

# Market barriers for welfare product innovations

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## Abstract

New products that are based on higher animal welfare standards encounter several barriers on the road to market acceptance. The authors focus on the Dutch poultry sector and distinguish between retailer and consumer barriers. Retailer barriers include the powerful position of retailers, the price competition, and the price-orientation of decision-makers. At the consumer level, potential barriers are: involving the consumer in animal welfare, making him understand the welfare benefits, convincing him to try the product and delivering satisfying quality. It is crucial to understand what product attributes influence the consumer decision process, as this will involve more than just ethical aspects. A consumer-oriented development process resulting in superior product performance on multiple attributes besides ethics should help producers and industries to overcome the barriers identified.

*Additional keywords:* consumer behaviour, retail, poultry, animal welfare

## Introduction

Increased attention has recently been paid, both in the literature (e.g. Meulenberg, 2003) and in public policy (Anon., 2004a), to the drawbacks of intensive agriculture and the market opportunities for sustainable products. Product innovations that do guarantee a higher level of animal welfare than mainstream products are often not substantially different with regard to other attributes – except perhaps for the price. Prominent examples include the introduction of free-range eggs and numerous organic products that have been introduced as sustainable and animal-welfare-friendly alternatives to mainstream products.

However, achieving a higher degree of animal welfare on the market – with

minimal government intervention – is not easy. For example, the market for organic products has not met growth expectations. Albert Heijn, the leading food retail chain in the Netherlands and a subsidiary of Ahold, was compelled to withdraw their support to organic pig farmers when organic pork sales fell short (Anon., 2004b). Higher degrees of animal welfare are generally associated with higher costs (e.g. Bornett *et al.*, 2003), which should be covered in the market. But market acceptance of the product should not be taken for granted: animal-welfare products are based on the animal's wants and needs (Bracke *et al.*, 2001), rather than on those of the consumer. Although consumers are concerned about animal welfare (Anon., 2003a; 2004a; Verhue & Verzeijden, 2003), these concerns do not automatically translate into a market demand and willingness to pay for 'welfare' products.

This article discusses the major barriers that may be encountered by animal-welfare products when launched on the market by producers or by the industry. To this end, we have drawn on retailing research and literature reviews carried out within the Dutch National Retailing Team of the EU-Welfare Quality project and a research programme of the Dutch Ministry of Agriculture, Nature and Food Quality (see Ingenbleek *et al.*, 2004). The barriers that are discussed in this article deal with the Dutch poultry and egg industry in particular, but are also applicable to animal-welfare products in other industries. To some extent the barriers represent obstructions to product innovations that aim to enhance other sustainability aspects (including environmental and socio-cultural issues). We define animal-welfare innovations as those that pay more respect to the well-being of animals than mainstream products do. It does not imply, however, that these innovations are *animal friendly* in an ideal way – the latter being a subjective criterion anyway. Although animal-welfare products may encounter barriers at any level in the supply chain, we have limited our framework to those barriers that these products may encounter at retailer- and consumer level. After a discussion of these barriers, the article proceeds with an analysis of the implications for project managers aiming to develop new products with the objective of improving animal welfare.

## Retail barriers

Developments in European retailing are driven by retail companies striving to be effective and efficient. Trends like retail concentration, efficient cost strategies and strategic assortment decisions are constantly observed (Meulenberg & Viaene, 2005). Although new products can be successfully introduced through quality butchers and outlets of the hotel and catering industry, it is not surprising that the supermarket is often the first retail channel that is considered to introduce new food products. In the Netherlands, supermarkets welcome four million shoppers on a daily basis, and are responsible for 75% of the food sales in food grocery stores and outdoor markets (Anon., 2004c). They sell over 80% of all fresh meat, processed meat and eggs (for consumption) (Anon., 2005a). There are indications, however, that the number of (animal) welfare alternatives in retailer assortments varies strongly across supermarket chains (see Anon., 2004d; 2005b for the Netherlands) and across countries. This suggests that welfare products that are not initiated by retailers encounter barriers at

the supermarkets. First we shall discuss three retail barriers that influence the availability of welfare products in the Dutch situation: (1) the degree of retail concentration, (2) price competition, and (3) passing the price-oriented purchaser.

