

Increasing organic food consumption in Spain

An analysis of policy obstacles in national and European policy

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Submitted May 15, 2014

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Abstract

Consumption of organic food products in Spain has not kept pace with the expansion of production. Supporting the consumption of locally-produced organic food would increase the sustainability of food consumption in Spain. The objective of this study is to analyse the policy obstacles to an increase in organic food consumption. Data collection is based on a document analysis of governmental measures affecting organic food consumption and relies on both qualitative and quantitative data. The four major issues to consider in regards to organic food consumption in Spain are exports, food prices, consumer knowledge, and availability. National Organic Action Plans show a policy-gap concerning the price-differential between conventional and organic foodstuffs and the scarce availability in key marketing channels. Further, policies to promote locally-produced organic food in Spain are severely constrained by international trade policies. Future policy steps should combine information-based policies with other policy-instruments and support alternative structures of provision.

Keywords

sustainable food consumption, organic farming, domestic consumption, policy instruments, distribution system, food prices, Organic Action Plan, Common Agricultural Policy

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Jennifer

“Less is more, more or less”.

- M. Levi

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List of Abbreviations

CAP – Common Agricultural Policy

COAG – Coordinadora de Organizaciones de Agricultores y Ganaderos (Coordinator of Farmers Organisations)

EOAP – European Action for Organic Food and Farming

EU – European Union

GMO – Genetically Modified Organism

IFOAM – International Federation of Organic Agriculture Movements

ICEX – Instituto de Comercio Exterior (Institute for Foreign Trade)

MAGRAMA – Ministerio de Agricultura, Alimentación y Medio Ambiente (Ministry of Agriculture)

MAPA – Ministerio de Agricultura, Pesca y Alimentación (Ministry of Agriculture)

MARM – Ministerio de Medio Ambiente y Medio Rural y Marino (Ministry of Agriculture)

MITyC – Ministerio de Industria, Turismo y Comercio (Ministry for Industry, Tourism and Trade)

OAP – Organic Action Plan

RDP – Rural Development Programme

SEAE – Sociedad Española de Agricultura Ecológica (Spanish Society for Organic Agriculture)

VAT – Value-Added Tax

1 Introduction

Throughout the world, the conventional system of intensive agriculture faces many environmental problems that question its long-term productivity. Some of the main environmental pressures resulting from conventional agriculture are soil degradation, widespread nutrient and pesticide use, and biodiversity degradation (Wood, Sebastian, & Scherr, 2000). Agriculture has the most severe impact on biodiversity (Reisch, Eberle, & Lorek, 2013). Yet, biodiversity is critical for food production (Miller & Spoolman, 2009; Reisch et al., 2013).

The system we employ to produce food determines to a great extent how sustainable in the long-term is our food consumption (Thøgersen, 2010). Organic agriculture is recognised as a key alternative to conventional agricultural practices to make food consumption more sustainable (Miller & Spoolman, 2009; Reisch et al., 2013; Thøgersen, 2010), and the European Commission has highlighted organic food consumption as a strategic objective for sustainable food consumption (European Commission, 2011). This agricultural system intends to preserve the natural life-cycle systems, and its practices involve the prevention of soil erosion, strict limits on fertiliser and pesticide use, and an absolute prohibition on the use of Genetically Modified Organisms (GMOs) (Stolze, Piorr, Härring, & Dabbert, 2000).

Spain is a leading producer of organic food in Europe and is among the world's main exporters (Ministerio de Agricultura, Alimentación y Medio Ambiente [MAGRAMA], 2012a). However, organic food consumption in Spain is residual and has the lowest per-capita consumption among the largest consumers of organic food in Europe and North-America (MAGRAMA, 2013). The motive for focussing this study on Spain stems from this apparent paradox. The extent of organic production in Spain signifies an already existing potential for increasing sustainable food consumption. Based on this existing potential and on the environmental impacts of conventional agriculture, I argue that the consumption of locally-produced organic food should be supported by the government in order to increase and promote sustainable food consumption in Spain.

Public policies are fundamental to empower citizens for sustainable food consumption because they can reduce important structural constraints, such as the distribution system and relative prices, that prevent consumers to change their behaviour towards more sustainable food choices (Fundación Biodiversidad, European Commission & Greenpeace, 2011; Thøgersen, 2005). This study shows the scarce support given by national and European policies to increase organic food consumption in

Spain. The policy support for the organic sector is essentially defined by the Common Agricultural Policy¹ (CAP), which has been key to further its development in Spain as well as in other member states in the European Union (EU) (Sanders, Stolze, & Padel, 2011b).

This study focuses on an analysis of existing governmental policies that drive consumer behavioural change towards organic food consumption. The analysis is based on policy measures at a national level as well as a European level when defined by the CAP. The objective of this study is to identify and analyse the policy obstacles of public policies affecting organic food consumption in order to assess how the Government can better support organic food consumption in Spain. The question I aim to respond to reads:

What are the policy obstacles to an increase in organic food consumption in Spain?

In order to respond to this question and fulfil the objective of this study, I will address the following sub-questions:

- 1) What are the key issues to increase organic food consumption?
- 2) How are national and European policies supporting organic food consumption?
- 3) What are the policy obstacles and what improvements can be made in public policy?

The second section outlines the methodology used in this study. The third section explains the rationale and the conceptual framework. The fourth section responds to the first sub-question and provides a contextual analysis of the Spanish organic sector. The fifth section addresses the second sub-question and analyses the policy support affecting organic food consumption. The sixth section responds to the last sub-question and explores the policy obstacles brought up in the overarching question opening the discussion for possible policy alternatives. The study concludes with a summary of its main findings.

2 Methodology

This study applies both qualitative and quantitative methods of research. This approach is known as “mixed-methods research” (Bryman, 2008). My research is primarily based on qualitative methodology as my focus is a document analysis of governmental policies and existing research on the organic food sector. I use quantitative methods in order to complement qualitative methods in providing a contextual ground and understanding for the policy analysis. By providing quantitative

1 The CAP is the agricultural policy of the European Union since 1962. Its main objective is to improve agricultural productivity, so that consumers have a stable supply of affordable food, and to ensure reasonable incomes for European farmers [European Commission, 2014d].

data I aimed to describe important trends in the organic food sector and identify patterns that explain the governmental support to the organic sector. The following sections look into the methodology ground of the contextual analysis, which relates to sub-question 1, and the policy analysis, which encompasses sub-questions 2 and 3.

2.1 Key issues to increase organic food consumption in Spain

My first sub-question deals with the contextual analysis of the Spanish organic sector. The analysis is structured according to three of the main stages in the organic food supply chain: production, consumption and marketing. Organic producers, consumers and retailers are addressed specifically, since they are key actors to explain the current trends in domestic consumption (Armesto-lópez, 2008; Sanjuán, Sánchez, Gil, Gracia, & Soler, 2003).

I based the answer of my first sub-question on an extensive literature review on the organic sector in Spain, including academic journal articles, a consumer and retailer survey carried out by the Agriculture Ministry (Ministerio de Medio Ambiente y Medio Rural y Marino [MARM], 2010a) and several official reports from the Government, the Agriculture Ministry, the Industry Ministry and the EU. Therefore, data on the key issues to increase organic food consumption in Spain were collected from a document analysis. The review of academic journal articles was based on keyword searches in English and in Spanish in various library search systems and journal article databases intending to be as exhaustive as possible. Official reports from the Spanish Government and from the consulted Ministries as well as those from the European Commission were accessed by browsing their respective websites. Furthermore, qualitative and quantitative data on the agri-food sector, such as the key production sector and the relevance of trade, were collected from national reports from the Government in order to place the organic sector in the general agricultural context.

In order to gather further information on some aspects of the Spanish organic sector, one of the board-members of the Sociedad Española de Agricultura Ecológica² (Spanish Society for Organic Agriculture [SEAE]), V. González, was contacted by e-mail, since he appeared as co-author in several publications from research projects in the EU related to organic farming. His response did not provide many additional information, but did provide me with a report from the Agriculture Ministry which was not available in the Spanish Government's website. The report gave me further insight into issues such as organic food-prices, consumer knowledge and marketing structure for organic foodstuffs.

2 Scientific association in Spain, whose aim is to bring together farmers, experts, scientists, and other people in order to develop sustainable agricultural production systems based on the tenets of organic farming [Sociedad Española de Agricultura Ecológica, 2014].

Qualitative data on the organic sector were complemented with quantitative data. In relation to the production side, the amount and trends over time of certified organic crop surface in Spain were collected from Eurostat (2014). The data refer to surface certified as organic as fulfilling all the conditions of production established in Council Regulation (EC) No 834/2007. Organic production amount and trends in Spain were taken from the Agriculture Ministry reports (MAGRAMA, 2012a, 2013). Both the surface and production data were depicted through line graphs in order to illustrate the consolidation of the organic sector over time. Furthermore, data on world organic exports were collected from a survey by the Research Institute of Organic Agriculture (FiBL) and the International Federation of Organic Agriculture Movements (IFOAM) (Organic World, 2012) and from the Agriculture Ministry (MAGRAMA, 2012a, 2013). A bar chart was used to compare the amount of exports in Spain with other countries.

Data on organic food consumption trends in terms of per-capita consumption and of the percentage of total food expenditure were collected for Spain from the Agriculture Ministry (MAGRAMA, 2012a, 2013). The same data were collected for the 10 largest consumers of organic food in Europe and the largest consumers in North-America in order to compare them with Spain. The 10 largest consumers in Europe were taken from the World of Organic Agriculture Yearbook (2014). In reason of their high organic food consumption relative to other countries, the USA and Canada were also considered. Organic food consumption was represented through bar charts in order to depict the low level of organic food consumption in Spain relative to other countries. In order to explain the low organic consumption trends in Spain, the large gap between organic and conventional food prices was analysed. Several studies explain this gap with the differential in food prices in relation to other countries (Armesto-lópez, 2008; Gil, Gracia, & Sánchez, 2001; Sanjuán et al., 2003). Therefore I looked for the Price Level Indices (PLIs) for food in Spain and the 10 largest European consumers of organic food, and took them from a study by Kurkowiak (2012) retrieved from Eurostat.

The marketing structure for organic foodstuffs in Spain was analysed with data on the percentage of total organic food sales in the main distribution channels, which were taken from the Agriculture Ministry (MAGRAMA, 2012a, 2013). National data were again compared with data from the 10 largest consumers of organic food in Europe and the largest consumers in North-America. Since these data belong to the realm of descriptive statistics, I used diagrams in the form of pie and bar charts to display the frequency distribution of organic food sales in each channel (Trochim, 2006).

