



“From the challenges of consumers’ perception to challenging the perception – A joint European communication perspective”.

copa

european farmers



cogeca

european agri-cooperatives

- Created in **1958**
- **23** million European farmers and family members
- **60** full members from the EU Member States and 36 partner organisations

- Created in **1959**
- **22,000** European agricultural cooperatives
- **35** full members from the EU Member States, 4 affiliated members and 36 partner organisations



In **1962**, a joint Secretariat was created, making it one of the largest and most active organisations in Brussels for the past **60** years.



Mission

To ensure a viable, innovative, competitive EU agriculture and agri-food sector guaranteeing food security to half a billion people throughout Europe.



Objective

Promoting European farmers and agri-cooperatives views to **influence** EU decision-making process and public opinion.



Foreword

*** Part 1: “From the challenges of consumers’ perception ...**

Understanding the concerns

*** Part 2 ...to challenging the perception”**

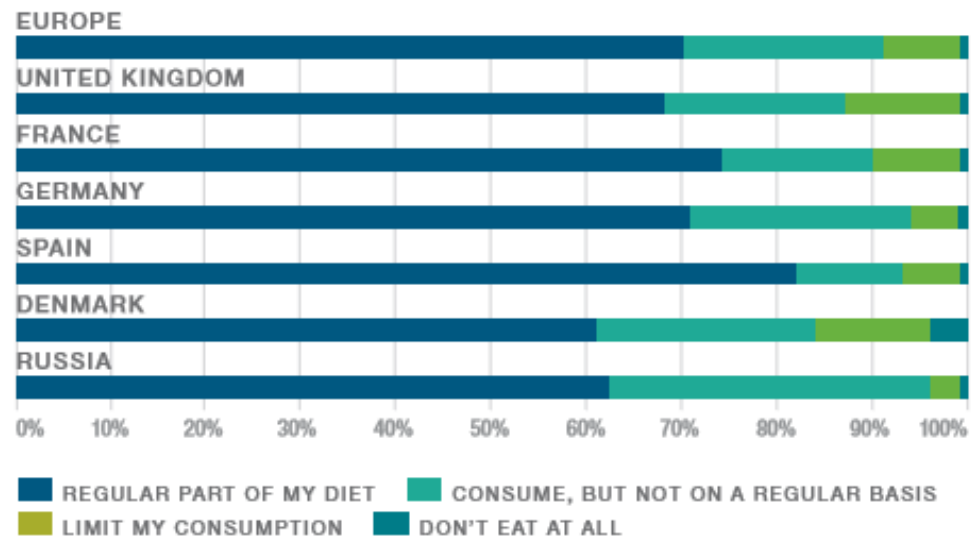
Proposing some concrete answers based on best case practices



Introduction

- * What is the current perception of dairy products in Europe ?
- * In a report from 2018 conducted in 6 countries, Cargill considered Europe as a « **region in transition** »

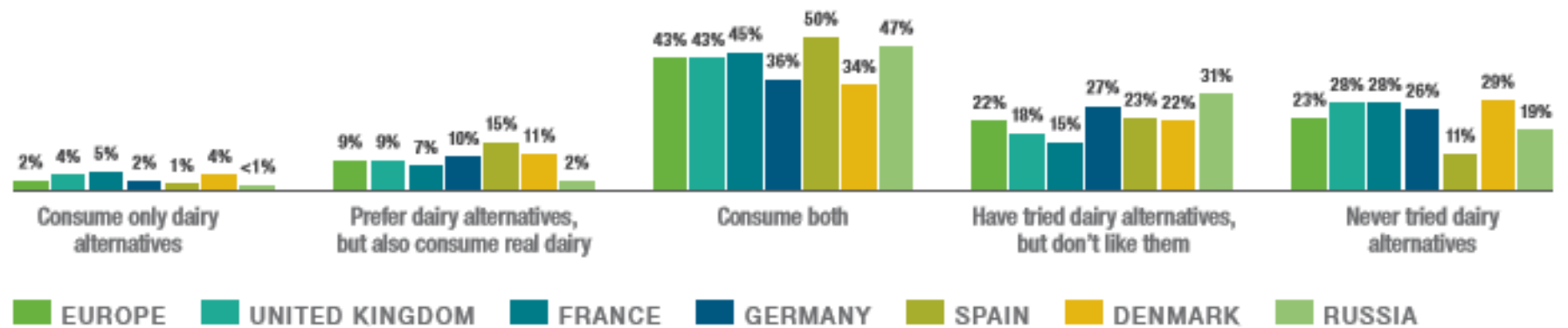
Real dairy consumption in Europe



Introduction

* A strong link with the tradition... but a stronger appetite than the rest of the world for dairy alternatives.

Dairy alternative consumption



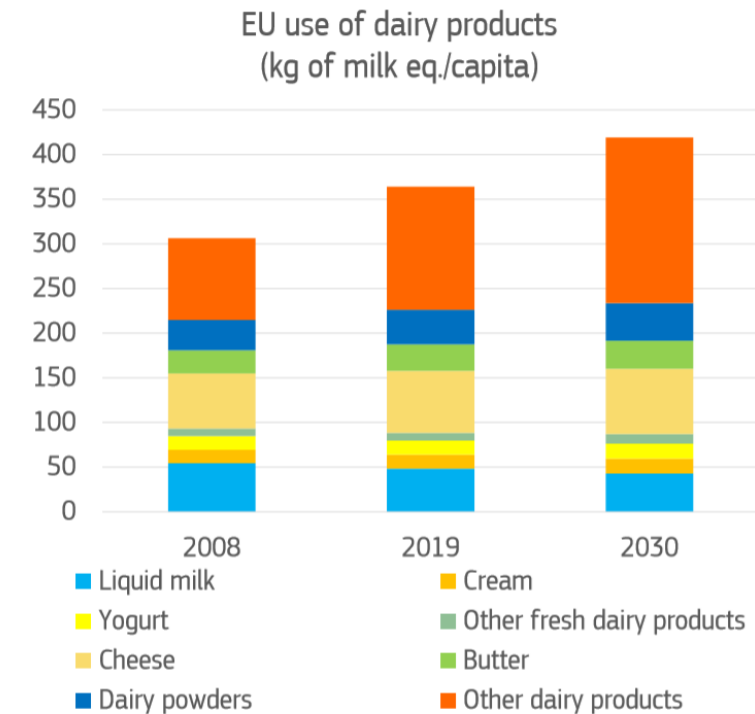


Introduction – Less direct consumption, more processed products

* **The decreasing trend in EU liquid milk consumption should continue over the outlook period 2020-2030** according to the European commission Agri-Outlook. By 2030, the declining trend in the EU is expected to slow to half the rate of the last decade, leading to consumption of **49 kg per capita by 2030**.

