (16%), the state (12%) or the media (2%).

If responses for food producers, retailers and wholesalers are taken together, a majority of respondents (55%) believe that the supply side bears the main responsibility. Survey respondents are, of course, themselves consumers, which may be one reason why they attribute greater responsibility to the supply side than to the demand side: it is common in surveys for respondents to shift responsibility from themselves to other stakeholders, regardless of the issue under discussion. Nonetheless, consumers as customers are ultimately able to influence change – provided there is a genuine appetite for such change.

Chart 3. Responsibility for sustainable food and ways of eating

Question: In your opinion, who has the main responsibility when it comes to sustainable food? (n = 1,524)



4. Obstacles and challenges facing consumers

Higher prices for sustainably produced food as the major obstacle

There is often a significant difference between consumer aspirations and intentions on the one hand and their individual behaviour on the other in the area of sustainability. This suggests that a number of different obstacles and challenges need to be tackled.

A majority of respondents (52%) report that the higher cost of sustainable food is the main reason for not eating (more) sustainably (see Chart 4). Consumers are well aware that eating sustainably often comes at a higher price than eating non-sustainably produced food.

Further obstacles and challenges cited are a lack of information about eating sustainably (32%), insufficient time for shopping and cooking (31%), and unclear product labelling (30%). These are also the major factors cited by those taking part in the EU survey.

Chart 4. Obstacles to sustainable food and nutrition

Question: What are the main reasons preventing you from eating (more) sustainably? (Up to three answers possible, n = 1,064: only respondents indicating that sustainability has no, slight or medium influence on the way they eat, see page 6)

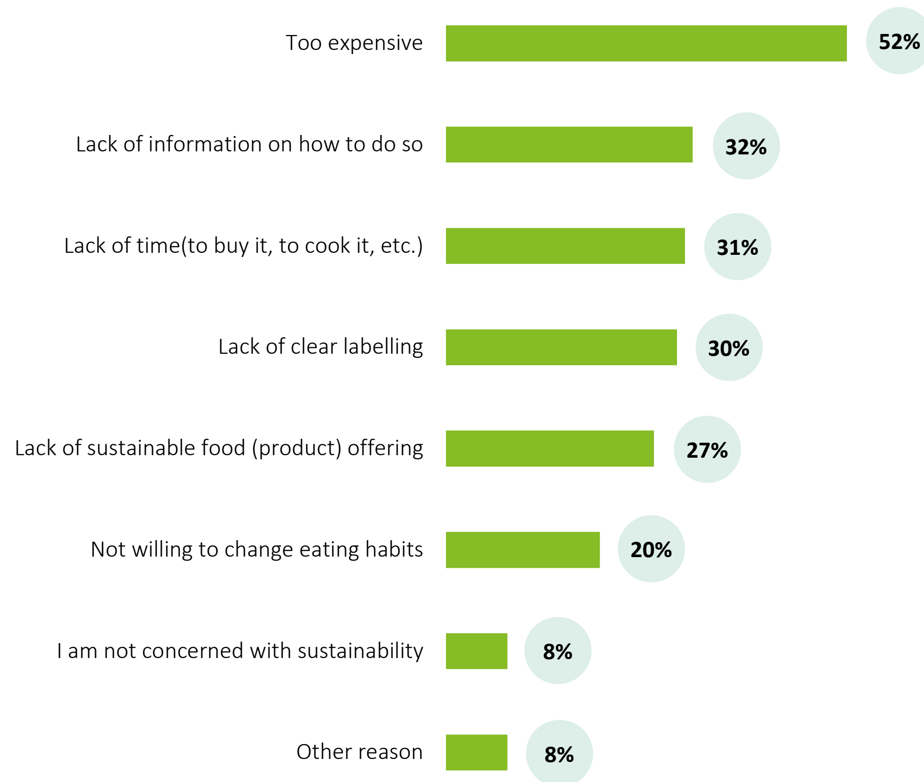
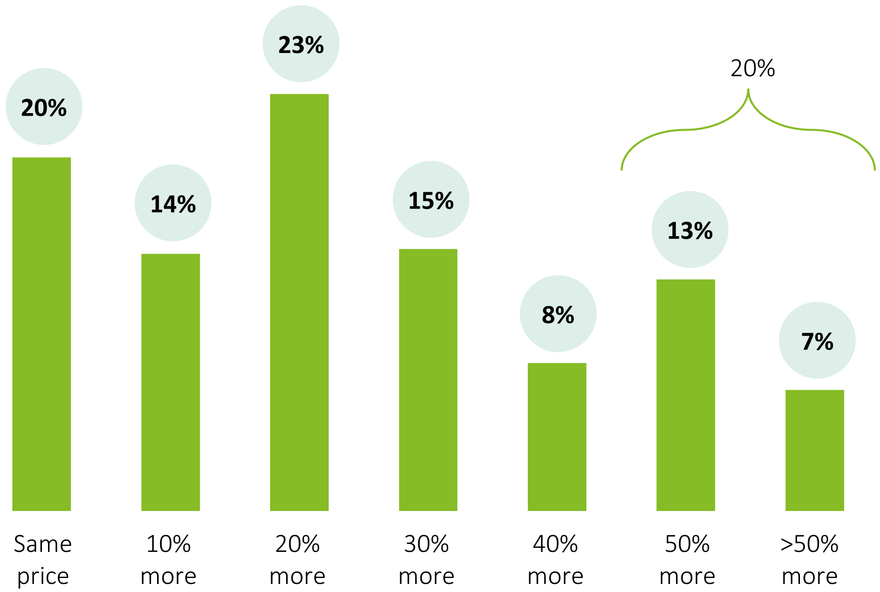