2.2 Analysis of policy support

The policy analysis is focused on public policies affecting organic food consumption and is structured according to different policy instruments that drive consumer behavioural change towards sustainable food options. The typology of consumer-policy instruments was taken from the study by Lorek, Spangenberg, and Oman (2008). This analysis is based on the three national Organic Action Plans (OAPs) disclosed up to date and contextual policies at the European and national level. I focus primarily on the first (2004-2006) and second OAPs (2007-2010), because there is no information available yet on the measures implemented in the last OAP, since its disclosure is very recent (6th of March 2014). Due to the scarcity of information available on the measures implemented in the first as well as in the second OAPs, the analysis focuses primarily on the long-term campaign for the promotion of organic food products. In reason of the high correspondence between the first and second OAPs, they are analysed together, while the new OAP is addressed separately. The OAPs corresponding to the periods 2004-2006 and 2007-2010, were retrieved from the Coordinator of Farmers Organisations' (COAG) website. The most recent OAP was retrieved from the website of the Agriculture Ministry (MAGRAMA, 2014). The analysis of contextual policies includes the national strategy for rural development and the regional measures, which were taken from the National Strategic Plan for Rural Development 2007-2013 (MAGRAMA, 2012b) and from the national inventories of a study on organic-farming policy support (Sanders, Stolze & Padel, 2011a) respectively. The analysis of the OAPs and the rural development measures are based on the CAP' Pillar 2 measures, since there was no implementation of consumption support measures in Spain identified in the Pillar 1 of the CAP. In the analysis of contextual policies, the strategic guidelines for the internationalisation of the agri-food sector are also considered. These were taken from a report from the Agriculture Ministry. The contextual policies considered also include the Action Plan for Domestic Trade and the Plan for Quality Improvement of Domestic Trade, which were taken from different reports from the Industry Ministry. None of the policy plans presented are referenced in their analysis, since it does not affect the traceability of the data. Therefore, references are made only when data were not extracted from the original policy document.

While sub-question 2 is answered through a descriptive analysis of the policies supporting organic food consumption, sub-question 3 explores the policy obstacles brought up in the overarching question. For the purpose of my study I define policy obstacles as the inconsistencies and gaps found in policies. Policy inconsistencies address the connection between different policies and between different measures within a policy, emulating the policy analysis by Sanders et al. (2011b). The policy

analysis is tied together with the contextual analysis of the organic sector so as to identify and explain the policy-gaps. The analysis is based on a review of documents such as academic journal articles, newspaper articles, and studies carried out by the European Commission in order to gather data on the implementation of policies and discuss the policy obstacles as well as possible policy recommendations.

3 Rationale and conceptual framework

Food consumption is a crucial issue in the politics of sustainable consumption because of its impact on the environment (Reisch et al., 2013). The main environmental impacts from food arise in the production stage (Miller & Spoolman, 2009; Reisch et al., 2013). Agriculture is largely responsible for such impacts. In particular, it has the most severe impact on biodiversity, due to biodiversity loss from the use of pesticides and fertilisers and the cultivation of monocultures (Miller & Spoolman, 2009; Reisch et al., 2013). In the EU a significant part of biodiversity decline has been caused by agricultural production (Fundación Biodiversidad, European Commission & Greenpeace, 2011). Biodiversity is essential to our system of food production, since it depends on fundamental ecosystem services provided by biodiversity such as pollination and nutrient cycling in order to function (Miller & Spoolman, 2009).

Therefore, the environmental sustainability of food consumption depends heavily on the production system (Thøgersen, 2010). Organic farming, as opposed to conventional farming, is recognised to play a strategic role in the move to sustainable food consumption (Miller & Spoolman, 2009; Reisch et al., 2013; Thøgersen, 2010). The current European sustainable development strategies highlight increasing organic food consumption as a major goal for sustainable food consumption (European Commission, 2011). In Spain, the extent of organic production (addressed in the next section) suggests an exceptional potential for increasing the sustainability of domestic food consumption.

In contrast with the conventional system of intensive agriculture, the organic method of agriculture and food production puts a strong emphasis on environmental sustainability. This system intends to work in harmony with natural ecosystems rather than dominating them (Colom-Gorgues, 2009; IFOAM, n.d.). Some of the most recognised benefits of organic-farming methods are detailed below.

The energy efficiency per unit of yield is recognised to be higher than in conventional farming, due to low inputs in the form of fertilisers and a high reliance on internal nutrient cycling (Infante Amate &

González de Molina, 2011; Miller & Spoolman, 2009; Stolze et al., 2000). By contrast, the artificial replenishment of fertility is fundamental in conventional farming (Infante Amate & González de Molina, 2011; Miller & Spoolman, 2009). Mainly as a result of different fertiliser use, organic farms generally use 50 to 70% less energy per unit of production than conventional farms (Infante Amate & González de Molina, 2011). In Spain, according to Infante Amate and González de Molina (2011), agricultural production is the main source of energy inefficiency, accounting for over a third of overall energy consumption of the agri-food system. The authors point out that nitrogen fertilisers make for a quarter of the total energy consumption of agricultural production and almost 10% of the agri-food sector energy expenditure. As they suggest, increasing the consumption of locally-produced organic food may considerably reduce resource use in the food system in Spain. In my view, this makes a strong motive for increasing locally-produced organic food consumption as a way to make food consumption more sustainable in Spain.

A high priority is put on maintaining and improving long-term soil fertility (Colom-Gorgues, 2009; Stolze et al., 2000). For this reason, organic farming involves a higher organic matter soil content than conventional farming. This is possible thanks to the maintenance of vegetated ecosystems that also allow to control erosion more effectively (Miller & Spoolman, 2009; Stolze et al., 2000).

Increased floral and faunal biodiversity as a result of the ban on chemical pesticides and nitrogen fertilisers is supported as a widely recognised benefit of the organic farming method (Rahmann, 2011; Stolze et al., 2000). The restriction on pesticides and fertilisers also has secondary beneficial effects on wildlife conservation and landscape (Stolze et al., 2000). Furthermore, according to Stolze, Piorr, Härring, and Dabbert (2000), crop rotations in organic farming provide more habitats for wildlife.

An increased animal welfare is observed in organic farms compared to conventional farms (Stolze et al., 2000). According to Stolze et al. (2000), organic standards take the natural habits of animals into account in relation, for example, to housing systems. Animal treatment is typically better on organic farms and cattle are less likely to be stressed or to carry disease (Owen, L., Seaman, & Prince, 2007).

Producing high nutritive quality food, i.e. in terms of its safety and health aspects, is a further benefit of organic farming (Stolze et al., 2000). The risk of contamination with pesticides and nitrates is found to be lower in organic food, according to Stolze et al. (2000). With regard to animal produce,

according to the authors, the risk of antibiotic residues is assumed to be lower in organically produced meat since the preventive use of antibiotics is strictly forbidden while therapeutic use is avoided as far as possible and strictly controlled. Furthermore, the strict ban on GMOs, whose effects on humans are not fully understood, implies in principle no risk of contamination (Stolze et al., 2000).

The joint efforts in preserving soil fertility, biodiversity, ecosystem functionality and animal welfare imply that consumer prices of organic products have internalised more environmental externalities related to agriculture than conventional products (IFOAM EU Group, 2010; IFOAM, 2008). Moreover, this translates into significant savings in public costs for environmental restoration activities (IFOAM EU Group, 2010).

Locally-produced organic food adds to the environmental benefits of organically-produced food and is regarded as a model of sustainable food consumption (Miller & Spoolman, 2009; Seyfang, 2009). Localisation of food supply chains means that food should be consumed as close to the point of origin as possible (Seyfang, 2009). In this study this concept refers to organic production at the national level. Therefore, the argument of this study (that increasing locally-produced organic food consumption should be supported to make food consumption more sustainable) implies that, in the case of Spain, consuming organic food produced in the country is more sustainable than consuming imported organic food. For instance, local food supplies reduce food miles and the resulting energy use and pollution from transport (Infante Amate & González de Molina, 2011; Seyfang, 2009). Moreover, they support local economies and farmers and benefit rural development (Seyfang, 2009).

The definition of sustainable food consumption in this study sums up the characteristics of locally-produced organic food and is taken from the UK Sustainable Development Commission' definition. Sustainable food consumption is defined as food that is safe, healthy, and nutritious; respects biophysical and environmental limits in its production while reducing energy consumption and improving the wider environment; respects the highest possible standards of animal health and welfare; and supports rural economies, in particular by emphasizing local products that minimise food miles (Sustainable Development Commission, 2005).

An important implication of the reasoning in this study is that governments can change consumer behaviour through policy. A primary goal of consumer policy is to empower consumers by reducing external constraints limiting an individual consumer's freedom to choose and make changes towards

a more sustainable lifestyle (Fundación Biodiversidad, European Commission & Greenpeace, 2011; Thøgersen, 2005). As pointed out by Thøgersen (2005), consumer policy can empower consumers to make informed choices through education and information. Therefore, in order to increase organic food consumption, consumer awareness and knowledge about organic foodstuffs is essential (Thøgersen, 2005). However, the need for empowerment is not limited to being able to make informed choices. According to Thøgersen (2005), consumer choice for organic food depends largely on structural factors. Governments are able to control these structural constraints that affect sustainable food consumption, such as the distribution system and relative prices of sustainable food products (Thøgersen, 2005, 2010). These factors affect the availability and affordability of sustainable food choices, which are the key levers to foster sustainable food consumption (Reisch, 2013). Organic food products are usually not as widely distributed as their conventional counterparts (Thøgersen, 2005). Hence, consumers usually have limited options for choosing sustainable food alternatives. Further, sustainable products are usually more expensive (Thøgersen, 2005). For organic food products, this is mainly due to the internalisation of the cost of tackling nitrogen pollution, certification costs and higher labour demands (Fundación Biodiversidad, European Commission & Greenpeace, 2011).

Policy makers have three major types of instruments to drive consumer behavioural change towards sustainable food consumption: information-based, market-based, and regulatory (Lorek, Spangenberg & Oman, 2008).

Information-based instruments most commonly consist in information and awareness campaigns (Lorek et al., 2008). As explained by Lorek, Spangenberg, and Oman (2008), these campaigns generally intend to develop “food literacy” among consumers with regard to choosing sustainable food. An aim of such campaigns can be to educate consumers about the source of their food and the impacts of different production methods (Seyfang, 2009). Another important information-based instrument is labelling. Organic labels and logos allow to communicate the control and certification of organic foodstuffs to consumers (Thøgersen, 2010). These are essential for consumers to be able to recognise a product as organic, particularly in a supermarket (Lorek et al., 2008; Thøgersen, 2010).

There are several types of market-based instruments. Financial instruments such as reduced Value-Added Tax (VAT) for organic foodstuffs and subsidies to organic farmers are key instruments to tackle the price-gap between organic and conventional foodstuffs (BIO Intelligence Service, 2012; Reisch et

al., 2013; Thøgersen, 2005). These instruments are particularly powerful because, in the food domain, price is a key criterion for consumption (Reisch et al., 2013; Thøgersen, 2005, 2010). The importance of changes in the price structure has been demonstrated by research, showing that when sustainable alternatives are made more affordable, consumer choices eventually adjust (Bamberg & Schmidt, 1999; Thøgersen, 2005; Wier & Calverley, 2001). Further, financial instruments are also used in the form of financial support to improve the marketing of organic foodstuffs, e.g. financial support for increasing the marketing of organic foodstuffs in key marketing channels (Lorek et al., 2008; Schmid et al., 2008; Stolze & Lampkin, 2009). According to Thøgersen (2005), financial instruments have increased both the affordability and availability of organic food products in supermarkets in many countries (Thøgersen, 2005).