* The production of cheese, yogurt, cream and other fresh dairy products, including dairy desserts, is expected to grow further.

* **the total intake of fresh dairy products should decline only slightly, to 74 kg per capita in 2030, compared with 77 kg in 2018.**

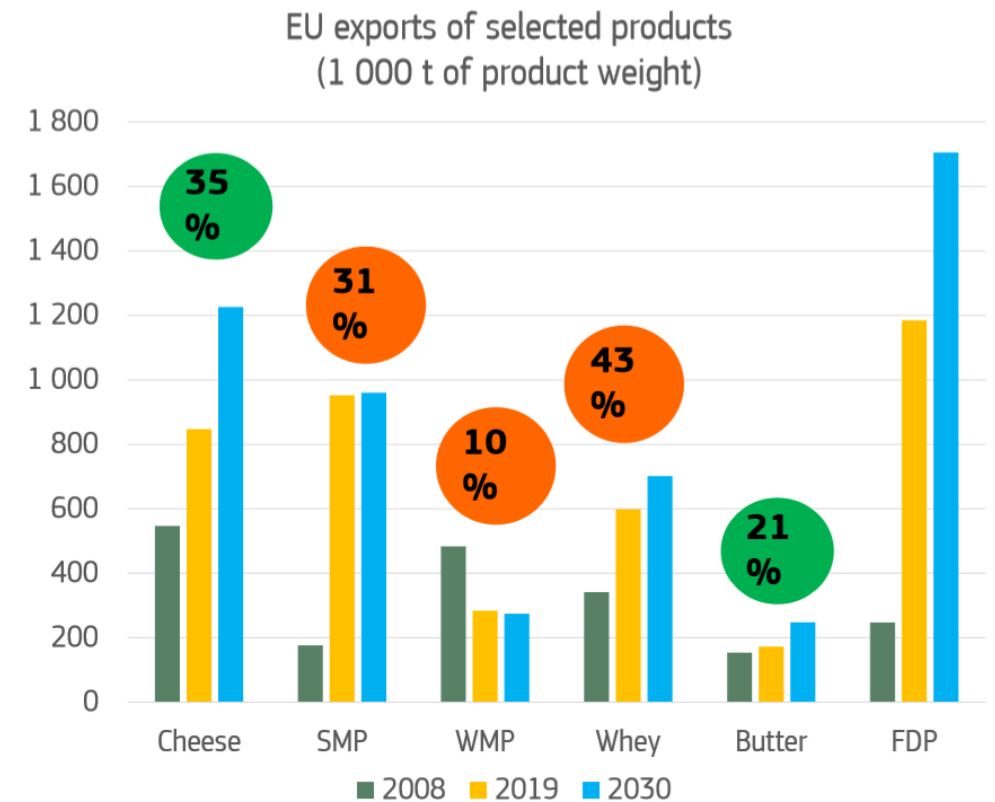


Source: DG Agriculture and Rural Development (preliminary baseline)



Introduction – Good prospects for cheese and FDP, gaining shares in butter

- * On the world market, demand for liquid milk will stay strong, especially in China, where imports complement domestic production.
- * By 2030, EU exports are expected to grow further. The EU could supply close to 35% of the global demand.

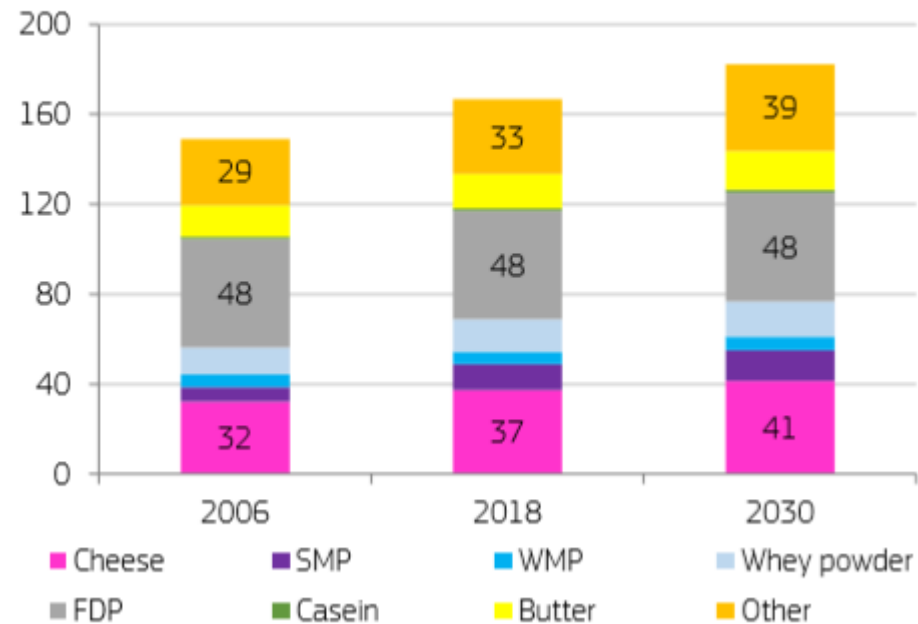


Source: DG Agriculture and Rural Development (preliminary baseline)