Chart 5. Willingness to pay more for sustainable food

Question: Think of a conventionally produced food item costing CHF 10. How much more would you be willing to pay for a sustainably produced version of this food item? (n = 1,524)



Limited willingness to pay more for sustainable food

When asked about obstacles and challenges of sustainable food, consumers most frequently indicate high prices. In Switzerland, for example, organic produce costs on average 63 per cent more than conventionally produced food,[6] but the average consumer is willing to pay just 26 per cent more for it. Moreover, surveys often suggest higher figures than respondents are actually willing to pay because this is the socially preferred response. Consumers' willingness to pay more for sustainable food is, therefore, probably more limited and may actually be less than the 26 per cent suggested by survey responses.

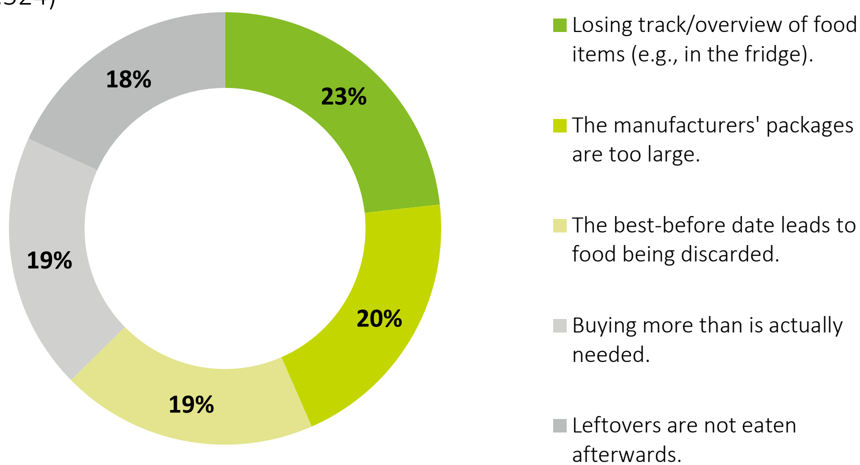
It is particularly revealing to consider differences between groups in terms of how much more they are willing to pay for sustainable food (see Chart 5). For example, just one respondent in five (20%) would be willing to pay 50 per cent or more on top. The same proportion, one in five, would not be willing to pay any more for sustainably produced food. Surprisingly, respondents' household income has only a limited influence on their willingness to pay more, but there are differences between age groups: young people (under 30) report that they would be willing on average to pay 32 per cent on top compared with 22 per cent more among those aged 50 and over.

A variety of reasons for food waste by households

Alongside higher prices and limits on willingness to pay more for sustainable food, avoidable food waste is one of the most significant challenges to buying and eating sustainable food. Households in Switzerland generate around 250 grammes of food waste every day.[7] There could be a number of reasons for this (see Chart 6). One is consumer behaviour: consumers fail to monitor the food they buy once they get it home (23%), buy more than they actually consume (19%) or throw away leftover food rather than using it (18%). However, 20 per cent of survey respondents believe food producers are responsible because of their packaging sizes, while for others, policymakers also share responsibility for food waste by households because of the system of ‘use by’ dates for food (19%).