Regulatory instruments is a form of policy support for sustainable food consumption that is rarely adopted (Reisch et al., 2013; Reisch, 2013). Regulation concentrates on food-safety issues and primarily aims to respond to acute threats to the life and health of consumers (Reisch, 2013). According to Reisch (2013), governments generally become involved only as organisers of public certification and inspection schemes.

4 Key issues to increase organic food consumption in Spain

The key issues that need to be addressed in policy support aiming at increasing domestic organic food consumption are analysed in this section. I structure my analysis according to three of the main stages in the organic food supply chain: production, marketing, and consumption.

4.1 Production

In Spain, organic production began in the 1970s (Colom-Gorgues, 2009; Coordinadora de Organizaciones de Agricultores y Ganaderos [COAG], 2006). In the 1990s, both the amount of organic surface and producers increased considerably (COAG, 2006). Currently, organic surface represents around 6% of total agricultural surface (Willer & Lernoud, 2014). Over the period 2001-2012, there has been an almost continuous expansion of organic agricultural surface certified for production, reaching 1.367.000 hectares in 2012 (Figure 1). The increase in both the amount of surface and producers dedicated to organic-farming has led to a steady expansion of organic production (Figure 2). As a result, Spain has consolidated its leadership in organic production in the EU (MAGRAMA, 2013). Almost all organic production is of plant origin, representing 86% of the total (MAGRAMA, 2013). According to the Agriculture Ministry (2013), fruit and horticulture is the most important

sector, representing 49% of total organic production. This branch is also important in the overall agri-food sector, where Spain is one of the European lead producers (Gobierno de España, 2013).

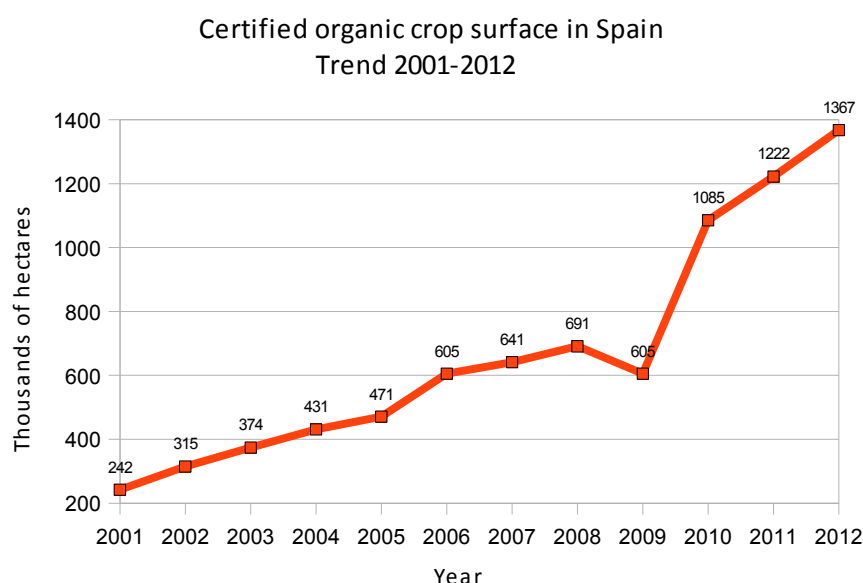


Figure 1. Trend of certified organic crop surface in Spain over the period 2001-2012. Crop surface is shown in thousands of hectares. There has been almost a continuous expansion of certified organic crop surface in Spain. Data source: Eurostat, 2014.

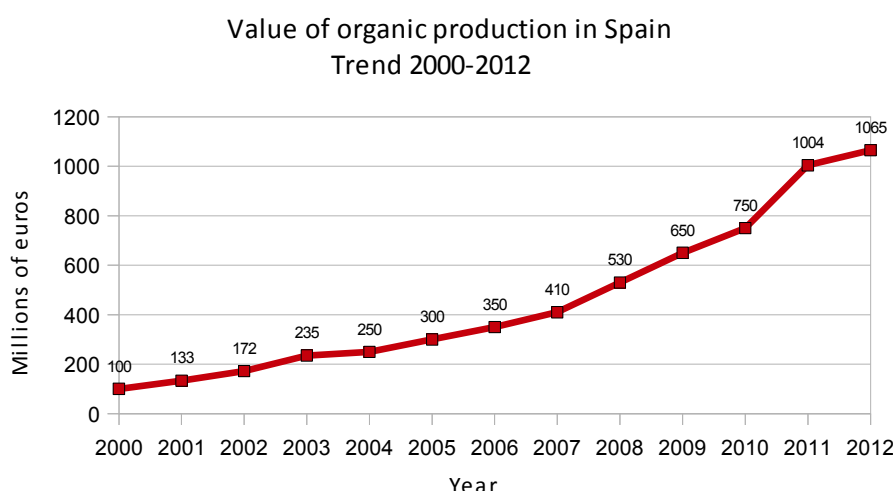


Figure 2. Trend of the value of organic production in Spain over the period 2000-2012. Organic production is expressed in millions of Euros. The continuous expansion of organic production has consolidated Spain's leadership in the EU. Data source: MAGRAMA, 2012a, 2013.

About 75% of the total organic food production is exported (Colom-Gorgues, 2009; Gil, et al., 2001; MAGRAMA, 2012b; MARM, 2007), mostly to Germany, France, other Central and Northern European countries and the United States (Colom-Gorgues, 2009; Gil, et al., 2001; MAGRAMA 2012a). Spain is in fact one of the leading organic food exporters in the world, only standing behind Italy in the world ranking (Figure 3). Therefore, the organic food sector in Spain is essentially exports-driven, which

leaves aside the development of domestic consumption (Armesto-lópez, 2008; Briz & Ward, 2008; Colom-Gorgues, 2009; Gil et al., 2001; Sanjuán et al., 2003). In consequence, retailers increasingly rely on imports in order to respond to the domestic demand of organic food, despite its limited volume (Ministerio de Agricultura, Pesca y Alimentación [MAPA], 2007a). According to the Agriculture Ministry, about 50% of the organic food consumption is met with imports, mainly from the EU. Exports are also very important in the agri-food sector, since they represent 16% of the total Spanish exports (Gobierno de España, 2013).

There is an ever increasing number of countries in the world producing in the organic sector, which leads to an intensifying competition in the organic market (MAGRAMA, 2012a; Sanjuán et al., 2003). However, the actual consumption of organic food concentrates in a few markets in Europe and North-America (MAGRAMA, 2012a). About 94% of this consumption concentrates in 15 markets, led by the United States, Germany and France (MAGRAMA, 2012a).

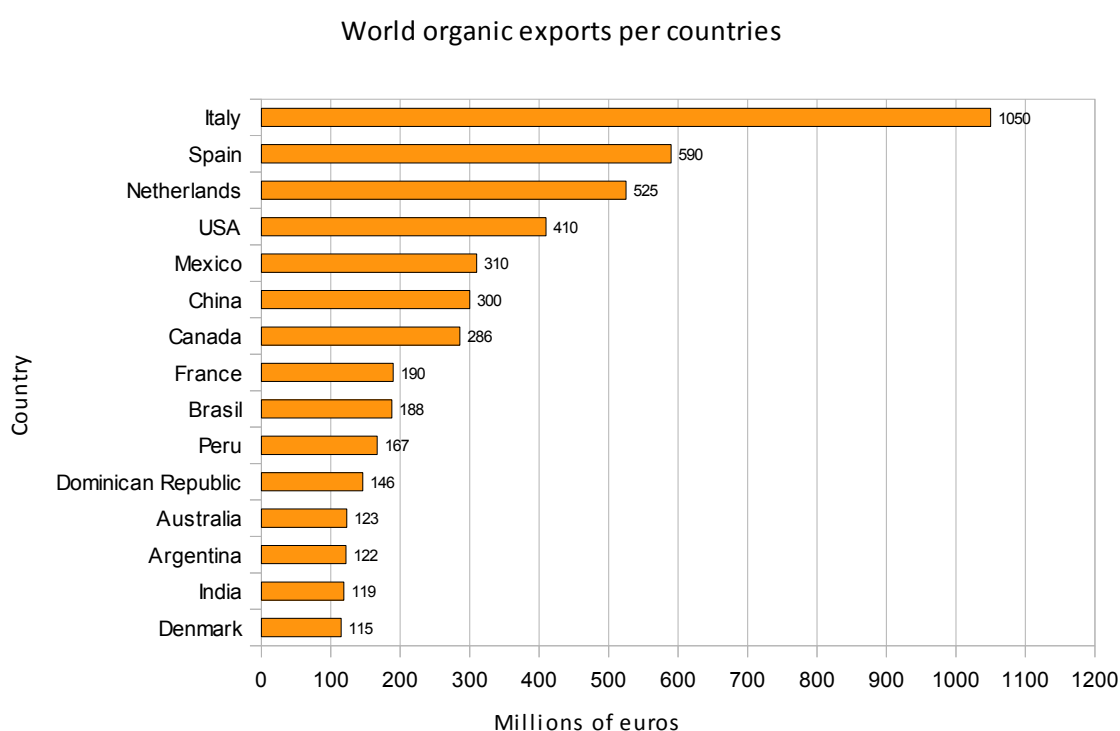


Figure 3. World organic exports per countries expressed in millions of Euros. Spain is a leading country in world organic exports. Data source: Organic World, 2012; MAGRAMA, 2012a, 2013. All data from 2010 except Spain (2012).

4.1.1 Producers

The rapid expansion of organic production is explained essentially by the EU policy implementation in

Spain and the favourable evolution of the exports market through the increase of organic consumption in Northern and Central Europe (Armesto-lópez, 2008; COAG, 2006; MAGRAMA, 2012a; Sanjuán et al., 2003). The second axis of the CAP has allowed organic farmers to receive conversion payments for improving the environment in vegetable crops and in livestock production (Sanders et al., 2011b). According to Armesto-López (2008), almost all Spanish farmers received European financial support for conversion from a conventional to an organic method of production. Therefore, organic farming became a good opportunity to claim generous subsidies from the agri-environmental measures implemented under the CAP (Armesto-lópez, 2008; COAG, 2006). Organic farming also provided an opportunity for farmers to charge higher prices for their produce (Armesto-lópez, 2008). Moreover, Spanish producers get a premium when selling in foreign markets because they can sell organic foodstuffs at a higher price than in the domestic market (Gil et al., 2001; Sanjuán et al., 2003). According to both studies, this can be explained by the fact that conventional foodstuffs are generally also less expensive in Spain than in other European countries. In fact, Spain has the lowest food price level index of the largest consumers of organic food in Europe (Table 1). Its price level index is below 100, which means food prices in Spain are relatively cheap compared to the EU average (Kurkowiak, 2013). Hence, Spanish producers prefer to export their produce to other countries such as Germany and France, where general food prices are higher, than selling it in the domestic market (Table 1). The gap in food prices is therefore a key factor to explain the fact that Spanish organic producers don't seek to amplify the domestic organic market (Armesto-lópez, 2008; Gil et al., 2001; MAPA, 2007; Sanjuán et al., 2003). Furthermore, the lack of product marketing and promotion concern organic producers when selling their produce in Spain (Armesto-lópez, 2008). According to the results of Armesto-López' surveys, many producers complained that they sometimes had to sell their organic produce as conventional products to avoid losses. These two factors are key to explain the scarce dissemination of organic foodstuffs in Spain.