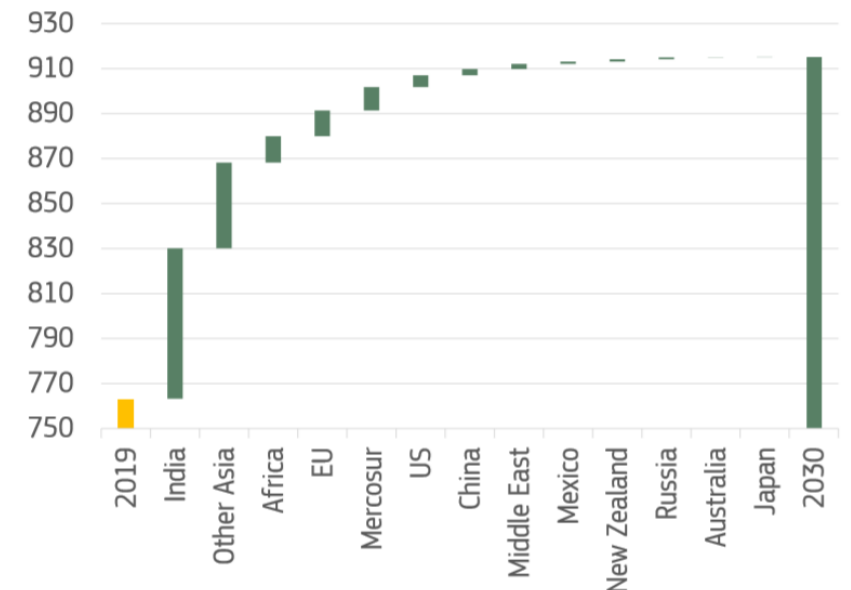
Introduction – Slower growth compared to last period but better than NL and US

- * EU milk production up to 179 Mt by 2030
- * The EU milk production should experience a modest increase over 2018-30, at 0.8% per year on average.

GRAPH 3.11 EU production by product (million t of milk equivalent)



World milk production growth by regions
(2019-2030, million t)



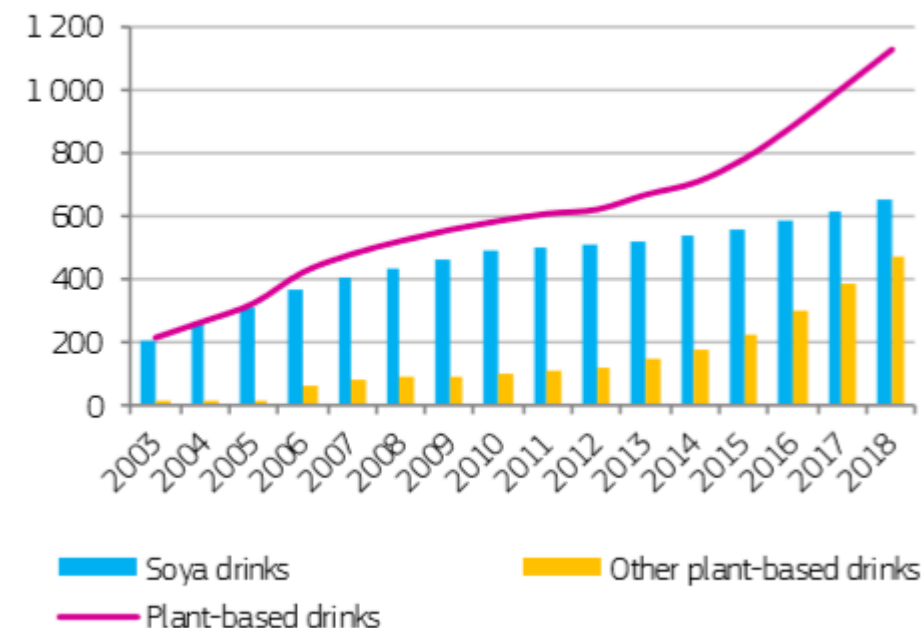
Source: DG Agriculture and Rural Development (preliminary baseline)



The unknowns – Alternative consumption trends (1/4)

- * The reduction in drinking milk consumption is also driven by a partial substitution of milk by plant-based drinks.
- * Their share is only representing 4 % in 2018 but this market is growing fast.
- * In the last decade, sales more than doubled, **in particular for non-soya drinks**, which represented more than 40 % of plant-based drinks in 2018 (as compared with 17 % a decade ago).

GRAPH 3.10 Retail and foodservice volume of plant-based drinks (million litres)



Source: DG Agriculture and Rural Development, based on Euromonitor

The unknowns – Growing International trade tensions (2/4)

* **Milk and dairy products are highly sensitive to the world trade environnement:**

* Threats are numerous in the short and medium terms:

* Escaliation of international trade Disputes (Airbus/Boeing case)