Chart 6. Reasons for food waste by private households

Question: What is the main reason for food waste in your household?
(n = 1,524)

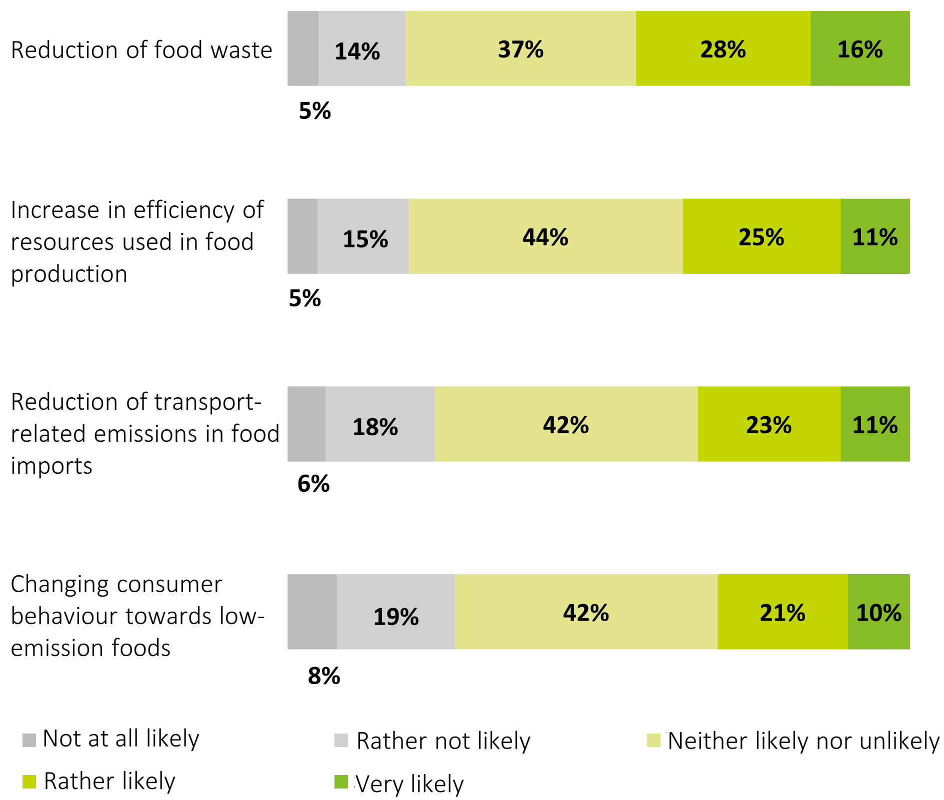


“We also want to help people learn to change their behaviour towards less food waste in the long term. Simple, straightforward solutions like Too Good To Go make a big difference in terms of sustainability. The simpler we make a solution like our app, the more people will use it.”

Alina Swirski, Country Manager,
Too Good To Go Switzerland

Chart 7. Likelihood of progress towards sustainable food production and sustainable eating

Question: How likely do you think the following measures are in achieving substantial progress by 2030? (n = 1,501)



Consumers optimistic about challenges

On the whole, consumers are optimistic about their ability to tackle the obstacles and challenges posed by buying and eating sustainable food. Nearly half (44%) believe that a substantial reduction in food waste can be achieved by 2030 (see Chart 7). One reason for this positive finding may be that avoiding domestic food waste has attracted increasing attention over recent years. Another may be that this measure does not require substantial effort on the part of consumers. Respondents also believe that progress will probably be made towards reducing the use of resources to produce food (36 per cent believe this is likely, compared with 20 per cent who do not) and towards cutting emissions from food imports (34 per cent believe this is likely, compared with 24 per cent who do not). Opinion is more or less divided, however, on whether consumer behaviour in relation to sustainable food will change by 2030, with 31 per cent of respondents optimistic and 27 per cent pessimistic.

5. Recommendations for action

The following recommendations for action are based on the findings of the survey and address two groups: food producers, retailers and wholesalers on the one hand and policymakers on the other.