4.2 Consumption

Organic food consumption is residual in Spain in comparison to the EU and North-America. Per-capita organic food consumption has consolidated around 20 or 21 Euros (MAGRAMA, 2013), which leaves Spain at the back of the ranking in relation to the main consumer countries (Figure 4).

Organic food expenditure in Spain equals to 1% of the total food expenditure, which makes it one of the countries with the lowest organic food expenditure (Figure 5). Per-capita organic food consumption increased by 8% between 2009 and 2012 (MAGRAMA, 2013). The proportion of organic foodstuff expenses in relation to total food expenditure has also increased by 12% in the same

period. However, as recognised by the Agriculture Ministry, this increase is affected by the current economic crisis, which has lowered total food expenditure.

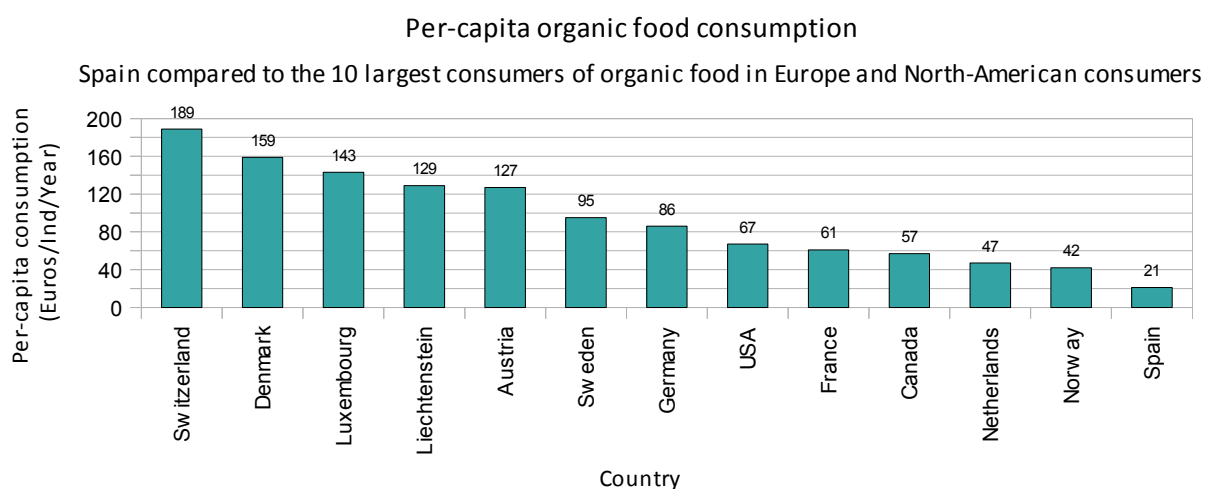


Figure 4. Comparison of per-capita organic food consumption in Spain with the 10 largest consumers of organic food in Europe and the largest consumers in North-America. Per-capita consumption expressed in Euros per capita per year. Organic food consumption in Spain is residual. Data source: MAGRAMA, 2013; Willer & Lernoud, 2014. All data from 2012.

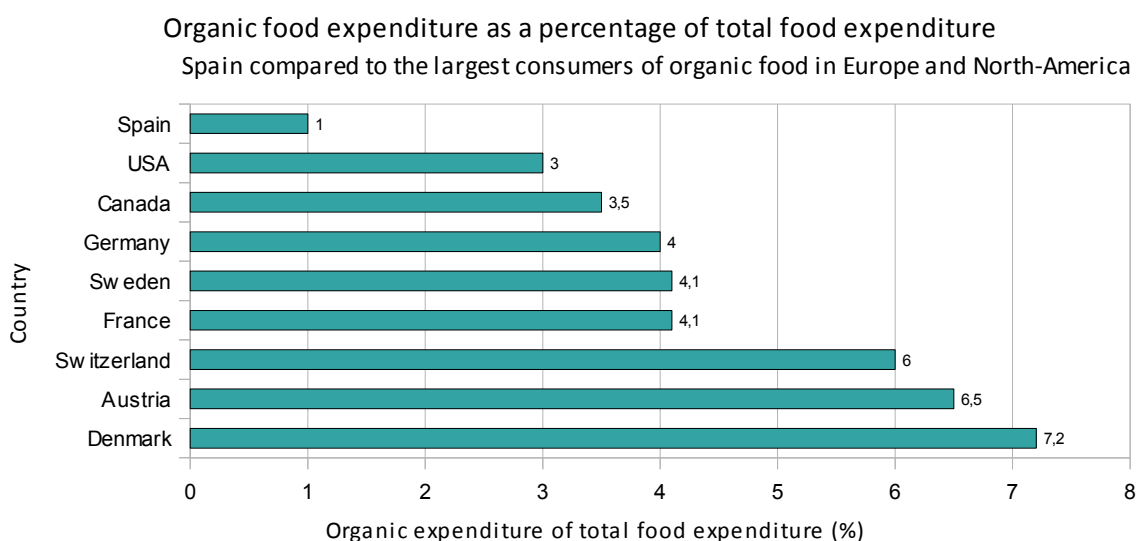


Figure 5. Comparison of organic food expenditure as a percentage of total food expenditure between Spain and the largest consumers of organic food in Europe and North-America. (Data not available for all top-10 European countries). Spain has the lowest organic food expenditure among the largest consumers of organic food. Data source: MAGRAMA, 2013, 2012a. All data from 2012 except for Sweden and Denmark (2010).

4.2.1 Consumers

As in other organic consumer countries, consumers are mainly concerned about the price, which is the main factor restricting consumer access to organic foodstuffs (Briz & Ward, 2008; Colom-Gorgues, 2009). In Spain, however, the price-gap between organic and conventionally produced food is very big

(Briz & Ward, 2008; Gil et al., 2001; MARM, 2010b; Sanjuán et al., 2003). Organic food prices are usually 30% to a 50% more expensive than conventional food products (MAPA, 2007a; MARM, 2010b). According to the Agriculture Ministry, this results in a deficient relationship between real costs and final prices. The big gap between conventional and organic product prices can again be explained by the differential between conventional food prices in Spain and in other European countries, where they are generally more expensive (Armesto-lópez, 2008; Gil et al., 2001; Sanjuán et al., 2003). As mentioned before, Spain has relatively cheap food prices compared to the EU average, and has the lowest food price level index relative to the largest consumers of organic food in Europe (Table 1). The price-gap between conventional and organic products happens because the producers' price strategy is to obtain more or less the same price level in both domestic and foreign markets in order to earn the same premium in the domestic market (Gil et al., 2001; Sanjuán et al., 2003). As a result, the price that Spanish consumers have to pay for organic food products is higher in comparison to other European countries, and consumers are not willing to pay such prices (Gil et al., 2001; MARM 2010a; Sanjuán et al., 2003).

Price Level Indices for food
Spain and the 10 largest consumers of organic food in Europe

Country	Price Level Index for food
Norway	184
Switzerland	159
Denmark	139
Luxembourg	119
Sweden	124
Austria	121
France	110
Germany	106
Netherlands	97
Spain	94

Table 1. Comparison of Price Level Indices (PLIs) for food between Spain and the 10 largest consumers of organic food in Europe. (Data not available for Liechtenstein). PLIs are shown in Purchasing Power Parities (PPPs). PLIs provide a comparison of countries' price levels relative to the EU average: if the price level index is higher than 100, the country concerned is relatively expensive compared to the EU average, while if the price level index is lower than 100, then the country is relatively cheap compared to the EU average. Spain has the lowest price level index for food, which explains the bigger gap between conventional and organic food prices relative to other European countries. Therefore, organic foodstuffs are too expensive for Spanish consumers, and organic producers prefer to export their produce to countries where food prices are higher. Data source: Kurkowiak, 2013 (Eurostat). All data from 2012.

Consumer knowledge on organic food and organic-farming methods is another key factor to increase organic food consumption. Several studies show the interconnection between organic food consumption and a higher environmental awareness and knowledge on organic foods (Briz & Ward, 2008; Colom-Gorgues, 2009; Gil et al., 2001; Ruiz de Maya, López-López, & Munuera, 2011). Consumers generally perceive such products as less harmless to the environment than conventional ones (Gil et al., 2001; Sanjuán et al., 2003). However, Spanish consumers don't have enough knowledge on the characteristics of organic foodstuffs and the organic production methods (Briz & Ward, 2008; Colom-Gorgues, 2009; MARM, 2010a). About 40% of the respondents in a national consumer survey carried out in 2008, stated that they were not aware of organics (Briz & Ward, 2008). When the respondents were asked to define organic products, about 30% gave erroneous answers. The results showed that the levels of awareness did not differ much across the regions. The average consumer in Spain doesn't know or differentiate the added value of an organic food product or its contribution to environmental sustainability (Briz & Ward, 2008; Colom-Gorgues, 2009; MAPA, 2007a). A large part of consumers are still not able to clearly differentiate the attributes of organic foodstuffs and tend to confuse them with other products that have similar attributes in appearance (Briz & Ward, 2008; MARM, 2010b).

The scarce promotion that organic foodstuffs have received from the public administration is also a key issue (Armesto-lópez, 2008; MARM, 2010a). In the last survey published by the Agriculture Ministry (2010a), almost all respondents replied negatively when asked if they had witnessed any promotional campaign for organic products in the last months. The survey further suggests that public administrations play a key role in delivering information about organic products through promotion campaigns, as they may have a higher credibility than a private organism trying to promote a specific product.

Until recently, the lack of information on organic food labelling used to be a crucial issue. In Spain, organic production is certified by public authorities and other private institutions in each of the Autonomous Regions (COAG, 2006; Colom-Gorgues, 2009; MAGRAMA, 2014d). The large number of certification entities resulted in a variety of logos for organic foodstuffs, and most consumers had difficulty in recognising them (MAPA, 2007a). Moreover, commercial opportunism led to the misappropriation of the organic mention or other appellations such as “natural” on food products that actually didn't respond to these criteria, which contributed to confuse the consumer (Colom-Gorgues, 2009). However, in 2010 Spain adopted the European logo, which became compulsory for

all organic pre-packaged food products produced in the EU (MAGRAMA, 2014d). Organic foodstuffs in Spain can now either display only the European logo or display it together with the national or regional logo (European Commission, 2014c). Ultimately, this has provided organic products with a common logo and has made them more recognisable to consumers.

4.3 Marketing structure

The commercialisation of organic products in Spain began in 1995 (MAPA, 2007a). Currently, most of the sales of organic food are carried out through specialist dealers (Figure 6). Bigger commercial formats such as supermarkets and hypermarkets perform a lower proportion of total organic food sales, almost 10% less than specialist stores. In contrast, direct marketing and other channels such as urban markets and Horeca³ are particularly relevant.

In Spain urban markets are very popular among consumers (COAG, 2006; Ministerio de Industria Turismo y Comercio [MITyC], 2005). They are found in the traditional urban city-centres and are key points of concentration of supply of fresh foodstuff (MITyC, 2005). Around 50% of the fruit and vegetable purchases are carried out in municipal markets. In many of the small and medium-sized cities, municipal markets are the main retail network of fresh foodstuff (MITyC, 2005). Similarly, the Horeca sector is very developed in Spain and although it represents a potential channel for organic foodstuffs, their presence in this sector is only residual (MARM, 2010b). Moreover, many cooperatives of both conventional and organic producers have marketed organic products directly to the consumer in stores located inside the cooperatives (COAG, 2006).