### **Barrier 1: Retail concentration**

The trend towards retail concentration leads to the first barrier to the introduction of welfare products: there are few supermarket chains from which to choose. In the Netherlands, the combined market share of the four largest supermarkets' buying desks is over 85% (Bijman *et al.*, 2003). The central place of supermarkets in the food chain together with this high concentration rate puts supermarkets in a powerful position. This has two implications for the relationships between suppliers and retailers. First, retailers may charge fees for new products in order to include them in their assortment, the so-called slotting allowances. Other commonly used terms are listing fees, end-aisle fees, fixed end-of-year rebates, return of unsold units, contributions to special promotions and long-term payments demands (Dobson *et al.*, 2003). The second implication is that suppliers should operate on a large scale to meet the demands of the large supermarket chains. An innovative farmer developing a new outdoor-chicken meat concept will face a retailer demanding availability for all his stores. As most retailers have a significant market share, this implies a considerable investment and risk for the individual farmer.

### **Barrier 2: Price competition**

Supermarkets may gain a position of competitive advantage in two different ways: either by providing more benefits to consumers than their competitors (service, accessibility, atmosphere, assortment; Ailawadi & Keller, 2004) or by providing some benefits to consumers at lower costs (and thus lower prices; Hunt & Morgan, 1995). In Switzerland, two major retailers typically compete on the basis of superior benefits offered to consumers. As a consequence, they also try to differentiate themselves on the basis of ethical issues. For instance, both provide a large assortment of organic and other socially responsible products (Remmers, 2004).

However, in the Netherlands the competitive landscape among retailers looks different. Albert Heijn does not face a direct competitor in its efforts to provide superior benefits to consumers. Other retailers have focused increasingly on price competition, which was stimulated by several factors such as (1) the market entry of typical price discounters, like Aldi and Lidl, (2) the failure of the Konmar chain to compete on consumer benefits with Albert Heijn at the end of the 1990s, (3) an economic recession in combination with increased price sensitivity of consumers (Bijmolt *et al.*, 2005), and (4) the strategic move by Albert Heijn to start a price war in order to change its 'expensive' image.

Price competition calls for retailers to lower purchase prices, make assortment restrictions and strive for higher sales per m<sup>2</sup> sales area (Meulenberg & Viaene, 2005). This imposes barriers to new, higher priced products with no additional benefits but the credence attribute 'animal welfare'. The greater the extent that supermarkets

provide benefits to customers (in other words, the less they compete on price), the more they will be interested in including these products in their assortments. This was illustrated in the aforementioned example of Switzerland, but also in the Netherlands there is substantial evidence for this conclusion (Anon., 2004d; 2005b; Binnekamp, 2004). Supermarkets that aim to provide superior benefits to consumers will adopt welfare products, whereas those that focus on price competition may follow later, or not at all.

### **Barrier 3: Passing the price-orientated purchaser**

Within a supermarket chain, different interest groups have a stake and actual purchasing policies emerge from the discussion between these groups (Anderson & Narus, 1999). Within organizational buying, various roles can be distinguished: initiators, users, influencers, deciders, approvers, buyers and gatekeepers (Kotler, 1997). Conflicting interests could also exist between actors in these roles – for example, between marketing managers and the buying desk of supermarket chains. Whereas the focus of the first group may be on innovation, ethics, new products or broad assortments, the buying desks may be tempted to focus more on lower costs and high turnover rates. One of the critical success factors is the support within the supermarket among managers who influence and/or make decisions. If the support for welfare and ethical issues can be attained within the organization, related products are more likely to be included in the assortment.

## **Consumer barriers**

Reaching the retailer shelf is a necessary, albeit not yet sufficient step in the process of successfully introducing an animal welfare innovation – unless supermarkets take a decision to remove ‘mainstream’ products, as happened with battery eggs in the Netherlands in January 2004. In models of consumer purchasing behaviour of (food) products, the following aspects have been identified as predictors of consumer (re-)purchase behaviour: product appearance, the shopping situation, perceived cost, perceived quality, sensory characteristics or image (see e.g. Monroe, 2003; Grunert, 2005). With regard to animal welfare innovations, four additional barriers have been identified that may prevent consumer adoption: (4) getting the consumer involved, (5) making the consumer understand, (6) making the consumer act, and (7) keeping the consumer satisfied.

