UNIVERSITÄT HOHENHEIM

Institute for Agricultural Policy and Markets

Supervisor: Prof. Dr. Tilman Becker

Master Thesis

Consumer Attitude and Behaviour towards Organic Food:

Cross-cultural study of Turkey and Germany

Submitted by

Nihan MUTLU

Im Chausseefeld 5

70599, Stuttgart

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Abstract

Organic food market is very challenging in Europe and developing rapidly with different rates between western and eastern part. Consumers have raised great interest to healthy and tasty diet with high nutritional compounds, confidence in food safety, environmental and animal welfare concern and also sustainability. This paper presents cross-cultural results for organic food consumers in Turkey and Germany. Quantitative data is collected by survey method consisting of structured questions which are only targeted to organic consumers in both countries and analysed with SPPS 13 for Windows statistical data package.

Results shows that, in Turkish consumers' age is lower, household and children number is higher and gender is more equally distributed than Germany. Similarly, both consumers have high level of education and belonging to middle income groups. In contrast, Germans have more experiences with organic food and buying frequency is more than Turkey. Majority of the Turkish and German respondents thought that organic food is healthy, contain high nutritional value and have positive image about organic production methods. Certification as a compulsion is not well known among Germans, whereas, Turkish people have more problems in label recognition.

Both in Germany and Turkey, supermarkets and organic retail shops will be the most preferred places and fresh fruits and vegetables will maintain their importance in the future market. Matured German market is not expecting big demand differences between products, whereas, some product categories especially meat products will burst-up in Turkish market. Cross-cultural consumer study shows that "heath" and "supporting organic movement and sustainability" are similarly standing on the top three places in the motivation list for Turkey and Germany, whereas high price and lack of availability reported as ruling barriers but with different degree of importance.

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List of Abbreviations

BLE: Bundesanstalt für Landwirtschaft und Ernährung

BOEL: Bundesprogramm Ökologischer Landbau

BOELW: Bund Ökologische Lebensmittelwirtschaft

BSE: Bovine spongiform encephalopathy

ETO: Ecological Agriculture Organization

FIBL: Forschungsinstitut für Biologischen Landbau

GMO: Genetically modified organisms

IFOAM: International Federation of Organic Agriculture Movements

MARA: Ministry of Agriculture and Rural Affairs

SOEL: Stiftung Ökologie & Landbau (Foundation Ecology & Agriculture)

SPSS: Statistical Package for the Social Sciences

TEMA: The Turkish Foundation for Combating Soil Erosion, for Reforestation and the Protection of Natural Habitats

WTP: Willingness to pay

1 Introduction

Twentieth century has been the witness of most technological agricultural changes leaving remarks on rural landscape and population. This technical revolution, which is continuing to be dominant method for food production, depends on on-farm and off-farm resource usage. Invention of machinery has put labour out off farm while variety of chemical fertilizers have increased yield without any concern of environmental measures for economical reasons.

Sustainable food production became more and more vital after facing with social, ecological and economic impacts of industrialized agriculture. Societies find solution by demanding for low-input, regional and seasonal products with the respect of environment, health and social welfare of the region. There have been organizations and policies have been established in developed countries to take measures in food production. Organic Agriculture as one solution to problems of industrialized agriculture based on holistic production management systems which aims creating integrated, humane, environmentally and economically sustainable agricultural production systems.

Consumers of industrialized countries have shown a great attention towards organic products starting from 90's. Food safety and quality issues have triggered the awareness of consumers and people start to be suspicious towards conventional products. Moreover, today's educated society is showing great interest to their and children's health and prefer foods with more nutritional values, less addictives and more coming from natural production methods. Furthermore, ethical movements are becoming widespread in developed countries towards animal health and welfare on farms and effect consumers' choice when buying meat and milk products.

In most parts of the Europe organic food has become a matured market like in Germany. Germans have been practising biological farming methods and protesting high input agricultural activities from the beginnings of the 20th century. On the other hand; there are still some emerging markets in eastern part of the Europe continent like Turkey. Turkish people have just become acquainted with organic agriculture in last twenty years with an export orientation to Western Europe and start to consume in the recent years. Aim of this paper is the comparison of Turkish and German consumers' attitude and behaviour towards organic products by the help of consumers' surveys which is only targeted to organic buyers.

In the first section an overview of organic agriculture in Europe, Turkey and Germany will be given. Production, legislation and marketing of the organically grown products will be summarized. The second section will focus on consumer behaviour and attitude in general and then followed by a specific part dedicated to organic consumers. The following section is summarizing the results of the field work from Turkey and Germany according to the questionnaire analyses by using SPSS statistical package. Lastly, study will be end with discussion part in which similarities and differences of two consumer groups will be compared.

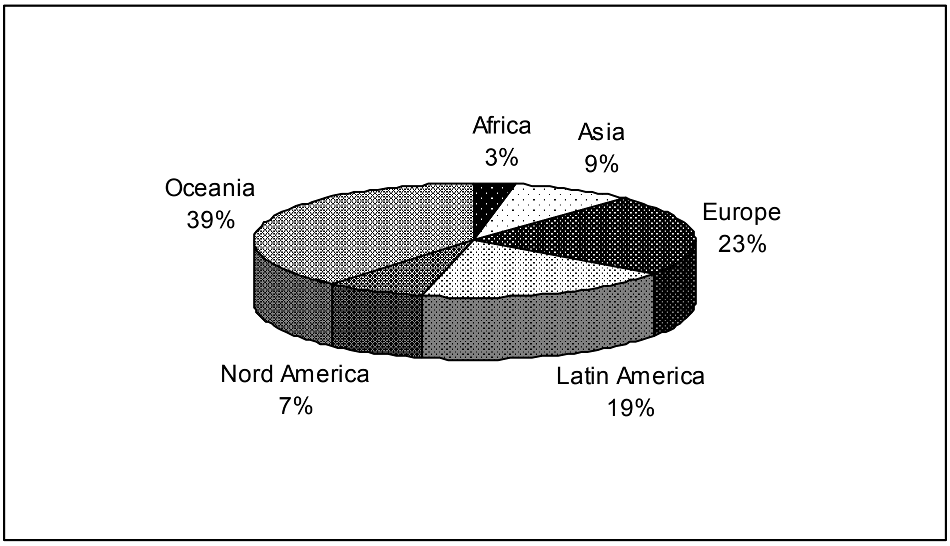
Due to the lack of consumer researches in Turkey and continuously changing trends among German consumers, this study can help market actors and policy makers to follow up the update consumers' buying behaviour and attitude. Moreover, this comparison research can give an idea about cross-cultural studies to other scientist. Additionally, it can be an evidence of how organic market changes on consumers sides between western and eastern Europe.

2 Literature Review

2.1 Worldwide Organic Agriculture

Agriculture has changed in a more mechanical and yield orientated way in the twentieth century after the World War II. Chemical adherence and intensive farming techniques have cause food safety and environment problems. As a result, countries start to search for new methods in agriculture and organic farming has got the challenge to develop all over the world. (Rehber and Turhan, 2002)

Figure 2.1: Worldwide distribution of organically managed lands



Source: SOEL-FiBL Survey 2007 in Willer and Yussefi, 2007, p. 25

Today nearly 120 countries in the world are practicing organic farming and number of farms and agricultural land are increasing day by day. According to the 2007 SOEL-FIBL survey on organic agriculture; 31 million hectares are organically grown under the management of 633'891 farms. This figures respect to the 0.7 percent of all agricultural land worldwide. Referencing to the Figure 2.1 continental rating starts with Oceania (39 percent) and then come Europe (23 percent) and Latin America (19 percent). On the other hand, Europe has the highest density of the organically managed land and largest number of organic farms as total in the world. In the last three years, North America and Europe have increased their organic areas almost half a million hectares and most of the other countries followed this trend; however China, Chile and Australia were not as successful as others. (Willer and Yussefi, 2007)

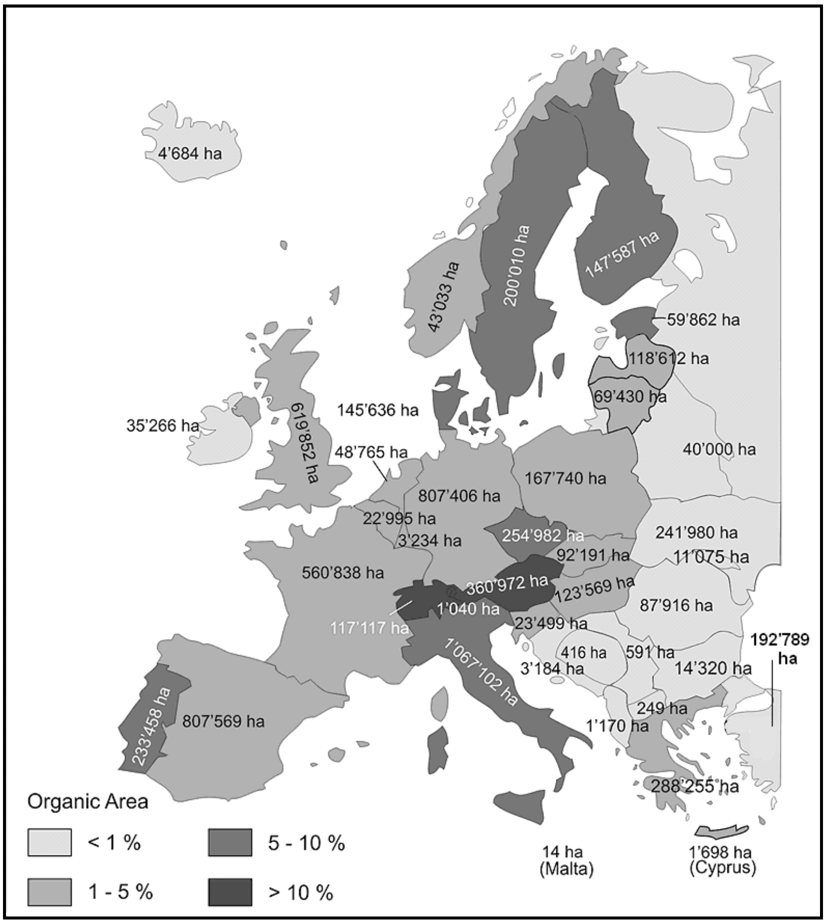
From 2002 to 2005 universally organic food and beverages sales have increased by 43 percent to 25.5 billion Euro and estimating sales are nearly 30.9 billion Euro in 2006. (Willer and Yussefi, 2007) Developed countries such as; US, Europe, Japan, Canada and Australia have extend their production due to the demand from domestic consumers while developing countries organic farming is depended on export. Leading markets in today's world; Europe and North America have such a huge demand that other regions are providing supply. (Babadogan and Koc, 2005) Consumer's awareness, health and environment sensitive actions are some highlights in developed countries causing a market demand. (Rehber and Turhan, 2002)

Developing countries provide wide range of organic products and most of them started to export. Products that cannot be provided by European, American or Japanese organic farming are advantage for developing countries to take part in these markets. Tee, coffee, cocoa, tropical goods, spices are some product groups that western consumers are willing to buy organically. However, there are some difficulties for importer countries like guarantying organic origin due to the facts that; lack of expert knowledge in production and certification. Depending on obstacles, USA and EU are opening certification bodies in developing countries all over Latin America, Asia and Africa. High certification costs related to level of standards and varieties are barriers for exporters. Moreover, local governments in most developed countries are setting high standards, which cause more constraints for exporter countries. Although, market and product information and finance are barriers for developing countries in organic agriculture sector, building cooperatives can be one good solution for better world market. (Kortbech, 2000 and Rehber et al., 2002)

2.2 Organic Agriculture in Europe

Organic agriculture in Europe has developed rapidly after 90's, reaching 6.9 million hectares under the management of 190'000 farms in 2005. (Figure 2.2) Besides, Figure 2.3 states 6.3 million hectares of these areas are belonging to EU members, which correspond to 3.9 percent of the total union agricultural area. New member states of the Union like Poland and Lithuania contribute to increase while Italy and Spain also show improvements in converting to organic. Moreover, numbers of organic farms are again start to increase after the decrease between 2001 and 2004 due to Italian organic agriculture. (Willer and Yussefi, 2007)

Figure 2.2: Organically managed land in Europe

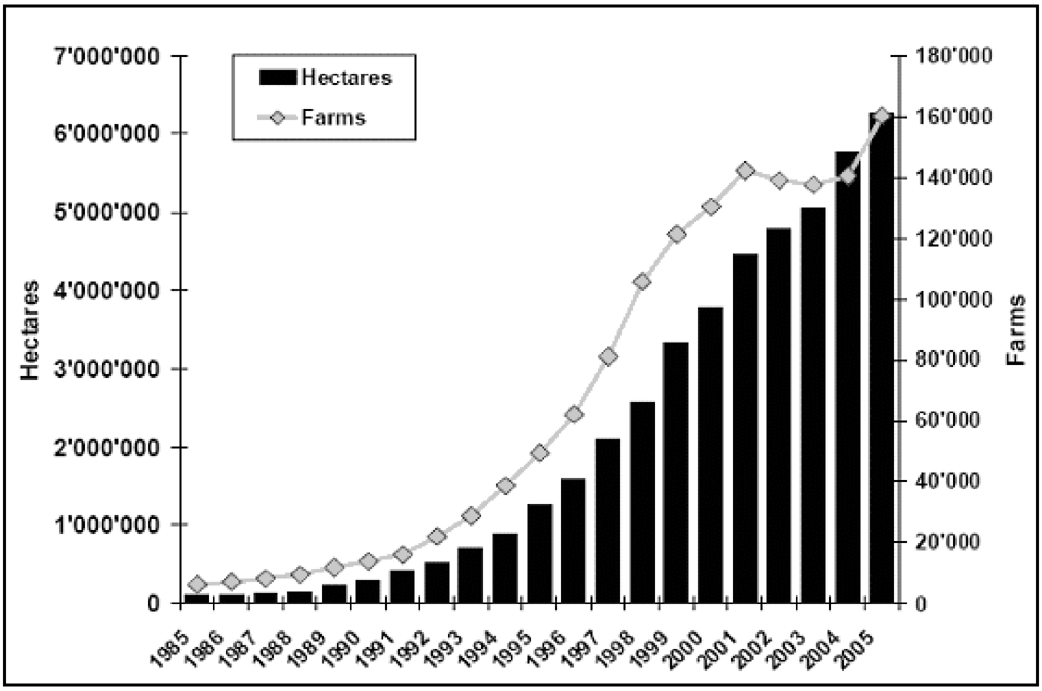


Source: Willer and Yussefi, 2007, p.133 with modification in organic area of Turkey from (ETO, 2007)

Europe has set up policies for organic agriculture. Council Regulation (EEC) No 2092/91 of 24 June 1991 is defining organic production, processing and marketing through agro-environment measures. Furthermore, Common Agricultural Policy and EU actions plans combining with national governmental support policies contribute to the development of organic sector. (Tuson and Lampkin, 2004) Similarly, other European countries outside EU have subsidies since 90's. (Willer and Yussefi, 2007)

The European market is estimated to be between 13 and 14 billion Euros (2005). The biggest market for organic products is Germany with an annual turnover of 3.9 billion Euros, followed by Italy (2.4 billion Euros) and by France (2.2 billion Euros). The highest market share of organic products of the total market is in Switzerland with 4.5 percent, and the highest per capita consumption is also among Swiss consumers with more than 100 Euros spent on organic food per year and citizen. Growth of the European market compared to the previous year is around ten percent. Some countries are currently experiencing a shortage of supply. (Willer and Yussefi, 2007)

Figure 2.3: Development of organic farming in the European Union 1985-2005



Source: Willer and Yussefi, 2007, p.135

Based on the Delphi survey in 2003, food scandal problems, media advertisement and policies such as more available raw material supply are driven forces for organic market development in Europe. European countries can be divided into categories regarding their organic market shown in the Table 2.1. (Padel, 2004)

Table 2.1: European organic market structure

Established Market	Growing Market	Emerging Market
Austria, Denmark, Germany, Switzerland, United Kingdom	Finland, Sweden, Italy, Netherlands, France	Spain, Greece, Czech Republic, Belgium, Ireland, Portugal, Norway, Slovenia

Source: Padel, 2004, p.24

Marketing is managed through mostly multiple retailer channels but on the other hand, direct marketing, organic shops are expecting to get less importance with the development. While rural areas grade direct marketing as the most second important channel, urban prefers special shops. (Padel, 2004)

General European purchasing behaviour towards organic food is; food safety and health concern due to the food scandals and recent BSE problems in Europe that boomed organic sales. Environmentally friendly agricultural practice techniques that is well adopted to organic farming is the following buying motive in EU. Better taste is another common reason for purchasing among countries. Moreover, in some countries animal welfare, wellness, prestige, curiosity, origin of food and fair trade are other minor reasons effecting consumers. Surprisingly, GMO free being of organic food is not so much important among European consumers in spite of the arguments in the media. (Hamm and Gronefeld, 2004)

2.3 Organic Agriculture in Turkey

Organic agriculture in Turkey started with external demand especially from European countries in the mid of 80’s. Initiative structure of organic farming depends on contracts between farmers and the demanding company which provides farmers advantages on reduction of certification costs and consultancy. Aegean region had become hearth of organic sector especially city of Izmir with 30 production units and 8 certification bodies. (Figure 2.4) The other cities from Aegean region; Afyon and Muğla, from Mediterranean Region; Antalya, Isparta and Mersin, from Black Sea Region; Ordu and

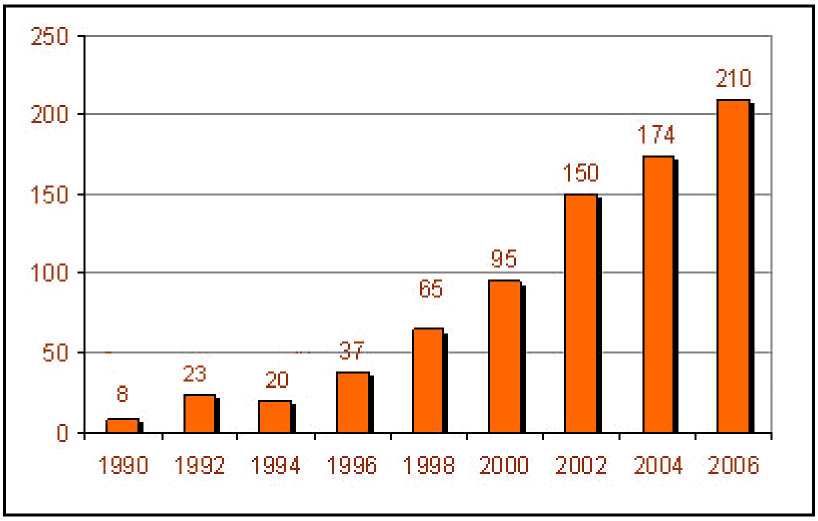
Trabzon and lastly Malatya from East Anatolia are playing important role in the development of organic sector. (Aksoy, 2002 and Güler, 2006)

Figure 2.4: Map of Turkey with seven regions

Source: Modified from Dempsey, 2007, p.1

In the beginnings there were only 8 products; dried fruits and nuts. Initial establishment was guided by European companies and at the end of 20th century; demand for organic food increased rapidly resulting with over 200 product varieties in 2006. (Figure 2.5)

Figure 2.5: Number of products by years

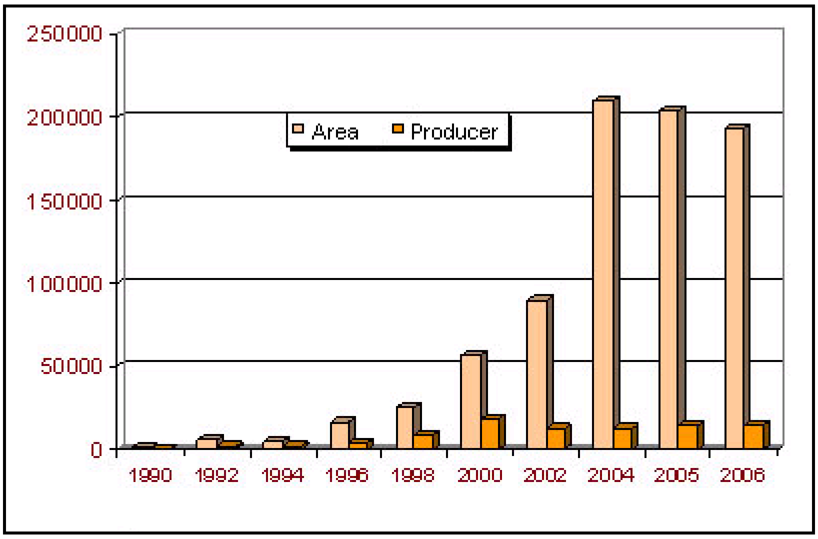


Source: ETO, 2007, p.1

2.3.1 Production

Production area data and number of farmers is really dependant on the literature. Regarding to the 2007 statistical research by ETO (Ecological Agriculture Organisation) Turkey has 192.789 ha area and managed in the responsibility of 14256 farmers in 2006. (Figure 2.6) According to the latest Ministry of Agriculture statistics, organic farmers are mostly located in Aegean region and number of producers reached to 6123. Black Sea region has 2800 farmers and this is followed by Central Anatolia region with 2017 producers. Total share of organic area is only 0.8 percent in 2005 compared with total agricultural land of Turkey. (MARA (a), n.d; (MARA (b), n.d)

Figure 2.6: Organically managed area (ha) and producer numbers by years



Source: Modified from ETO, 2007, p.1

Turkey has a rich biodiversity with seven different regions that provides wide range of agricultural products. Aegean region with mild climate, offers grapes, olives and fruits and responsible from the 39% of the organic products with 80400 ton production amount in 42500 ha area. Mediterranean cropping, with 24% of the organic production, is generally based on tomato, cucumber, citrus, banana and olive. Moreover, organic rose cultivation in this area is attractive for organic cosmetic sector and getting high demand from EU and North America. Central Anatolia region provides wide range of field crops and fruit crops and in the third place with 11% of the organic production in 34000 ha area. Marmara region favours olive and fruit production with high amount of peach and have 79600 ton organic production. East turkey cultivates apricots especially in Malatya region and 43500 ton organically grown products are coming from South-east Turkey. Besides, Black Sea region produce tea and hazelnuts with high precipitation in all seasons. (Güler, 2006 and Güneş, 2005; Mara (b), n.d) Additionally, Turkey is the biggest producer of organic cotton in the world and in the sixth place among grape producer countries. (Willer and Yussefi, 2007)

2.3.2 Legislation

Turkey's organic agriculture started with exporting products therefore, certification has been done according to the importer countries till 1994. In that year Turkey published regulation for organic food production considering Council Regulation (EEC) No 2092/91 and IFOAM Basic Standards. All production chain including farming, processing and marketing areas are covered within this regulation. In the following years revisions have been made and in 1995 some penalties entered to prevent free rider problems. Afterwards, Turkey published the document for being compatible with European organic regulation to export goods in 1995. One year later, organic products that have to be certificated are collected under a list. Renovates continue without a cease as the developments emerged and in 2002 another regulation has been prepared with more widen descriptions. Lastly, Turkey's ongoing organic national legislation has been issued in 2005 covering all missing areas from farm to consumers in the production chain. Ministry of Agriculture is responsible from regulation renewing, controlling the certification agents and spreading out the information for further investigations. (Kenanoglu et al., 2002 and Güler, 2005)

There are 11 certification bodies according to MARA update statistics. These agents; Anadolu, BCS, Ceres, CU, Ecocert-SA, Eko-tar, Etko, Icea, IMO, Orser and Türkgap are accredited by MARA and responsible for inspecting organic operators. While six of them are foreign bodies, numbers of Turkish agents are increasing every year. Certification bodies are in the charge of giving organic national logo to the producers and foreign logo for products that will directed to export markets. Organic national logo is given to raw materials, semi-products and products which are coming from organic agricultural origin. Unauthorized products cannot be market with national logo. Additionally, organic products in the domestic market have to carry national logo with the details of the certification body (name, code, certification code, logo of the certification agency) Turkish national organic logo can be green, blue, white and black also has a map of Turkey with six daphne leaves on it as show in the Figure 2.7. (MARA, 2005)

Figure 2.7: National organic logo examples of Turkey

Source: MARA, 2005, p. 31

2.3.3 Marketing

Starting from mid of 80's with dried raisins, figs and apricots, Turkey's export has reached to 37 countries. While EU has the biggest share, USA, Canada and Japan are the other potential markets. (Babadogan and Koc, 2005) While 99 percent of the production is exported to foreign countries, local market is still emerging. Germany has 61 of the total share and then follows USA with 15 percent and UK with 5 percent. Holland, France and Switzerland are other EU market with 2-3 percent share. (Aksoy, 2002 and Güler, 2006) Table 2.2 figures out the registered organic export amounts between 1998 and 2006; whereas, export is expected to more as data collection from exporter firms is quite difficult.

Marketing infrastructure described according to Kenanoglu and Karahan's 2002 research in three ways. Production project, processing firm and exporting operation can be hold by domestic or foreign company. First way of marketing chain is managed by local firm and this company is responsible from production, processing and finally exporting. In the second method, a foreign company owns the production project and processing and exporting processes are given to a local firm by contract. In the final way, foreign company is again handling the production, but also processing and marketing units are settled in Turkey by this firm or with cooperation with Turkish bodies. Farmers are engaged by contracts to these companies and paid for the demanded production. Price premium is added around 5-25 percent to the conventionally produced product's price.