Other marketing channels and Horeca are found not so relevant in other countries in relation to Spain (Figure 7). Besides, specialist dealers play a much less significant role in the main consumer countries, while supermarkets and hypermarkets are the most important distribution channel. In fact, most of the main organic markets in the world, and especially those with a higher per-capita consumption of organic products, are based on a strong presence of organic products in supermarkets and hypermarkets, which tend to be the most usual shopping places (Colom-Gorgues, 2009; MAPA, 2007a; MAGRAMA, 2012a).

3 Horeca refers to the Hotel/Restaurant/Catering sector.

Marketing structure for organic food in Spain
Share of total organic food sales among distribution channels

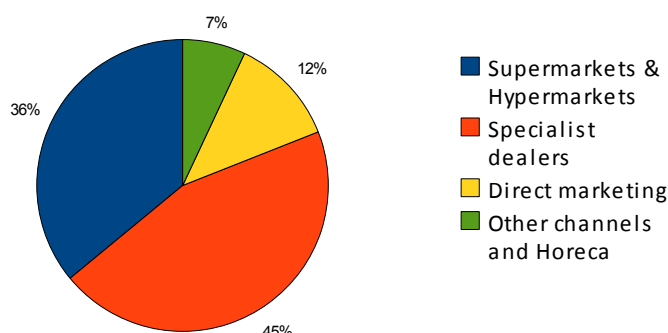


Figure 6. Marketing structure for organic foodstuffs in Spain expressed as the percentage of total organic food sales in each distribution channel. Horeca refers to the Hotel/Restaurant/Catering sector. Other channels include formats such as urban markets and traditional stores. Direct marketing include associations such as producer-cooperatives. Most of the sales of organic foodstuffs are carried out through specialist dealers, while supermarkets and hypermarkets perform less sales. Direct marketing and other channels perform a significant amount of sales. Data source: MAGRAMA, 2013. All data from 2011-2012.

Marketing structure for organic food. Largest consumers of organic food
in Europe and North-America compared to Spain

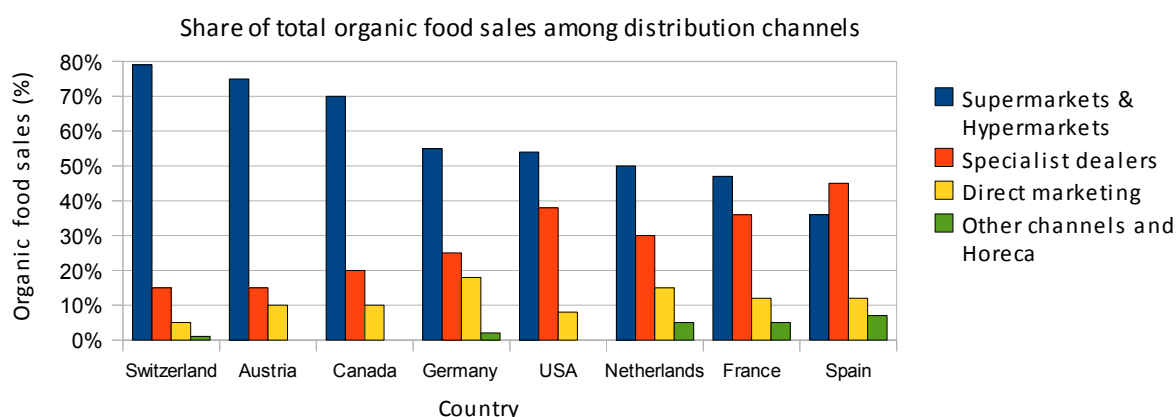


Figure 7. Comparison of the marketing structure for organic foodstuffs between the largest consumers of organic food in Europe and North-America, and Spain. (Data not available for all top-10 European countries). Data expressed as the percentage of total organic food sales in each distribution channel. Supermarkets and hypermarkets are the most important distribution channel in other countries, while in Spain specialist dealers are the most relevant channel and other channels are particularly significant. Data source: MAGRAMA, 2012a. All data from 2010-2011.

4.3.1 Retailers

In order to enlarge the organic domestic market, not only should consumers show favourable attitudes to organic products but they should also be available in the usual retail stores. Retailers are an essential step for organic products to reach the consumer (BIO Intelligence Service [BIOIS], 2012; Sanjuán et al., 2003). As shown in both studies, they play an important role in transmitting information, consolidating consumption and keeping consumers' faith in organic food. Therefore,

retailers' attitudes are also crucial. Only if they are persuaded about the need to complement the conventional food supply with organic food will there be an opportunity to expand demand (Sanjuán et al., 2003).

The MARM survey (2010a) revealed that, in line with the findings for the organic marketing structure, the majority of retailers did not provide organic products. Their main reasons for not providing them were an insufficient demand, and that their usual suppliers did not work with organic products.

The retailers that did provide organic products, gave as main reasons the demand of costumers, the potential future of organic products, and supply diversity purposes. As supported by this survey and several studies (Colom-Gorgues, 2009; Gil et al., 2001; Sanjuán et al., 2003), the price is the main problem faced by retailers when offering a supply of organic products, and explains the insufficient demand referred to by the retailers. The Agriculture Ministry (MAPA, 2007a) suggests that since the price is very high, the consumer of organic products in Spain is expected to have a high purchasing power. As a result, organic products are less attractive for hypermarkets and supermarkets, which seek the average consumer (MAPA, 2007a). Illustratively, when consumers were asked, almost 40% of the respondents replied they didn't find organic food in their usual shopping place (MARM, 2010a). In particular, almost 60% of the respondents did not find organic food products in supermarkets and hypermarkets. The proportion of respondents that did find organic food products in specialised stores was almost as high as that of the respondents that did find them in hypermarkets (about 10%). These results show again the relatively low performance of supermarkets and hypermarkets as distribution channels for organic food products. The fact that, according to the survey, most of the retailers' usual suppliers don't work with organic products is consistent with their preference to export their produce. Suppliers are not so attracted to negotiate with retailers, given the residual value of the domestic market in relation to the foreign market (MAPA, 2007a). According to the Agriculture Ministry, relative to their broad number, only a few suppliers are providing national retailers. Finally, in line with the accounts from producers and consumers, the results of the survey indicate that Spanish retailers seldom get a financial aid or training from the Administration for marketing organic products.

In sum, there are four major issues to consider in order to increase organic food consumption in Spain:

- 1) Exports.** The organic food sector is exports-driven, which leaves aside the development of domestic consumption.

- 2) **Food prices.** There is a food-price gap between Spain and other European countries, which in Spain results in a higher price differential between organic and conventional foodstuffs.
- 3) **Consumer knowledge and awareness.** Consumers have a low level of knowledge on organic foodstuffs.
- 4) **Availability.** Organic foodstuffs are scarcely available in usual shopping places, namely supermarkets and hypermarkets.

5 Analysis of national and European policy

On the basis of the contextual factors and the conceptual background presented in the previous sections, I will analyse the policy support given to organic food consumption in Spain. The policy analysis is structured according to different policy instruments that drive consumer behavioural change towards sustainable food consumption. In the following section, I contextualise the policy support for organic-farming within the CAP.

5.1 Policy support for organic farming within the CAP

In Europe, the major framework shaping food supply and demand is the CAP (Reisch et al., 2013). A fundamental aim of the CAP is to minimise the environmental impacts of agriculture such as the loss of biodiversity and water pollution, and to promote resource use sustainability and animal welfare in European agriculture (European Commission, 2006). Given its concordant objectives, developing organic farming has itself become a policy goal within the CAP (Sanders et al., 2011b).

Government support has been granted to organic farming since the mid-1980s (Padel & Lampkin, 2007). In Spain, the first national regulation of organic agriculture happened in 1989, which was superseded by European regulation in 1991 (Ministerio de Agricultura Alimentación y Medio Ambiente, 2014).

Policy support for organic farming was initially focused on direct payments to farmers under the agri-environment measures in the CAP' Pillar 2. In the late 1990s, a more integrated approach was adopted in order to address the dual role of organic farming; i.e. not only as a provider of environmental public goods to society, but also as a market that provides food (Padel & Lampkin, 2007; Sanders et al., 2011b; Schmid et al., 2008). In this way, supply-push policies have been increasingly balanced with more market-focused demand-pull policies, such as consumer promotion (Padel & Lampkin, 2007; Sanders et al., 2011b). This changing role of organic farming within agricultural policy has not taken place in all EU member states to the same extent (Sanders et al.,

2011b). As shown in the analysis, in Spain, policy support has remained focused on increasing production for trading purposes, while the consumption side has been neglected.

The scope of the following analysis is centred on the CAP' Pillar 2 measures, which require national co-financing (Brady, Höjgard, Kaspersson, & Rabinowicz, 2009; Pohl, 2009). This pillar's focus is on rural areas and the provision of environmental public goods. The future of agriculture is closely linked to the sustainable development of rural areas, which comprises almost the totality of the EU territory (European Commission, 2006; Sanders et al., 2011b). The objective of rural sustainable development requires farmers to consider how the systems they employ shape the environment (Colom-Gorgues, 2009). In this sense, local organic food markets can be an effective tool for sustainable rural development (European Commission, 2014b). Since the mid-1990s it has been recognised that organic farming can help meet the goals of national Rural Development Programmes (RDPs) (Padel & Lampkin, 2007). Organic farming can be a source of employment in rural areas, since it is more labour-intensive than conventional agriculture. However, due to the small size of this sector, organic farming is expected to have little direct effect on unemployment rates in rural areas (Dabbert, Häring, & Zanoli, 2004). Small-scale marketing initiatives may contribute more effectively to rural employment. Further, a strong commitment to environmental goals might add to the appeal of a region for tourism. Indirect effects such as increased employment in tourism due to the positive ecological image of a region can be particularly important in Spain.

RDPs are based on the Community's rural development policy, which has three main targets: competitiveness, the environment and rural development (European Commission, 2006). It gathers a group of measures around these three axes, and Member States can choose which to include in their RDPs. Member states are encouraged through this policy to reinforce the contribution of organic farming to the environmental and animal welfare objectives of the CAP. The European Action Plan for Organic Food and Farming⁴ (EOAP) also links organic-farming to the CAP by recommending that Member States give strong support to organic farming within the national and regional RDPs (Pohl, 2009). National OAPs also contain CAP' measures. The OAPs in Spain, like in many other Member States, bundle CAP measures and complementary national measures not funded by the EU.

5.2 The three national Organic Action Plans

Organic Action Plans are an instrument for governments to make the strategic role of organic farming

4 The EOAP is an Action Plan launched by the European Commission in 2004 containing 21 initiatives to develop organic farming in Europe [European Commission, 2014a].

within the general organic farming policy transparent (Sanders et al., 2011b). They integrate different policy areas such as agriculture, environment and trade in order to further develop the organic sector. They also coordinate different supply-push and demand-pull instruments (Sanders et al., 2011b; Schmid et al., 2008).