### **Barrier 4: Getting the consumer involved**

In order to perceive added value from a welfare product, consumers should recognize a problem with the mainstream counterpart and become involved with the welfare issue. If consumers do not see the relevance of the welfare attributes upon which the product is positioned, then the welfare product will not satisfy any need. Four factors may cause a lack of involvement.

First, when asked, respondents state that the current state of animal welfare in the Netherlands is 'bad' or 'poor' (Anon., 2004a). The majority of Dutch consumers (52%), however, state that they do not or rarely take animal welfare into account when purchasing meat (Anon., 2005c). Only relatively small segments of consumers are more involved in welfare products. Burrell & Vrieze (2003) found that in the Netherlands, women, the elderly, the more highly educated, members of animal welfare associations, and vegetarians find the welfare of chickens important.

Second, meat and eggs are often considered to be low-involvement products (e.g. Kujala & Johnson, 1993), although the level of involvement varies across consumer segments (see Verbeke & Vackier, 2004). A routine purchase decision will predominantly determine the product choice. Consider that most poultry products are sold in the supermarket. A consumer spends on average a total of 26 minutes per visit in the supermarket (Anon., 2003b). So consumers have little time to spend on selecting products, and tend to go through a low effort decision-making process, using simplifying heuristics like image, price, brand, or past buying behaviour. Under these circumstances it would hardly be surprising that many consumers do not recall their latent animal welfare concerns.

Third, consumers respond more readily to negative than to positive information (Sen & Bhattacharya, 2001). They are more likely to reject a product because it is considered 'bad', than to purchase a product because it is 'better' on animal welfare attributes. So it is difficult to sell poultry products on the basis of their 'outdoor' or 'welfare' attributes alone.

Fourth, the buying process is also contextually determined: the salience of animal welfare depends on the buying environment and occasion. The 'adopt-a-chicken' programme, where consumers 'adopt' an organic chicken and receive its eggs, has led to a significant rise in market share for organic eggs (Anon., 2004e). This shows that consumers may be willing to pay more for a welfare innovation once they are taken out of their habitual buying behaviour exhibited in the supermarket.

### **Barrier 5: Making the consumer understand**

The next step in successfully introducing welfare products is making the consumer (as opposed to the producer) understand the benefits of the product. The consumer buying process is complex because many factors influence perceived quality, including the appearance of the product, brands, labels, country of origin, and the image of the store where the product is bought (Monroe, 2003). Consumers may find it difficult to interpret welfare attributes. Animal welfare is a so-called credence attribute, i.e., it cannot be verified by the consumer – not even after consumption. Consumers will use certain cues (such as labels and package) and associations (Keller, 1993). Such associations may not always be correct: wrong links could be activated in the consumer's mind, and incorrect information could become associated with a product. An example of this is the failure of the introduction of slow-growing chicken meat in the Netherlands in the 1980s: consumers were not aware that regular chickens only live 42 days, and thought the 56-day grown chickens were slaughtered too young.

Finally, product image may inhibit the growth of welfare initiatives. The Dutch

word for barn eggs, 'scharrel' eggs, may evoke an idyllic image of happy animals that live in small couples with a cock and roam around freely on the farmyard pecking about a bit (as suggested by Van Leeuwen, 2005). This perception is actually incorrect as hens are kept indoors. Yet, there is little knowledge amongst Dutch consumers about welfare labels on eggs (Burrell & Vrieze, 2003). Whereas 40% of the Dutch consumers state that they buy outdoor eggs (Anon., 2005c), the actual market share of outdoor systems is less than 4% (Anon., 2005a).

Consider the situation in Germany, where barn eggs are called 'Bodenhaltung' eggs (literally translated: floor-produced eggs) and free-range eggs are called 'Freiland' eggs (literally translated: freiland, 'open-air' eggs). One could argue that the positive and better fitting associations of the Freiland eggs in Germany translated into a better market share: 18.0% in 1999, compared with 2.5% for the free-range outdoor eggs in the Netherlands (Tacken & Van Horne, 2002). This illustrates the potentially powerful role of a positive and fitting image.