* US/China trade conflict

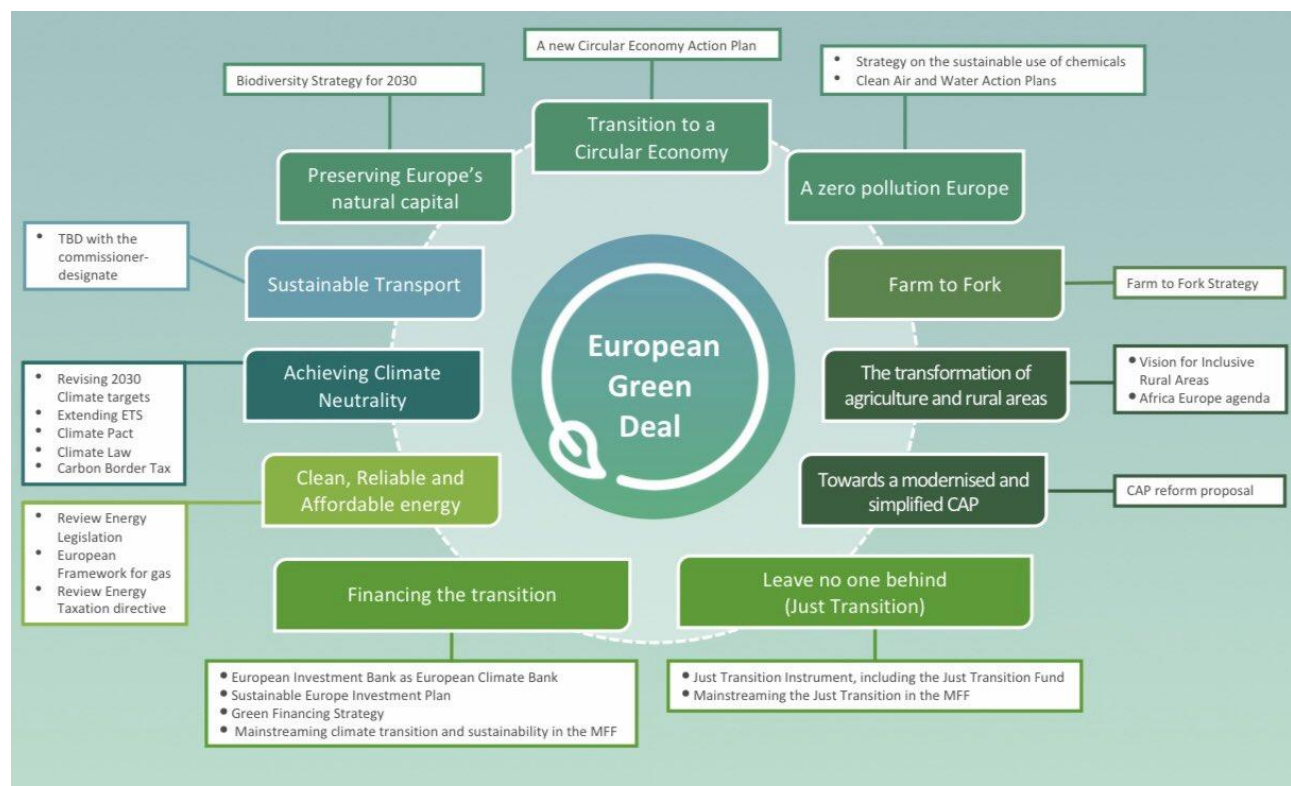
* Current WTO blocage on multilateral trade negotiations

* Brexit Aftermath (9% of the EU Milk production, 4 million t of dairy products export)



The unknowns – Current EU discussions (3/4)

- * The CAP negotiations are currently underway
- * The CAP will be integrated in a broader « Green Deal »
- * Farm to Fork strategy – less animal products consumption in our diet





The game changer in Europe ? The animal welfare concern – and the related communication (4/4)

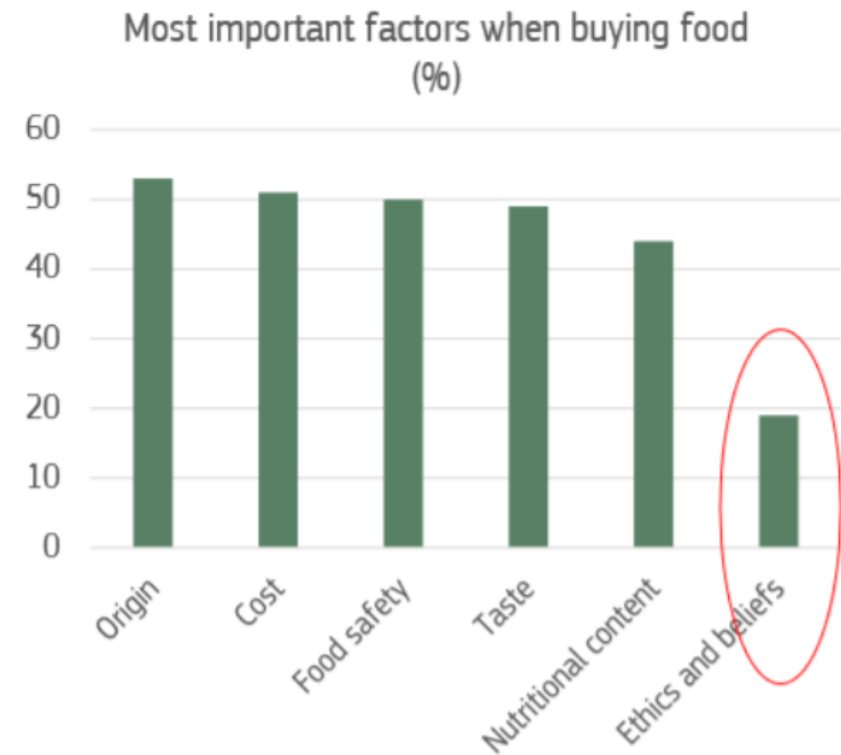
- * According to perception studies **Meat/dairy consumption is reduced in the name of health...**
- * ...but a complete ban is decided on the basis of ethical considerations of animal welfare and the environment.
- * Only 6% of respondents in France, Spain, the United Kingdom and Germany declare themselves vegetarians or vegans.
- * Flexitarians represent between 20% and 25% of the populations of the four countries studied: France, Germany, Spain and the United Kingdom.