In Spain, three national OAPs have been disclosed to date. The first national OAP was introduced as the Strategic Plan for Organic Agriculture in the period 2004-2006. Subsequently, the Integral Action Plan for the Development of Organic Agriculture was launched for the period 2007-2010. The last plan was disclosed in 2014 named as the Support Strategy for Organic Production.

5.2.1 The first OAP and the Integral Action Plan for the Development of Organic Agriculture

The first OAP (2004-2006) was presented in 2003, before the approval of the EOAP in 2004. This action plan was based on three main objectives, one of which was to improve the knowledge and to promote the consumption and marketing of organic products. The measures to develop the organic sector can be summed up in three major strategic guidelines: to recognise the importance of organic agriculture as a form of sustainable agriculture providing benefits both for the environment and rural development; to consolidate the evolution of organic production; and to increase consumer trust through information, training, and promotion (COAG, 2006). According to COAG (2006) and González & Moreno (2008), the first OAP was scarcely put into force. However, in regards to the support for consumption, a long-term campaign on promotion and information activities for organic food products was launched in November of 2006 for the period 2006-2008 (González & Moreno, 2008; MAGRAMA, 2014a). So far, this campaign has grown to be the most important and recognised governmental measure to support domestic consumption. The campaign was co-financed by the EU as a CAP measure (González & Moreno, 2008; MAGRAMA, 2014a). Its objectives were to promote organic food consumption, increase consumer knowledge on organic food and farming, and disseminate the European and national logos as well as the mentions in organic labelling (MAGRAMA, 2014a). According to the Agriculture Ministry (2014a), it was primarily targeted to the wider public but did also target distributors, consumer associations, schools, restaurants, caterers and canteens. The campaign was concentrated in two “weeks of organic food” over the two years and was carried out in all the autonomous regions (MAGRAMA, 2014a). However, there is scarce information about the implementation of the campaign during this period.

In 2006, an agreement of collaboration between the Agriculture Ministry (MAGRAMA) and the

Institute for Foreign Trade (ICEX) took place for the period 2007-2008 in order to foster the internationalisation of the marketing of priority products, which included organic foodstuffs (MAPA, 2007b). This suggests that the government's strategy is split between promoting organic food consumption inside the country and promoting it abroad.

The second OAP (2007-2010), presented as the Integral Action Plan for the Development of Organic Agriculture, draws on the three objectives highlighted in the first OAP (González & Moreno, 2008). The plan identified several weaknesses in the Spanish organic sector in relation to consumption. Firstly, the low domestic consumption and insufficient knowledge on the side of consumers; secondly, a limited domestic market structure, with an insufficient presence of organic food in key market channels; and finally, a greater price difference than other European countries, together with a scarce supply, which is translated into a lack of several basic food products. Further, it mentioned as potential threats for the organic sector, the competition with third countries, and the dependency on foreign trade until domestic demand is activated. The identified weaknesses and threats repeat the diagnosis carried out for the first OAP. In response to these, it highlighted the objective of improving knowledge and promoting the consumption and marketing of organic products, stressed in the previous OAP.

In the 2007-2010 plan, the Agriculture Ministry aimed at prioritising the support of organic farming within rural development measures and mentioned the EOAP as a justification. This plan provided a broader set of measures to support organic food and farming than the previous plan. The measures related to consumption are also broader, involving information-based as well as market-based measures, which are detailed below.

Information-based instruments

The information-based instruments focused primarily on promotion and information campaigns, which aimed to respond to the low level of consumer knowledge on organic food. In particular, the plan provided financial support for consumer associations for the provision of consumer information services on organic foodstuffs. Further, financial support was given for information on and promotion of organic food in speciality stores. In addition, this OAP provided financial support for the participation of the organic sector in national as well as in international fairs in order to promote organic food products. Therefore, as the first OAP, it did not only focus on promoting domestic consumption, but also in promoting organic food consumption abroad.

The implementation of the campaign launched in 2006 was concentrated in this period. However, this OAP had no measures addressing the continuation of the campaign after 2008. The campaign was in fact not continued until 2013. In September of 2013, a “week of organic food” was organised by the Ministry of Agriculture (ABC, 2013; Gastronomía&Cía, 2013; MAGRAMA, 2014e). Its objective focused on spreading consumer knowledge on organic food and farming, and promoting domestic consumption (MAGRAMA, 2014e). The fact that a large part of the national organic production is exported was explicitly used as a rationale for the campaign (ABC, 2013; Gastronomía&Cía, 2013; MAGRAMA, 2014e). In contrast with the previous campaign, the scope was limited to five cities: Almería, Murcia, Pamplona, Logroño, and Madrid (ABC, 2013; Gastronomía&Cía, 2013; MAGRAMA, 2014e). The activities of this campaign comprised the promotion of organic foodstuffs in 18 hypermarkets and supermarkets, and 20 restaurants spread across the five cities; organic food tastings in Madrid; workshops on organic food and farming in one school in Madrid; an experts' talk on the marketing of organic foodstuffs in Madrid, which targeted distributors, directors from supermarkets and hypermarkets, and the Horeca sector; and, a guided tour in an enterprise of organic food production in Madrid, which was primarily aimed at the mass media (MAGRAMA, 2014e). The implementation of the campaign suggests that it would not have an impact on the wider public, despite its objective. Firstly, the scope of its activities was very limited, since it focused on one school, a guided tour, and some restaurants and retail stores. Secondly, as it stands out, almost all the activities were concentrated in the capital. Therefore the impact of the campaign in other cities was even more limited. Moreover, the campaign was framed into the broader promotional activities carried out by the Ministry of Agriculture targeting the consumption of other quality foodstuffs such as olive oil (ABC, 2013), which suggests that organic foodstuffs did not receive a particular consideration. In fact, the Agriculture Ministry's record of campaigns show that the campaign efforts concentrate in promoting the Mediterranean diet and the consumption of specific foods, and that the promotion of organic food is residual (MAGRAMA, 2014b).

Market-based instruments

The market-based instruments addressed in this OAP focused on measures to improve the marketing of organic foodstuffs. Firstly, the plan intended to facilitate consumption through the concentration of supply. The plan made an explicit link to the Action Plan for Domestic Trade to support this measure (further explained in section 5.3). Two different actions were considered in the plan to implement this measure. The first one involved the creation of organic food markets; the second one supported

the availability of organic food in the MERCAS network⁵, namely, in the wholesalers' network, in order to facilitate the supply to national retailers. Secondly, the plan intended to support cooperative stores, specialist stores, and retailers. The plan specially stressed the support to the availability of organic products in cooperative stores and to increase the participation of cooperatives in the organic food supply chain. A third measure supported the availability of organic products in local markets within the framework of the Plan for Quality Improvement of Domestic Trade, which is described in the section related to the policy context.

5.2.2 The new national OAP

In March 2014, the Ministry of Agriculture presented a new strategic plan for the organic sector, which will be applicable for at least the next three years (Cañete, 2014). This plan draws on the three objectives stated in the previous plans and aims to strengthen the promotion of organic production within rural development policy. In comparison with the previous plan, domestic consumption receives even a lower attention in the new OAP.

As the previous plans, this OAP stresses the high prices and the scarce supply of organic foodstuffs as major barriers to increase domestic consumption. One of the stated strategic guidelines stated is to carry out information activities to increase knowledge on organic food. Further, it stresses the key importance of improving the marketing channels for organic food. In particular, it promotes an effective multichannel distribution system “without disregarding any of the existing options”, specially in regards to channels associated with short supply chains. In relation to the marketing aspects, the plan also stresses the promotion of measures to concentrate supply. However, the actual actions for promoting the consumption of organic foodstuffs are focused on information-based measures, in particular, promotion campaigns to increase knowledge on organic foodstuffs by continuing the annual “weeks of organic food”, and the promotional fairs implemented in the previous plan. Furthermore, in concordance with the previous OAPs, the Agriculture Ministry stresses the importance of the internationalisation of the marketing of organic foodstuffs, by committing to continue its collaboration with the ICEX. In relation to the measures for the support of domestic marketing, the plan only specifies that the Agriculture Ministry will promote the communication between organisations representative of marketing and consumption and organisations related to the organic sector. Other than that, there are no stated measures to support the domestic marketing of

5 The MERCAS network is a group of 23 food units spread throughout Spain that comprise primarily wholesalers for fresh foodstuffs, and their logistic enterprises. It is part of Mercasa, a national public service supporting the food supply chain [Mercasa, 2014].

organic foodstuffs.

In sum, even though the plan includes several strategic guidelines that would be necessary in order to increase domestic consumption, it does not develop them further in a specific set of measures. The new OAP emphasises the need to further consolidate organic production by granting economic support from the CAP and from national funds to organic producers. According to the minister of agriculture during the presentation of the new OAP, “organic production is a thriving business in Spain that still has a great potential for growth” (Cañete, 2014), which might reflect the consolidation of a governmental strategy mainly focused on production and with a very weak interest in developing domestic consumption.

5.3 Policy context

5.3.1 National strategy for Rural Development and regional measures

Spain has a national strategic plan for rural development but rural development measures are administered at regional scale through regional RDPs (Sanders et al., 2011b). Despite the aim of the 2007-2010 OAP to prioritise organic farming in the national strategy for rural development, organic farming is not considered as a priority in the 2007-2013 RDP, and is therefore not included as an horizontal measure. Instead, organic farming is addressed as one of the possible actions to improve biodiversity, which is one of the priorities of the national strategy for rural development. The EOAP is mentioned in the RDP to highlight the importance of organic farming in rural development policy.

Regional measures for rural development are primarily aimed at organic farmers, focussing on production-related investment grants and the provision of environmental public goods through agri-environmental payments. The support identified in relation to consumption is described below.

Information-based instruments

For this type of instruments, the regional RDPs focus on promotion and information campaigns, which corresponds to Measure 133 of the Community's rural development policy. A grant is given for supporting information and promotion activities in order to raise public awareness about organic products. The regions that apply this measure in Spain are: Andalucía, Aragón, Asturias, Baleares, Canarias, Castilla-La Mancha, Cataluña, Extremadura, Galicia, and the País Vasco. This means that about 60% of the total 17 autonomous regions apply this measure. All the identified regions apply

this measure with partly special provisions for organic farming, i.e addressing organic farmers among other types of farming which also receive higher payment rates. It is therefore unclear if organic farmers have a real advantage over others, as pointed out by Sanders, Stolze, & Padel (2011b).

Market-based instruments

Regarding market-based instruments, regional RDPs focus on Measure 123 of the Community's rural development policy, which is a measure to improve the marketing of agricultural products. A grant for investments in this area is provided to the enterprises. When applied to the organic sector, the aim of this measure is to address specific difficulties of the organic sector such as small size and dispersion of farms, and lack of supply structure and marketing initiatives. A higher level of grant is provided for micro, small and medium enterprises. The regions applying this measure in Spain are Andalucía, Cataluña, Galicia, Madrid, and Murcia. In relation to the total of regions, only about 30% apply this measure. Madrid and Murcia apply this measure with partly special provisions for organic-farming. All the other regions apply this measure without special provisions for organic farming, which means that organic farming is among a number of target groups and does not receive special provisions. Therefore, in this case, the additional benefit organic farmers may derive from this measure is questionable (Sanders et al., 2011b).