### **Barrier 6: Making the consumer act**

After the product reaches the shelf and the consumer becomes involved and understands the product's benefits, the consumer must also be compelled to *act*, that is, ultimately he must purchase the product. If consumers perceive more benefits from an animal welfare alternative than from a mainstream product, then the majority of the consumers (who are not highly engaged in animal welfare) will trade off these benefits against the perceived price (Monroe, 2003). Like quality, price is a perception in the consumer's mind. Small differences in objective prices may seem large to consumers (for example, the difference between € 2.00 and € 1.95). Because welfare products are often sold at a higher price than mainstream products, consumers may perceive these products as 'expensive' and remember them in that way.

Some consumers may be more sensitive to these price differences than others. Differences in price sensitivity also exist between product categories. Because eggs are not easily substituted by other products, a higher price for eggs will have a relatively small effect on sales. Dutch supermarkets did agree to remove battery eggs from their shelves: the risk for supermarkets of decreasing sales was relatively low due to the low substitutability of eggs. A similar concerted action with poultry meat would probably be much more difficult to implement. A higher price for poultry meat would likely induce consumers to switch to alternatives like pork. So an attractive price-quality perception would be a necessity for poultry meat.

### **Barrier 7: Keeping the consumer satisfied**

After the consumer has tried the product, repeat purchases determine the true success of low-cost fast-moving consumer goods such as food products (Kotler, 1997). A consumer will not become loyal unless he is entirely satisfied with the product at the moment of consumption (Oliver, 1997). A disappointed consumer will not purchase the product a second time. Producers should therefore meet or exceed all product

expectations of consumers. Based on Maslow's Hierarchy of Needs, fulfilment of lower-order needs is necessary before higher-order needs can be fulfilled (Maslow, 1943). Ethical issues like animal welfare are therefore contingent on more basic needs like food safety and sensory factors (taste, freshness) (Frewer *et al.*, 2005). Purchase motives for organic products, for example, reflect that the 'more basic' need for healthy food is a more important consideration than 'less basic' needs such as a sustainable environment or animal welfare (Schifferstein & Oude Ophuis, 1998; Viester, 2003). If consumers have the appropriate purchase motives and are satisfied with the product, they are more likely to purchase the product again and to talk more favourably about it, leading to new customers that will try the product (Woodruff, 1997).

## Implications

This paper identifies the major barriers that welfare products may encounter when introduced on the market. In anticipation of these barriers, some guidelines are provided for managers aiming to develop animal welfare products.

Common marketing wisdom (e.g. Kotler, 1997) says that the consumer should be the starting point for developing and marketing a product. A product must always satisfy the consumer's needs, and the development of new products must start from this point of view. What does the consumer want? Or formulated in this context: should hens be kept outside? Purely looking at market dynamics, outdoor-chicken products will only succeed if:

1. The product really satisfies consumer's wants and needs. This increases the chance of re-purchase and market acceptance.
2. The price-quality comparison with the mainstream product makes the product worth trying for the consumer.
3. The product raises favourable associations. The 'message' of the product should therefore be communicated clearly through its name, packaging and advertisements.
4. The product targets an appropriate consumer segment that is involved enough to become interested in the product. Note that the segment might be small if the product offers animal welfare only as an additional attribute compared with the mainstream. If improving animal welfare is considered an issue that concerns the entire society, then increasing legal standards might be the best way to ensure this.
5. The product is available to this segment. The chance of availability is increased if key decision-makers in the retail actively support a far-reaching animal welfare strategy. However, the degree of concentration and price competition makes it more difficult for the product to reach the supermarket shelf.

Despite these insights, innovation will remain a difficult process: *"almost every product developer should be able to sum up the 10 to 15 critical success factors that make the difference between winning and losing [...] but we still make the same mistakes"* (Cooper, 1999). So creating other attributes (like taste, quality and appearance) that consumers appreciate remains the most important advice. Products that offer more benefits are generally the most successful on the market (Henard & Szymanski, 2001). In the end,

a product that consumers perceive as superior will overcome the hurdles it may meet on the market with the greatest ease.

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