Table 2.2: Turkey's export data: between 1998 - 2006

Years	Quantity(KG)	Amount($)
1998	8.616.687	19.370.599
1999	12.049.949	24.563.892
2000	13.128.934	22.756.297
2001	17.556.280	27.242.407
2002	19.182.859	30.877.140
2003	21.083.351	36.932.995
2004	16.093.189	33.076.319
2005	9.319.327	26.230.259
2006	10.374.493	28.236.617

Source: MARA, 2007, p.1

Domestic market for organic products is very small and still developing. Price differences are ranging from 40 to more than 450 percent when compared to conventional ones. Today big supermarkets are provided by organic products are; Migros, Tansas, Begendik and Endi with have special shelves. The rest of the domestic consumption takes place from special organic shops in urban area. Istanbul takes the first place with 9 shops. (Kenanoglu and Karahan, 2002) Till June 2006, Istanbul has a weekly organic bazaar which is organized by private companies, organic association and municipality. Additionally, another weekly bazaar has opened in Bursa city. (ETO, 2007)

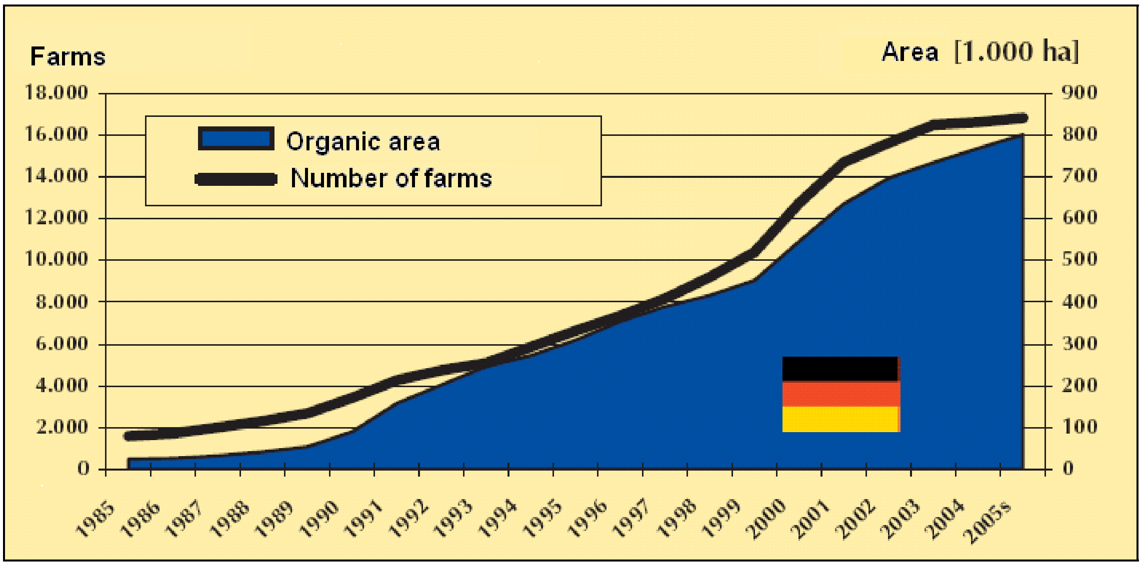
2.4 Organic Agriculture in Germany

Organic agriculture in Germany started in early twentieth century following the bio-dynamic principles by Rudolph Steiner and organic-biological agriculture which spread to Germany from Switzerland practiced by Mueller family. Initial development of organic agriculture stimulates between the end of 60's and end of 80's, where people has got more involved with nature and unfavourable impacts of extensive farming techniques. In these years initiative producer organizations and has been established to prove that organic farming can be alternative way for good agricultural production. The Federation for Organic Farming was established in 1988 to collect producer organizations in the same association. Standards and policies are started to be considered as an emerging issue in 90's resulting with the first EU Regulation 2092/91 to setup rules for organic farming. After the German reunification in 1990, organic area started to increase rapidly. 2000's bring a new breath and organic agriculture spread up to all regions of Germany with supports of Federal Organic Farming Scheme BOEL and as well as the national organic seal establishment. (Haccius and Immo, 2000)

2.4.1 Production

Germany is practicing organic farming on 833000 ha area with 17286 numbers of farms according to latest 2006 reports. These numbers refers to the 4.9 % of the total agricultural area of Germany. (Willer, 2007). (Figure 2.8)

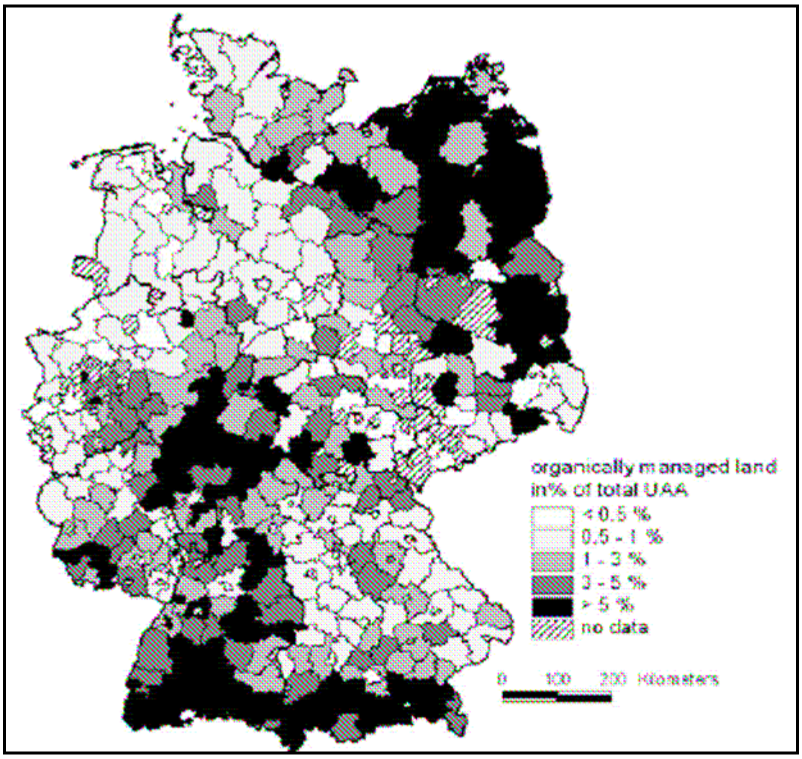
Figure 2.8: Organically managed land and farms by years



Source: Modified from ZMP Oekomarkt Jahrbuch 2006

Southern Germany especially Baden-Württemberg and Bavaria States have vital importance for organic farming due to large number of organic farms. On the other hand, Eastern Germany has the highest distribution of organically managed land compared to all agricultural area due to the changes occurred after reunification. (Figure 2.9) Moreover, Eastern part has less fertile land compared to Western which favours organic farming. Another reason is the bias towards organic movement in West is higher due to the establishment of numerous organisations during 50's and 70's defending either organic farming or conventional. (Haccius and Immo, 2000)

Figure 2.9: Spatial distribution of organic farming in Germany in 2001



Source: Bichler et al., 2005

Germany is the biggest importer of Europe with 38% of the organic products in the total market especially in fruits and vegetables. Moreover, cereals and grains can be produced domestically and need less import demand. Whereas, there is a surplus production in organic livestock like lamp and beef also some dairy products. Decreasing exports in these product groups and conversion of more livestock farmers in unfavourable lands are some explanations for this surplus. (Richter, 2005)

2.4.2 Legislation

EU Council Regulation mostly based on IFOAM standards are followed by Germany in organic farming practices. On the other side, Germany has organic agriculture associations such as; Demeter, Bioland, Biokreis, Naturland, Biopark, Ecoland, Ekovin and Gaea that have contracted farmers all over Germany. (Table 2.3) Even some operates worldwide and have stricter standards than EU. (Haccius and Immo, 2000)

Table 2.3: Organic producer associations in Germany

Name	Establishment	Description	Logo
Biokreis	1979	Regional association focusing on east Bavaria	
Bioland	1971	Association for organic-biological farming	
Biopark	1991	Association of meat production with focus on North-eastern states	
Demeter	1924	Association for bio-dynamic farming and active worldwide	
Ecoland	1996	Regional association of Hohenlohe	
Ecovin	1985	Association of organic wine-growers	
Gäa	1989	Association focusing on eastern states	
Naturland	1982	Certification organization operating worldwide	

Source: (Richter, 2005)

Importing of organic products from non-EU countries must be complied with EU standards and importers have to be allowed by German Federal Office for Agriculture and Food (BLE). (Haccius and Immo, 2000) According national regulation and private standards, organic foods can be labelled as “bio” or “öko” in the market. Moreover, government has established “Bio-Siegel” logo in 2001 that can be used voluntarily. This emblem has been accepted by organic sector quickly while enabling consumers, better recognition of products. (Richter, 2005) Approximately, more than 40500 organic products from 2373 companies are using Bio-Siegel. According to the regulation; 95% of the ingredients come from agricultural origin, addictive use is limited and GMO is completely forbidden in organic products. Producers, processors and importers have to obey this regulation to sell their products as organic in the market. (BLE, 2006) Today, all Germany states have their advisory authorities and they control 22 inspection bodies which are serving in the field. (BMELV, 2007)

If a product will be labelled as organic with the following logos in Figure 2.10; as a rule certification agency must be described. There is a list of codes in labelling system of Germany. For example;

DE-000-Control agency must be written on the product. Here “DE” stands for “Germany” and the following three digit number represents code of the certification body. (BLE, 2006)

Figure 2.10: EU Labels for Germany and national logo: Bio-Siegel

Source: EU, 2007 and BLE, 2006

Organic agriculture has subsidies by government and EU programs in Germany. Every federal state has various schemas for organic producers and processors. Not only production but also certification and marketing are also supported by government. EU program has set up subsidies for the producers who convert to organic farming since 1998. After the revisions in EU legislation organic supports are given by Agenda 2000 program. (Babadogan and Koc, 2005)

2.4.3 Marketing

Organic food market share in Germany is around 3 % making a conjecture of 4.5 billion €. Every year market is growing more and more and the between the years 2005 and 2006, 16% growth was shown that cannot be underrated. (Willer, 2007) Although Germany is the biggest market among other European countries, budget expenditure per person is quite lower and around 31 euros per year. (Richter & Hempfling, 2003)

German organic food retailing is unique among European countries. German consumers not only shop in supermarkets but also there are other retail channels for organic products. Direct marketing and health stores were the pioneers of sales in the past. Afterwards organic shops established in 70's and flowingly in the 80's, the number of organic shops increased rapidly and reached 2000 today varying from fifty to two hundred square meters in size. (Bolten et al., 2006) Today, Bioland has efforts to galvanize the local marketing by making associations with producers and promising the local origin to consumers. (Latacz and Foster, 1997)

In the last few years, conventional retail chains have become the most important market player in the sector with organic varieties and price discounts, while other marketing channels such as specialized organic shops, health shops or directly buying from farmer have lost their market share. Therefore, in 2004 retail chains took more than one-third of the market, while organic shops and health stores were responsible from the other one-third and leaving direct sales only 16% share in market. Among the retail chains Edeka, Rewe, Aldi and Metro have almost 50 % of the total market share. But on the other side, biggest variety of the organic assortments can be found mostly in Tegut and followed by Feneberg, Karstadt, Bremke & Hoerster retail chains. Pioneers of these retail chains that decided to enter organic sector in the middle of 80's were; Tegut, Karstadt and Tengelmann and then other retail companies entered this attractive market in 90's and beginning of 21st century . (Richter & Hempfling, 2003 and Richter, 2005)

There is a fact that these supermarkets have only between 1-2 % organic sales turnovers in total. Mostly people who consume rarely and less addictively prefers supermarkets, while regular consumers' choice is from organic food shops. (Zanoli et al., 2004)

Nowadays, new trend is big organic retail chains with more than 5000 product varieties attracting organic consumers with successful marketing strategies, good prices and atmosphere of the shops. Basic, Alnatura, Biomarkt denree and SuperBio markt have been heavily increasing their shop number since 2000. (Babadogan and Koc, 2005) Today organic retail supermarkets have shown the biggest grown and opened 300 stores with the mean of 200 square meters in size. (Bolten et al., 2006) Furthermore, specialized product shops such as only selling dairy or meat products or weekly open bazaars for fruits and vegetables are getting attention from organic consumers. On the other hand, health shops, direct marketing channels and purchasing cooperatives are getting less interest every day. (Zanoli et al., 2004)

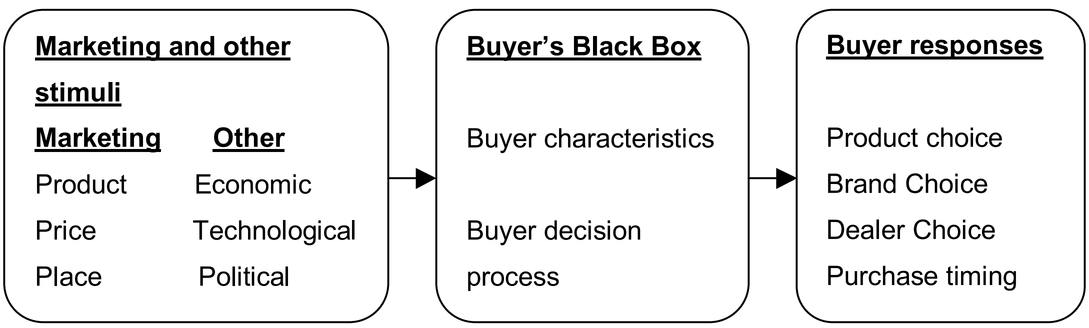
3 Consumer Attitude and Behaviour

3.1 Consumer behaviour analysis

Consumer behaviour is a complex pattern and sophisticated understanding for marketing researches, but simply defined; study of psychological, social and physical actions when people buy, use and dispose products, services, ideas and practices. (Solomon, 2006; Blackwell et al., 2001; Peter and Olson, 2008) Basic idea behind the consumer research was questioning of buying reasons, however researchers have to go deeper and also ask people how and in which circumstances purchase and consume. (Blackwell et al., 2001)

Consumer behaviour consists of ideas, feelings, experiences and actions of consumers with additional environmental factors like ads, prices and commends. Furthermore, consumer behaviour is a dynamic process, because of the continuous changes in ideas, perceptions and activities of consumers as an individual or in a group. (Olson and Peter, 2008) Consumers' response to different types of marketing strategies is the major question to be answered. (Figure 3.1) Stimulus-respond model is often used to explain this query as shown in the following figure. Buyer's black box is the vital point that companies and other actors in the market have to discover from various researches. (Armstrong and Kotler, 2007)

Figure 3.1: Model of Buyer Behaviour



Source: Armstrong and Kotler, 2007, p. 129

3.1.1 Determinants of consumer analysis

According to Peter and Olson, consumers should be analysed by looking into three objects; “affect and cognition”, “behaviour”, “environment” and their relations between each other. (Figure 3.2) Every single element can affect other elements or it can be a reason to realise. So, all elements should be considered when deciding for marketing strategy. (Peter and Olson, 2008)

Figure 3.2: Three Elements of Consumer Analysis

Source: Peter and Olson, 2008, p. 22

“Affect” represents persons’ emotions concerning a product like admiring or hating, while “cognition” can be explained as mental activities such as learning, interpreting and evaluating. When people are exposed to stimuli, they have the image of objects, situations, people or experiences in mind. Every individual has own way of understanding, perceiving and explaining of the surroundings in his own environment. In some degree these specialities can be common depending on common attitude and beliefs. “Affect and cognition” are connected to each other intensively however they are originated totally in different ways as feelings and thoughts. (Peter and Olson, 2008; Chisnall, 1995)

Due to the various explanations of “consumer behaviour”, Peter and Olson defined this term as “overt consumer behaviour” that means consumer’s activities which can be analysed by quantitative and qualitative methods. Successes of marketing strategies pass through not only changing of this behaviour of the consumers but also affect and cognition. Although a person likes a product, it can be possible that s/he does not purchase it. (Peter and Olson, 2008) Consumer environment is the surroundings and out side effects. All consumers are exposed to social pressure, culture, family, personal influence and situation effects. (Blackwell et al., 2001)

3.1.2 Internal factors affecting consumer behaviour

3.1.2.1 Demographics and personal choices

Demographics is especially an interest of marketers as it is important to see how population is changing in numbers, and distribution of genders, age, economic situation, birth rates and etc. For example, recent increase of women' economical activity put them in the first place for companies as women purchase much more than men. (Blackwell, 2001) Furthermore, distribution of wealth is in focus as it has importance to determine buying power and market potential of the targeted consumers. (Solomon, 2006)

Family structure, marriage and divorce rates of the countries have also effects on consumption habits like couples with children buy much more health concern food than singles which can prefer junky food. Also, children have effects on changing buying decisions of the parents when they are shopping in a supermarket, therefore advertisements are more relevant to children in some countries with young population. (Solomon et al., 2002)

Another important factor is the personality that separates a single consumer from the whole society. Personality is described as consistent responses to stimuli. Having a certain personal values in many ways could be a marketing tool to connect some people with definite products and brands. (Chisnall, 1995) According to a marketing research, people who prefer strong coffee seem to be more social and aggressive than the consumers who prefer light and milky coffee segments. Due to this fact some coffee companies redesigned their cafes. (Solomon, 2006)

Lifestyle of a person is a further key for buying habits and this attribute is important to be measured to know how consumers spend money, time and in which way a person is showing of own values and choices to consumption. (Solomon, 2006) Lifestyle can be more adaptable to new circumstances than personality. If a person changes his job, that also affects his purchasing power and as buying behaviour. (Armstrong and Kotler, 2007)

3.1.2.2 Consumer attitude

Attitude is mentioned and used by the society so often with various meanings. Simply, attitude has been defined by Allport "a mental and neural state of readiness, organised through experience, exerting a directive or dynamic influence upon the individual's response to all objects and situations with which is related". Attitude is shaped selectively to compromise consumers needs and could be changed by external effects like; joining a new community, gaining more knowledge and environment of a person. (Chisnall, 1995)

Attitude has a significant effect on purchasing a brand and choosing the place for shopping. Also, attitude measurement is necessary for finding out how marketing strategies and advertisements are influencing people. Moreover, new products emerge in the market or existing product's future demand can be predicted by measuring consumers' attitude. (Blackwell et al., 2001)

Due to the various marketing strategies to increase consumer portfolio in the market, many companies conduct large scale consumer attitude surveys to catch changes over time. There have been examples in the past about how the big companies end up with failure due to their lack of interest in society's attitude changes toward their product or service while the new brands tract their consumers after handling sophisticated attitude researches. (Peter and Olson, 2008)To sum up, attitude is not the exact forerunners that say which consumption behaviour will be in the future, but they can show the way what buyers are likely to do in a defined situation. (Chisnall, 1995)

3.1.2.3 Consumer motivations

Marketers are aiming to satisfy the consumers' needs that rise in certain time or period. When there is a need, people seek solutions to diminish or sift. (Solomon, 2006) People's needs and motivations are intensively connected to each other which is shown by the following figure. Motivations start up behaviour and direct to a goal or a specific action. A motivated person's involvement to an activity is obviously more than the unmotivated. (Figure 3.3)

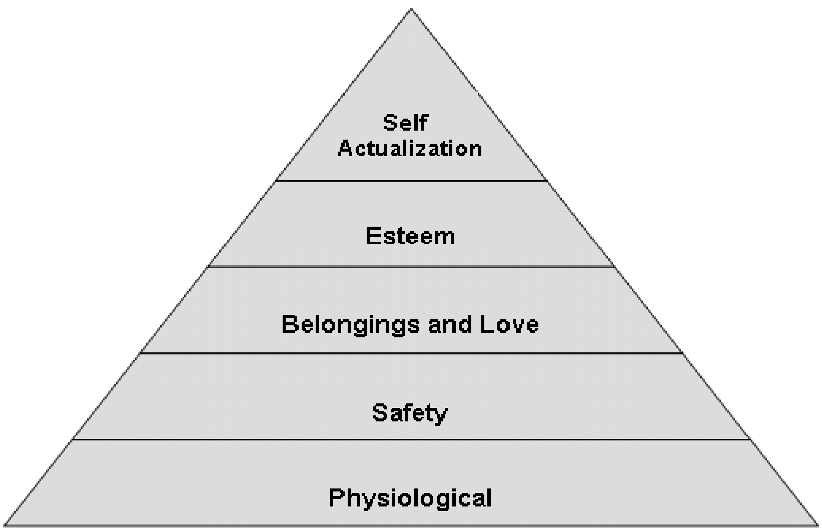
Figure 3.3: Motivation links needs and objectives

Condition of Need → State of Motivation → Goal Object

Source: Chisnall, 1995, p. 40

Psychologists have examined motivation and its importance in human behaviour in several ways and the most common ideas were propounded by Abraham Maslow and Sigmund Freud. (Armstrong and Kotler, 2007) Maslow has developed a theory that classifies the needs as "lower" and "higher" wishes. (Figure 3.4)

Figure 3.4: Maslow's pyramid: hierarchy of needs



Source: Chisnall, 1995, p. 43

Maslow puts the psychological needs such as hunger and sexual activities in the bottom and need for self-actualization on the top of the pyramid as show in the Figure 3.4. (Chisnall, 1995) Besides, according to Sigmund Freund, people are not aware of their buying behaviour that is mostly shaped by our physiology. People have lots of wishes and these are driven by provoked forces in deeper. For instance; when a person buys a luxury sport car, he can claim that he likes the wind when driving. But in a psychological level he might want to show off the other how successful he is and moreover he might wish to feel younger and free. (Armstrong and Kotler, 2007)

3.1.2.4 Learning and Knowledge

Learning is gained by experience and it is affecting behaviour. Scientists thought that almost all behaviours are learnt. Leaning eventuate between a stimuli and a response and consumer behaviour as learnt attitude and how it is learnt and experienced is really vital for marketers. (Solomon, 2006) Companies have to examine consumers' knowledge about a product carefully. Finding out how consumers shopping habits; from where they buy, how often they purchase, which product groups have importance and how much they are aware of the products or brands help companies to motive and reinforce consumer for buying behaviour. (Blackwell et al., 2001)

For example, a person is willing to buy a digital camera and the idea of this buying behaviour can come into mind maybe from an ad or a friend. That stimulus is called "cues" which determines how, where and when a consumer corresponds. Finally, our consumer decides for a certain brand and buys after using several times and if the consumer is satisfied, probably from the experience and positive image of the previous one he would buy the same brand as well. (Armstrong and Kotler, 2007)

Consumers think about a product according to desired properties, probable risks and advantages and then attribute occurs towards a product. Relative buying attributes are connected to personal values and needs, consumers build knowledge bridges and this is examined by means-end chain theory. Some features are highly connected to personal values and belief while others are less. (Peter and Olson, 2008)

3.1.3 External factors affecting consumer behaviour

3.1.3.1 Culture and Subculture

Culture is one of the main external factors that have a big effect on consumer behaviour, ideas and wishes. As mentioned in the learning and knowledge section, behaviour is almost a learnt process and culture has power on our behaviour as we all grown up in a certain group of society with peculiar cultural properties. (Armstrong and Kotler, 2007)

Culture is the circulation of the values, norms and traditions among the society between the generations. A product introduced to a market that carries cultural specialties is expected to be well perceived from that targeted society. Furthermore, a product can point out the on going changes in the culture although it does not belong to objected population. For example, American convenience, pre-cooked or frozen products are marketed in some cultures that targets the changes in the household lifestyle like both parents are working or decrease of housewife in the population. (Solomon et al., 2002)

When consumers buy a product, they expect it to perform to compromise their needs. But these needs are differentiating between cultures. For instance, Miele, a German company for electrical machines have introduced a washing machine with high performance and lasting for a decade. They obtained a good sale results in Europe and Asia with the high selling price. But when they try to enter the North American market, they could not find such big consumer. This is all related to American culture. As the society is mobile and continuously changing the houses, they do not want to spend too much on this machine category instead they prefer rather cheaper and less efficient one. (Blackwell et al., 2001)

Another big trend in developed countries is the change of eating habits. Most of the societies start to choose more healthy diets especially with balanced nutritional meals. This “health awareness” movement has boomed natural and organic foods on the shelves of the supermarkets. (Peter and Olson, 2008)

Cultures can be also divided into various groups called subculture. These people belonging to the same subculture have more common values, religion and mostly coming from same region and ethnicity. (Armstrong and Kotler, 2007) Age groups can be a subculture in the society. For example while some brands are targeted to teen-age groups the others can be offered to matured market like health care products, home decoration, travel and so on. (Blackwell et al., 2001) Race groups in a society can show diverse consumption habits. For example, black or African American subculture is largest minority community in the US and companies are developing strategies to get these groups. For example, a doll company had introduced to the market black girl dolls with different hair style, skin colour and face characteristic to show that all black women have different appearance. (Peter and Olson, 2008)

3.1.3.2 Social class

Consumer's position in a society with income level, family background and profession are the indicators of person's social class. The amount of money spent and the way of this expenditure are both considered in the social status. Social equality is trying to be kept in a certain level in European countries but of course there are social hierarchies like low, middle and high income consumer groups. The people in the common groups seemed to have similar lifestyles, jobs and tastes and they mostly socialized between each other and affect their behaviour in the same social class. (Solomon et al., 2002)

Consumer behaviour and social class can be connected in different ways. For example, wealthy consumers mostly prefer magazines about fashion, technology, some specific sport branches like sailing or art and decoration. Because these group of people have mostly interest on these subjects in common and these magazines considered as high segment in the market and sold in special shops with higher prices. (Armstrong and Kotler, 2007) Another reality is some brands are connected to certain social groups like; Heineken beer considered as upper-middle class drink while Budweiser is accepted as middle and low social class drink with the image of a beer for everybody. (Blackwell et al., 2001)

Social classes and their needs are continuously changing rapidly. For instance old working class discrimination from office workers in US and Europe has been changed. Today, even factory workers can drink quality wines, go to holidays to another countries and becoming middle class with modern life styles. In mobile societies, where the women are also contributing to house income, low class consumer behaviour can switch to middle consumption. However, this does not mean that definitely all habits will change, so marketers have to aware of these interactions and must know the distinguishes. (Chisnall, 1995)

3.1.3.3 Family and Group Influence

A group is a cumulative of people that have something common and distinctive relations between each other. The most common and natural group in the society is the family that mostly act together with certain aims. Marriage mostly results with establishing a new place to live and people need to buy several of new products and services and also forming a family is one of the important factors to change buying and consumption behaviour of an individual. (Chisnall, 1995)

Family members have different roles like initiator, influencer, decider, buyer and user. The impacts of family members on different assortments of products are changing depending on family size, structure and hierarchy in buying decision process. Moreover, women are targeted in developed societies as their income and responsibilities are increasing day by day and result of togetherness in housework affects buying behaviour of men. (Blackwell et al., 2001)