Recommendations for food producers, retailers and wholesalers

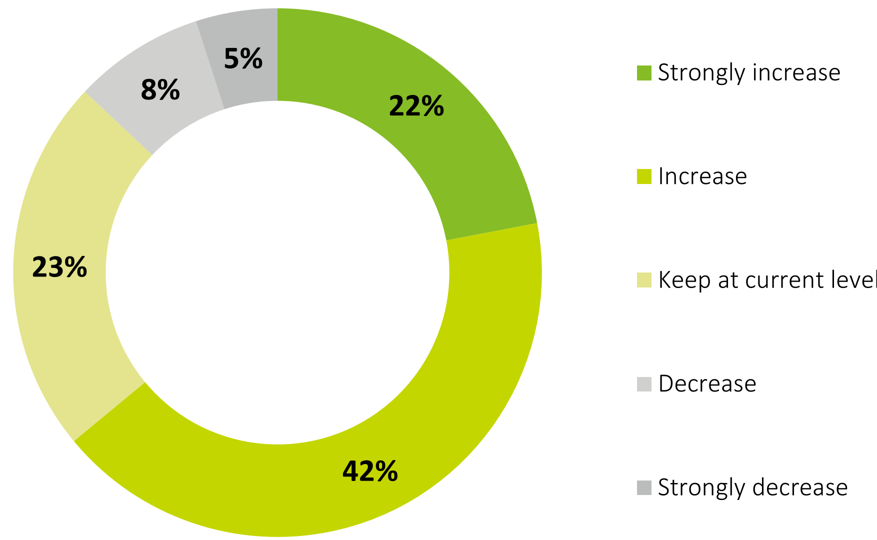
01	Use the potential demand for sustainable food
02	Make it easier to switch to eating sustainably
03	Reduce food waste
04	Persuade consumers of the added value of sustainability

1. Use the potential demand for sustainable food

The considerable influence sustainability has on consumers' eating habits suggests that there is significant potential for sustainable food. Almost two-thirds of respondents (64%) believe that retailers should offer more sustainable food products (see Chart 8), with just one in eight (13%) believing that the offering should be reduced. This finding suggests that support for wider availability of sustainable food is not limited to groups with a particular concern for sustainability, such as flexitarians, vegetarians and vegans, but is more general across the population.

Chart 8. Availability of sustainably produced food in retail

Question: Retailers should … their product offering of sustainable food. (n = 1,524)



This potential demand represents a major opportunity for food producers and retailers as well as wholesalers. Greater consumer demand for sustainably produced food brings greater economies of scale for producers and suppliers alike. Higher volumes drive down unit costs for producers in relation to the purchase of raw materials and processing. And as sales of sustainable food rise, retailers and wholesalers also benefit from lower unit costs for marketing and advertising. If these cost advantages are passed on to customers in the form of lower prices, the price differential with conventional food narrows, making it likely that demand will increase further. Both sides benefit: consumers save money, while food producers, retailers and wholesalers see demand increase and costs fall.

Deborah Huber, Corporate Sustainability Manager, ORIOR

"Sustainably produced products (e.g., organically certified) still make up a relatively small part of the industry-wide production volume. Production must be carried out separately, and separate logistics must be set up, because the raw materials and products must not mix with conventionally produced products. The smaller the quantities, the greater are the additional costs per product sold. If sustainable food becomes the standard, the costs will also be lower."

2. Make it easier to switch to eating sustainably

Given the higher prices sustainable food commands, purchasing and eating sustainable food may look like a privileged choice, but this is not always the case. For example, giving up or eating less conventionally produced meat enables consumers both to protect the environment and to reduce their food bills. Producing one kilogramme of beef uses around four times as much water as producing plant protein,[8] such as pulses, and the cost of plant protein is considerably lower than that of most animal protein.