5.3.2 Domestic trade policies

Action Plan for Domestic Trade

This action plan aims to improve the competitiveness and transparency in the national distribution system. One of its core measures is to respond to the dispersion of supply affecting some sectors such as those related to the agri-food sector, for instance, the organic sector. In contrast with the 2007-2010 OAP, this measure particularly focuses on promoting the association between small distribution enterprises in order to enhance the concentration of supply. The cooperation between these small enterprises, according to the plan, can be materialised through the creation of distribution cooperatives. According to the plan, distribution cooperatives are developing among retailers and wholesalers related to the agri-food sector, and allows them to reach a greater volume and variety of products. Therefore, applying this strategy to the organic sector would support retailers in providing a supply of organic foodstuffs in their stores, and would thereby support the availability of organic foodstuffs in retail stores. However, the plan only refers to “promoting” such a measure and does not further specify its support.

Plan for the Quality Improvement of Domestic Trade

A major objective of this plan is to promote urban markets in reason of their popularity among consumers. The programme of measures set around this objective involves the modernisation of municipal retailer markets. Given that organic produce mostly consists in fruit and horticulture, and that municipal markets are the main retail network of perishable foodstuff in many small and medium-sized cities, it makes sense to support municipal markets in an OAP. Enhancing municipal markets as well as increasing the availability of organic foodstuffs in such markets can be an effective way to support organic food consumption.

5.3.3 Strategic guidelines for the internationalisation of the agri-food sector in Spain

This strategic document supports the internationalisation of the agri-food sector on the basis of its fundamental role in Spanish exports. Its strategy is to place as a priority the improvement of the access of agri-food enterprises to foreign markets as a means to further develop the sector and to enhance its competitiveness. Further, the Government considers this strategy to have a potential to create employment. In this respect, the internationalisation of the economy in general and of the agri-food sector in particular, is viewed by the Government as a strategic measure to contribute to the economic recovery. The main strategic axes of the plan include providing information and specialised formation on internationalisation to national companies; supporting exports by carrying out promotion activities abroad such as campaigns and fairs about Spanish food products; and opening new markets by encouraging trade agreements. In concordance with this strategy, the Agriculture Ministry aims to enhance the exports of organic foodstuffs and ensure the highest possible added value (MARM, 2010b). In this sense, the Agriculture Ministry (2010b) highlights exports as a fundamental pillar of the Spanish organic sector.

6 Policy obstacles and future policy steps

6.1 Gaps and inconsistencies in public policy

All the OAPs disclosed up to date in Spain carry out a very accurate diagnosis of the situation of the organic sector, and particularly of the domestic consumption of organic food products. They highlight the structural constraints related to the affordability and the availability of organic food products, which are fundamental factors in the policy support for sustainable food consumption (Reisch, 2013; Thøgersen, 2005, 2010). Further, they point out the need to increase consumer knowledge, which is a key factor for empowering consumers to make informed decisions (Thøgersen, 2005, 2010). They also

mention the reliance on exports as a potential threat for the development of the organic sector and the importance of activating domestic demand. Therefore, the OAPs address all four key issues to increase organic food consumption identified in this study. However, the policy measures formulated in the OAPs generally fail to address these issues. All three OAPs focus exclusively on the implementation of information-based policy instruments, particularly promotion campaigns and fairs, which concentrate on increasing consumer knowledge and awareness on organic food. In contrast, there is no specification on how the market-based policy instruments formulated in the OAPs are going to be implemented. Further, there is a clear policy-gap concerning the structural factors that impede an increase of organic food consumption in Spain, namely the price-gap between conventional and organic foodstuffs and the scarce availability in supermarkets and hypermarkets. This neglect of the national marketing structure for organic foodstuffs in the policy support is not consistent with the objective stated in the OAPs, namely to improve the national marketing of organic foodstuffs. Further, it stands out from the analysis that information-based measures to increase consumer knowledge and awareness on organic food are very limited.

The main inconsistency found in the first OAP is the objective of promoting domestic consumption and the simultaneous promotion of organic food products abroad in order to foster the internationalisation of the marketing of organic food products. The launch of the long-term campaign in 2006 for promotion and information activities on organic food products coincided with the launch of the collaboration between the Agriculture Ministry (MAGRAMA) and the Institute for Foreign Trade (ICEX) to encourage exports of organic foodstuffs.

The OAP for the period 2007-2010 focuses on the formulation of information-based instruments, particularly in measures aiming to promote organic food products, not only in the domestic market but also abroad. In comparison, market-based instruments are quite limited. Despite the fact that they don't address the key structural factors to increase organic food consumption, the market-based measures formulated in the plan are relevant. For instance, the support to the availability of organic foodstuffs in the MERCAS network is consistent with the fact that national suppliers seldom provide organic foodstuffs to national retailers (see "Retailers"). However, the plan does not specify how these measures are going to be supported. Further, the OAP concentrates its support in urban markets and direct marketing channels, in particular cooperative stores. These are key marketing channels for organic foodstuffs, yet there are also other marketing channels to be considered in the distribution system for organic foodstuffs (see "Marketing structure"). Hence, there is a policy-gap in

the support of the availability of organic food products in other key channels, namely in large commercial surfaces such as supermarkets and hypermarkets, and in the Horeca sector.

In 2013, the Agriculture Ministry organised the promotion campaign for organic food as a continuation of the “weeks of organic food” launched in 2006. Its motivation was to address the neglect of domestic consumption resulting from the fact that a large part of the organic production is exported. In this way, the campaign seems to respond to the threat of a high reliance on exports pointed out in the OAPs. The objective of the campaign was to promote domestic consumption through having an impact on the wider public. However, as pointed out in the analysis, the campaign stood far away from its objective, due to the inconsistency between its objective and the actual measures to implement it. Further, the objective of the campaign is not consistent with the fact that such promotion activities have only taken place once a year and have not been implemented in a continuous manner. In fact, the time-gap in relation to the last campaign (in 2008) was five years, which limits even more its impact. Further, the analysis of the record of campaign efforts carried out by the Agriculture Ministry, shows that organic food promotion is residual in relation to other food-related promotion campaigns, which supports the scarce promotion reported in the national survey (see “Consumers”). Therefore, there is a basic contradiction between the objective of promoting organic food consumption and its actual implementation.

The new OAP focuses exclusively on the formulation of information-based measures and offers few prospects to improve the national marketing of organic food products in the near future, which reinforces the contradiction with the objective of improving the national marketing of organic foodstuffs. Moreover, there is a gap between the end of the second OAP in 2010 and the beginning of the new OAP in 2014, where no strategic plan for the organic sector has been applied. In part, this might be explained by the world economic crisis that hit Spain in 2008, which had a great impact on the priorities of the governmental agenda, and might have resulted in the organic sector receiving less attention. The economic situation might also explain that the new OAP concentrates on the production capacity and the international promotion of organic foodstuffs in order to encourage exports. In fact, the policy plan for the internationalisation of the agri-food sector in Spain highlights the internationalisation of the agri-food as a key strategy for the economic recovery. In consequence, the objective of the promotion of organic food marketing and consumption in Spain has been further neglected in the new OAP.

In regards to the national strategy for rural development, the second OAP for the period 2007-2010 aimed at prioritising the support of organic farming within rural development policy, referring to the EOAP recommendation to give a strong support to organic farming within RDPs. However, the national RDP does not set organic farming as a priority within rural development. In consequence, there is a failure to combine the objective of sustainable food consumption with the objective of sustainable rural development, and in particular to support local organic food markets as a tool for sustainable rural development (European Commission, 2014b).

The regional RDPs focus on information-based instruments rather than market-based instruments, which is made evident by the low number of autonomous regions supporting Measure 123 for the improvement of the marketing of organic products. This supports the trend followed in national OAPs, where greater support is given to information-based instruments. Further, despite the European strategic objective to increase organic food consumption, the EU support for increasing organic food consumption in Spain is negligible in relation to the support given for production.

The Action Plan for Domestic Trade highlights measures to address the dispersion of supply, which affects the organic sector and would improve the availability of organic food products in retail stores. These measures respond to a major weakness of the organic sector identified in the OAPs, namely the scarce supply, which is translated into a lack of several basic food products. Similarly, the Plan for the Quality Improvement of Domestic Trade highlights the importance of urban markets as a marketing channel for fresh foodstuffs. As pointed out in the analysis, urban markets are a key marketing channel for organic foodstuffs. However, none of the policy plans specifically address the organic sector.

In relation to the policy document on the strategic guidelines for the internationalisation of the agri-food sector, the main policy-gap identified is that it does not include specific guidelines for organic produce. Finally, the promotion of the internationalisation of organic food marketing and the consideration of exports as the main pillar of the organic sector is not consistent with the fact that the dependency on foreign trade is identified in the OAPs as a potential threat for the organic sector. In fact, the strategy to internationalise the organic food marketing reinforces the exports-driven character of the Spanish organic sector.

6.2 The scene for the policy obstacles in organic food consumption

It has been argued by several scholars that supply-push policies such as subsidies provided to organic producers under the CAP, are more effective in pulling the consumption of organic products than many demand-pull measures focused on consumer information because they increase the availability and affordability of organic products (Reisch et al., 2013; Thøgersen, 2005). Concerning the policies to increase sustainable food consumption, governments generally play a marginal role, since they restrict themselves to information-based instruments (Mont, 2008; Reisch et al., 2013; Reisch, 2013). This is partly due to the powerful retail industry in the European food domain, which lead governments to adopt non-invasive instruments such as consumer information (Mont, 2008).

The policy instruments adopted by governments to change consumer behaviour are related to different modes of governance (Hall, 2013). Three major contemporary approaches can be recognised in approaching issues of sustainable consumption: the utilitarian, social/psychological and the systems of provision/institutional approach (Seyfang, 2009).

The utilitarian approach to behavioural change is based on a neo-classical view of consumers as rational utility-maximisers (Hall, 2013; Seyfang, 2009). According to this approach, government intervention focuses on overcoming an “information deficit” and aims to encourage “rational behaviour” with measures to improve market functioning and information flows to the consumer, so as to empower consumers to practice more sustainable consumption (Hall, 2013; Seyfang, 2009). The tools to drive consumer behaviour change towards sustainable food consumption focus on labelling, tax incentives, and information/promotion activities (Seyfang, 2009).

The social/psychological approaches, recognise the importance of institutions in shaping consumption decisions (Seyfang, 2009). Policy measures inspired from this perspective focus on the reconfiguration of the “choice architecture” within these institutions so as to encourage sustainable consumption behaviour (Hall, 2013; Seyfang, 2009). In terms of this approach, the goal of public policy-making is to steer consumers towards sustainable choices (Hall, 2013). “Nudging instruments” belong to this approach, and consist in nudging consumers towards more sustainable choices (Seyfang, 2009).