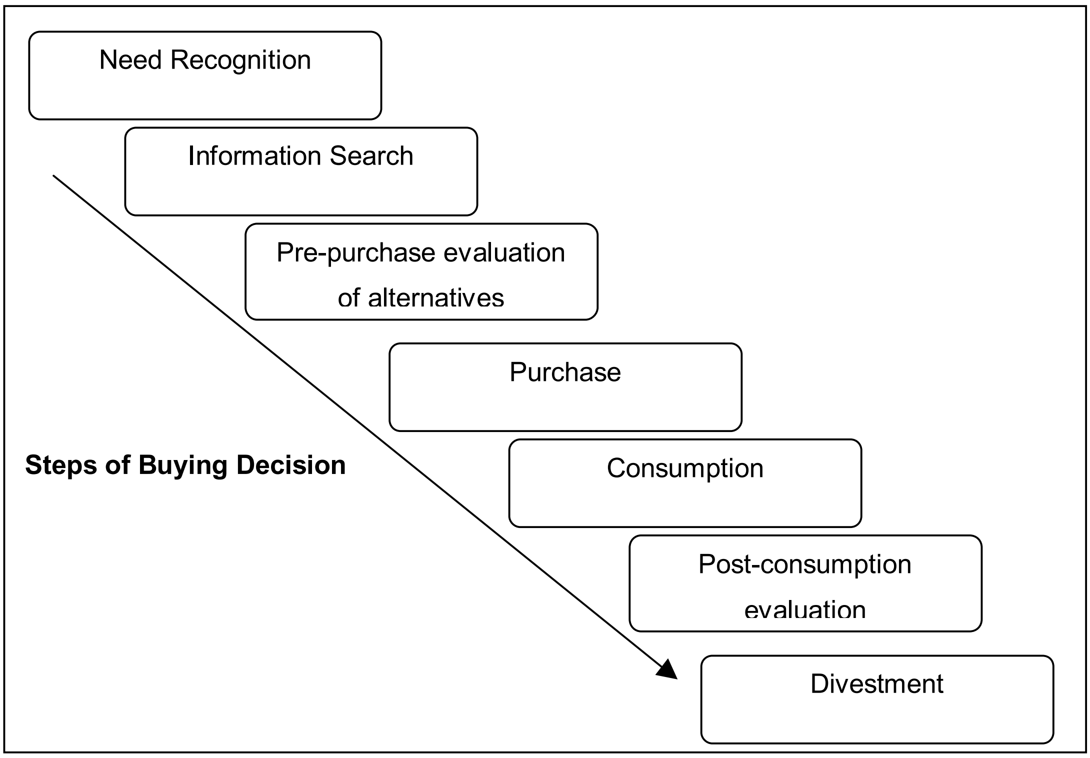
The other group of people can be formed by sharing the same profession, beliefs and hobbies. (Chisnall, 1995) Reference group consists of one or more people and this group is taken as a reference when evaluating peoples' values and attitudes. Reference groups not only affect peoples values but also they can change buying behaviour such as; products that are consumed, placed to shop and brands that are used. As an example sport brands like; Converse, Nike and Puma use famous players in their ads to attract more consumers that admire these people. (Olson and Peter, 2008)

For a better understanding of reference group effect on consumer behaviour, first marketer should analyse the group features and find out why people are dedicated to these groups. Thereafter, brand managers and producers should know well the leaders of these reference groups and they need to consider their ideas and behaviour while concluding. It is known that, leaders are affecting group members with their ideology and distinctive abilities. (Armstrong and Kotler, 2007)

3.2 Consumer Decision Process

Consumer buying decision starts with a need recognition and end up with divestment process. These paths of purchase behaviour enable marketers to interpret the buyer in one of these steps and change his decision. Fallowing Figure 3.5 shows in which ways consumers pass through before and after buying a good or a service. (Blackwell et al., 2001)

Figure 3.5: Schematic model of consumer decision process



Source: Blackwell et al., 2001, p. 71

Need recognition: The first stage is the need of consumer towards a product. These needs can emerge from individual cause like physical necessities or from the environment of the person like ads or society. (Armstrong and Kotler, 2007) Manufactures and market actors should continuously trace the consumers' need and problems. Otherwise even the big companies can make a mistake of introducing wrong products to the market, where almost no demand is raised. (Blackwell et al., 2001)

Information Search: After recognition of a need consumer start to seek for information in the external area. Also, there can be information in person's mind and additionally person can be so close to the targeted object. So, in this case consumer probably buys this product instead of searching. On the other side, some consumers like to go shopping and spend time for inquiring. In many cases search takes short time and consumers' actions depend on their memories such as remembering a brand or a price or they just repeat their old purchases. (Solomon, 2006; Armstrong and Kotler, 2007)

Pre-purchase evaluation of alternatives: Consumer spends much of the time to choose in between alternatives. Some product groups have hundreds of different brands like cigars and on the other hand, some brands have so many different sorts like lipsticks. (Solomon, 2006) Before purchasing consumer will ask himself about his alternatives and try to select the best. Mostly consumers use the stored evaluation in the memory like; price, brand or services and choose between them. Moreover, consumers evaluate the shopping mall and choose between different offers that fits best to their needs. Consumers are mostly sensible to price, size, and quantity changes of the preferred brands. If there is a price raise occur in their certain brand, they will evaluate if it is proper or not. If they perceive the change inconvenient, purchase probability will decrease. (Blackwell et al., 2001) Marketers should survey how consumers evaluate the alternatives in the market. (Armstrong and Kotler, 2007)

Purchase: After evaluating the different products, a person came with a decision of purchasing. But this purchase step, sometimes do not end with the decided product. One of the factor can be, influence of the other such as a person close to us recommends strongly another product or a salesman in the shop can convince the consumer that other brand is better than the selected product of the consumer. Another factor is the unexpected changes during the purchase. For example, one brand can decrease its prices relatively that day so that consumer can change his mind in the shop or because of traffic consumer is detained from the targeted retail chain and have to prefer the closer one instead. (Blackwell et al., 2001; Armstrong and Kotler, 2007)

Consumption: Following the purchase step, consumption of the product takes place. It is important to find out how consumers use the products as this will determine the satisfaction of the consumer and affect the pre-purchasing activities. Moreover, how the product is used is the indicator of the lasting of the endurance. (Blackwell et al., 2001)

Post-consumption Evaluation: As people begin to coalescence their purchased products to their habits, post-purchase evaluation stars. There are several researches showing that satisfaction of the consumers is decreasing in many sectors. When dissatisfaction arises, this will change attitude and behaviour towards that brand and will affect negatively the future consumption of the same product. (Solomon, 2006) Dissatisfaction sometimes occurs due to the big expectations of the consumed good and marketer advice sellers, not to exaggerate the properties of the products. For instance, Boeing underrate their planes performance in case of fuel saving. They commit that Boeing airplane can save up to 5 percent of fuel however; this rate was reaching to 8 percent in the tests. So their consumers gain more satisfaction after the purchase and willing to buy again and circle this positive image among the other possible consumers in the sector. (Armstrong and Kotler, 2007)

Divestment: This is the last stage in the consumer decision process. Consumer can dispose, recycle or sell the product after they use. Depending on the environmental concern of the consumers, they can decide on whether to dispose or recycle the packing of the consumed good. Moreover, a person can again market the used product to other consumers like second hand cars. (Blackwell et al., 2001)

3.3 General attitude and behaviour of organic consumers

Worldwide studies on consumers show diverse results depending on the country, region and the year of the research. While some nations are more familiar to organic food consumption and even accepted as a part of their lifestyle, others especially developing countries involved in newly. Studies mostly focused on describing organic consumers and also their motives and barriers. Moreover there are studies regarding to non-users of organic food and trying to dissolve and understand the reasons of not consuming. Today, income and price differences are no longer the only barriers and also green movement is no longer the only motive in the sector. Important thing is, marketers and companies have to be aware of that organic consumption is rapidly expanding among the people from every socio-group and ideology and new individual needs are rising. These factors bring new demand on the market.

3.3.1 Organic consumer identity

Various researchers aimed to distinguish organic consumers by looking at the demographics like age, sex, income, presence of children and education.
Classifications can diverse depending on the writers. Most studies use terms of regular and occasional buyers (Hofmann, 2006; Zanoli et al., 2004; Davies et al., 1995; Zanoli and Naspetti 2002) while other uses terms; unaware consumers, unaware non-buyers, buyers of organic food. (Hofmann, 2006) Fotopoulos and Krystallis separate Greek organic consumers into four groups such as; explorers who are highly exploratory and married older female buyers; greens who are environmental conscious, educated and belonging young middle age groups; motivated people are in young middle age groups very motivated towards organic idea; price sensitive are young, low educated and married female. (Fotopoulos and Krystallis, 2002)

3.3.1.1 Gender

Many surveys find out that women are more disposed organic foods than men. (Radman, 2005; Hofmann, 2006; Fotopoulos and Krystallis, 2002; Zanoli et al., 2004; Davies et al., 1995) A consumer study showed that females feel more responsible for the health of the family than males. So this led women to buy more organic products while men mostly purchase due to taste. (Hofmann, 2006) Another study found out women think more about that organic food has better taste and quality. (Radman, 2005)

According to Swiss study, men recognise organic labels less than women. (Zanoli et al., 2004)

3.3.1.2 Age

Some studies cannot find obvious difference between age groups. (Davies et al., 1995; Radman, 2005; Zanoli et al., 2004) On the other hand, there are studies that correlation can be shown (Latacz and Foster, 1997) For instance; in UK it is declared that regular organic consumers are older and especially 45-54 years old people who prefer more vegetables than other age groups. However, the same study found that younger people spend more money on organics. Another UK survey showed youngest and oldest showed less interest and people reaching to 30 have and have no children show high interest. (Padel and Foster, 2005) European study stated that organic buyers are generally younger than 45 years old. (Wier and Calverley, 2002) Finnish researchers declared that age groups of over 65 have the lowest tendencies and then this is fallowed by 50-65 years old people. According to the same study young people show the same negative attitude likewise. 35-49 is the most interested group in Finland. Furthermore, Italians found that 25-40 is the most interested group and also added that till 60 years old can be considered in the purchaser group. (Zanoli et al., 2004)

3.3.1.3 Presence of children

Children in the household seem to have positive effect on organic food consumption. (Davies et al., 1995) Fricke and Alvensleben (1997) claim families with children focus on health more than other others. This statement can be powered by a Swiss study which is declaring that; couples and families with babies and small children are more interested in consuming organic products. Moreover a Finnish study declared the positive attitude of families with children towards consumption. (Zanoli et al., 2004) On the other hand a UK study described regular consumers as having fewer children than others. (Padel and Foster, 2005) Moreover, Wier and Calverley (2002) stated that families with teenagers have lower intention to buy.

3.3.1.4 Education

Regular consumers in most of the countries are found to be high educated than occasional and non buyers. (Radman, 2005; Wier and Calverley, 2002; Zanoli et al., 2004) Regular organic consumers have more information about products. In addition, there is positive relation between product knowledge and buying frequency. Moreover, high educated consumers are found to have better product knowledge. (Zanoli et al., 2004)

However, sometimes labelling and brands in the organic market can be problem for consumers in Europe. According to Soil Association survey results nearly half of the UK consumers are seeking for organic name on the label and not searching for brands when buying a product. On the other hand, other European consumers especially Germans have confusion with different labels from private associations. Government had introduced national logo in 2001 to overcome this label barrier in Germany, after that positive effect had shown in the market. (Wier and Calverley, 2002; Padel and Foster, 2005)

3.3.1.5 Income

Studies have different results on income variable. Some researchers claim that income has positive effect on organic food consumption (Davies et al., 1995; Wier and Calverley, 2002; Latacz and Foster, 1997; Padel and Foster, 2005; Zanoli et al., 2004) Another claim is, people who grown up and live in urban consume more than rural people. (Radman, 2005) Danish studies also agree on; organic consumers mostly live in big cities and urban area with higher socio-economical status. (Zanoli et al., 2004)

3.3.2 Consumer motivation towards organics

3.3.2.1 Health

Almost every consumer research indicates “health” as a dominant motivation towards organic consumption. (Alvensleben, 1997; Backer, 2004; Davies et al., 1995; Radman, 2005; Padel and Foster, 2005; Wier and Calverley, 2002; Zanoli et al., 2004; Zakowska, 2007) People want to intake organic products for better health conditions or maintaining the present situation. Moreover, preventing and treating illnesses or food allergies is another health related attribute. When keeping the health condition, avoiding the intake of chemical residues is also further motive that is mentioned in surveys. Especially less addictive, pesticide, fertilizer and more vitamin and mineral content of fruits and vegetables is seemed to be responsible from own health protection attitude. (Padel and Foster, 2005; Zanoli et al., 2004)

One of the UK consumer stated that; eating some fruits and vegetables without pealing the skin contributes to dietary nutrition. In that case, organic products take attention from consumers with natural and uncontaminated production methods. (Zanoli et al., 2004) For elder people, health is the most important factor to have an organic diet. (Wier and Calverley, 2002) European research on eastern countries stated that, Hungarian, Polish and Czech consumers showing great health attitude when buying organics. (Zakowska, 2007)

3.3.2.2 Environmental protection

Rising concerns about environment and resources are motives for majority of organic consumers but not the main or strong reason as health. (Alvensleben, 1997; Backer, 2004; Davies et al., 1995; Radman, 2005; Padel and Foster, 2005; Wier and Calverley, 2002; Zanoli et al., 2004) Respecting and protecting environment, sustainability and production in harmony with nature can be described as values causing the environmental attitude. (Zanoli et al., 2004) According to Alvensleben (1997); ecological reasons for buying organic products is the second biggest attitude with 15 percent after the main health motivation (59 percent) in Germany. Moreover, younger people prefer organic food especially due to environmentally friendly production methods. (Wier and Calverley, 2002)

When different product groups are considered, environmental concerns are very strongly expressed in consuming fruits and vegetables. On the other hand, in dairy products most of the European countries mentioned as second motive after health or animal welfare. Concerning the meat products and cereals majority of the Europeans are not highly motivated due to environmental-friendly production methods except Switzerland and Denmark. (Zanoli et al., 2004)

3.3.2.3 Animal welfare

Animal welfare is almost mentioned in all of the consumer surveys but with different understanding behind depending on the countries. The way that animals live, fed and slaughtered is almost the top topic in developed countries. Appropriate husbandry is mentioned and given importance by organic consumers. Most of the western European consumers agree on motives for buying organic dairy products is animal welfare as a second value after health. On the other hand, Swiss consumers buy organic dairy products especially linked to animal welfare and they feel responsible from the animals on the farms. (Zanoli et al., 2004)

According to a European survey, except French consumers animal welfare is the dominant reason for European organic meat consumption. Another survey in UK declared that pork, beef and chicken products are preferred especially due to animal welfare and health reasons, while organic lamp meat is purchased as outbreak of values; animal welfare together with taste. Moreover, Swiss and Danish consumers are affected by animal husbandry methods too much that, they feel happy when animals are live happy as well. (McEachern and Willock, 2004; Zanoli et al., 2004)

Animal welfare motivation is also connected with safety, healthiness, taste and high quality. Meat scandals like BSE and antibiotic residues have boomed up the demand for organic meat products. (Zanoli et al., 2004; Harper and Makatouni, 2002; McEachern and Willock, 2004) According to a UK consumer study, people (organic and non-organic buyers) are concerned about animal welfare and this directs them to animal friendly products. But, especially in hens organic and free range production is confused by non organic users. Moreover, organic consumers are more concerned to ethical issues and mostly following a vegetarian diet. (Harper and Makatouni, 2002)

3.3.2.4 High quality

Organic products are perceived as high quality and premium products due to the special way of the production methods. So some authors argue that to reflect the high quality of organic products there should be a price difference compared to conventional products. (Hill and Lynchehaun, 2002) For Croatians consumers, high quality is the second most important attribute after health to consume organic products. (Radman, 2005)

3.3.2.5 Origin

Where the organic food comes from is a debate for many authors. Many people are against long food miles in organic production, as it is against firstly to organic philosophy. But due to market situation, enormous quantities of imports from developing countries are made to ensure the demand from developed countries' consumers. However, still lots of organic consumers pay attention of the products coming from regional agricultural practices.

European wide consumer survey finds out that; Australian, British, German and Swiss people prefer buying products from their local area. They believe to contribute to environmental protection by decreasing the food miles especially in Switzerland and Denmark. Also, regular consumers of these two European countries have stated that they have problem when consuming products coming from distant lands. Another attitude is to support their local farms and so as the animal welfare on these organic farms. Moreover, buying from the region is closely related with supporting small organic farmers and standing against the international big food producers. (Zanoli et al., 2004)

3.3.2.6 Taste

Eating tasty food is a general motive for everybody to satisfy our needs. Most organic consumers think that organic products taste more natural, intense and rich in flavour. German occasional buyers are mostly affected from the taste of the organic products. (Zanoli et al., 2004) On the other side, frequent buyers and elder people find organic products tastier and this is the one of the main reason for Croatians to purchase organic food. Also Croatian women find organic products tastier than men. (Radman, 2005) However, some western European studies showed that, taste is one of the main buying motives for men. (Hofmann, 2006)

As, taste is sensory property of the food, can be diverse depending on the product group. For instance, a research made in UK to measure the claims about organic food taste. Organic fruit juice and milk were given to the respondents. Organic orange juice competed with conventional economy and high quality products and at the end it is supported by the majority that organic juice taste different and better. On the other hand, organic milk was failed in the sensory taste and there was no significant difference found by the researchers. This study comes to the conclusion that, not all the product groups in organic assortments taste better than conventional ones. However, as taste found to be a motive for consumers, companies continue to put on the ads that organic taste better without any scientific evidence which is later banned by Advertising Standards Authority in UK. (Fillion and Arazi, 2002)

3.3.2.7 Trust and food safety

Consumers' trust in organic products is one of the key elements in marketing and also understanding their behaviour. People want to feel secure when paying a price premium to organic products. Moreover, purchasers want to be sure that when they buy a product it is really coming from organic agriculture without any cheats in certification and production side. Some consumers also want to trust organic products that they protect animal welfare and also their food safety and health. (Zanoli et al., 2004)

A UK study in 2003 stated that concerns about conventional products and food safety are a reason to buy organic products. But there is a fact that food scares are diminishing in recent years and people are less worried about security of the food which can make people to change attitude towards consumption. (Padel and Foster, 2005) a wide eastern European survey found out that food safety is more important factor to decide on organic products than ethical values as in western European countries.

3.3.3 Consumer barriers towards organics

High price, low budget, lack of availability and poor appearance can be seen as general barriers to organic food consumption. On the other hand; some consumer's studies found out standing against imported products, lack of taste, cooking difficulties and lack of information can be constraints to buy products coming from organic agriculture. In some cases consumers are not really aware of in what sense organic agriculture contributes to them and they are not really interested in environmentally friendly products or sometimes they are just satisfied with conventional ones. Moreover, some see organic products only a marketing cheat and even do not believe certificates. Another barrier is organic products are confused with natural, eco, functional food, fair trade or regional products even in developed countries whose inhabitants are used to consuming and hearing from media. (Hofmann, 2006; Zanoli et al., 2004)

3.3.3.1 Price

Organic food price differences remain the major barrier for most of the people to keep them away from buying. (Radman, 2005; Robles et al., 2005; Padel and Foster, 2005; Wier and Calverley, 2002; Zanoli et al., 2004; Zakowska, 2007) Especially in underdeveloped markets in Eastern Europe and Balkans, organic food prices can be really high that only high income class can able to consume. (Radman, 2005; Zakowska, 2007) In mature markets such as Denmark, even the price reductions can be seen in a period of time to attracted more people through environmental programs. (Squires et al., 2001) WTP is highly survey dependant and changes between European countries. Most of the Europeans are willing to pay price premium around 5-10 %.

When the premiums increase, WTP is rapidly decreasing. Especially Danish consumers have high interest to pay considerable price premiums to organic products. (Wier and Calverley, 2002) On the other hand, Greek consumers are willing to pay more for organically produced olive oil if they follow a health conscious eating style. (Sandalidou et al., 2002)

3.3.3.2 Availability

For most consumers to go shopping that is nearby the house become a routine work and a way of time and money saving. Even if they want to buy organic, they cannot reach the products in daily life. Some consumers in surveys declared that, after work when going to home they feel exhausted, starving and mostly in a rush to shop and cook immediately afterwards. So, there is not much time for paying special interest to look for organics. (Zanoli et al., 2004) A UK survey found out that in a quarter of the surveyed consumers even do not know where to search for organic products and a 35 % of the consumers find to look for organic products very hard. (Padel and Foster, 2005)

3.3.3.3 Appearance

Bad looking or poor appearance compared to conventional products can be reason not to buy organic food. If appearance of an organic product is not satisfying for consumers, they can feel cheated and additionally they can think that also has low quality. People mostly are not willing to pay more for low quality products and in case of organic food if they face with low quality they think that it is really not good for healthy nutrition. So, even the heavy buyers do not prefer bad looking products. (Radman, 2005; Zanoli et al., 2004)

3.3.4 Organic product groups and consumers

Fruit and vegetables are popular product groups and mostly important for southern and western European consumers. (Radman, 2005; Michelsen et al., 1999) According to a

UK survey in 2003, mostly 45-54 years old consumers' choice is vegetables, while younger people are less likely to buy. (Padel and Foster, 2005)

Bread and cereals are indispensable products for central Europeans. (Michelsen et al., 1999) In Germany, some bakery chains are started to offer organic varieties in their shops. (Babadogan and Koc, 2005) Organic baby products are also extending their market share in western European countries in Netherlands, UK, Belgium and Sweden. (Wier and Calverley, 2002) Moreover most European countries and US consumers are looking for ready or frozen organic products in the markets. Especially German consumers demand more organic frozen vegetable varieties. (Babadogan and Koc, 2005; Wier and Calverley, 2002)

Organic meat have gained importance in the last years and mostly preferred in Alps and Scandinavia. (Michelsen et al., 1999; Padel and Foster, 2005) According to FiBL survey in Switzerland, organic beef is mostly consumed by high income, well educated young families with small children. (Zanoli et al., 2004) Additionally, another survey in Scotland showed that organic chicken is the most preferred meat product. All organic consumers purchase at least once a month, whereas pork is the less and only 44 percent of the consumers are willing to have on their table. More than half of the consumers mentioned about high price as a major barrier and some declared that they do not think that organic meat taste different and a small group have inconvenience with imported organic meat products. (McEachern and Willock, 2004)

3.4 Turkish Consumer Studies

According to the 1998 research only 8.7 percent of the surveyed 1005 consumers in 3 biggest cities (Ankara, Istanbul and Izmir) recognised organic products. Consumers' preference is more on the side of nutritional value and residue free of products especially in fruits and vegetables, rather than price. They have declared that, taste and safety of the food is decreasing compared to past. Exceptionally bakery products, consumers believe that non-seasonal products have feasible residue levels. These consumers of health sensitive are mostly elder people. Generally consumers want universities to check residues of the fruits and vegetables. Tomato and apple was found to be the highest choice of the consumers and price premium that they will to pay increase with consumption amount of surveyed time, house income and guarantee of residue free of organically grown product. . On the other hand, willingness to pay is negatively correlated with the high price of the product and number of people in the household. This paper indicates that there is consumption potential among urban consumers with high income level, if the product is organically produced and certified. (Akgüngör et al., 1999),

Another survey took part in 1998 with the consumers of Izmir city by Senturk and Kalayci as a graduate thesis to measure consumer awareness and motivations. According to this small sampled study, consumer's awareness of organic products is only 8.3 percent. These people have high education and get involved in organics from publications. In the research, it is declared that people living in urban area of Izmir, would like consume fresh organic fruits, vegetables and meat at most and flowingly bakery products, canned fruits and vegetables, juices, frozen product and dried fruits. (Kenanoglu and Karahan, 2002)

In 2000, one more consumer research to understand attitude and behaviour conducted by Ozkan and his colleagues in Antalya. They found out that around 19 percent of the sample populations have heard about organic food; however only 8 percent knows really what organically produced food is. Looking at the social demographic situation, willingness to pay a price premium has proportion with the level of education and income, additionally marriage status. Unlike from the first study, they could not find relation between numbers of household level but among the consumers mostly women have high interest for paying. (Kenanoglu and Karahan, 2002)

Koc et al. (2001) have made consumer demand study in the city centre of Ankara with 397 households. Around 33 percent of them can give correct definition of the organic products. Education of the mother in household has correlation with the organic knowledge but on the other side; income does not seem to be relevant. Among the consumers, 46 percent wants to have organic fruits and vegetables and 30 percent wants to consume additionally meat. Consumer's attention to health risks while buying food is around 60-80 percent depending on the subject like cholesterol level and balanced diet. They trust Ministry of Agriculture mostly for controlling food safety. Moreover, willingness to pay a price difference is mostly for the products; tomato, cucumber, chicken and egg.

3.5 German Consumer Studies

German consumers' habits, attitudes and barriers towards purchasing are examined by lots of scientists, policy makers and market actors. Moreover, classification of the demographical structure is given by lots of surveys. Consumer attitude studies showing diverse results between years and samples; so that, here will be shown some general findings on German literature researches.

Looking at the age of the organic consumers, it is not obvious that a certain age group is more interested than others. Starting from mid 80's surveys, it was showed that young people with the age between 25 and 34, got more involved in organic food. As approaching to end the end of 80's, organic food become more prevalent and people at the age of 35 and 49 increased their consumption. Elder people, 50-65 years old, adopted at last however, this group showed the highest interest growth in mid 90's. Additionally Fricke and Alvensleben (1997) argue that, socio demographic variables such as income level and age have less revealing effect on organic consumption however, recent studies (Richter, 2005) claimed that, high educated and high-income level households are demanding more for organics. Moreover Richter (2005) indicated consumers with the age interval 25 and 40 mostly with kids and elder people between 55 and 65. ZMP survey of 2001 indicates age group range from 30 to 50 and EMNID 2003 survey displays consumers at the age from 30 to 39 have increased their demand by 12%. Almost all surveys figure out fewer than 25 have the lowest purchasing rates and some other surveys claim up age up to 64 in major consumer groups. (Zanoli et al., 2004)

Buying motives of German consumers' seem to be heath and animal welfare; however, taste and quality attributes are mostly belong to non-regular buyers. (Richter, 2005) In the past, early adopters of organic foods are mostly influenced by food scandals and lost their trust towards conventional products. (Fricke and Alvensleben 1997; Babadogan and Koc, 2005) A recent study again figures out from focus group discussion that, heath of an individual buyer or children's are the most significant factor and supporting organic movement another indicator. On the other hand taste is again determining factor for occasional buyers. Environmental protection and sustainability could be also reason for some Germans, showing attributes of buying local and seasonal products to avoid transportation miles. On the other hand animal health and welfare is linked to eating and protecting own health according to some buyers. Trust to organics, locality, availability and some special situations such as pregnancy and health problems also have some effects on consumers. (Zanoli et al., 2004)

Major problem that keep people away from organics is the price difference. Most people are not willing to pay a premium for all organic goods but, they wish to buy if there are more logical and affordable rates. Another reasons could be listed like; lack of availability and interest, doubts about organic origin, poor taste and appearance. Moreover, study from 2002 shows that nitforen contaminated eggs and small ruminants keep away organic new adopters for market but regular buyers did not affected. (Babadogan and Koc, 2005; Zanoli et al., 2004)

4 Research Objectives

Organic food is growing rapidly worldwide and especially in the Europe continent. European consumers are found to be interested research area for scientist and market actors as there is enormous demand. While some scientist found out common values behind organic food consumption in Europe, some has shown diverse results in European wide researchers.

This paper is looking into consumers of Eastern and Western Europe with the examples of two countries; Turkey and Germany. These two countries are separating from each other with lot of factors like; roots of organic farming, market structure and consumer demand. Germany is chosen to be representative of western developed consumers who got used to live in organic food and searching for environmentally friendly products. On the other hand, Turkey is chosen to depict consumers in an emerging market in less industrialized country where they used to consume regional products from the rich agricultural activities.