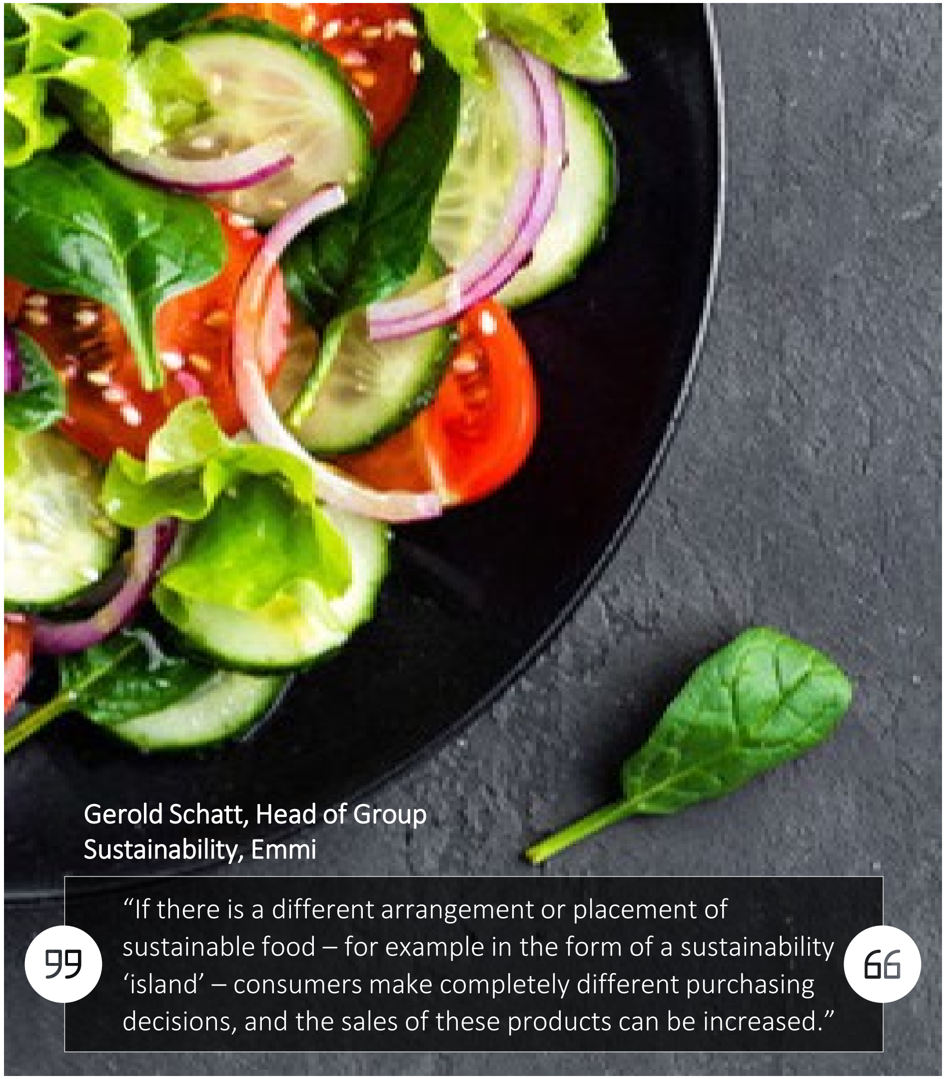
The market for alternatives to conventionally produced meat is booming. In 2020 sales of meat substitutes in Switzerland grew by 52 per cent year on year, albeit from a low base.[9]

The potential is particularly substantial for plant-based meat substitutes that do not contain GMOs (see Chart 9). A relative majority of respondents (45%) say they are willing to consume such substitutes in place of conventionally produced meat.

This may be because plant-based meat substitutes are already part of the mainstream market and widely available in supermarkets, meaning that many consumers already have positive experiences of them. Other substitutes, such as insects or meat grown from cell cultures, are less widely available, so fewer respondents indicate they would be willing to buy them (13% and 17% of respondents, respectively).

Karin Nowack, Project manager in strategic projects and research, Bio Suisse

"First, a sustainable diet means fewer animal products. And that would not be more expensive because vegetable protein is cheaper than animal protein."