The game changer in Europe ? The animal welfare concern – and the related communication (4/4)

- * According to a recent survey commissioned by the EFSA, when buying food ethics and beliefs still appear as limited drivers.
- * However Ethic issues are on the rise.
- * **Conclusion: It is late but not too late to engage actively in this debate!**

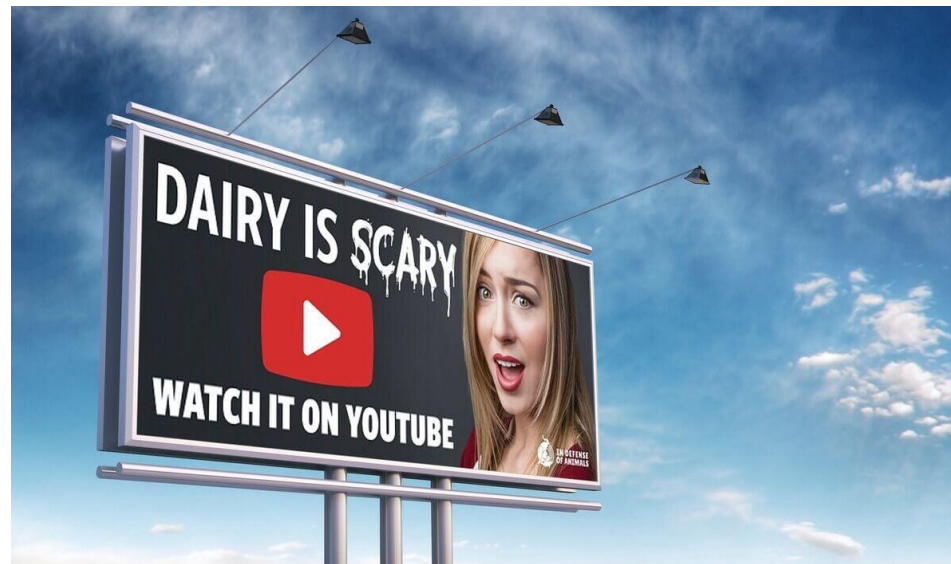


Source: Special Eurobarometer - April 2019 "Food safety in the EU"
Survey requested by the European Food Safety Authority (EFSA), based on a list of 15 food safety-related topics
<http://www.efsa.europa.eu/en/press/news/190607>



Understanding the animal welfare question from a communication perspective

Part 1: *The challenges of consumers' perception ...



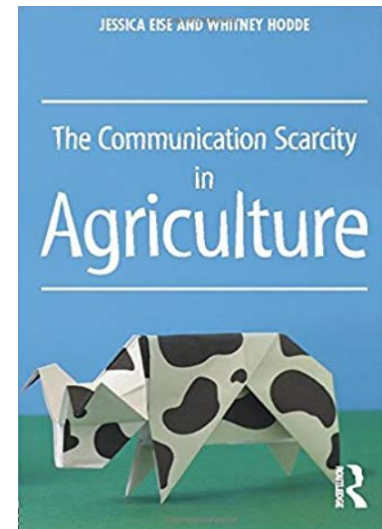


Why is that so hard to make our voice heard? (1/6)

* A demographic concern:

* European farmers are a rural, rather homogenous and older group when compared to the average population. One third (32%) of farm managers in the EU were 65 years of age or more. Only 11% of farm managers in the EU were young farmers under the age of 40 years. The farming profession is dominated by men, with only about three in ten (29%) EU farm managers being women.

* Harder to get connections with the general media, to have a community of online influencers and well-established ambassadors.





Why is that so hard to make our voice heard? (1/6)

* A demographic concern:

* At the opposite, the “vegan trend” seems to attract more women, young people (under 35 years of age), urban populations.

* A symbolic opposition between two parallel cultures/groups that don't have much interactions besides social media/media.

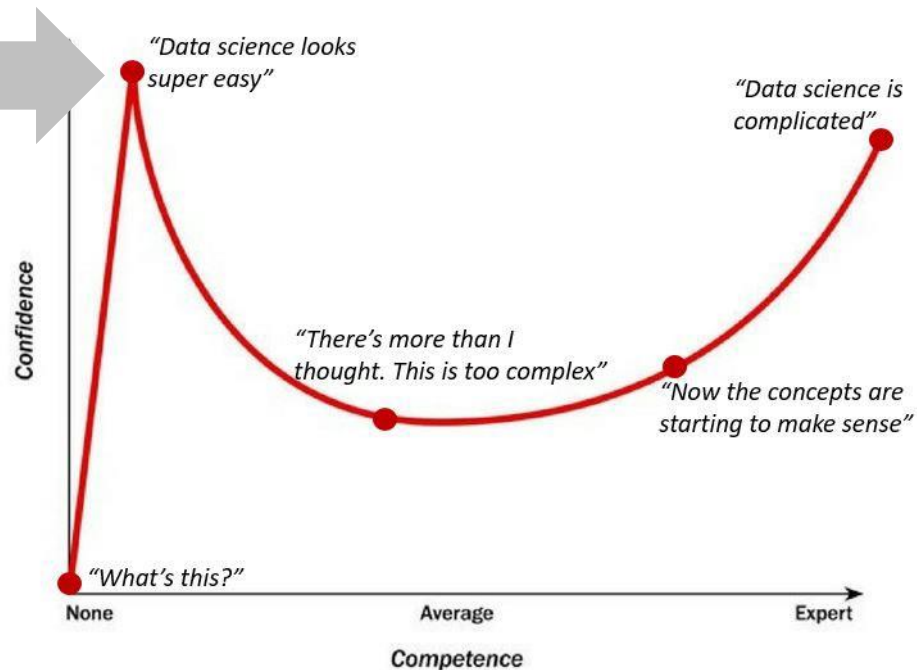
* Conclusion: we should pay greater attention to WHO is emitting our messages



Why is that so hard to make our voice heard? (2/6)

* **A problem of cognition:** « I know food therefore I know how it is produced »

Dunning-Kruger effect in Data science



* **Conclusion:** Instead of attacking the competence or answering directly to critics, it is a better option to show the complexity of the discussion

* **Use carefully the concept of « fake news »**



Why is that so hard to make our voice heard? (3/6)