Moreover there is another big difference between these countries. Germany's organic agriculture is developed in late 19^{th} century with green movement of the German people. But Turkey has started organic agriculture in 1985 from the demand of European consumers. This means that majority of the Turkish people were not looking for organic products or environmentally friendly production methods in agriculture. We can explain this situation if we look at the economical activities of Turkey. Governmental policies were mostly supportive for industrial activities rather than agriculture and this led farming sector to slow down although Turkey is very convenient for various product groups with diverse climatic and soil conditions in different regions. In the last few years people are getting more involved in organic products but demand is still very low if we compared to Germany.

Turkey and Germany as a two distinctive markets for organic products and consumers are chosen to find out similar and different attitude and behaviour towards organic food consumption. This paper will describe the general organic consumer with classification in age, gender, family structure, education level, occupation and income level.

Moreover, organic production methods and label knowledge will be tested and compared between two consumer groups. Furthermore, consumer attitude will be examined and common and distinctive properties will be underlined. Lastly, product choice of two countries will be examined.

This cross-cultural consumer study aims to contribute to socioeconomic research, market actors and policy makers. After describing organic sectors and consumer behaviour from literature, the following survey study will try to find out the new situation in both countries. Due to the time and finance limitations of this study, only the organic consumers will be studied and results will be evidence of only small targeted groups not the all country.

5 Hypothesis

H1: Organic consumers in Turkey and Germany have different and similar properties in socio-demographics properties.

As Germany has a longer experience in organic food business and people are adapted to organic products, it is expected to be age would be generally higher than Turkish consumers who will be young new adopters. Income level of Turkish organic consumers is expected to be higher due to high price difference between conventional products. But on the German side, all income groups are expected to take place in survey as price is lower than Turkey in most of the product groups and there are discount markets that also sell organic products with competitive costs. Where as Turkish organic products are still on the premium shelves of the markets. Education level is expected to be high and families with small children are expected to consume more in both countries. In Turkey mostly fulltime working people are expected to consume more where as in Germany both working and retired people are expected to consume.

H2: Organic consumers in Turkey and Germany differ in buying behaviour.

As Turkish organic market is in the emerging phase with limited organic assortments and sale channels, it is expected that frequency of the consumption will be lower than Germans who has more access to the market and varieties. Also, high prices are expected to effect Turkish consumers buying frequency. Moreover, it is expected that German consumers are much more familiar to organic products and majority had bought an organic product much before than Turkish consumers.

H3: Organic consumers in Turkey and Germany differ in shopping place choices.

When we inspect the shopping places, supermarkets will be the major choice of Turkish consumers as there are only a few organic supermarkets distribution channels available and moreover discount markets sometimes bring organic products to their shelves but number of varieties is not satisfactory. Also weekly street bazaars in most cities of Turkey do not have organic products. There are only two weekly organic street bazaars in Istanbul and Bursa. On the other hand Germany has good selling channels from direct marketing to supermarket chains and choices will be multi-optional.

H4: Organic consumers in Turkey and Germany have similar and different organic product choices.

Fruits and vegetables are expected to be the most preferred organic products of today's and future consumption in both countries. But the second and the following choices are expected to be different. Especially, unequal market infrastructures and cuisine cultures will make a lot of difference in product choices.

H5: Organic consumers in Turkey and Germany have similar and different answers when defining organic products.

It is expected to German consumers will define organic products more accurate and will think that they are healthy and nutritious. Also Turkish consumers probably will connect organic products with health and nutrition but there will be some differences in defining especially in GMO content and certification.

H7: Organic consumers in Turkey and Germany differ in organic label knowledge.

Turkish consumers are not familiar with logos like German consumers and probably national state logo will be better recognised by Germans than Turkish consumers. On the other hand, as there are lots of logos in Germany, consumers will be mistaken when they see our imaginary logo. Turkish consumers probably will not recognise their fake logo and will not think as organic. Moreover, a close organisation logo to organic agriculture will be confusing for both Turkish and German consumers.

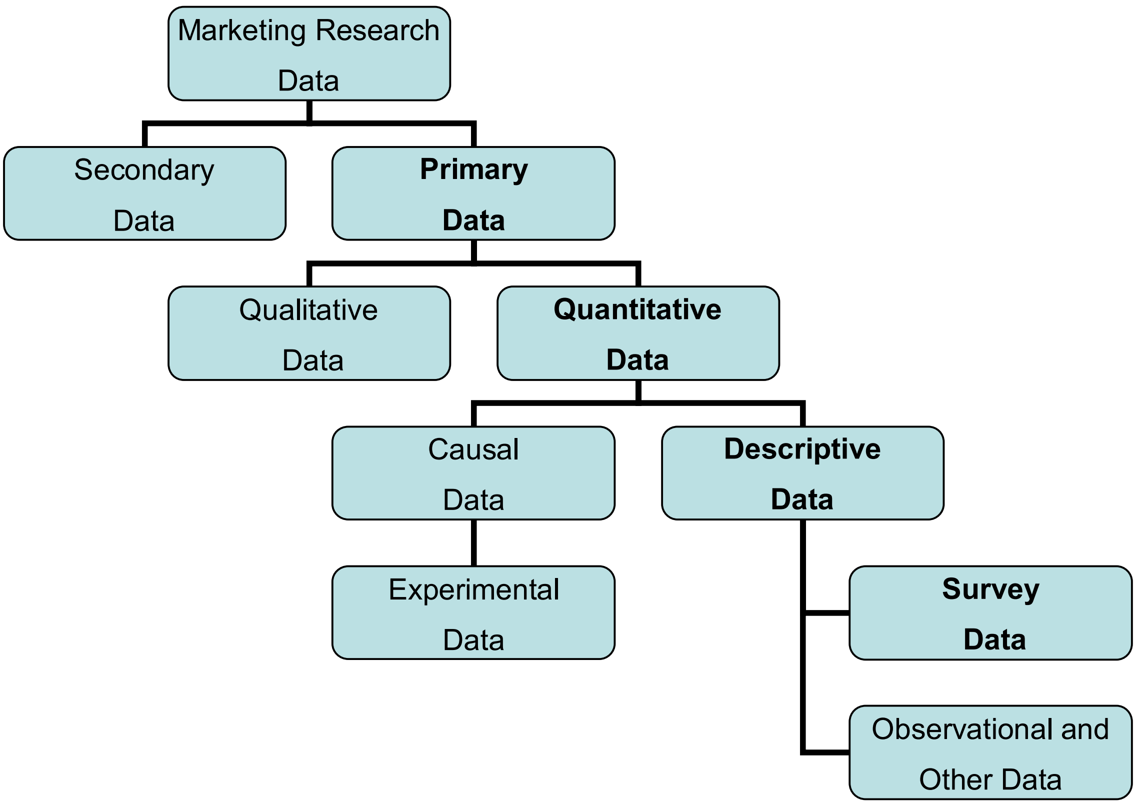
H7: Organic consumers in Turkey and Germany have similar and different attitude towards organic products.

Health is expected to be the major similar motivation and price is expected to be the major barrier towards organic products both in Turkey and Germany. On the other hand; second and third values are expected to be different due to cultural distinctions and level of awareness.

6 Methodology

First step of the research is the literature based study to give out the current situation of organic farming and consumers in general. Then specific literature research on Turkey and Germany is carried out to figure out the recent situation and consumers' preferences in both countries. Second step is a quantitative data collection from Turkey and Germany. Quantitative method is chosen in this marketing research as the results will be quantified and statistically analysed to make a general overview. The following Figure 6.1 gives the exact classification of a marketing research data.

Figure 6.1: Types of marketing research data



Source: Malhotra, 2004, p.137

Survey method is chosen and structured questions are asked to the respondents. Survey is only targeted to organic consumers in both countries and no results from the non-organic consumers are included in the data. Survey method is chosen as it has application, coding, analysing and interpretation of the data are rather simple. As the respondents are limited to choose from set of alternatives, the results are reliable. But of course there are some disadvantages like in all marketing techniques. For instance in attitude measuring questions, respondents can give unconscious answers. But generally, survey method is the most common marketing technique for scientist and marketers in anyway. (Malhotra, 2004)

6.1 Questionnaire design

Questionnaire is firstly prepared in English language and after discussing with supervisor of the thesis, it is translated into German and Turkish languages with small modifications due to the country. (See annex 1) As the questionnaire is only targeted to organic consumers people are asked first if they consume organic products and after the positive reply questionnaire is delivered.

First two questions of the questionnaires are for identifying the shopping behaviour and frequency of the organic consumers. One of the next two questions regarded to the first purchase time and the other one measure the knowledge and opinion about image of organic products in a six point scale form from strongly agree to strongly disagree and sixth point is used for don't know answer. The following multi optional two questions are figuring out which shopping places are visited mostly and what can be the choice in the future.

In the next section there are two set of attitude measurement questions are directed to the respondents in again six point likert scale form from strongly agree till strongly disagree and one point added for don't know answer. The following two multiple choice questions are given to understand product group choices of today and future consumption. This is followed by a label knowledge question and this question is measuring whether Turkish and German organic consumers know well the labels on the products or just buying randomly. Three logos are prepared according to two countries. (Figure 6.1) First one represents the national governmental logo and Bio-Siegel is used for Germany and Government logo used in Turkey.

Second one is the imaginary logo that is prepared by the researcher. Design of the logo is taken from web research and belongs to an organisation which is not active in organic food business and then "organic agriculture" is written under the symbol in national languages in both logos. Third one is the logo of an association that can be mixed with organic agriculture. For Germany, as fair trade is chosen as it is widely used together with organic products. Moreover for Turkey, TEMA Foundation is used as this is the biggest and the most popular environmental movement in Turkey and they have also introduced some organic products in the market.

Table 6.1: Label questions in the surveys

Labels		Do you know it?	Does it represent organic products?
Used in Germany's Survey	Used in Turkey's Survey	Yes… No…	Yes… No… No idea…
Used in Germany's Survey	Used in Turkey's Survey	Yes… No…	Yes… No… No idea…
Used in Germany's Survey	Used in Turkey's Survey	Yes… No…	Yes… No… No idea…

The questionnaire has ended with some demographical questions for statistical analysis. In this part respondents are asked to answer age, gender, number of people in the household, presence of children, education level, and occupation status and income questions. Income was an optional question but mostly answered by the respondents. Also income is designed according to Turkish currency (Lira) unit in Turkey survey while euro is used in Germany. Additionally, education level is revised in German survey according to German system and for Turkey exact translation from the original English questionnaire is used. Summary of the questions are given in the Table 6.2.

Table 6.2: Variables in the questionnaire

Question Number	Variables	Type of question	Level of measurement
Q1	Person responsible from shopping	Behavioural	Nominal
Q2	Buying frequency of organic products	Behavioural	Ordinal
Q3	First purchase of organic products	Behavioural	Ordinal
Q4	Image of organic products	Attitudinal	Likert-scale 7 statements with 6 point scale
Q5	Place of shopping today	Behavioural	Nominal, multi-optional
Q6	Place of shopping in the future	Behavioural	Nominal, multi-optional
Q7	Reasons for buying	Attitudinal	Likert-scale 13 statements with 6 point scale
Q8	Conditions to buy more	Attitudinal	Likert-scale 14 statements with 6 point scale
Q9	Product groups of today's choice	Behavioural	Nominal, multi-optional
Q10	Product groups of future choice	Behavioural	Nominal, multi-optional
Q11	Label Knowledge	Attitudinal	Nominal
Q12	Age	Classification	Ordinal
Q13	Gender	Classification	Nominal
Q14	Number of people in the household	Classification	Nominal
Q15	Children in the household and ages	Classification	Nominal
Q16	Education level	Classification	Ordinal
Q17	Employment status	Classification	Nominal
Q18	Income	Classification	Ordinal

6.2 Sampling

As there is a time and money limit only 50 German and 64 Turkish consumers are used in the research. Targeted (only organic consumers) but random sampling is applied. First of all people whom are interviewed are told that, this questionnaire is only for the people who has bought an organic product during 2007. As the surveys are made during summer, this means that respondents have bought an organic product at least in the last six months.

6.3 Data Collection

Different types of data collection methods applied in Turkey and in Germany. 50 German people are interview during the organic-day (Bio-erlebnistag) in the centre of Stuttgart on Saturday by the researcher. This day is chosen to reach more all types of consumers of organic products. As it was weekend also fulltime working people and families with children can be easily found. Most of the interviews are delivered in the fair and collected between 10-20 minutes. Only small respondent group are interviewed face to face. On the other hand, for Turkish organic consumers, an internet based questionnaire form is used. As this research had little time and no foundation, internet based research was the easiest and cheapest way for data collection from Turkey. Again targeted group was selected and the web address of the internet survey is only send to the people who consume organic products. These consumers are found from the organic agriculture and consumer associations. About 2 weeks is given to survey and then the web page is closed. For avoiding the duplicate results can be arise from the computer mistakes, internet protocol address and the time of the survey controlled and duplicate results are eliminated.

6.4 Conducting the results

The results of the survey are coded, translated in English and collected in excel sheets by the researcher. Also commends are translated and evaluated by the researcher. After collection and coding, data was ready for statistical analyses. For analysing SPSS 13 statistical package for Windows is used. Firstly variables are taken from excel sheets and then series of analysis are applied.

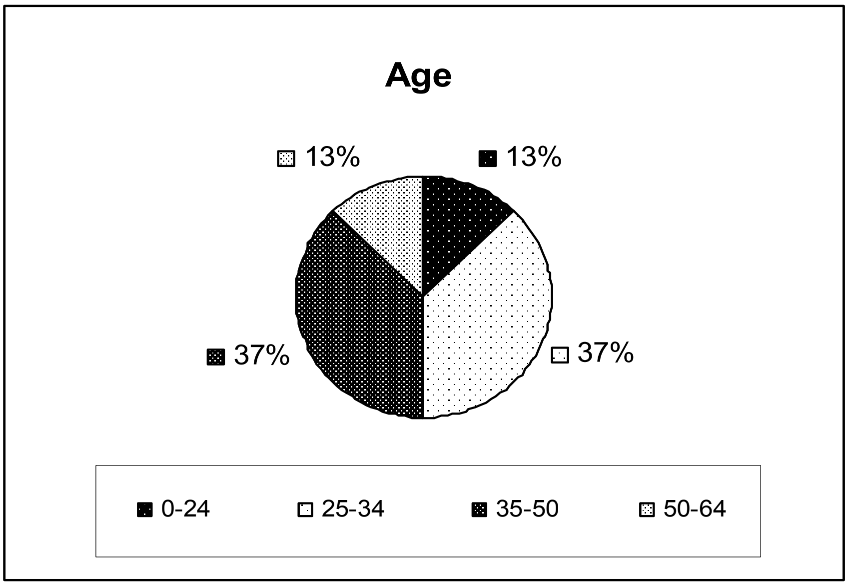
7 Results of the Questionnaires

7.1 Turkish organic consumers

7.1.1 Demographic distribution

Turkish organic consumers age distribution shows that, dominant group is between 25 and 50 years old with 74 % of the respondents. Other 13 % is young people under 25 and another 13 % stands for the age group 50-64 years old. (Figure 7.1)

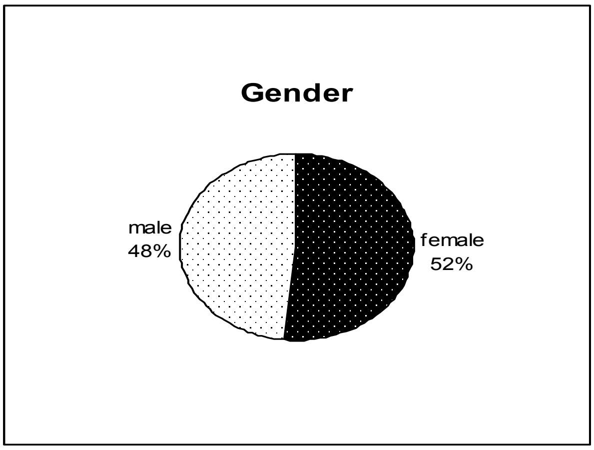
Figure 7.1: Age distribution of Turkish organic consumers



Source: Own Calculations

Gender is distributed equally in survey surprisingly, as other Turkish and European studies found out women as predominant purchasers of organic food. But in this study women were 52 % of the respondents. (Figure 7.2)

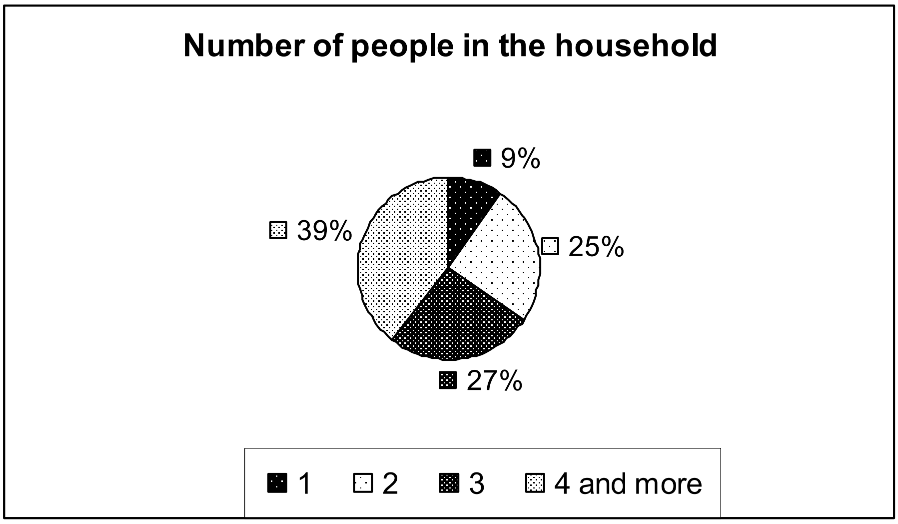
Figure 7.2: Gender distribution of Turkish organic consumers



Source: Own Calculations

Moreover, 39% of the organic consumers are big households and composed of 4 or more people. Half of the respondents (52%) are living in the households that are consisting of 2 or 3 people. Only 9% of the respondents are single in their household. (Figure 7.3)

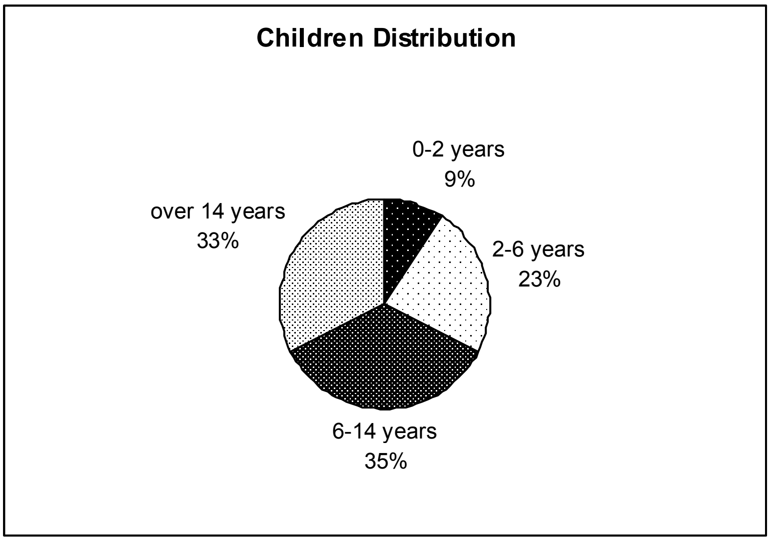
Figure 7.3: Household distribution of Turkish organic consumers



Source: Own Calculations

When we look at the children status in the household, we can see majority 59% of the respondents have kid(s). Generality consumers have children between 6-14 years old and teenagers more than 14 years old. This is followed by 2-6 years old kids and babies in the households have the lowest percentage. (Figure 7.4)

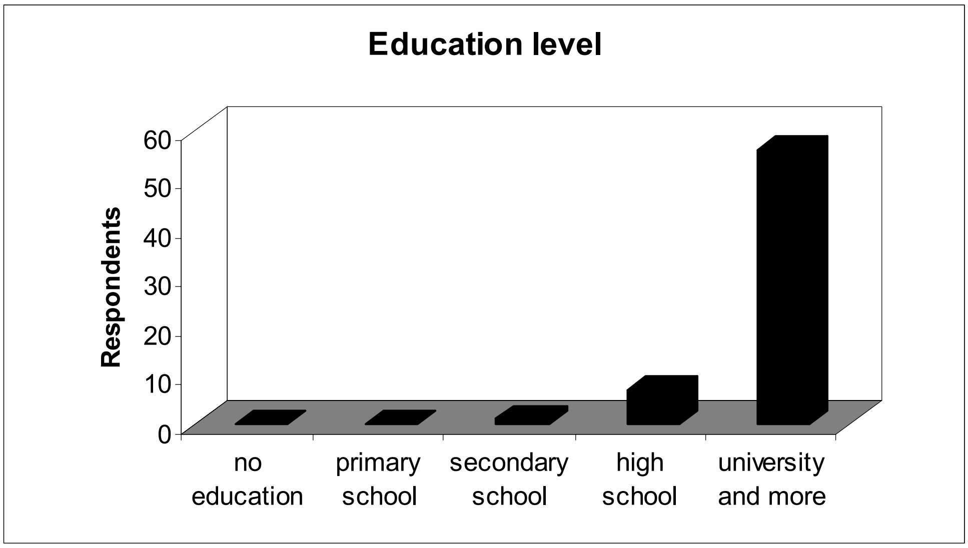
Figure 7.4: Children distribution of Turkish organic consumers



Source: Own Calculations

Many of the respondents have high education level and 88 % are university graduates. In addition, 11% are high school graduates and only one of the respondents has secondary school certificate. (Figure 7.5)

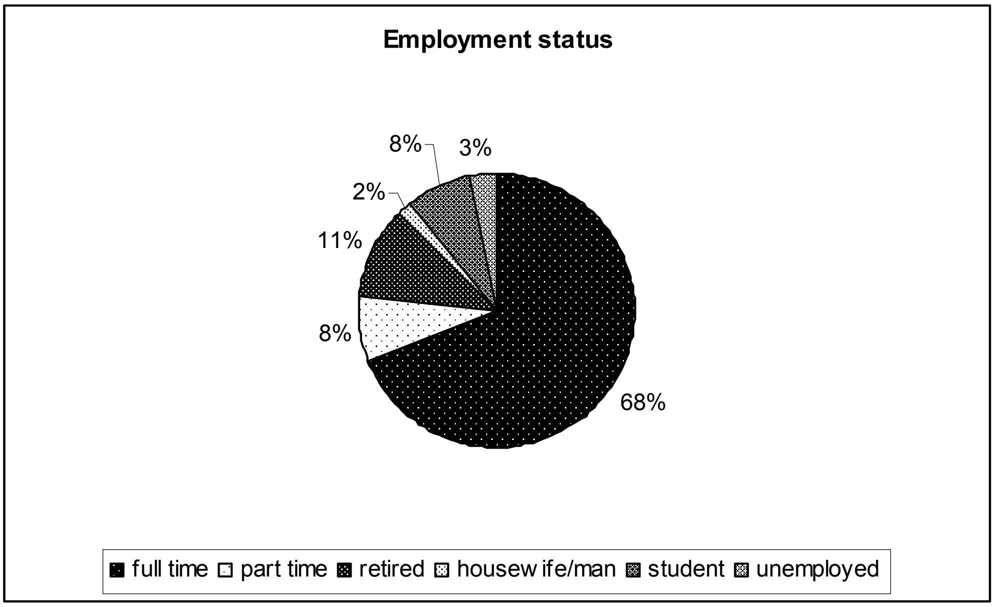
Figure 7.5: Education level distribution of Turkish organic consumers



Source: Own Calculations

Additionally, employment status of the respondents is reported as; 68% is full time working, 11% is retired, 8% is student and another 8% is part time working. Only 2 of the consumers are unemployed and one is working at home. (Figure 7.6)

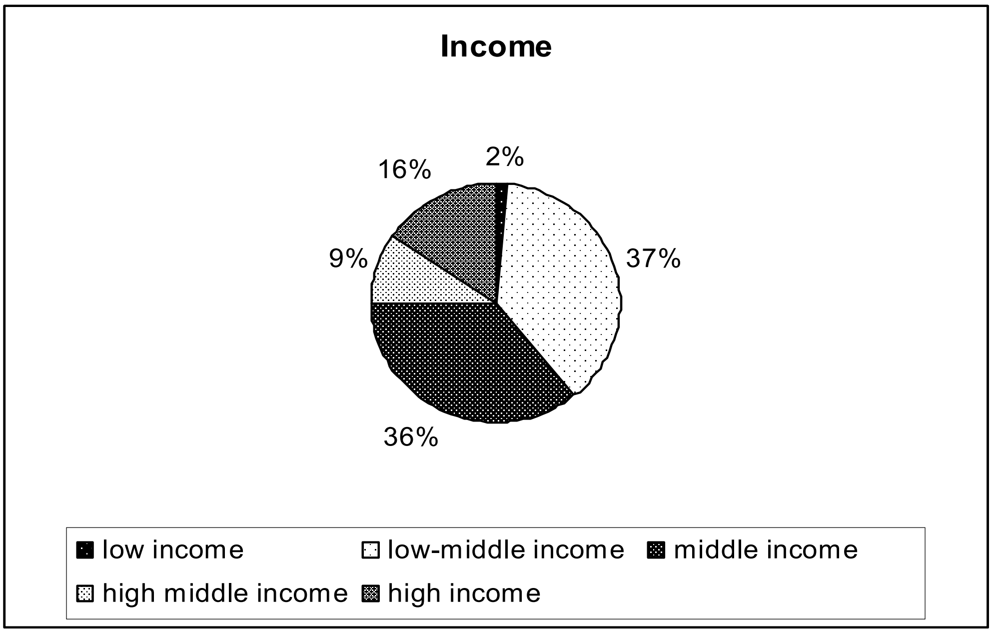
Figure 7.6: Employment distribution of Turkish organic consumers



Source: Own Calculations

Furthermore, income distributions of the respondents are especially collected in the low-middle and middle income groups with 73%. This is followed by 16% in high income, 9% in high-middle income and only one of the respondents is in the low income group. (Figure 7.7)

Figure 7.7: Income distribution of Turkish organic consumers

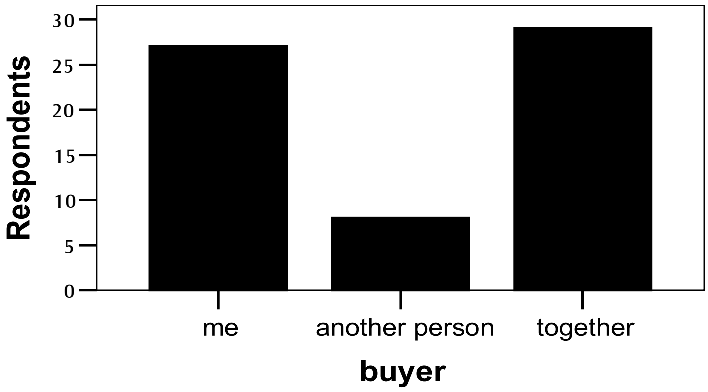


Source: Own Calculations

7.1.2 Buying behaviour

Person who is responsible from household food shopping is asked to the respondents and shown in the Figure 7.8. 42% of the people have declared that they are in the charge of shopping, 45% of the consumers are shopping together with a partner from the house and the rest 13% have answered as another person in the household is caring shopping duty. (Figure 7.8)

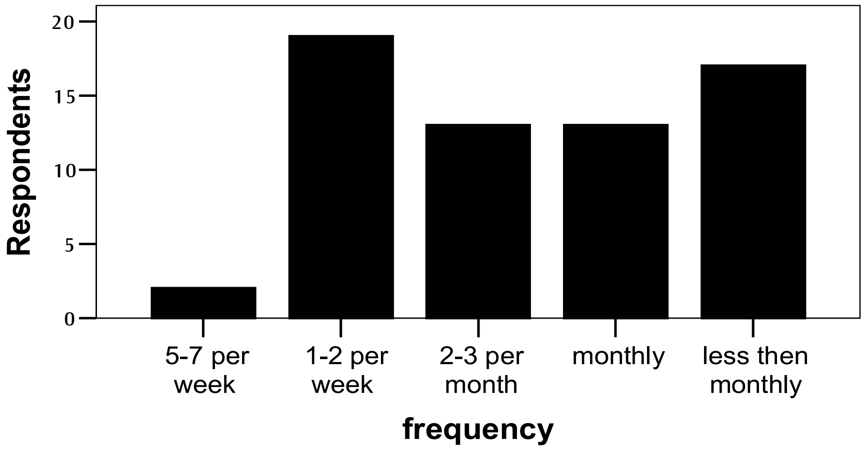
Figure 7.8: Shopping responsibility in the Turkish household



Source: Own Calculations

Respondents are asked about their organic food purchasing frequency. 30 % of the consumers buy 1 or 2 times in a week, 27 % purchase less than once a time in a month, 20% consume 2-3 times per month and another 20% purchase monthly. Only a little 3% of the respondents buy very frequently and around 5-7 times in week. (Figure 7.9) According to analyses there is no significant relation between socio demographic characteristics of the sample and buying frequency.