Gerold Schatt, Head of Group Sustainability, Emmi

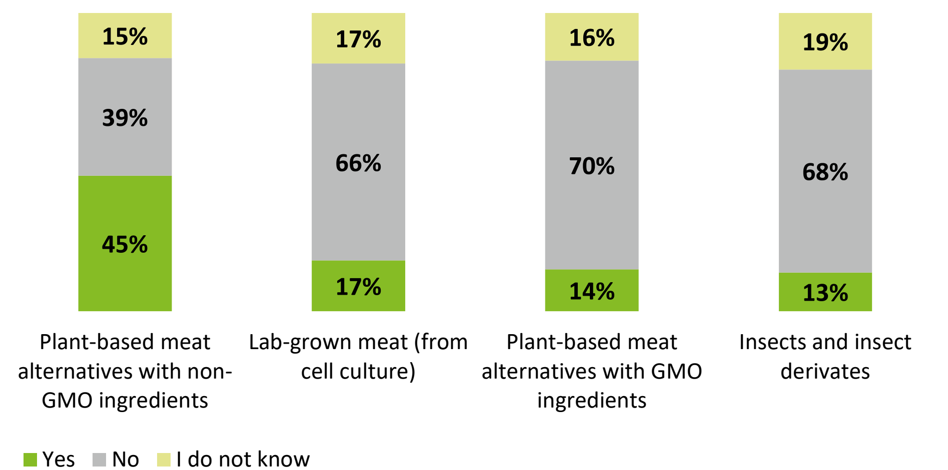
> “If there is a different arrangement or placement of sustainable food – for example in the form of a sustainability ‘island’ – consumers make completely different purchasing decisions, and the sales of these products can be increased.”

As more food producers, retailers and wholesalers make such alternatives available, it is likely that more consumers will try out such products and switch to them. Producers and suppliers can exert a considerable influence on consumer choices and decisions.

Food producers, retailers and wholesalers can therefore do more to support shifts towards sustainable eating through their marketing activities. One important aspect of marketing is the way products are displayed in supermarkets, such as in specialist aisles or themed areas. The more prominently retailers position sustainable food, such as seasonal fruit and vegetables, the more likely shoppers are to buy them.

Chart 9. Willingness to replace conventionally produced meat products

Question: In the future, would you be willing to replace meat with each of the following food items? (n = 1,431, all respondents except vegetarians and vegans)



3. Reduce food waste

Switzerland produces 2.8 million tonnes of food waste across the food chain every year – the equivalent of 150,000 fully-loaded lorries, which, if placed end to end, would stretch further than the distance between Zurich and Madrid.[10]

Food producers, retailers and wholesalers together generate almost half of all food waste, with 35 per cent attributable to processing (predominantly by-products that cannot be used, such as whey) and 10 per cent to retail (such as damage to products in transit or incorrect storage).[11] Both processing and retail therefore offer substantial potential for reducing avoidable food waste.

The same groups can also help reduce food waste by private households: consumers cite too large packaging sizes as one reason for wasting food. Indeed, pack size for some products is one area that could be reviewed or adapted to changing consumer habits, not least as household size has fallen considerably in Switzerland over recent decades. Higher margins for smaller packaging sizes would benefit both producers and retailers, although smaller quantities also involve proportionally more packaging. One way of avoiding the negative impact that packaging can have on a company's sustainability footprint would be to make packaging itself sustainable, for example by producing it from recycled materials.

However, consumers also share responsibility for food waste. More thoughtful purchasing, in particular in relation to quantity, more careful management of food and especially leftovers could also help to alleviate the problem.

4. Persuade consumers of the added value of sustainability

Sustainability is a relatively complex and abstract issue. The impact of individual actions is often difficult to pinpoint, as it may take place a considerable distance away or involve a substantial time lag. A consumer purchasing a sustainably produced food item cannot, for example, always base their decision on, say, flavour or appearance to identify the added value of their choice over a comparable conventional product.

It is therefore crucial that measures are taken to give consumers specific and clear information about the added value of buying and eating sustainably produced food, encouraging them to reflect this in their purchasing decisions. One way of doing this would be to include the energy and resource savings from land, water and waste on product labelling, either in percentage terms or per product unit. Another option would be for food producers, retailers and wholesalers to make their production and supply chains as transparent as possible so that consumers can track the origins of what they buy, especially for locally or regionally produced items. Finally, specific reference to sustainably produced ingredients or the potential health benefits of a particular food item would help to illustrate the added value of buying and eating sustainable food.

Such measures are already in place for individual food items, but more could be done across the sustainable food range as a whole. Food producers, retailers and wholesalers need to be more open and transparent when communicating with consumers: if the added value of sustainable food were clearer to consumers, they could be more willing to pay the price (difference) for such food and make a tangible contribution to sustainable development.