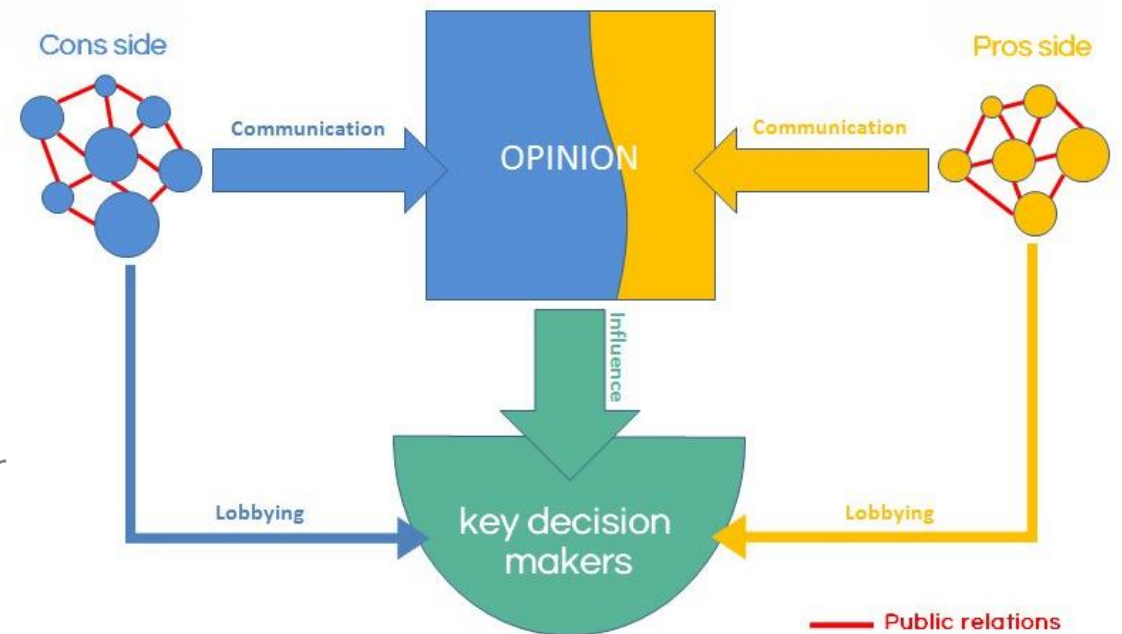
* **A problem of approach** – direct lobbying vs. Indirect influence

Eurogroup for animals – staff

+25% of their Brussels office staff is dedicated to communication

Birdlife Europe – staff

there is a ratio of 1 policy officer for 1 communication officer



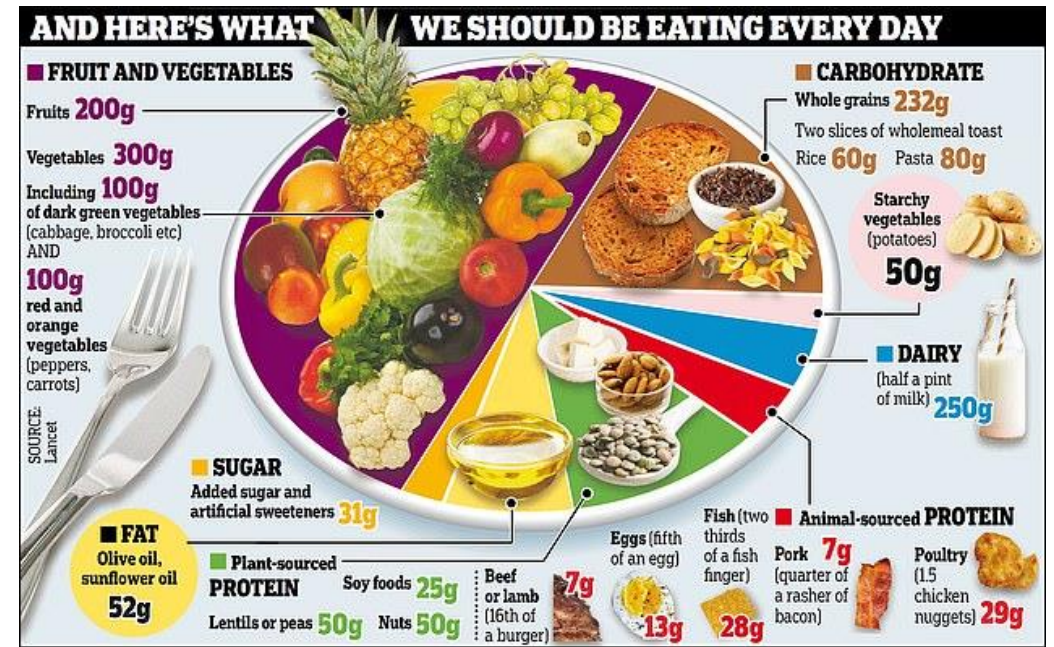
Why is that so hard to make our voice heard? (4/6)

* A problem of timing and agenda setting

- * Often forced to react
- * Often forced to do in a very short period of time

* This is a strategy!

- * The case of the eat lancet report



Why is that so hard to make our voice heard? (4/6)

- * A 47 pages report backed up by a powerful communication campaign - a growing trend
- * The abstracts that are proposed are more radical and do not reflect the methodology/ the doubt present in the full report.
- * In this kind of campaign messages are tested within group studies to find the most effective concepts for the media/decision makers.
- * A “wow” effect – so impressive and fast that you will agree without discussing it
- * A communication proposed at the same time in different language on different media channel. This required a lot of time and preparation!