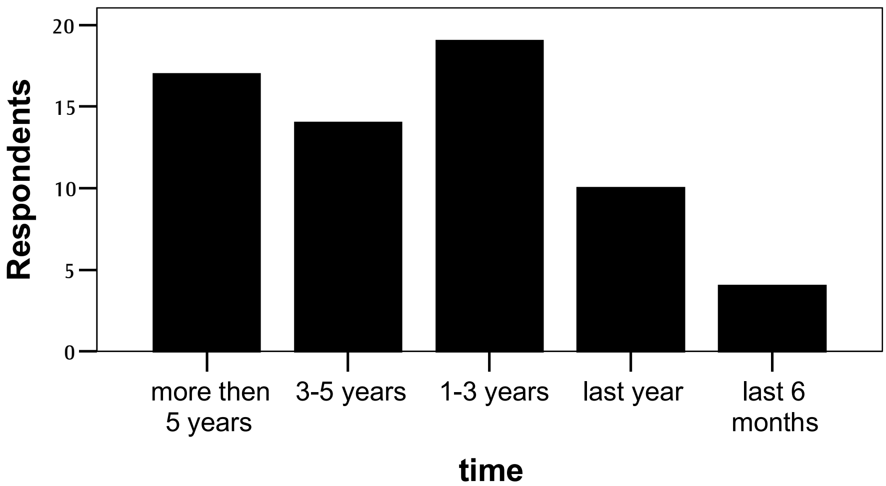
Figure 7.9: Frequency of organic food purchase in Turkey



Source: Own Calculations

Turkish consumers are asked about the first purchase time of an organic product. 30% have bought between in the last one and three years, 27% have bought more than five years ago, 22% have stated that between three and five years ago, 16% have responded as last year and for 6% of the consumers have purchased firstly in the last six months. (Figure 7.10)

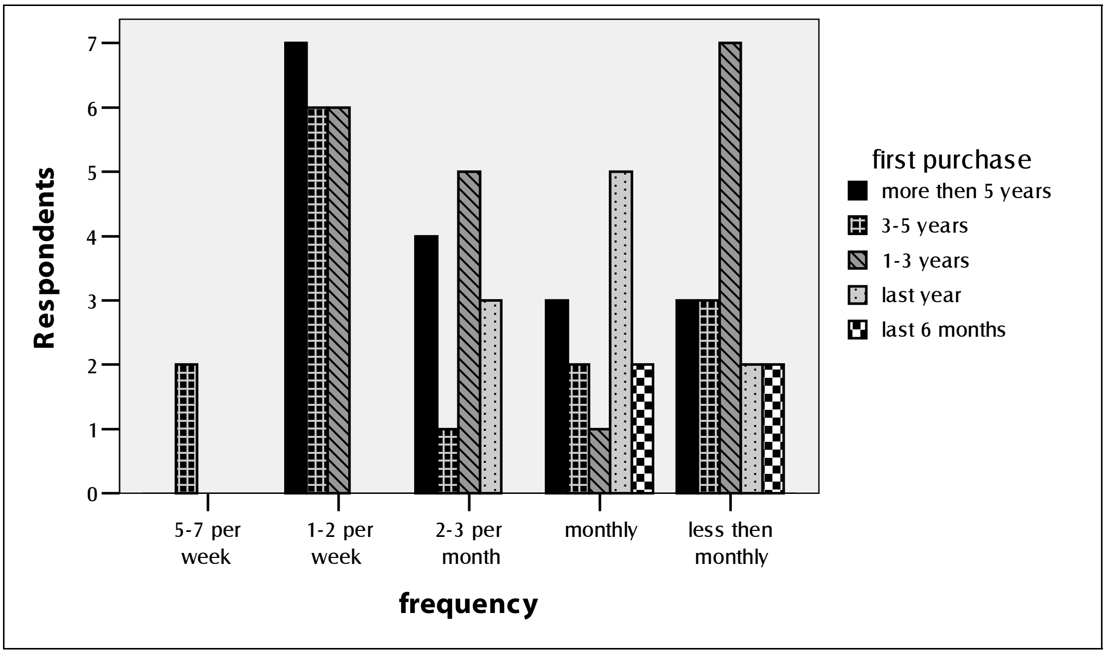
Figure 7.10: First purchase time of an organic product in Turkey



Source: Own Calculations

There is a positive relation between first purchase time of the respondents and the buying frequency. (Figure 7.11) According to the analyses first adaptors buy more frequent than consumers who start to purchase in the last years.

Figure 7.11: Relation between first purchase time and buying frequency

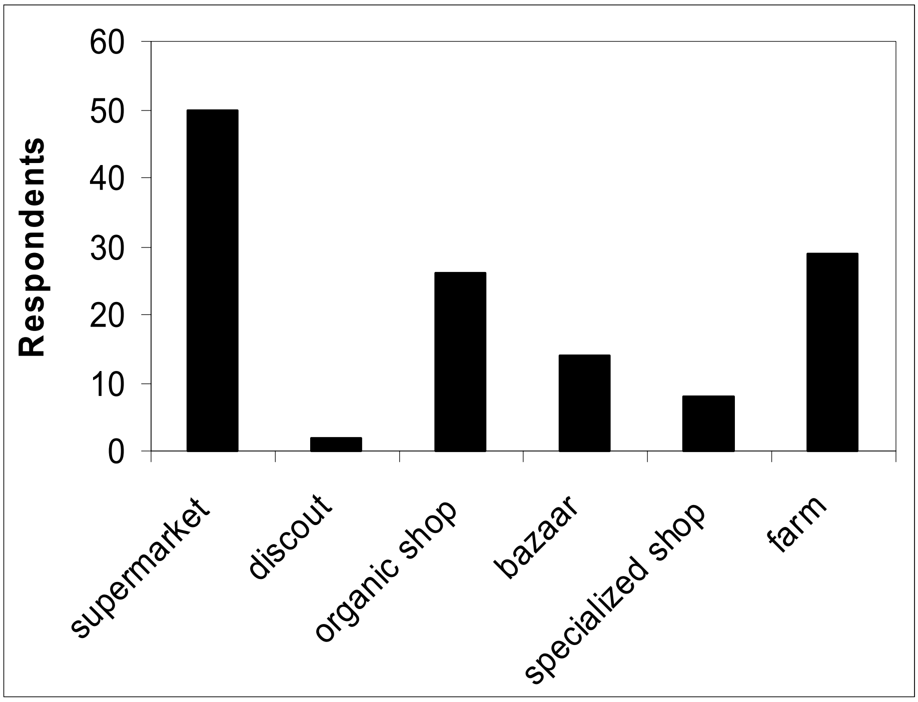


Source: Own Calculations

7.1.3 Preferences of the shopping places in Turkey

In order to figure out the most preferred shopping places in the organic food market, sixty four respondents among Turkish organic consumers are asked in which places they go for shopping when they want to buy organic products. Before asking the question, six places were identified as common shopping malls for Turkey. Supermarkets (Migros, Carrefour, Tansas….etc), discount shops, organic shops, bazaar, specialized shops (bakery, butcher...etc) and farm are the multiple choices in the survey. Respondents were free to mark the all choices. Majority of the Turkish consumers, 78 %, prefer supermarkets; this followed by farm, 45%; organic shops ,41%; specialized shop, 12,5%; bazaar, 22% and discount, 3%. All the percents are calculated independently from the other choices. (Figure 7.12)

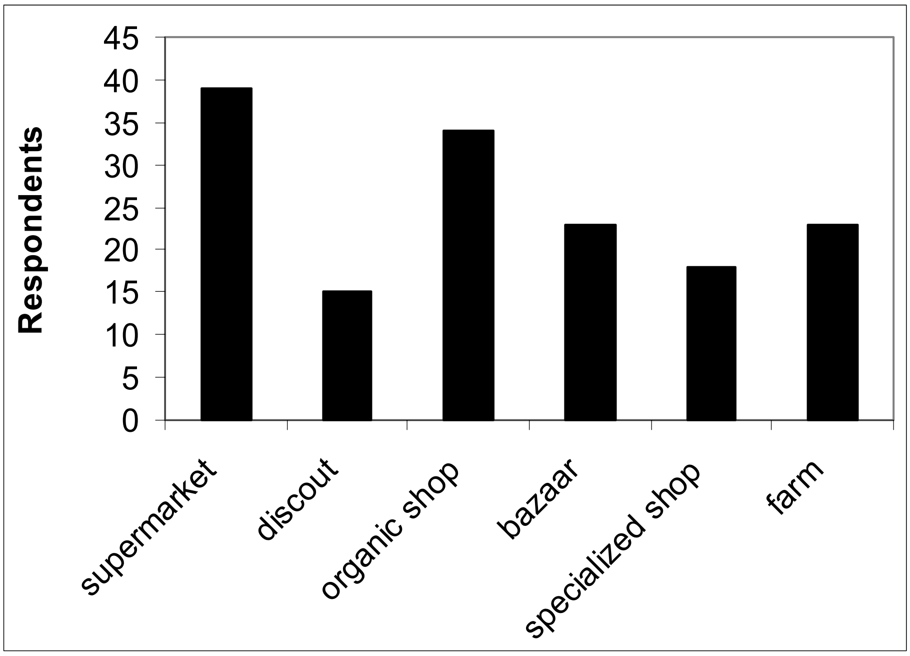
Figure 7.12: Turkish consumers' shopping place choice of today



Source: Own Calculations

Figure 7.13 represents the shopping places which consumers want to see more in their area in the future. Again respondents are asked to choose between the same six places as much as they can. Results show that, Turkish consumers want to find more organic shops (53%) in their area and want to see more product varieties in bazaars (36%), discounts (23%), and specialized shops (28%). On the other hand; supermarket preference share decreased to 61% where as still the most preferred place and farm shopping (36%) share the third place with bazaar.

Figure 7.13: Turkish consumers' shopping place choice in the future

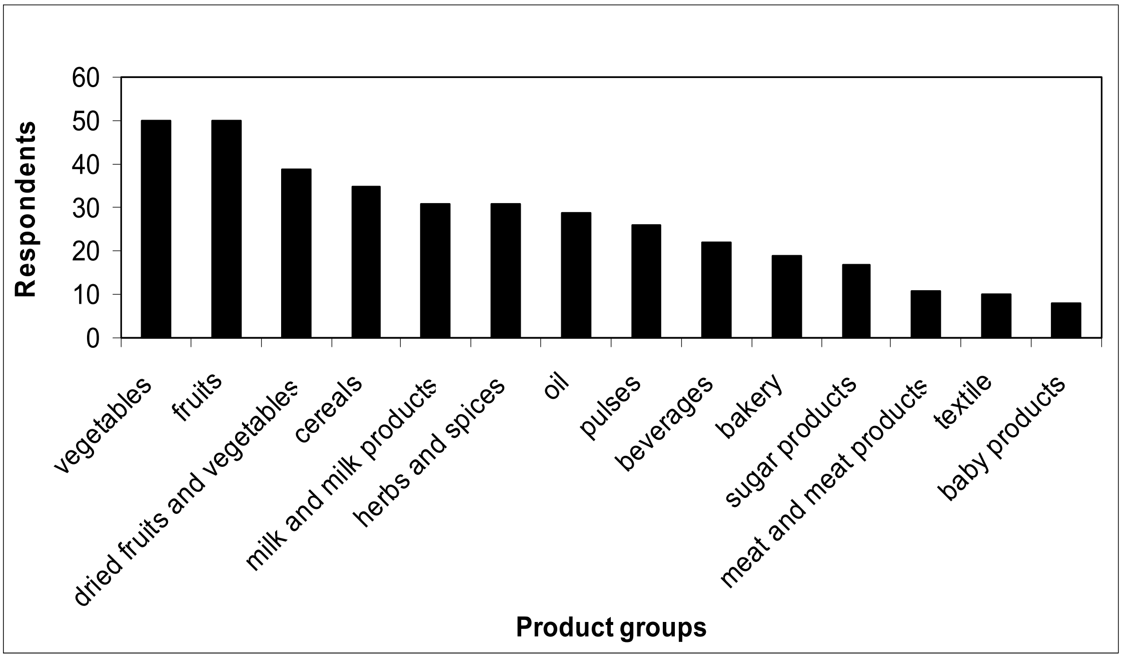


Source: Own Calculations

7.1.4 Product preferences in Turkey

First thing to mention is that Turkish domestic market is very limited in varieties and not all the products are available in every city. In the case of organic consumption 78% of the respondents are purchasing fresh fruits and vegetables which are at the top of the preference list. Second most preferred group is the dried fruits and vegetables (61%) which are Turkey's major production and export product group. Cereals are coming next in the list with 56% of preference rate. Milk and milk products and herbs and spices are the next groups that are both purchased by 48% of the respondents. The list continues as following; oil products (45%), pulses (41%), beverages (34%), bakery products included bread (30%) and sugar products (27%) like honey, marmalade and chocolate…etc. Meat and meat products (17%) are listed at the bottom as they are very new in the market and very hard to find. Moreover textile (16%) and baby products (13%) are the least consumed goods as they are also not available and especially baby products are really dependant to respondents household situation whether there is a baby or not. (Figure 7.14)

Figure 7.14: Product groups that consumed today in Turkey

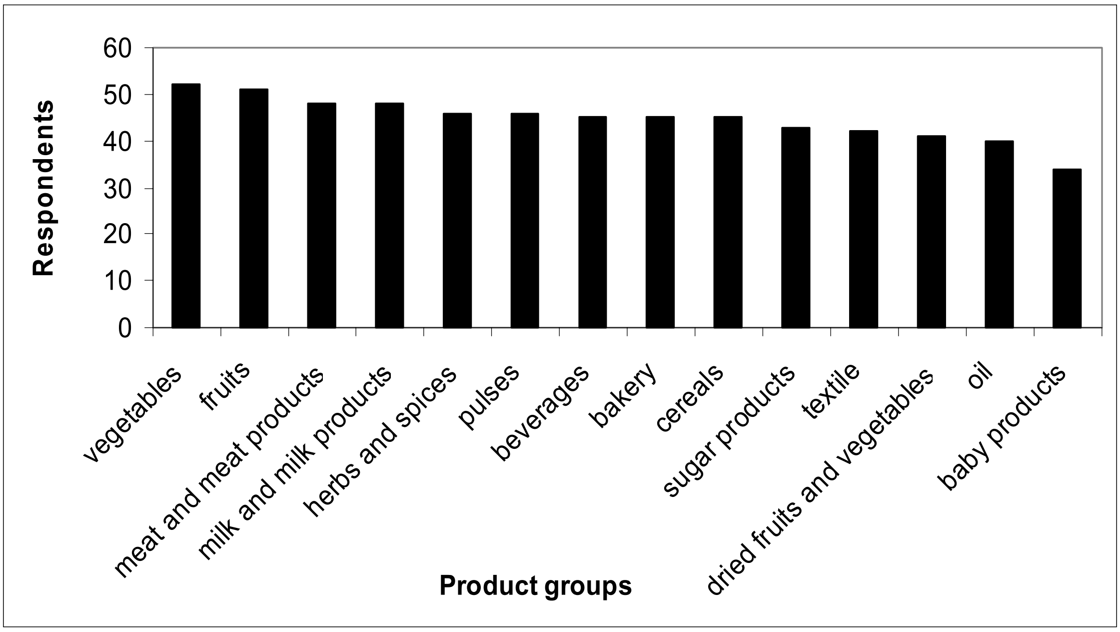


Source: Own Calculations

Prediction of potential demand among product groups is shown in the Figure 7.15 in which the respondents marked their future preferences by their own. According to the survey, most preferred group will be again fresh vegetables and fruits in the future with the rate of 81% and 80%. Meat and meat products and milk and milk products are coming in the next place with demands from 75% of the respondents.

Herbs and spices, pulses, beverages, bakery products and cereals are the following groups holding demands between 70% – 72% of the respondents. Following groups of the list are also very differently demanded by the respondents are; sugar products (67%), textile (66%), dried fruit and vegetables (64%) and oil (63%). Baby products are again listed at the bottom of the list with 53% of the demand.

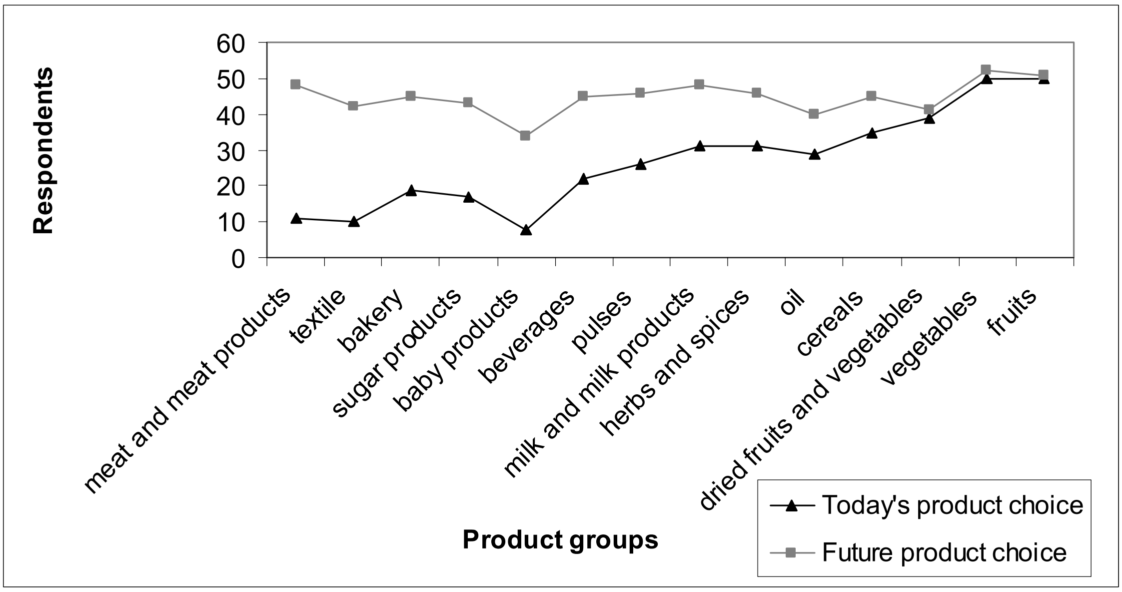
Figure 7.15: Product groups that will have demand in the future in Turkey



Source: Own Calculations

When we analyse the magnitude of the demand differences between products consumed today and expected to be consumed in the future, it is obvious that there will be a big demand in meat and meat products and textile. Moreover bakery, sugar products and baby products are coming in the next group. It can be seen that market is getting mature in the product groups; fresh and dried fruits and vegetables. (Figure 7.16)

Figure 7.16: Demand differences between products of today and future in Turkey

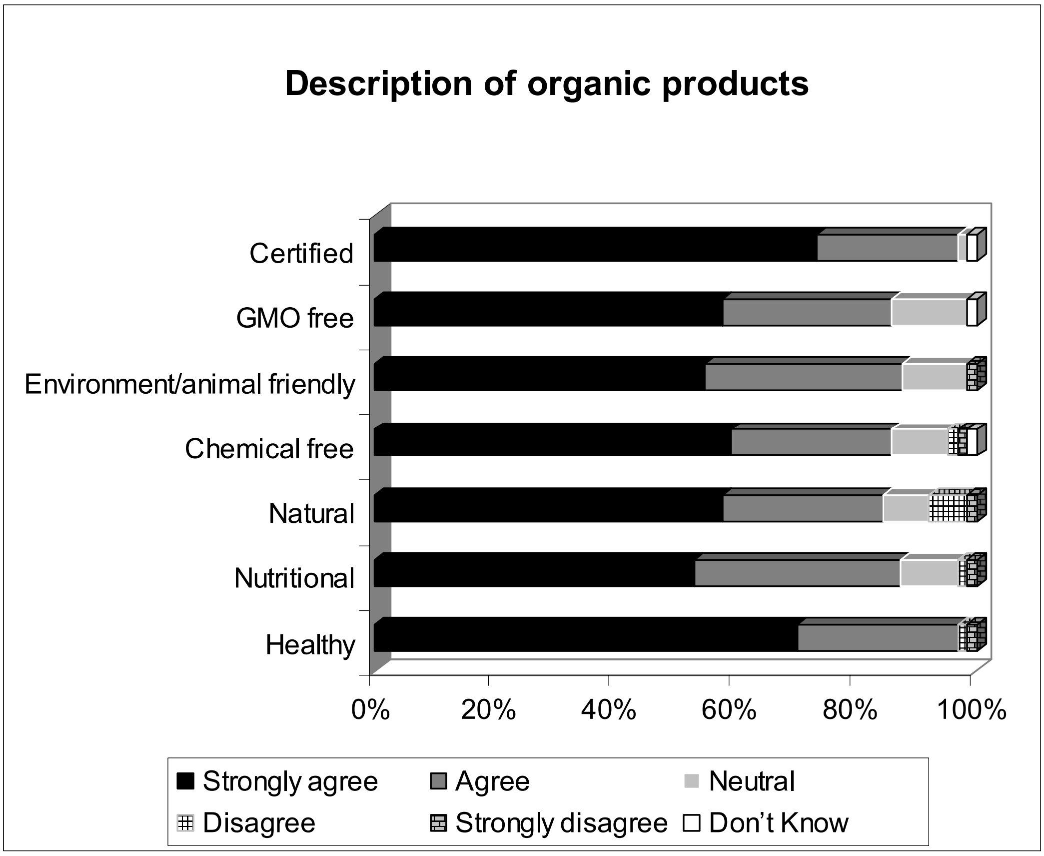


Source: Own Calculations

7.1.5 Description of organic food and label knowledge in Turkey

In this question understanding and knowledge of organic food among Turkish consumers tested. Seven statements are given to the consumers and they marked in a 6 point scale from strongly agree (5) to strongly disagree (1) and don't know (0) answer is also added. Results indicate that, 97% of the Turkish consumers find organic products healthy. Overall average to health attribute of organic products got 4.6 rating which means majority strongly thinks in same way. Again most of the consumers (87.5%) agree on organic products contain high amounts of nutritional substances and mean of the ranking is 4.3. If we look at how Turkish consumers' description of organic production methods, majority have positive image in their minds. 84% of the respondents think organic production methods are in a harmony with nature (4.3 ranks) and 86% agrees to organic food is grown free from chemical pesticides and fertilizers (4.4 ranks). Moreover, 87.5% of the consumers described organic agriculture methods as animal and environmentally friendly (4.4 ranks).

Figure 7.17: Description of organic food in Turkey



Source: Own Calculations

When relationship between GMO containing and organic food is questioned, 58% strongly agree and 28% agree that organic food is free from GMOs. Rest 12.5% neither agree nor disagree. Therefore, average points to this attribute got 4.4 which explain that the majority is aware of GMO free content of products. Certifications of organic products are highly known and 73% of the consumers strongly agree and another 23% agree that organic products are certified and overall rating is 4.7. As seen from the results, 96% of the respondents know that certification is a must in organic products. (Figure 7.17)

The further step in the questionnaire is the measurement of organic label knowledge in the market. Knowledge comparison of the three logos; one official organic logo of the government, one imaginary logo that prepared by the researcher and one logo from an environmental association that is thought to can be confused by the respondents are surveyed.

Table 7.1: Logo recognitions by Turkish organic consumers

Labels	Do you know it?	Does it represent organic products?
	Yes… 59% No… 41%	Yes… 64% No… 0% No idea… 36%
	Yes… 45% No… 55%	Yes… 44% No… 12% No idea… 44%
	Yes… 92% No… 8%	Yes… 23% No… 66% No idea… 11%

Source: Own Calculations

Table 7.1 shows the organic logo label knowledge among Turkish respondents. According to the results, 59% of the respondents have seen the governmental logo and 64% have said that it represents organic products. The increase in the number can be explained as; 5% of the respondents who have seen the logo first time in the survey predict that it belongs to organic products. In the case of imaginary designed logo, 45% of the organic consumers claimed that they know the logo and 44% identified as organic. This can explain that, Turkish people do not really informed about true organic label and market is exposed to fake labels.