> "If consumers really see the added value of sustainable food for themselves, then a large proportion is willing to pay this extra price. If so to say the purpose is very clear due to transparency and communication. But that is rarely the case today."
>
> Gerold Schatt, Head of Group Sustainability, Emmi

Recommendations for policymakers

01	Make sustainability information mandatory
02	Reflect real costs in pricing
03	Educate the public and raise consumers' awareness
04	Create incentives for sustainable agriculture

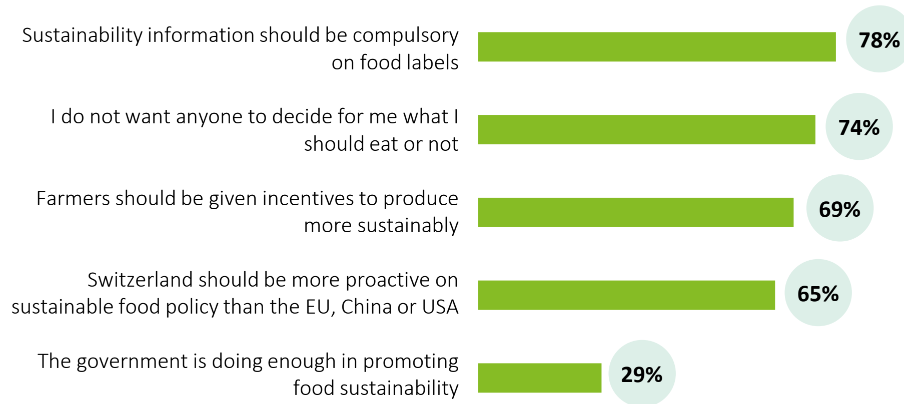
1. Make sustainability information mandatory

A majority of consumers would like policymakers to support the expansion of sustainably produced food and sustainable eating but without patronising them (see Chart 10). Almost four out of five respondents (78%) are in favour of compulsory sustainability information on food labels, while around two-thirds (69%) support incentives for agriculture. However, around three-quarters of all respondents do not want policymakers to ban certain types of food.

One way of ensuring that sustainability information is on food packaging is by using labels indicating that a product has been produced organically or is being traded fairly. However, less than half of survey respondents (41%) say that they know what such labels mean and what the difference is between them (see Chart 11). One possible explanation is that there are now so many different labels that consumers have lost track.

Chart 10. Role of policymakers in sustainable food production and sustainable eating

Question: To what extent do you agree with the following statements? (n = 1,524)



> "There are already similar examples worldwide, such as colour markings that distinguish between healthy and unhealthy products. Something like this would also be necessary with regard to environmental damage. It is also important to have communication that is understandable for consumers, for example the colours already mentioned or comparisons such as: 1 kilogramme of this product has a greenhouse impact equivalent to a car drive of 100 kilometres."

Christoph Mayr, Co-Founder & CEO,
Mirai Foods

Rather than use sometimes confusing labels, mandatory sustainability information on food packaging could instead follow the system used for food values (fat, carbohydrate, protein, etc.). Such information needs to be clear to consumers and not perceived as patronising, with any sustainability labelling system for food based on robust, independent and transparent scientific criteria, and independent of commercial interests. It must also be accessible and affordable for all producers, regardless of size. Costly certification systems and complex sustainability indicators, for example, are likely to deter smaller producers from introducing such labelling.