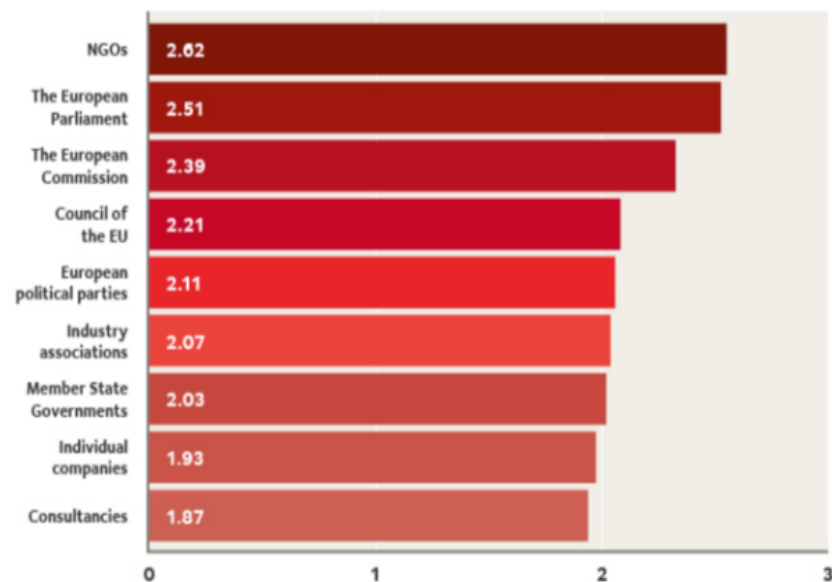


Why is that so hard to make our voice heard? (5/6)

* A problem of approach with the media

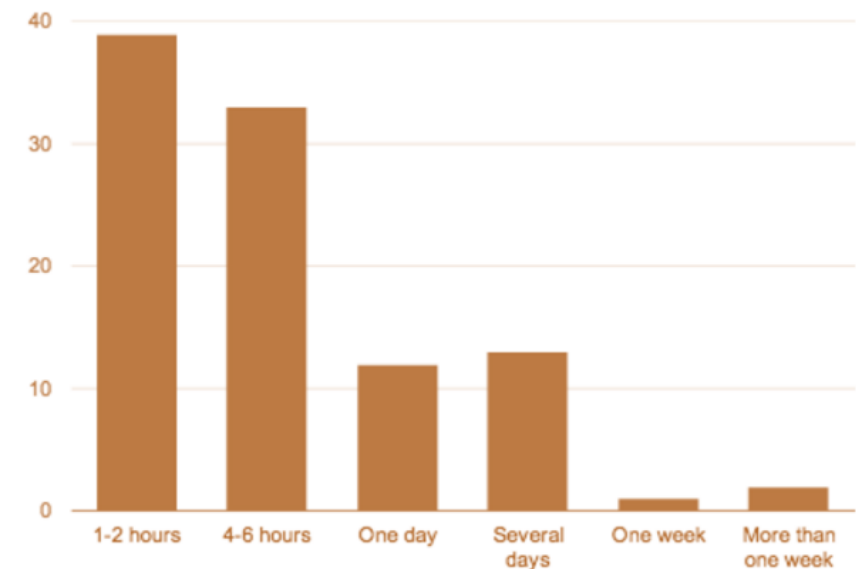
- * Complex/technical stories do not make good headlines.
- * Too simple messages are considered as “Institutional Communication”

Survey Question: How do you rate the quality of the information you get from



Answers are averaged according to a weighting where 4 = Very Good, 3 = Good, 2 = OK and 1 = Bad.

How much time do journalists spend on an average story?



Source: Media relations and Europe – from the journalist's perspective, APCO, 2008



Why is that so hard to make our voice heard? (6/6)

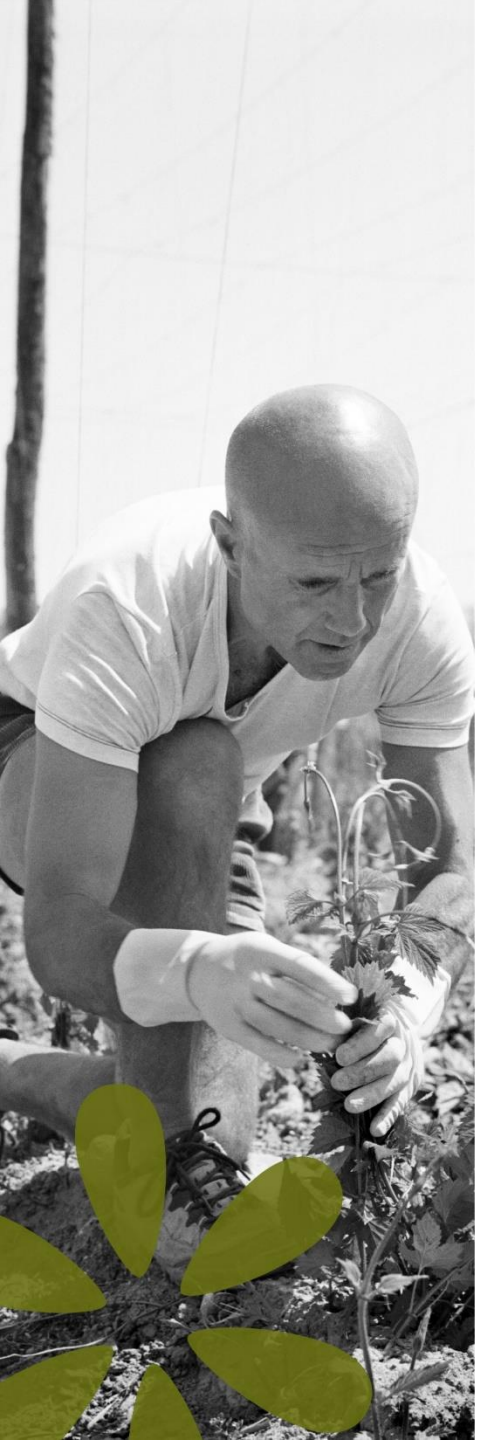
- * **The « salami tactic » also applies to livestock products**

- * EAT lancet and WWF "Meat guides" : To move the consumption of meat from red to yellow and green (more sustainable). Same applies to milk.