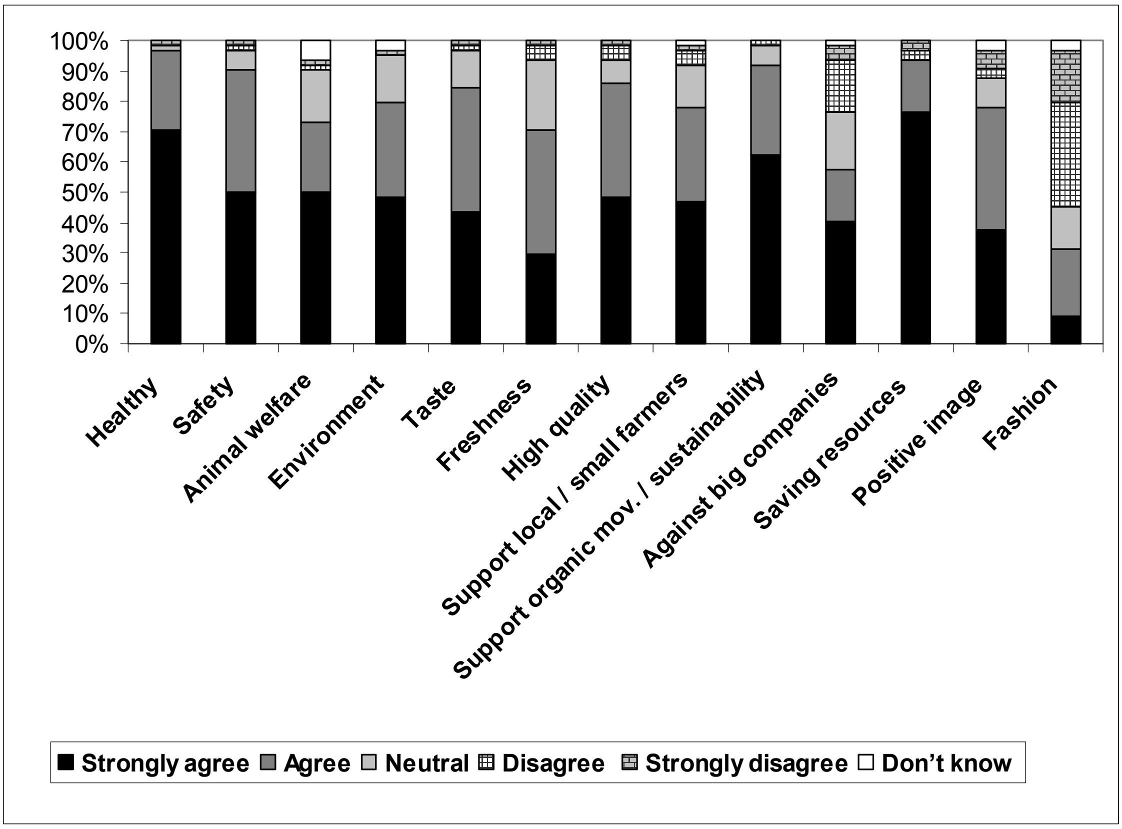
Moreover, TEMA environmental association is very well know in Turkey and 92% declared that they know the emblem. Direct connection to organic agriculture is only thought by 23% of the respondents. 66% of the respondents exactly know that there is no connection of this logo with organic agriculture and 11% do not have idea.

7.1.6 Turkish consumer attitude

7.1.6.1 Motivations towards organic products

Sixty four Turkish organic consumers are given statements and asked to marked them from strongly agree (5 points) to strongly disagree (1 point). (Figure 7.18) According to the results; “saving resources for future” got the highest rank, in strongly agree part from the 77% of the buyers. On the other hand average rankings show that “healthy for me and my family” is the first motivation and ranked 4.64. (Figure 7.19) Saving resources for future is coming in the second place after summing up degrees and ranked 4.61 by the consumers. Third motivation of Turkish consumers is “supporting organic movement and sustainability” with 4.53 rank and food safety is following with 4.36 in the fourth place. “Higher quality” and “good taste” perceptions of organic products are listed as following motivations by 4.27 and 4.23 rankings. Surprisingly protection of the environment is standing in the middle of motivation list but still has an important degree as 4.16.

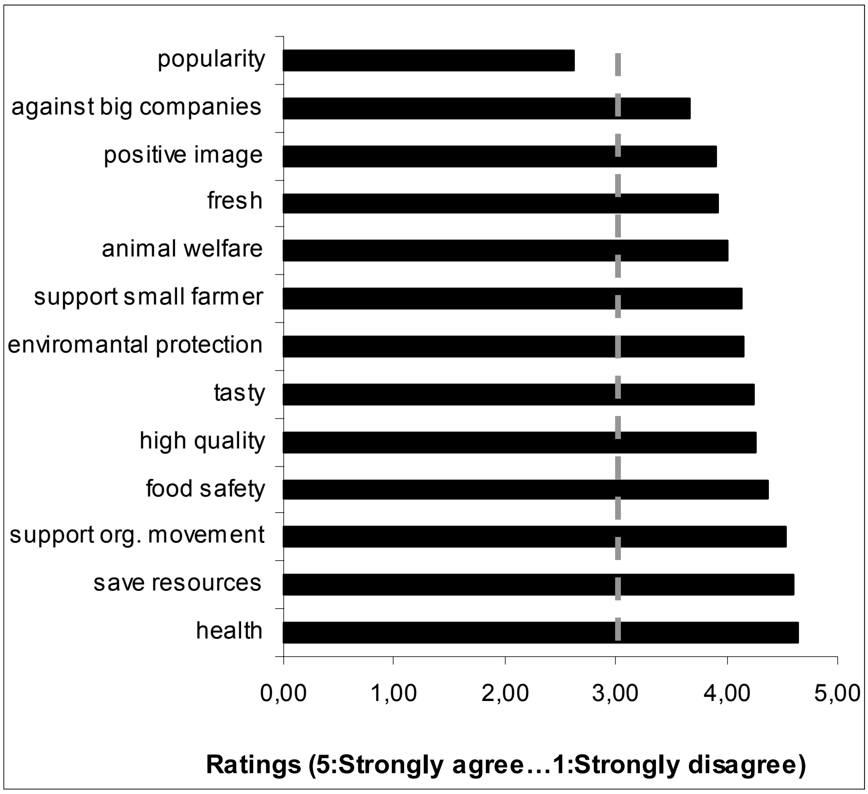
Figure 7.18: Percentages of the motivation ranking in Turkey



Source: Own Calculations

Moreover, "supporting small and local farmers" is closely coming after with 4.13 points. Following important motivation is "animal welfare" in organic farming with 4.00 rating. "Freshness" and "positive image" of organic products have very similar degrees 3.92 and 3.91 which are also considerable motivations for the majority. "Standing against the multinational companies" is tested if there is a motivation related and results showed 3.67 points which is close to "agree" degree. Being popular is not a valid motivation for Turkish people and got 2.63 rating in the overall results and 52% of the consumers disagree or strongly disagree with this motivation.

Figure 7.19: Motivations of Turkish organic consumers



Source: Own Calculations

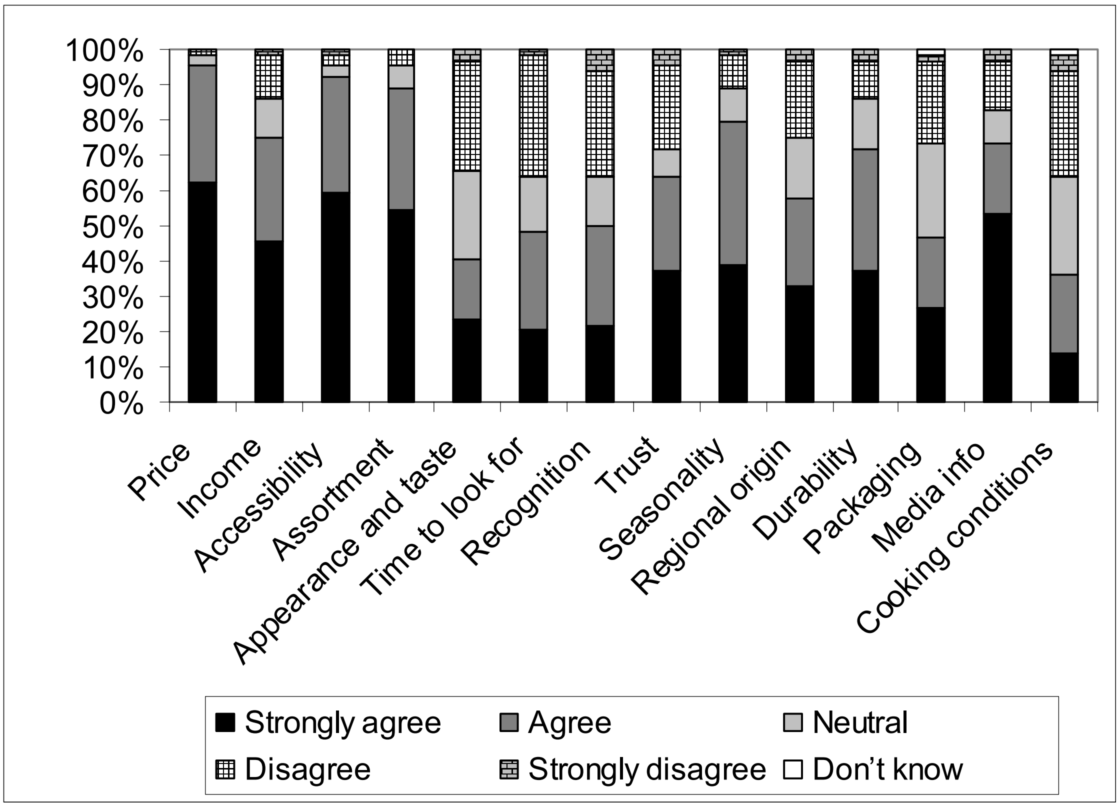
To sum up, we can say that over 4.5 points which means that majority is close to strongly agree there are three motivations that are highlighted in the survey; “health”, “saving resources” and “supporting organic movement and sustainability”.

7.1.6.2 Barriers towards organic products

Barriers towards buying organic products are measured in the form of question that; in which conditions will have effect for buying more organic products. Percentages of the respondents are stated in the Figure 7.20 and “high price” with 4.56 ranking is still the major factor for keeping people away from organics. (Figure 7.21)

As Turkish organic market is in the emerging phase; it is not hard to predict the second and third major barrier. Availability with 4.45 and limited assortments of organic products with 4.39 rankings is the following barriers. Moreover fourth place in barrier list is shared by; lack of media information (4.06), less seasonal product availability in the market (4.06) and insufficient income to afford organic products (4.05)

Figure 7.20: Percentages of barrier rating in Turkey

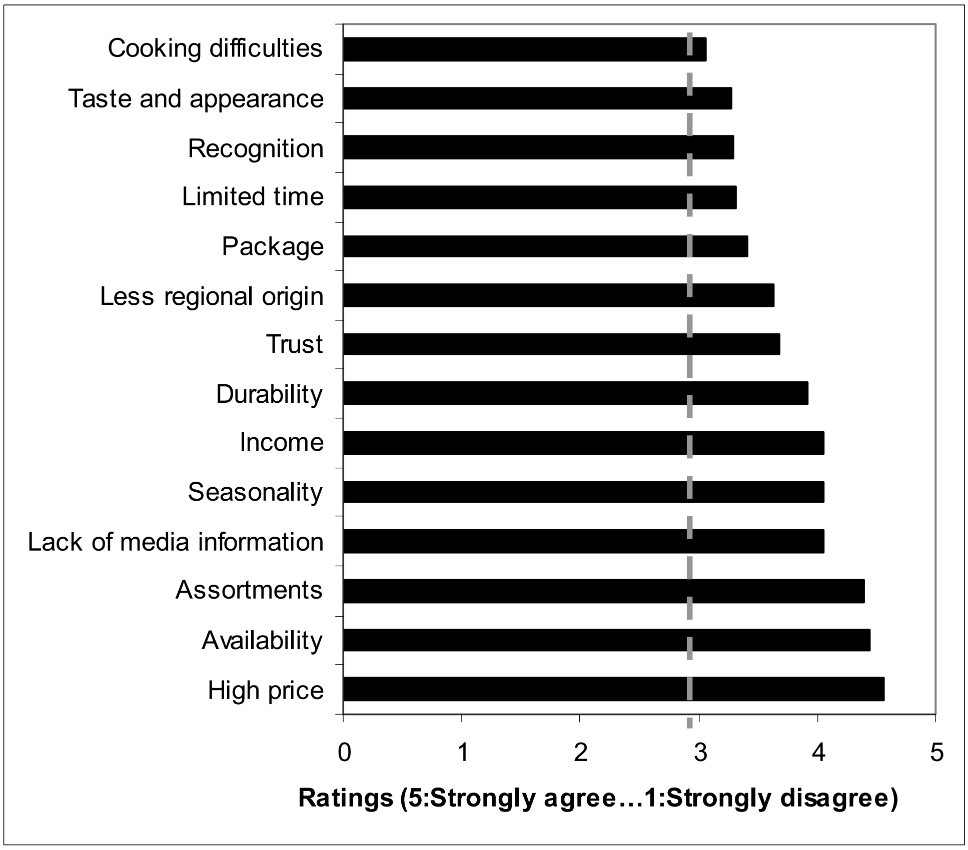


Source: Own Calculations

Organic consumers have problems with expiration date and ranked “durability” of the products 3.92 which means they agree on if there is more durability they will purchase more. “Trust” is seemed to a barrier with 3.69 ranking but on the other hand 28% of the respondents believe that the products they buy is exactly coming from organic origin.

Moreover, majority of the consumers want to have regional products and which carry an importance of 3.63 ranking. However, 25% do not have problem with eating regional when having organic products. Packaging materials like using too many plastic materials with organic goods is seem to be a small barrier with degree of 3.43. Furthermore, nearly half of the respondents (48%) declared that if they have more “time” to search for organic products they would consume more, but overall rating of this barrier was 3.31. In addition, “recognition” of organic labels and products is a barrier for half of the respondents and rated with 3.3 points. Taste and appearance of organic products do not seem to be big barrier for Turkish people by getting a rank of 3.27 which is very close to neutral. List ends with “cooking difficulties” like better and shorter conditions which is not a real barrier for consumers with 3.06 ranking.

Figure 7.21: Barriers of Turkish organic consumers



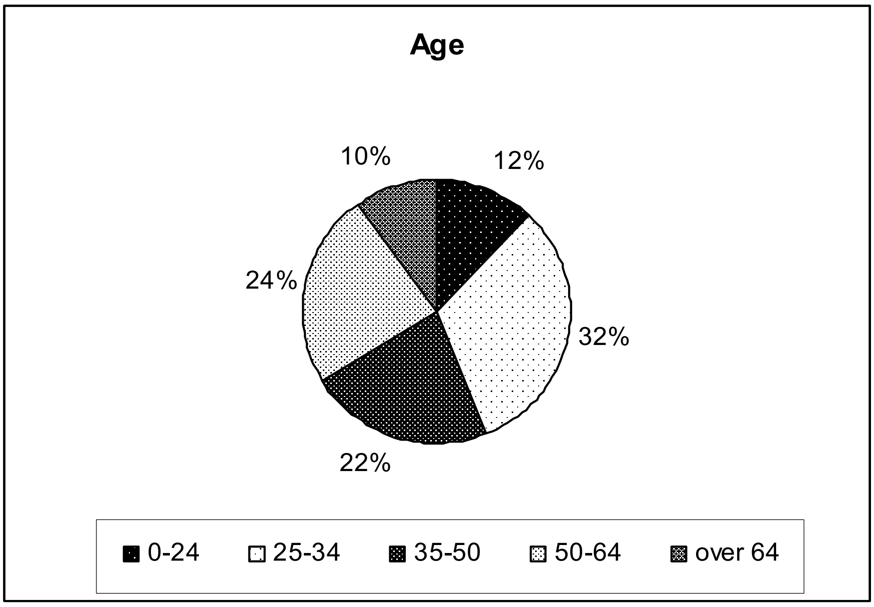
Source: Own Calculations

7.2 German organic consumers

7.2.1 Demographic distribution

German organic consumer's dominant age groups are changing between 25 and 64. 32 % of the interviewed people are belonging to 25-34 age range, 24 % is 50-64 and another 22% is between 35-50 years old. Only 12% is under 25 and 10% is over 64 years old. (Figure 7.22)

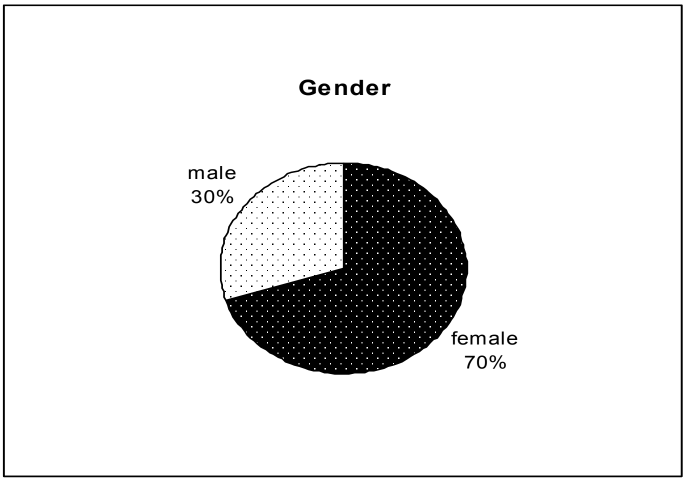
Figure 7.22: Age distribution of German organic consumers



Source: Own Calculations

Among the surveyed 50 consumers in random sampling, 70% of the consumers were female. Although questionnaire is done on weekend in an open fair, only 30% of the consumers were men. (Figure 7.23)

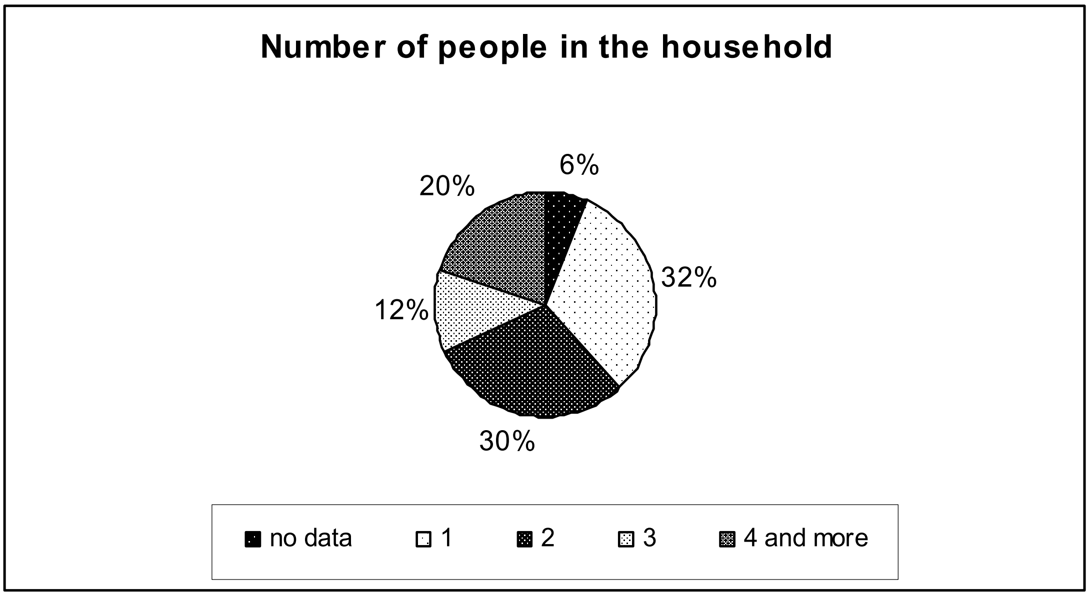
Figure 7.23: Gender distribution of German organic consumers



Source: Own Calculations

Findings from the household numbers of organic consumers show that, generality of the households are consisting of one and two people. 32% is living alone, 30% is living with one person, 20% of the households have 4 and more people, 12% is 3 people in the house and 6% of the respondents did not answer the question. (Figure 7.24)

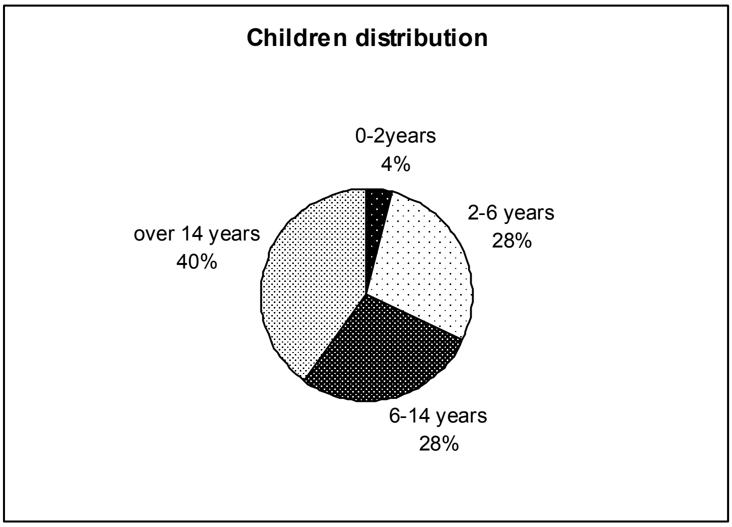
Figure 7.24: Household distribution of German organic consumers



Source: Own Calculations

Moreover, 40% of the consumers have declared that they have kid(s) in their home. 20 % have children over 14 years old and majority of the rest have children between 2-14 years old. Only one of them has baby under 2 years old. (Figure 7.25)

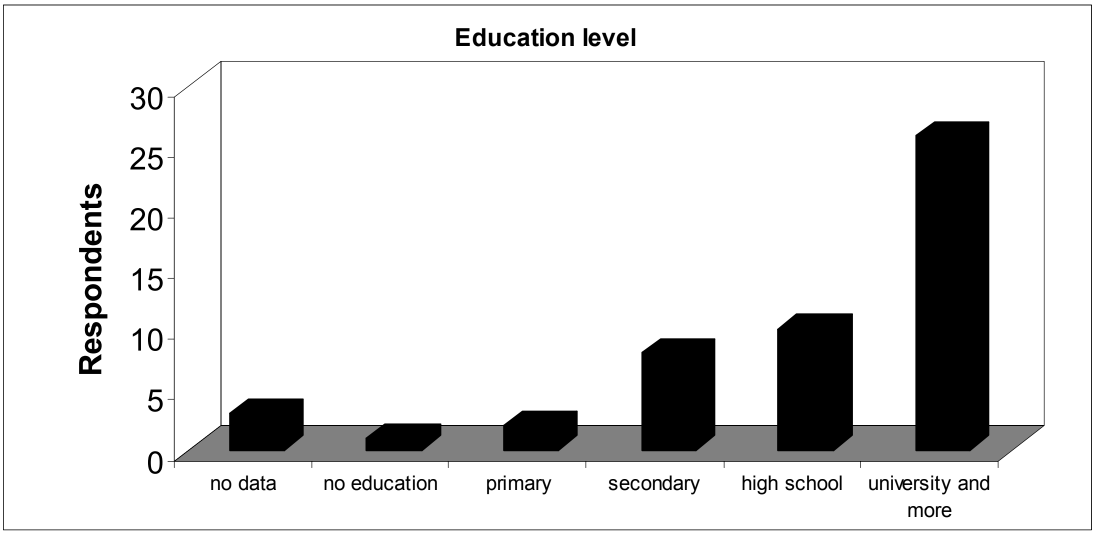
Figure 7.25: Children distribution of German organic consumers



Source: Own Calculations

Education levels of the respondents are high. 52% have background as a university graduate, 20% is high school graduate, 8% is secondary school graduate and 4% has completed only primary education and one of the respondents have no education. Again 6% of the consumers did not answer. (Figure 7.26)

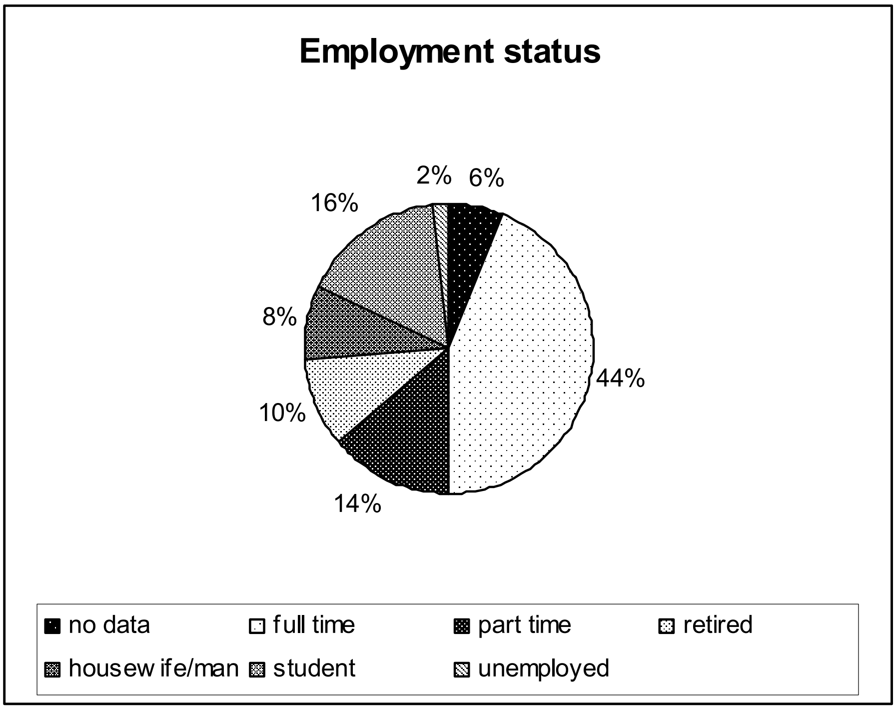
Figure 7.26: Education level distribution of German organic consumers



Source: Own Calculations

Employment statuses of organic consumers are mostly full time and this corresponds to 44%. 16% is student, 14% is working as part time, 10% is retired, 8% is working at home and one of the respondents is unemployed. 6% of the consumers did not want to fill in this part. (Figure 7.27)

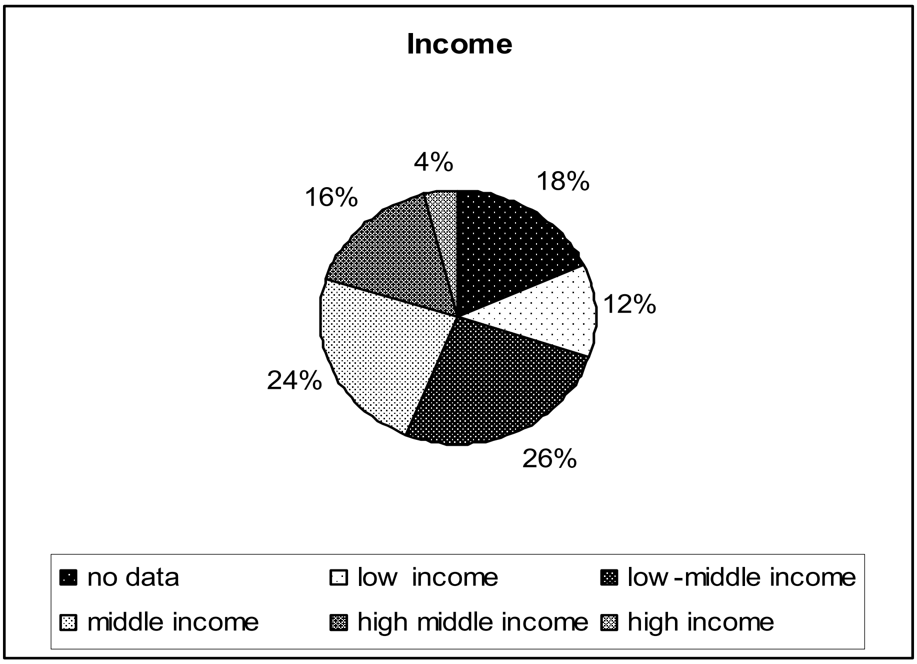
Figure 7.27: Employment distribution of German organic consumers