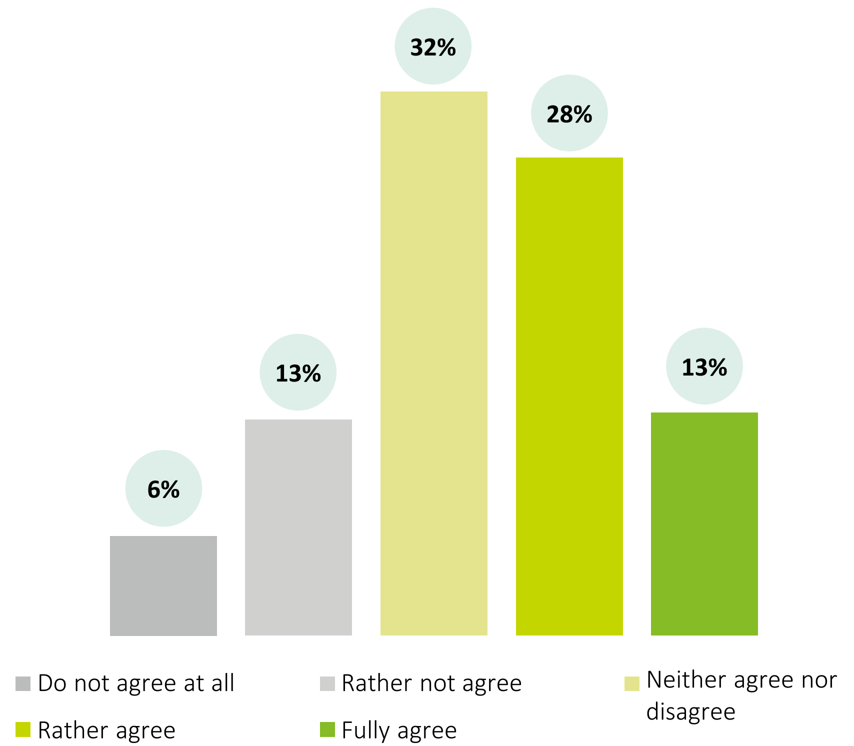
2. Reflect real costs in pricing

The main reason consumers cite for not buying and eating sustainably produced food is its relatively high price. Organic products, for example, consistently cost more than the conventionally produced equivalent. This price difference is often a deterrent to purchasing sustainable food.

However, the market price for most food items does not currently reflect the total cost of producing them: for example, it excludes the environmental costs arising from agricultural use of pesticides that harm biodiversity and ecosystems. Nor does the price of food wholly reflect social costs: milk prices, for instance, are distorted by state subsidies financed by the population through (higher) taxation. And the price of products that harm health fails to reflect the true cost of poor nutrition in terms of unnecessary demands on the health system.

Chart 11. Labelling of sustainable food

Question: To what extent do you agree with the following statement: I know the meaning and differences of the various existing labels for sustainable, fair trade and organic products. (n = 1,501)



7%: «I do not know»

Christoph Mayr, Co-Founder & CEO, Mirai Foods

"The price of traditionally produced meat would also be higher if externalities, such as the negative environmental impact, were priced in and government subsidies were removed. Therefore, a level playing field is unfortunately not yet in place, but given the increasing (political) sustainability trends, this will change."

Alina Swirski, Country Manager, Too Good To Go Switzerland

"The most important thing is education. The more people know about the effects [of their diet], the better they can decide: Do I want to eat this or not? What does this mean for my children and the next generation?"

One possible measure in relation to pricing would be to identify the most important sustainability-related additional costs for individual food items or groups and to categorise them. These additional costs could then be displayed on food packaging as part of the sustainability information, helping consumers to make informed decisions about the items they buy. Another option would be incentive taxes or levies, so that prices reflect the additional costs and the state is able to finance measures to offset the negative impact of consuming products harmful to the environment, society and individual health.

3. Educate the public and raise citizens' awareness

Fewer than one-third of those surveyed (29%) believe that the government is doing enough to promote sustainability in food and nutrition, for example through public information campaigns (see Chart 10). In general terms, the state plays an important role in providing citizens with objective information and equipping them to make informed decisions – and this includes the way people eat and the decisions they make when purchasing food.

One important aspect of raising awareness about food and nutrition is demonstrating the environmental and social impact of different foods. Other issues, such as environmental pollution, fair trade, animal welfare and health, are also relevant in this context. For example, food groups differ widely in the level of environmental pollution they produce, and public information campaigns could make this clearer to consumers.

Food waste is an important aspect of environmental pollution. As the survey has shown, private households waste food for a variety of reasons, so it is important to raise their awareness of the scale and impact of unnecessary food waste. The more aware consumers are of these issues, the more likely they are to reduce avoidable food waste in future.

4. Create incentives for sustainable agriculture

Only around three-quarters of the cost of food production (74%) is borne by Swiss consumers or taxpayers. The remaining 26 per cent can be attributed to environmental damage caused by prevailing production methods and/or agricultural incentives and is not directly offset. The production of animal food products is a driving factor here.[12]

More than two-thirds of consumers (69%) believe that subsidies and other incentives for agriculture should encourage more sustainable food production. We recommend that policymakers review current incentive structures in agriculture to encourage sustainable development.

The specific design of subsidies and other incentives also needs to take account of a number of harmful impacts, including emissions or residues of greenhouse gases, ammonia, nitrates and pesticides, soil erosion, habitat loss, and animal suffering.[13]

6. Endnotes

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7. Contacts and authors

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