- * **Conclusion: we shouldn't play one sector against the other. The questions around animal ethic are impacting ALL livestock productions**

The silver bullet does not exist ! Multiple actions are required

* **Part 2 ...to challenging the perception”**





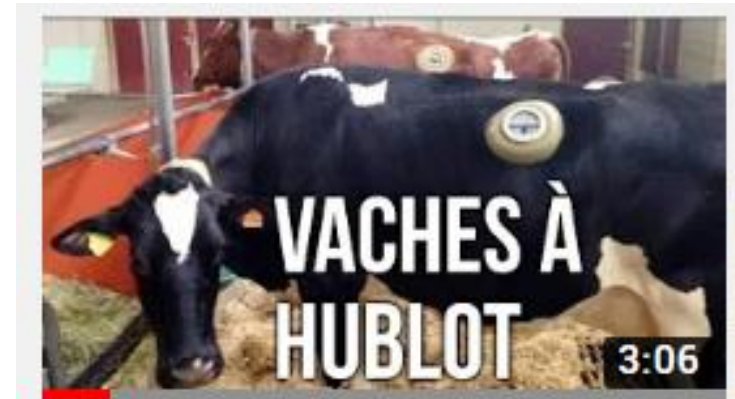
Answering the demographic concern, challenging the dunning Kruger effect (1/2)

* Through social Media...



Réponse à Rémi Gaillard d'un éleveur sur l'abattage

67K views • 1 year ago



VACHES A HUBLOT, LA RÉALITÉ FACE A L214

52 k vues • il y a 4 mois

- * More efficient than institutional communication
- * Create farm influencers (invited in the media)

Answering the demographic concern, challenging the dunning Kruger effect (2/2)

* by phone !



Jérôme Regnault, Fanny Durand-Boschung et Olivier Coupery, producteurs en Ile-de-France, ont imaginé un service d'appel gratuit pour contacter un agriculteur.

© DR



Working more closely with the media

- * Creating a central hub for discussions on social media



Working more closely with the journalists

- * Involving journalists – they know how to communicate/engage with the press!



HOME PAGE

SALUTE E
NUTRIZIONE

AMBIENTE E
SOSTENIBILITÀ

SICUREZZA
ALIMENTARE

BENESSERE
ANIMALE

ECONOMIA E
SPRECO

EVOLUZIONE E
CULTURA



Carni e salumi: quanto ne sai davvero?

Il modello zootecnico italiano è un esempio di sostenibilità in tutto il mondo. Per ribadire questo concetto, sempre più impo



SALUTE E
NUTRIZIONE

AMBIENTE E
SOSTENIBILITÀ

SICUREZZA
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BENESSERE
ANIMALE

Involving end consumers ?

- * The example of « who's the boss »

- * Specifications decided online by consumers



Proposing studies with a communication approach

- * More than 6 out of 10 French people think - wrongly - that vegetable drinks can replace cow's milk.
- * Almost 1 in 3 French people think - wrongly - that vegetable drinks or desserts contain milk.
- * 1 in 2 French people think - wrongly - that vegetable drinks provide the same nutrients as milk.
- * **1 in 4 consumers of these drinks, say that vegetable drinks meet the needs of babies.**



What are we doing at EU level ?



A collective (re)action - #Meatthefacts

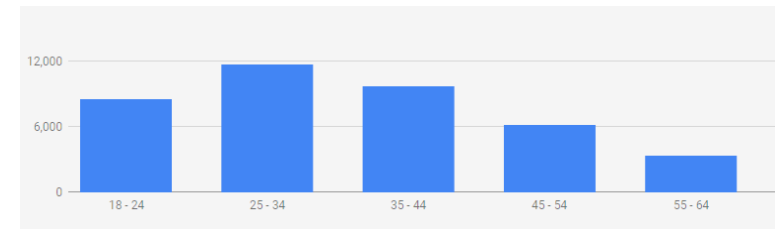
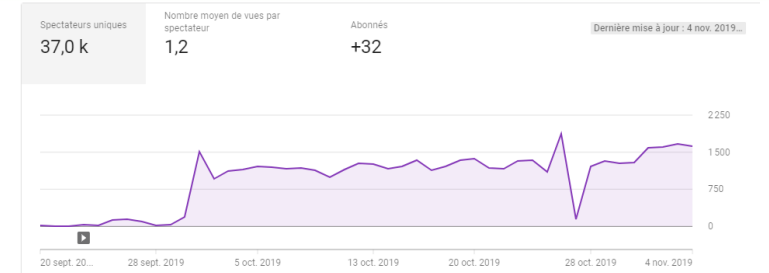
- * 6 months ago – first analysis of NGOs marketing strategy / willingness to replicate their approach to tell the other side of the EU livestock story.
- * 11 EU based organisations accepted to join us in this project (participation involved financial/knowledge investment)
- * Creating a strong and user-oriented web platform addressing the most popular myths around livestock (something missing at EU level)
- * to back up this platform with a visual/emotional 360° communication campaign (NGO- style)



Working on the emotion in a non aggressive manner



Using paid advert systems to reach a new audience



Working with key decision makers in a different way





Creating a central hub to engage with everyone

<https://meatthefacts.eu/>

ANIMALS GET SICK BECAUSE THEY ARE KEPT IN CRAMPED CONDITIONS IN FACTORY FARMING SYSTEMS! - IS THIS FACTUAL?

+

HOW CAN CONFINED ANIMALS EXPRESS THEIR NATURAL BEHAVIOUR?

+

SHOULD CONFINEMENT OF ANIMALS IN FARMING BE BANNED IN EUROPE?

+

HOW IS ANIMAL STRESS MANAGED IN LIVESTOCK PRODUCTION ? WHAT MEASURES CAN BE CONSIDERED TO REDUCE STRESS?

-

Animals can experience stress for a number of reasons: fatigue or injury; hunger, thirst or temperature control; environment; unfamiliar people, handling, environment or surroundings; etc. Efficient, experienced and calm handling of livestock, using recommended techniques and facilities, as well as taking measures to eliminate pain and accidental injury, will reduce stress in the animals

DIG DEEPER





Conclusion

- * Livestock issues are **communication concerns** that should be solved through communications
- * A good communication campaign can be achieved with limited expenses
- * We should **not be afraid of controversy**: better to frame the debate ourselves than 'be framed.'
- * We can theoretically rely on a **larger and more supportive community** – the livestock sector!





Thank you for your attention!

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European farmers

European agri-cooperatives



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