Source: Own Calculations

Considering the income level of the organic consumers, half of them are belonging to low-middle income and middle income groups. This is followed by 16 % in high-middle income, 12% in low income and 4% in high income categories. But 18% of the interviewed consumers did not want to answer this question as they think that this is private information. (Figure 7.28)

Figure 7.28: Income distribution of German organic consumers

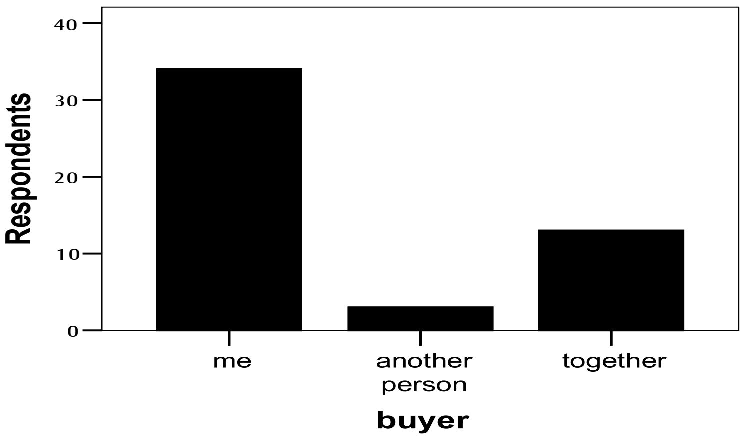


Source: Own Calculations

7.2.2 Buying behaviour

Person who is responsible from household food shopping is asked to German respondents. 68% has answered that they are in the charge of shopping, 26% is shopping together with a partner from the house and 6% has answered as another person in the household is taking care of shopping. (Figure 7.29)

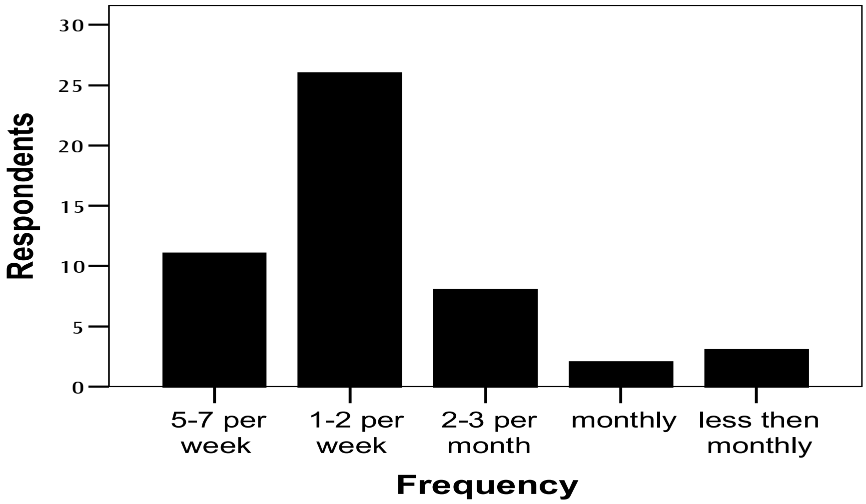
Figure 7.29: Shopping responsibility in the German household



Source: Own Calculations

German respondents are asked about their organic food purchasing frequency. Majority of the households have organic food every week on their table. Numbers indicate that; 52% is buying 1 or 2 times in a week, 22 % is buying around 5-7 times in week, 16% is consuming 2-3 times per month and 4% is purchasing monthly. Only a little 6% is buying less than once in a month. (Figure 7.30)

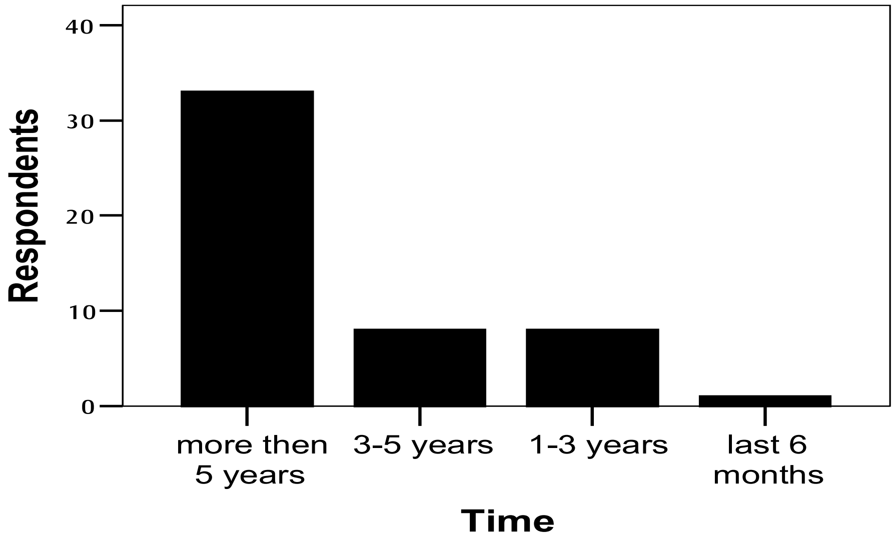
Figure 7.30: Frequency of organic food purchase in Germany



Source: Own Calculations

German consumers are asked about the first purchase time of an organic product. Generality have a long time experience in buying. 66% have bought their first products more than 5 years ago. %16 stated that they have purchased between the last three and five years and another 16% have bought between one and three years ago. Only one of the consumers have purchased firstly in the last six months. (Figure 7.31) According to analyses there is no significant relation between socio demographic characteristics of the sample and buying frequency.

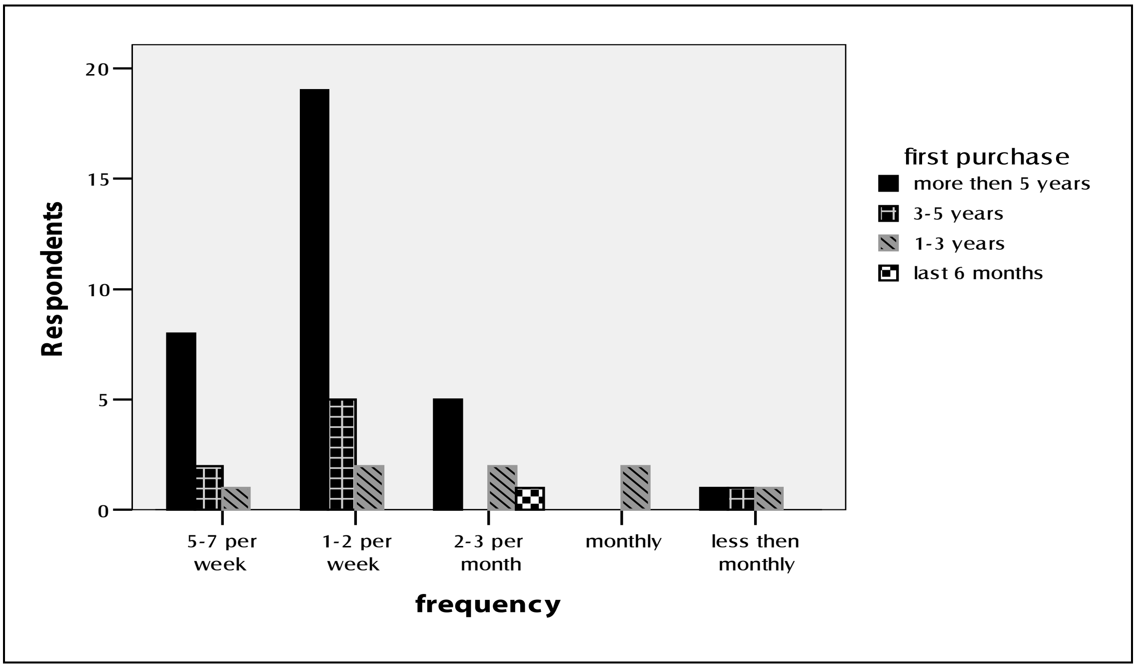
Figure 7.31: First purchase time of an organic product in Germany



Source: Own Calculations

There is a positive relation between first purchase time of the respondents and the buying frequency. (Figure 7.32) According to the analyses first adaptors buy more frequent than consumers who start to purchase in the last years.

Figure 7.32: Relation between first purchase time and buying frequency

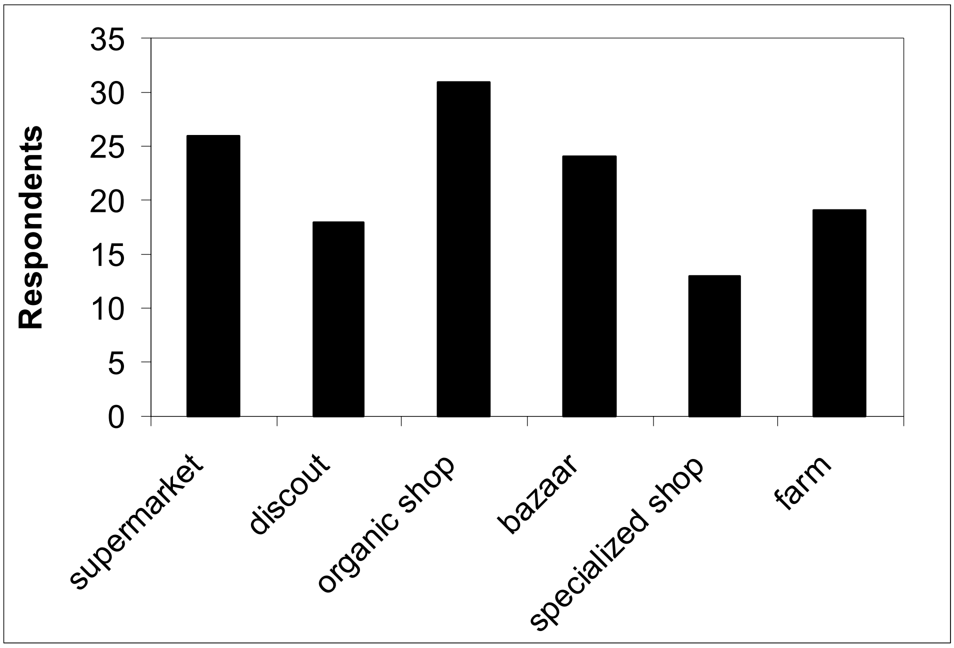


Source: Own Calculations

7.2.3 Preferences of the shopping places in Germany

Identification of the most preferred shopping places in the organic food market, fifty respondents among German organic consumers are asked in which places they go for shopping when they want to buy organic products. Six places were identified as common shopping malls for Germany as in Turkish survey. Supermarkets, discount shops, organic shops, bazaar, specialized shops (bakery, butcher...etc) and farm are the multiple choices in the survey and respondents were free to mark the all choices. Majority of the German consumers, 62 %, prefer organic shops, this followed by supermarkets (52%), bazaar (48%), farm (38%), discount (36%) and specialized shops (26%). All the percents are calculated independently from the other choices. (Figure 7.33)

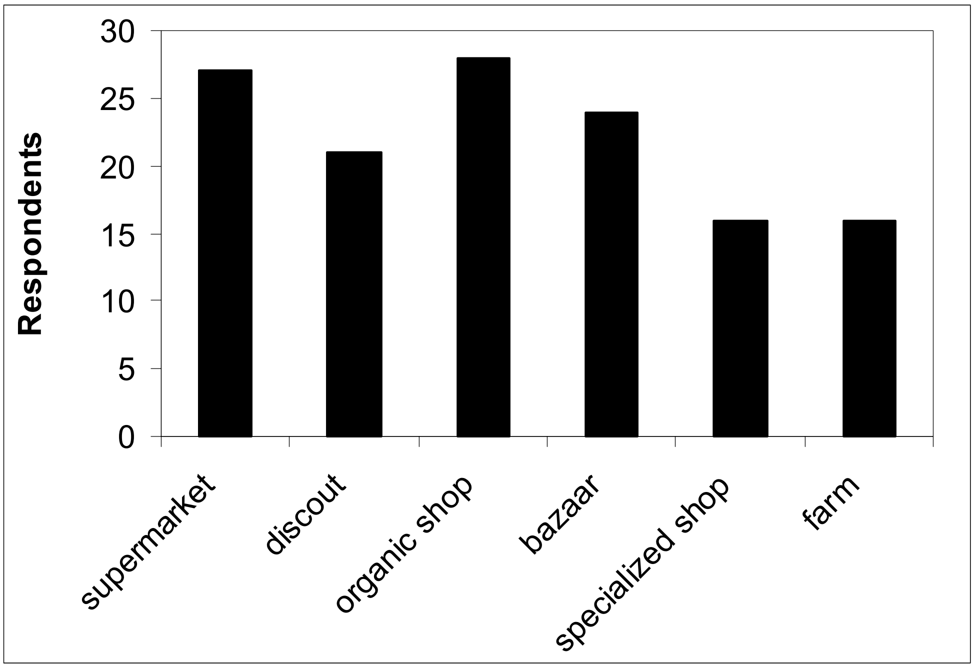
Figure 7.33: German consumers' shopping place choice of today



Source: Own Calculations

Another measurement is the shopping places which consumers want to purchase organic products more in the future. Again respondents are asked to choose between the same six places as much as they can. Results show that, German consumer's preference in the future is not expecting to change too much. Discounts (42%) and specialized shops (32%) have increasing ratios compared to today's preferences. Bazaar as a choice is remaining same and will be preferred by 48% of the respondents. On the other hand organic shops have the most decreasing ratio to 56% but still will be the most preferred one. This decrease is followed by supermarkets (52%) and farms (32%). (Figure 7.34)

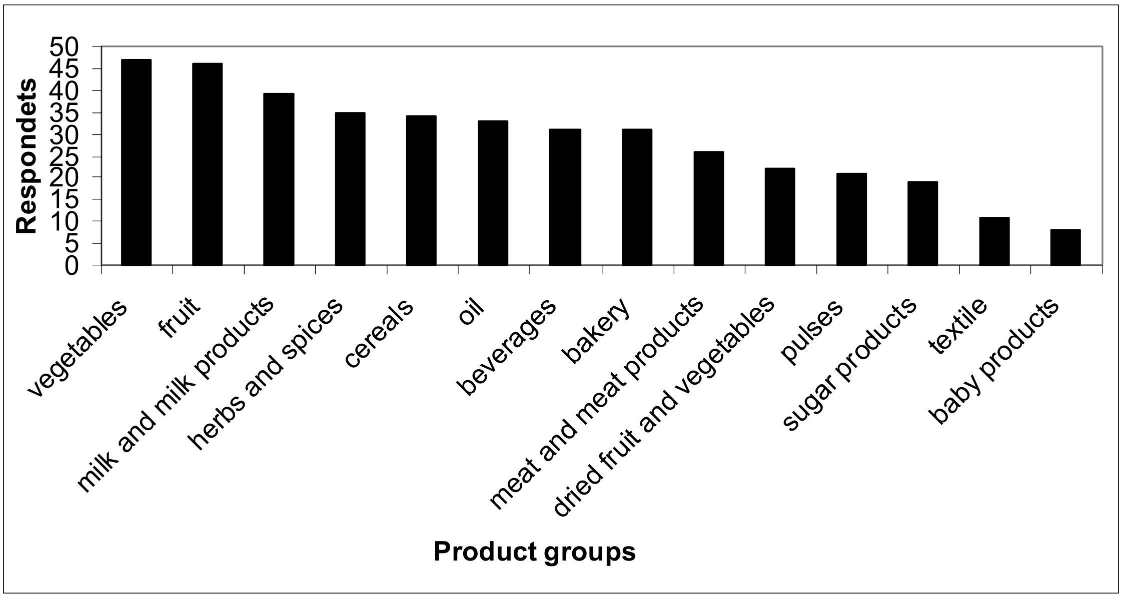
Figure 7.34: German consumers' shopping place choice in the future



7.2.4 Product preferences in Germany

German consumers are asked to mark the product groups that they consume today between organic varieties. (Figure 7.35) 94% of the consumers are buying fresh fruits and vegetables in Germany. Moreover, 78% is purchasing milk and milk products, 70% is consuming herbs and spices, 68% buy organic cereals and 66% choose organic oil products. These preferences are followed by; 62% of the consumers buy organic beverages and bakery products included bread. Meat and meat products like beef, chicken, sausages…etc is preferred by 52% of the respondents. 44% buy dried fruit and vegetables, 42% consume organic pulses and 38% purchase sugar products like honey, marmalade, chocolates…etc. the least interesting group for consumers seem to be organic cotton products in other words textile (22%) and baby products (16%). Baby products are very specific group that is demanding only for a certain time period and really dependant on the respondents whether they have babies or expecting in the near future.

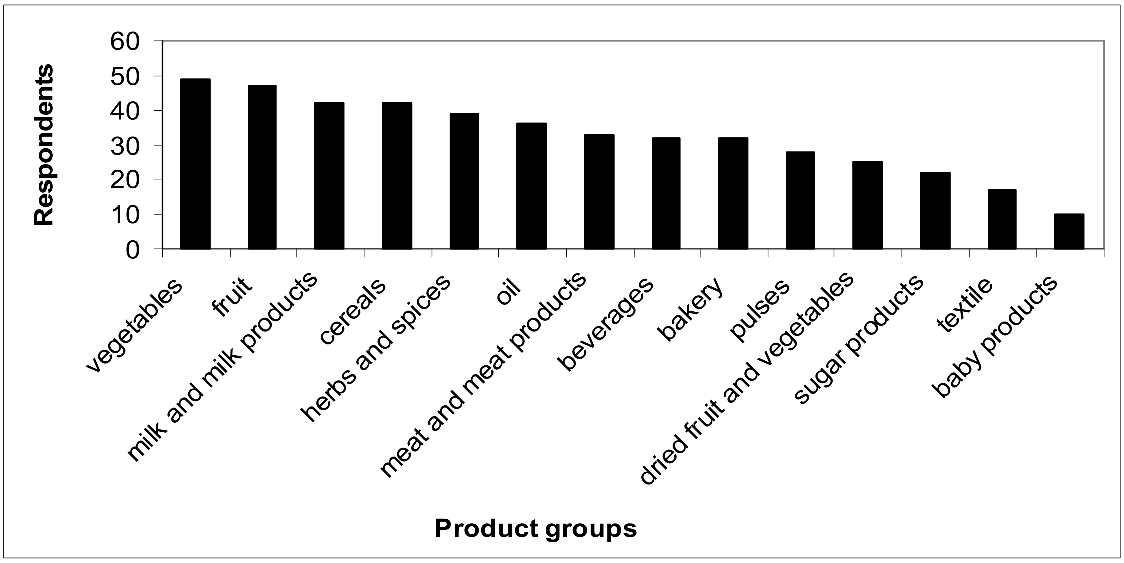
Figure 7.35: Product groups that consumed today in Germany



Source: Own Calculations

Another question was the product groups that the consumers are willing to buy in the future. Again fresh vegetables and fruits are at the top of the list with 98% and 94%. Following demanded products are; milk and milk products and cereals with 84%, herbs and spices (78%), oil (72%), meat and meat products (66%), beverages and bakery with 64%, pulses (56%), dried fruits and vegetables (50%), sugar products (44%), textile (34%) and baby products (20%). (Figure 7.36)

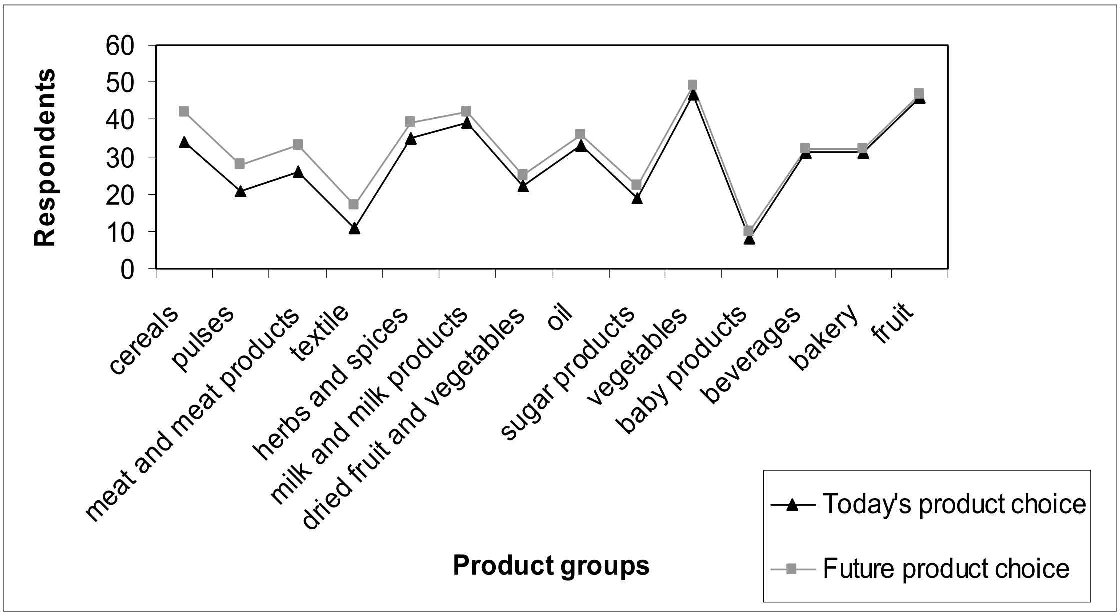
Figure 7.36: Product groups that will have demand in the future in Germany



Source: Own Calculations

All the product groups' demand increased in the results with different magnitudes. (Figure 7.37) Major demand differences can be seen in the product groups; cereals, pulses, meat and meat products and organic textile.

Figure 7.37: Demand differences between products of today and future in Germany



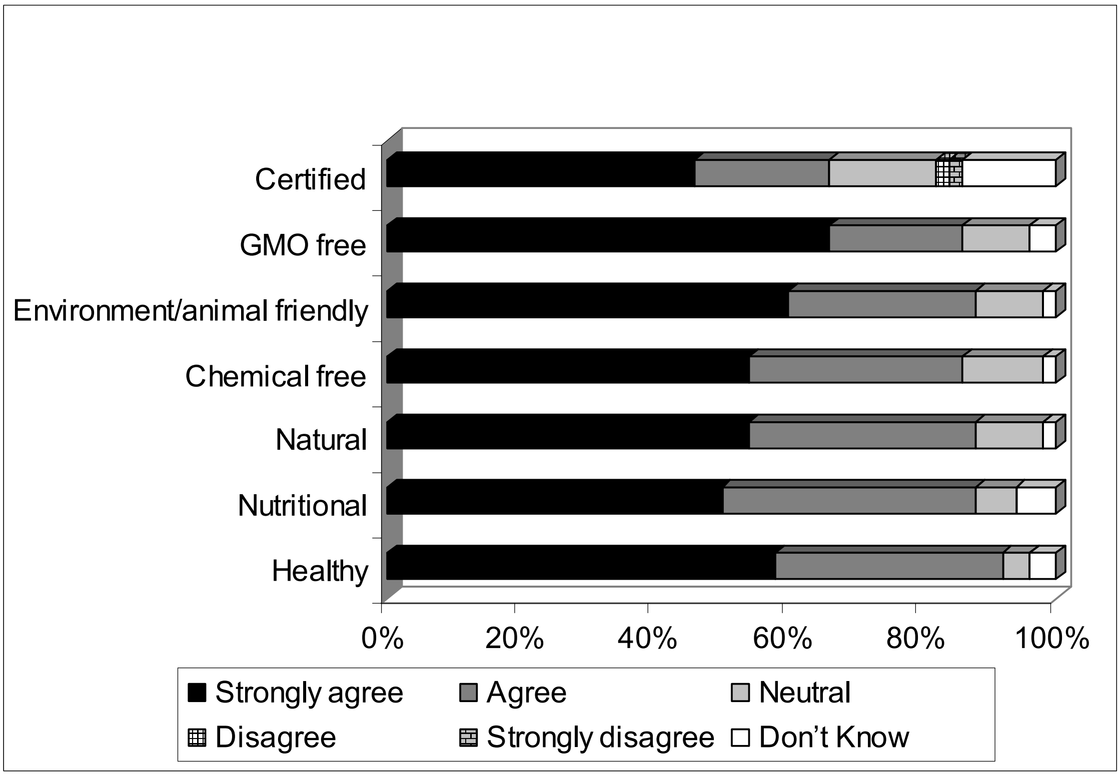
Source: Own Calculations

Especially; fresh fruit, bakery and beverages do not have significant demand changes in the future when compared to today's consumption. Fresh vegetables and baby products are in the second place in the less demand increase group. It can be said that these products already have a mature market or consumer specific demand like in baby products in Germany.

7.2.5 Description of organic food and label knowledge in Germany

Organic food in Germany is described with the percentages in Figure 7.38 and accepted by the majority as a healthy food with 4.4 ratings on a 5 point scale. (Figure 7.39) 92% of the respondents correspond as agree and strongly agree to the "healthy image" of organic products. Moreover, 88% of the consumers think that they got high nutritional value when they eat organically. Organic products as high nutritional value got average 4.2 points from consumers. When we look at the organic production methods perception by German consumers, mostly they have positive opinions. 88% generally agrees on organic production methods are in a harmony with nature (4.4 ranks) and environmentally friendly techniques are applied on farms combined with animal welfare. (4.4 overall rating) Furthermore, 86% of the consumers trust that; organic farming is done without using chemical pesticides and fertilizers and rank 4.3 as an average. Concerning the organic production knowledge, there is minority around 10-12% that they present a neutral attitude on good farming techniques such as; being free of chemicals, environmentally and animal friendly production methods and farming in harmony with nature . Concerning the GMO contamination opinion in organic products, 86% of the respondents believe that organic products that they buy do not produce with using gene technique methods. But there is a suspicious group of 10% among consumers who reply as neutral. At the end GMO free attribute got 4.4 points from organic consumers.