The systems of provision approach/institutional approach adopts a structural perspective on the organisation of systems of consumption and provision by focusing on the contextual institutions,

norms, structures and infrastructures that constrain individuals' ability to make sustainable consumption choices (Hall, 2013), and can be applied to food supply chains (Seyfang, 2009). Systems of provision are vertical commodity chains comprising production, marketing, distribution, retail and consumption, which link a particular pattern of production with a particular pattern of consumption (Fine & Leopold, 1993). According to this approach, systems of provision can “lock-in” consumers to particular patterns of consumption, thereby reducing the choices available to them and preventing significant changes in consumption patterns (Seyfang, 2009). This approach focuses on alternative systems of provision (hall) to achieve sustainable consumption, emphasising localism and short supply chains (Seyfang, 2009).

The perspective followed by the policy support for organic food consumption in Spain matches with the utilitarian approach, since it concentrates on information-based and market-based instruments, and particularly on promotion campaigns. Since policy measures are split into promoting domestic consumption and promoting the marketing of organic produce abroad, there is a conflict between national and European interests. National policies to promote locally-produced organic food consumption might conflict with European policy-principles for the free movement of goods (Reisch et al., 2013). The European strategic objective to increase organic food consumption is therefore not always consistent with the trade objectives of the EU and the World Trade Organisation (Reisch et al., 2013), especially for countries with an exports-driven organic sector, such as Spain. In fact, economic concerns both at the national and the European level are the main obstacle to implement policies to increase organic food consumption in Spain. As shown in this study, exports play a major role in the economy, not only in the organic sector but also in the agri-food sector as a whole. Moreover, this division between policy objectives translates into a clash between different policy approaches to address the economic recovery. On the one hand, local food supply chains are portrayed as a potential source for creating jobs, especially as they contribute to rural development (European Commission, 2014b; Seyfang, 2009). On the other hand, the internationalisation of the economy is regarded as a key strategy for creating employment and facing the economic crisis (Gobierno de España, 2013).

Viewed under a structural perspective, the conflict between national and European objectives reflects the system of provision of organic food in Spain. The dominant pattern of production in the provision system, namely the internationalisation of the organic sector, defines the pattern of consumption, which is residual and neglected in public policy. In particular, the European objectives

on trade act as a contextual constraint on the consumer ability to make sustainable consumption choices in Spain. Further, Fuchs and Lorek (2002) argue that globalisation fundamentally affects the available range of governance strategies, and “has the potential to undermine any sustainable consumption policy which ignores this context” (p. 35). As a result of trade liberalisation, governments have a very limited capacity of effective sustainable consumption governance at the national level (Fuchs & Lorek, 2002; Quaye, Ruivenkamp, Frimpong, & Jongerden, 2013). The concept of food sovereignty lends further insight into the dis-linkages between local production and consumption in the organic sector in Spain. Trade liberalisation policies, according to this approach, are a major threat to localised food systems (Quaye et al., 2013). In response, according to Quaye et al. (2013), food sovereignty promotes the formulation of trade policies that enable the achievement of sustainable development objectives and allow citizens to access local sustainable food production. In this regard, the increasing competition in foreign markets, might result in an opportunity for enhancing the protection of the Spanish organic market and for enlarging domestic consumption (Gil et al., 2001; Sanjuán et al., 2003).

6.3 Future steps in public policy

Future policy support for organic food consumption in Spain should strengthen local organic food supply chains, as they make a significant contribution to sustainable food consumption and rural development (Reisch et al., 2013; Seyfang, 2009). In particular, the national strategy for rural development should include organic farming as a priority measure.

According to Hall (2013), all three ways of approaching consumer behaviour outlined above can be applied to foster sustainable food consumption. Information-based instruments and market-based instruments need to be complemented with a fundamental examination of the system of provision (Hall, 2013). Hall (2013) argues that the mode of governance and the policy-instruments become mutually reinforcing. In this way, small policy steps in the form of better information and powerful advertising, form a mutually reinforcing thread of influence to change consumer behaviour (Hall, 2013). Even though information-based instruments are a limited tool for change, as Seyfang (2009) suggests, they may nevertheless be a useful stepping stone. In the following, information-based and market-based instruments, as well as regulatory tools are reviewed in order to suggest future steps in public policy.

Consumers should have information about the benefits of organic production methods and their

implications for environmental conservation, biodiversity protection, and food quality (Colom-Gorgues, 2009). It is particularly important to increase consumers' knowledge of what an organic product is and how to differentiate it in the market place (Gil et al., 2001). As Colom-Gorgues (2009) suggests, mass media such as TV, radio and the press play a key role in setting powerful information campaigns. It is necessary to make a stronger use of these channels in promotion and information activities. Information-based measures to promote organic food should probably be national in scope, since regional differences in awareness appear to be small in Spain (Briz & Ward, 2008). The “organic weeks” implemented in Spain would make a greater impact on the wider public if they were complemented with a measure to facilitate the actual access to organic food during the promotion event. For instance, Denmark and Norway have implemented “organic months” in which all organic products were offered with a price discount of the full VAT (Reisch et al., 2013). In addition, the Government could collaborate with specific entities aligned with the organic movement, such as the SEAE, to organise promotion and information events on organic food.

In addition to information-based instruments, market-based instruments also belong to the utilitarian approach. As pointed out previously, these instruments usually address the consumer issues related to affordability and availability. Price is the main factor restricting consumer access to organic foodstuffs (Briz & Ward, 2008; Colom-Gorgues, 2009). According to Dabbert et al. (2004), when the sale of organic food goes up, economies of scales in production and distribution allow more competitive prices and lower the price barrier. Therefore an increase in organic food consumption is self-reinforcing. Spain could encourage organic food consumption through the application of reduced VAT rates for organic food products, which are widely recognised instruments to reduce the price-gap between organic and conventional foodstuffs (BIO Intelligence Service, 2012; Reisch et al., 2013; Thøgersen, 2005). As argued above, production subsidies are particularly powerful in fostering organic food consumption. This instrument has been widely implemented and has been key to lower consumer prices (Briz & Ward, 2008; Colom-Gorgues, 2009; Reisch et al., 2013; Thøgersen, 2005). Furthermore, subsidies could be used in Spain as a tool to enlarge the domestic market of organic products. In particular, the Government could increase the current production aid by investing in productivity, on the condition that organic producers sell a certain percentage of their produce in the national market. In this way, the expansion of organic food production would mitigate the economic loss resulting from selling organic produce in the national market instead of exporting it abroad.

The availability of organic foodstuffs is also a key constraint for organic food consumption.

Supermarkets and hypermarkets are key structures in the provision system in Spain, since they are usual shopping places. These channels have been crucial to develop organic consumption in other European countries (Colom-Gorgues, 2009). It is argued that in order to foster organic food consumption among the wide public, first it has to penetrate these mainstream structures of provision (Aschemann, Hamm, Naspetti, & Zanolini, 2007). Given the fact that organic foodstuffs are usually not available in supermarkets and hypermarkets, these structures act as a constraint on consumers for choosing organic food products. The market-based instruments outlined above, as well as financial support provided for the marketing of organic foodstuffs in these key distribution channels, can improve the availability of organic food products.

Furthermore, they can provide support to alternative structures of provision, which can be effective tools to tackle both the availability and affordability of organic foodstuffs (Reisch et al., 2013). In this regard, urban markets and direct marketing through farmers cooperatives generally provide fresh fruits and vegetables at prices significantly lower than supermarkets (Seyfang, 2009). According to Seyfang (2009), direct marketing channels are especially effective in lowering prices, since they are characterised by a short supply chain involving few intermediaries. Furthermore, Seyfang (2009) argues that direct marketing channels and urban markets make a major contribution to local economies. As shown in the analysis, both of these marketing channels display a good potential to develop in Spain.

Another type of direct-marketing is emerging in Spain and in other countries, which is referred to as box-schemes. This type of marketing channel consists in a regular home delivery of a seasonal fruit and/or vegetables box, which normally are organic and locally cultivated (Vidal, López, & del Campo, 2011). In this way, box-schemes are an alternative to existing structures of provision, especially for small organic producers who can't access large marketing channels such as supermarkets (Seyfang, 2009). According to Vidal, López and del Campo (2011), key successes of this distribution channel include supply variety and lower prices. The results of the study by Vidal et al. (2011) indicate that most organic consumers usually know about this marketing channel, whereas non-consumers usually have a low level of knowledge about box-schemes. As the authors suggest, entrepreneurs using this marketing channel should publicise its benefits in order to develop it. Lower prices might be an incentive for current non-consumers to consume organic foodstuffs.

Direct marketing of locally-produced organic produce through farmers cooperatives and box-schemes

are alternative structures of food provision that employ the tools highlighted in the institutional approach, i.e. localism and short supply chains (Seyfang, 2009). These channels add to the environmental benefits of organic food consumption, particularly by reducing food miles. An example of how these marketing channels can become effective structures of organic food provision is provided by the organic producer cooperative Eostre Organics based in the UK, analysed in Seyfang (2009). In brief, this cooperative sells to local businesses and hospitals as well as through market stalls and weekly subscription boxes of mixed vegetables and fruit delivered direct to consumers. Therefore, initiatives to supply organic foodstuffs using different marketing channels could be particularly effective in improving both their availability and affordability.

Another category of market-based instruments are “nudging instruments”, which belong to the psychological approach. Public procurement, and particularly public catering, is a policy instrument in which governments and public bodies such as schools, cafeterias in the public sector and hospitals, act as powerful role models for sustainable food consumption by choosing sustainable alternatives by default (Reisch et al., 2013). The case study by Wahlen, Heiskanen, & Aalto (2011), suggests that public catering is an effective measure to influence consumer behaviour towards organic food. In Spain, this measure was implemented as part of the information campaign and particularly targeted schools. Sustainable public catering could be further used in public institutions as well as in public enterprises in the Horeca sector.

A fundamental need in governmental policy for sustainable food consumption, and in Spanish public policy in particular, is to define and enforce clear national sustainability targets in the food domain (Reisch et al., 2013). The enforcement of such objectives might require interventions in the form of regulations. In Spain, the measure suggested to balance exports interests with the objective to increase domestic consumption should be regulated in order to set an amount of produce destined to the national market. Further, it is argued that public procurement measures must be regulated in order to have a great impact on the food served in the public sector (Dalmeny & Jackson, 2010).

7 Conclusion

The objective of this study was to identify and analyse the policy obstacles of the governmental measures affecting organic food consumption in Spain. This analysis has provided an assessment on how the Government can better support organic food consumption as a means to increase the sustainability of food consumption in Spain. Four issues are particularly relevant for the support of

domestic organic food consumption, namely exports, food prices, consumer knowledge and awareness, and availability. The three OAPs applied so far, focus exclusively on the implementation of information-based policy instruments, which are based on an utilitarian approach and concentrate on increasing consumer knowledge and awareness on organic food. There is a policy-gap concerning the structural factors that impede an increase of organic food consumption in Spain, namely the price-differential between conventional and organic foodstuffs and the scarce availability in key marketing channels, particularly in supermarkets and hypermarkets. Further, there is a fundamental inconsistency in the policy support to increase organic food consumption, which simultaneously aims to promote domestic consumption and foster the internationalisation of the marketing of organic food products. In particular, policies to increase the consumption of locally-produced organic food in Spain are constrained by the European and international policies on international trade. Future policy steps have to diversify the use of policy-instruments and employ different modes of governance, which should include the support of a variety of marketing channels.

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