Figure 7.38: Description of organic food in Germany



Source: Own Calculations

Certification of organic products is a very critical issue for German organic consumers and resulting with 3.6 points in the scale which is a nearly middle of neutral and agree attributes. Nearly half, 46% of the respondents only strongly agree with certification is a must in organic products. Another 20% agree but, 16% of the consumers do not agree nor disagree. Moreover, even disagree and strongly disagree answers come from 4% of the respondents. During the street interviews a regular organic buyer who is also very active in environmental movements and have a high education level in agriculture declared that:

"All the products coming from organic agriculture definitely do not have to be certified in the market and this statement in the survey is completely wrong"

Furthermore, 14% of the people declared that they do not have any information about certification of organic products. Additionally, label knowledge among German consumers is tested with three labels. (Table 7.2) First label is "Bio-Siegel" which is known by 94% of the consumers and introduced by government. 90% of the consumers are declared certain knowledge that the label belongs to organic products. Imaginary label designed by the researcher did not take any recognition from 78% of the respondents. On the other hand, only 26% thought that this belongs to organic agricultural goods.

Third label, Fair Trade is recognised by 76% of the consumers and only 24% have confused that this label belongs to organic products. As Fair Trade label is commonly used together with organic labels, these results were not very surprising. On the other hand, 46% of the consumers certainly declared that Fair Trade is not representing organic products.

Table 7.2: Logo recognitions by German organic consumers

Labels	Do you know it?	Does it represent organic products?
BIO nach EG-Öko-Verordnung	Yes…94% No… 6%	Yes… 90% No… 0% No idea…10%
Bio ÖKOLOGISCHER LANDBAU	Yes…22% No… 78%	Yes… 26% No… 8% No idea…66%
FAIRTRADE	Yes…76% No… 24%	Yes… 24% No… 46% No idea… 30%

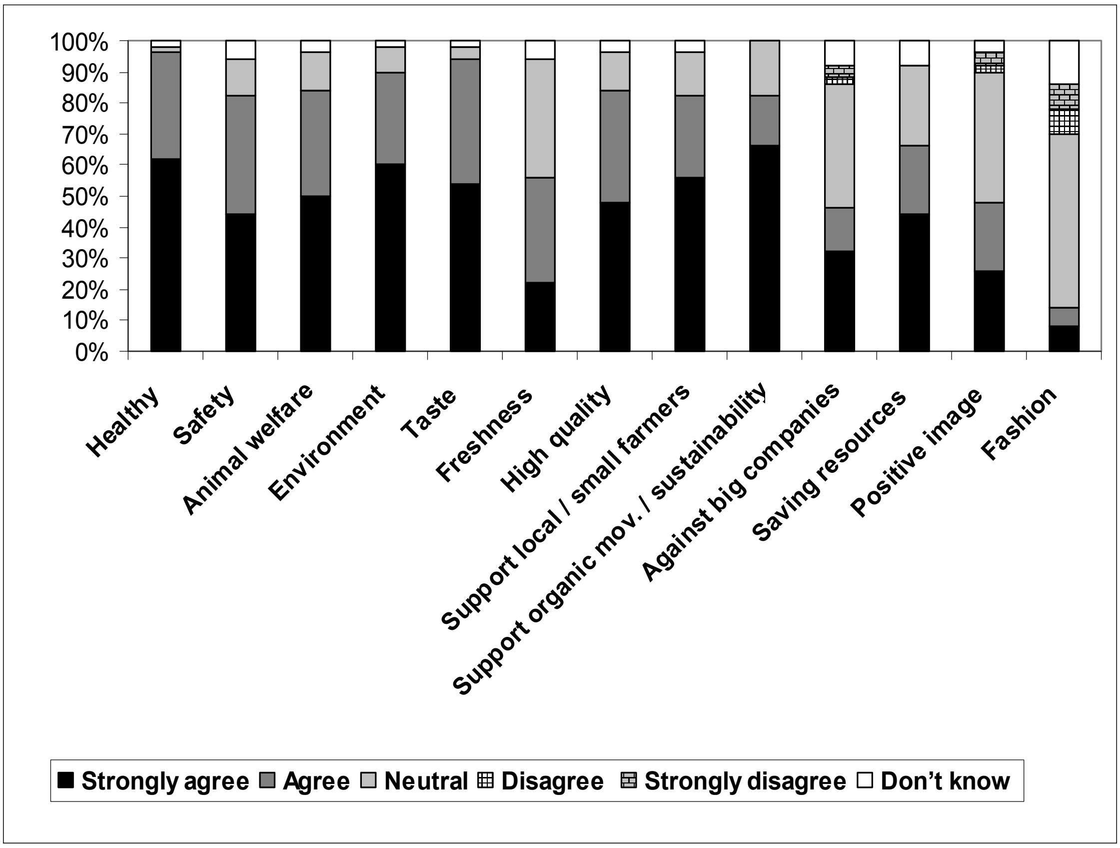
Source: Own Calculations

7.2.6 German consumer's attitude

7.2.6.1 Motivations towards organic products

Fifty German organic consumers are asked to rank the following statements in the Figure 7.39 to describe why they buy organic products. For the majority of the consumers "Health" is the first buying motive with 4.52 average of ranking. (Figure 7.40) 62% of the buyers strongly agree that they buy for their and children's health. Supporting organic movement is the second most important motivations when to decide for buying an organic good with 4.48 ranking.

Figure 7.39: Percentages of the motivation ranking in Germany

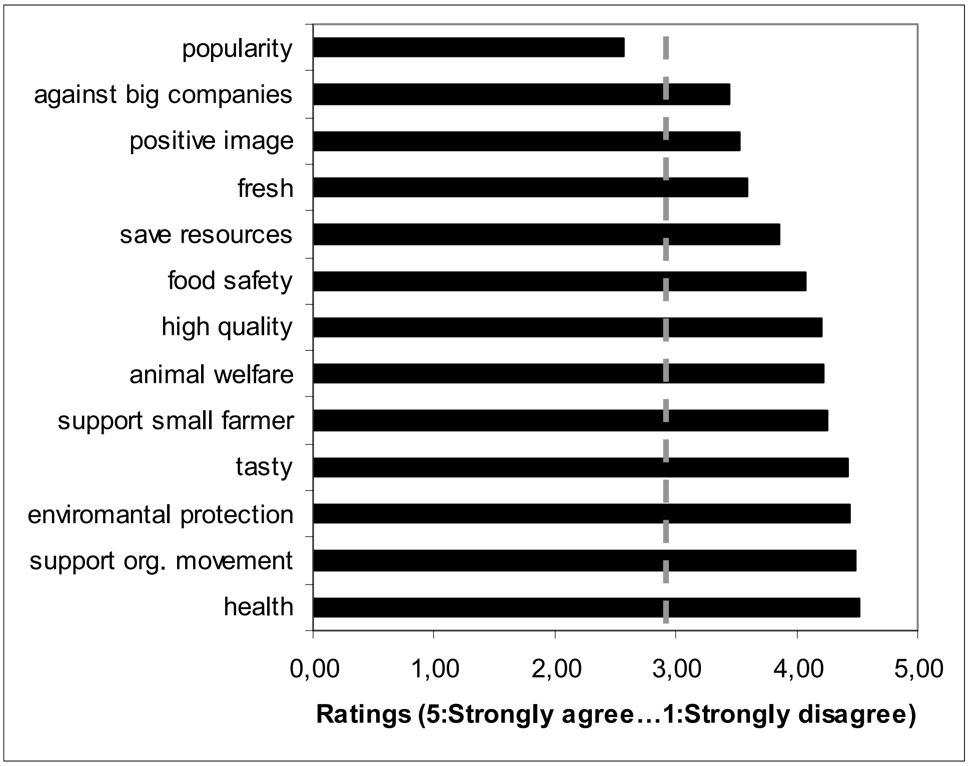


Source: Own Calculations

Again majority (90%) agrees that organic practices are less harmful for environment. So, “environmental protection” with 4.44 points is coming in the third place as a motivation. “Tasty” perception of organic products is accepted by 94% of the respondents and very close to the “environmental protection” motivation with 4.42 ranking. Supporting small and local farmers is the fifth most important motivation for consumers by having 4.26 rates. Moreover, animal welfare motivation has got 4.22 points from organic consumers and half of the respondents strongly agree that animals are treated better on organic farms. Further motivation is the “higher quality” of the organic products and 4.2 is the average think of organic buyers. Organic products are mostly seen as high safety level of guarantee and control. When we test whether “food safety” is a motivation for consumers or not, we saw the rating of 4.08 which carries an importance but listed after seven motivations in average. “Saving resources” for future generation is an attitude close to agree degree with 3.86 points.

In addition, "freshness" and positive image of the organic products are not very effective motivations for Germans with 3.6 and 3.52 ratings. Standing against big multinational companies by buying organic products is not strong motivation and standing at the end of the list with 3.44 ranking. Also, we asked consumers if there is a relationship between purchasing of organic products with the popularity of these goods and the answer is rated as 2.56 which means that we cannot consider as a motivation.

Figure 7.40: Motivations of German organic consumers

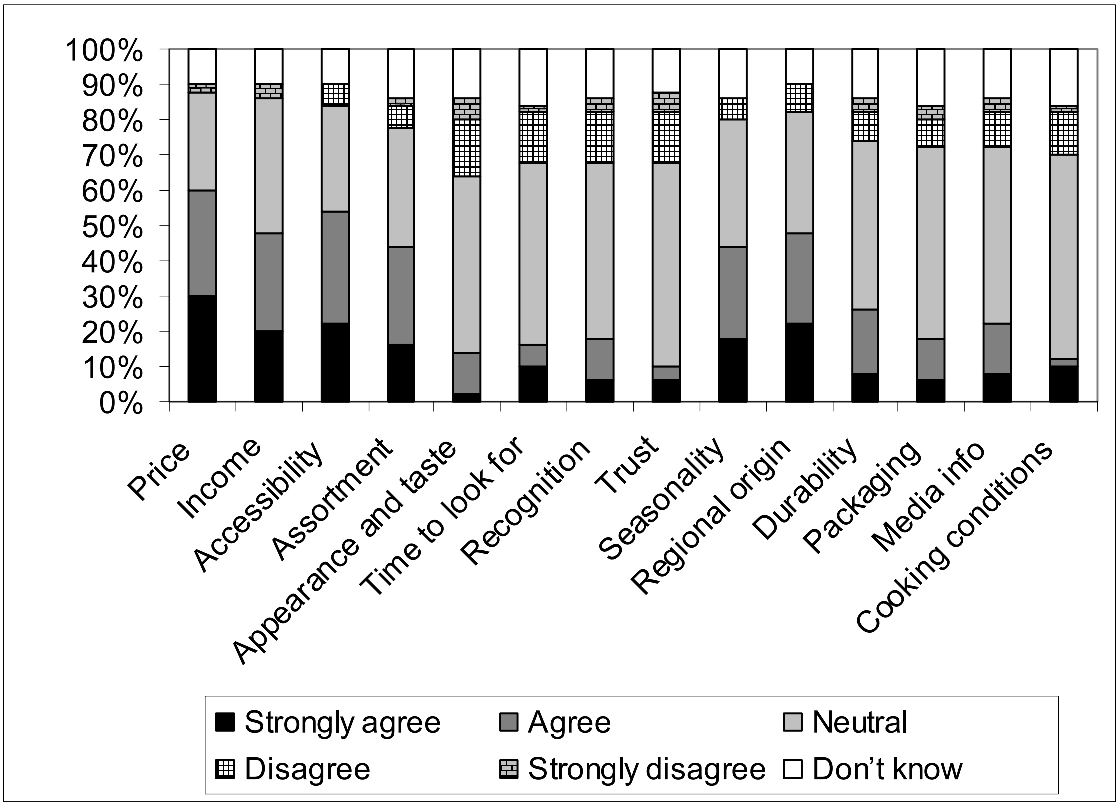


Source: Own Calculations

7.2.6.2 Barriers towards organic products

Barriers towards buying organic products are measured in a way that; in which conditions will effect for more buying of organic products. Results are shown with percentages in the Figure 7.41. First overlook to the table shows that German consumers are mentioning "high price" as a barrier and averagely people agreed on this with 3.96 points on a 5 point likert scale. (Figure 7.42)

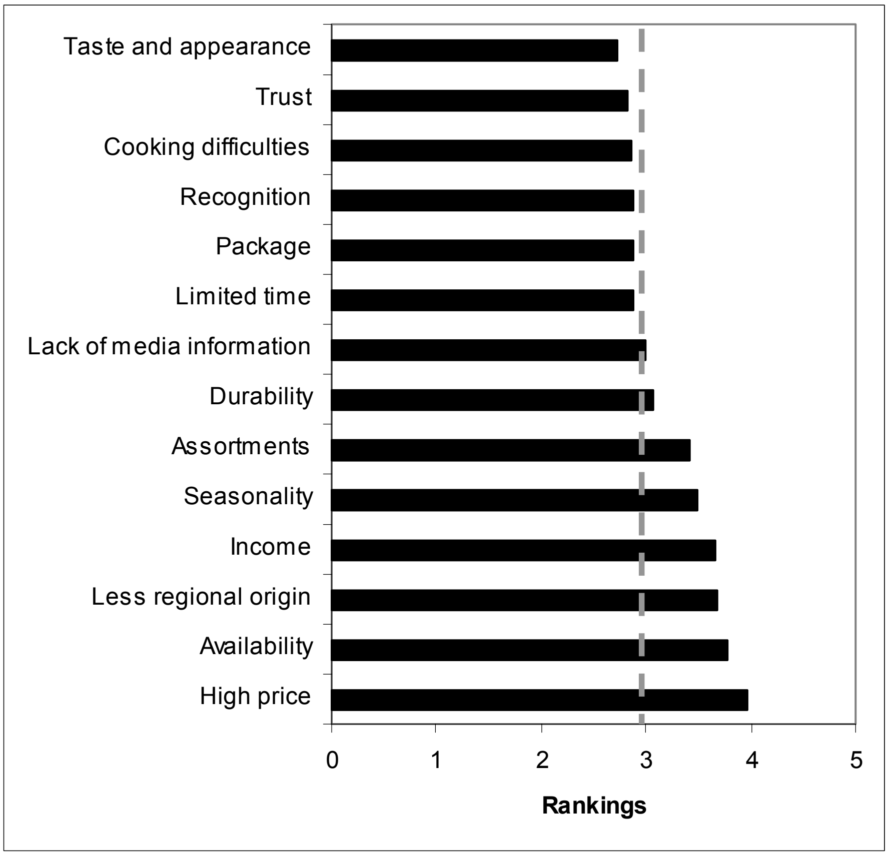
Figure 7.41: Percentages of barrier rating in Germany



Source: Own Calculations

On the other hand; Figure 7.42 shows that there is not really strong barrier in Germany especially over 4 points. Following barrier is the availability of the products and got 3.78 ranking from German consumers. The third considered problem for German consumers is the origin of the products and average 3.69 ranking as a barrier is the "less products from local region". With a slight difference 3.67 points is belonging to the fourth barrier which the "low level income" of the household. A "Less seasonal" product variety in a year is the fifth barrier which got 3.49 rates from the consumers. Final barrier is the "lack of assortments" in the markets and got 3.42 points. Considering the "durability" of the organic varieties and "media information about organic products, Germans are neutral for these characteristics and do not think as real barriers. On the other hand; survey asked people opinions about the other possible problems like; "limited time to look for organics", "packaging material in products", "recognition of labels and products", "cooking difficulties", "trust to organic origin" and "taste and appearance". None of the listed was a barrier for surveyed German consumers in the average and got less than 3 points.

Figure 7.42: Barriers of German organic consumers



Source: Own Calculations

8 Discussion

8.1 Comparison of demographic distribution

Demographic properties of two consumer groups differ in many ways whereas some similarities have found in the results. Looking into age distribution among two countries; big majority of the Turkish organic consumers are young between 25-50 years old and no consumers found over 64 years old. On the contrary; German age groups are distributed more equally than Turkey. Although 25-34 years is the most interested group, all in all practically half of the German consumers are between 35-64 years old. Besides, 10% of the German consumers are over 64 years old. Young people below 25 years old have little interest in both countries and ranging around 12-13%. From the result analysis it is seen that; over 50 years old people have more adapted in German organic market than Turkey. This was an expected result of the matured market, as Germany has a longer experience in organic business than Turkey. In contrast, Turkish organic market is facing an emerging state while gaining new adopters day by day. Further reason can be the types of the surveys; it can be possible that elder people in Turkey were less involved to online surveys than younger consumers.

Gender observation was a surprise for Turkey with equivalent frequency of female and male population. However, 70% of the German consumers are consisting of female which is supported by the previous marketing researches. Therefore, Turkish organic market has is distinctive even when compared to the other European studies and this should be taken into account by market developers and companies to introduce products not only for female.

Household structures have also diverse findings between two countries. 66% of the Turkish organic consumers state that number of people in the household is starting from 3 and rising. Particularly, %39 of the households in Turkey consists of 4 or more people. However, German dominant household structure is composed of 1 or 2 people and shown with 62% of the respondents. Additionally, 59% of the Turkish households have child/children while this amount decrease to 40%. Major children age is starting from 6 years old in Turkey whereas; over 14 years old age group is prevailing among German households. Babies between 0-2 years old are the minority group in both countries. Household sizes and present of children effect to organic consumption can be seen in Turkey but not clearly in Germany. Apparently, Turkish organic consumption is present among families while singles and couples are dominating in Germany.

Both in Turkey and in Germany, education level of organic consumers are generally high. However there are slight differences such as; 88% of the organic consumers in Turkey have university education whereas only 52% of the Germans are graduated from university. Another point is that, rest of the Turkish buyers have high school diploma; but, in Germany 20%have high school and 12% have primary or secondary school education. Owing to the matured market structure of Germany; majority of the population are well informed by the media and experience organic foods. On the other side, Turkey is just getting known organic foods and most interested people are still the educated people of urban.

Socio-economic structures of two consumer groups are compared by employment status and income level. Income questions were fully answered by 82% of the German respondents; on the other hand, all Turkish respondents were open to give information. Although there was such a data collection difficulty in Germany, ruling group in both countries is full time working people belonging to middle or low-middle income communities. Income group results were surprising for Turkey owing to the high price margins between conventional products. However, students, part-time workers and low income groups were higher among German respondents. Moreover, percentages of retired people were nearly same. Therefore, Turkish domestic market is expending and many socio-economic groups can now afford organic products; although, in the former years these were only premium products for high income groups. Naturally, Germany with structured market and various price alternatives is attractive for all social groups as expected.

8.2 Comparison of buying behaviour

Buying frequency of two populations was resulted as expected from the hypothesis. Therefore, big majority of the German sample, almost three fourths, are regular consumers who purchase every week with changing frequencies. Additionally, people who buy per month or 2-3 times in a month are 20% of the respondents. In contrast, Turkish consumers buying frequency is less than Germans. Weekly shopping is declared by 33% of the sample and these regular consumers are dominantly buying once or twice per week. Moreover, 40% consumes monthly with different frequencies and 27% of the samples even buy less than monthly. Therefore; 67% of the Turkish sample can be described as occasional consumers where as only 26% of the German respondents buy occasionally.

Results of the "first purchase time" do not differ from former consequence as it is highly correlated to buying frequency. German consumers have much more experience with organic products. 66% of the German sample decided to buy products coming from organic farming more than five years ago. On the other hand only 27% of the Turkish consumers have such a long experience. Almost half of the Turkish sample have been purchasing in the last five years but dominantly last 3 years. Moreover, there are consumers who have met in the last year or even in the last six months. On the contrary, rest of the German population (32%) has been buying in the last five years but not recently like in the last year or months as in Turkey.

All in all, both survey results are supported by the positive correlation between "buying frequency" and "first purchase time". It is obvious that, regular consumers who have been buying organic products for a long time have weekly buying frequency than new adapted occasional consumers which buys monthly or less. Particularly, this is the only common finding when compared to two populations buying behaviour. In the main, German consumers are more adopted to purchase than Turkish consumers. This can be again explained with market structure characteristic such as; longer experiences of the domestic market with organic products, well informed consumers by the marketers and government and as well as the product and price varieties in various sale channels more than doubled the number of regular consumers in Germany.

8.3 Comparison of shopping place preferences

Turkish and German consumers were examined due to their shopping place preferences according to today's and future choices. Turkish consumers have difficulties in finding organic products in the market, whereas German sale channels are much better organized during the last years and even the organic shops have supermarket chains all over the country. Owing to the different market structure preferences are very diverse.

First of all; most preferred place in Turkey is supermarket which is marked by 78% of the respondents. This was an expected result as most of the products are sold by conventional retail chains and only a few organic products are available in other sale channels. On the other side, Germans choice was organic supermarkets which have obtained big success in the market and got trust from organic consumers with their positive image. Second choice in Turkey was direct shopping from farm and organic shops but not even chosen by half of the consumers. In contrary, Germans second preference was supermarket and followed by bazaars which were marked by 52% and 48% of the consumers. Additionally farms, discounts and specialized shops are less preferred by Germans when buying organic products. Likewise, Turkish consumers do not prefer specialized shops and discounts as much but additionally bazaar is only preferred by quarter of the respondents. However, there is fact that only two bazaars is known in Turkey for organic products and also discounts and specialized shops do not offer organic varieties except organic bread which can be find in special bakeries. So, people have only limited choices in Turkey, that's why supermarkets have the highest rate among consumers.

Future demands can give an idea for market actors and government to decide on which sale channels need to be improved. For instance; discounts have the highest percentage increase among Turkish consumers and this is followed by specialized shops, bazaars and organic shops. Nevertheless, overall rating indicates that supermarkets will be again the first choice of Turkish organic consumers with decreasing demand. Due to peoples shopping habits and place preferences it is normal that Turkish consumers will not easily abandon retail chains and desist the offers, sales and instalment chances. In spite of the supermarket sovereignty in the market, more organic shops should be open in

Turkey due to their high demand from 53% of the consumers and closely coming in the second place on the most preferred future list. Moreover, bazaar and farm are sharing the third place and followed by specialized shops and discounts.

On the other hand, German consumers are generally satisfied with present shopping places and do not have so much demand differences. Organic shops, supermarkets and bazaar maintain their top three places in the list. Fourth place is replaced to discounts and farm is sharing the fifth place with specialized shops which have increased their demand in Germany like discounts. Germany with well organized market channels is not affecting consumers' future demands only small percentage differences observed in the analyses.

Table 8.1: Comparison of ranking in shopping place preferences

	Turkey		Germany	
	Today	**Future**	**Today**	**Future**
Supermarket	1	1	2	2
Organic shops	3	2	1	1
Bazaar	4	3	3	3
Farm	2	3	4	5
Discount	6	5	5	4
Specialized shops	5	4	6	5

Source: Own Calculations

Table 8.1 illustrates how demands are changing in the preference list of Turkey and Germany. Common expected demand is the increase in discounts and specialized shops in both countries. Both in Germany and in Turkey, supermarkets are maintaining their place. On the other hand; there will be demand decrease in direct marketing from farms in again both countries. Only difference on the list except the ordering is the demand increase of the organic shops and bazaars whish are particularly remain same for Germany.

8.4 Comparison of product preferences

Fourteen product groups are asked consumers to identify their demand of today and future. One thing to be considered when comparing two countries is the differences in the domestic markets. Therefore, saturated German market versus unsaturated Turkish market has different demands in organic food consumption but also some similarities have found. (Table 8.2)

Table 8.2: List of product choices and demands

PRODUCTS	Turkey		Germany	
	Today	Future	Today	Future
Fresh vegetables	1*, 78%**	1*, 81%**	1*,94%**	1*, 98%**
Fresh fruits	1*, 78%**	2*,80%**	1*, 94%**	2*, 94%**
Meat and meat products	10*, 17%**	3*, 75%**	7*, 52%**	6*, 66%**
Milk and milk products	4*, 48%**	3*,75%**	2*, 78%**	3*, 84%**
Cereals	3*, %56**	5*, 70%**	4*, 68%**	3*, 84%**
Bakery products	8*, 30%**	5*, 70%**	6*, 62%**	7*, 64%**
Pulses	6*, 41%**	4*, 72%**	9*, 42%**	8*, 56%**
Baby products	12*,13%**	10*, 53%**	12*, 16%**	12, 20%**
Dried fruits and nuts	3*, 61%**	8*, 64%**	8*, 44%**	9*, 50%**
Beverages	7*, 34%**	5*, 70%**	6*, 62%**	7*, 64%**
Oil	5*, 45%**	9*, 63%**	5*, 66%**	5*, 72%**
Sugar products	9*, 27%**	6*, 67%**	10*, 38%**	10*, 44%**
Herbs and Spices	4*, 48%**	4*, 72%**	3*, 70%**	4*, 78%**
Textile products	11*,16%**	7*, 66%**	11*, 22%**	11*, 34%**

* Ranking on the list, ** Percentage of demand

Source: Own Calculations

To begin with, fresh fruits and vegetables are the most demanded products not only in Turkey but also in Germany. Future situation of these groups remains stable but a little more observed increase in fresh vegetables. However, it is surprising to see that Turkish market is also getting saturated in fresh fruits and vegetable groups as in Germany. Although these products are new in the market, it can be explained that conventional products have satisfying effect on consumers by blocking the future demand increase. Third most demanded group for German households is the milk and milk products and will maintain its place in the future but with increasing demand. Situation for Turkey is quite different in this case and dried fruits and vegetables are consumed in the third place. Because dried products are the major output and export in Turkey, market is satiated and future demand increase is very low. On the other hand, milk and meat product groups are expecting to be in the third demanded place in the following days.

Following product groups are listed in the Table 8.2 for Germany and Turkey. While small grade variations occur in German list, Turkey has great new ordering. Therefore, some products are in Turkey has a high demand only because of availability such as dried fruits and vegetables but particularly demanded as 8th product in the following days. On the other hand, more than half of the consumers are demanding all product groups in Turkey and above 70% is willing to buy nine different sorts but are not able to buy today. Especially meat products are demanded buy third fourths of the consumers, whereas only 17% can afford to buy. In contrast Germans do not have so high meat demand, as vegetarian nutrition is more common than Turkey.

Cereals are expecting more consumers in both countries; but priority of cereal consumption is expected to decrease in Turkey, whereas an increase is observed for Germany. Bakery products demand will be more than doubled in Turkey, on the other hand Germany do not have significant demand change. Moreover, pulses have raising their popularity in both countries but especially in Turkey as they have high importance in Turkish traditional cuisine and eating habits. Further point is the beverage sector in Turkey which is expected to be doubled in the following years if there will be enough products in the market. In contrast, German organic beverage sector is matured and will not show expressive demand changes in forthcoming days.

Herbs and spices are demanded by both countries but mostly from Turkish consumers and will be in the fourth place in most demanded lists of Turkey and Germany. Organic oil products are also increasing their customers but their place on the most demanded list remains at 5 for Germany and decrease to 9 for Turkey. Although, organic oil has limited availability with only olive oil variety these small increase can be an indicator that Turkish consumers are also satisfied with conventional oil products especially

Aegean region has good quality and cheap olive production in huge quantities. Furthermore, lack of organic sugar products is problem in Turkey and will be much more demanded but not in Germany.

Turkish consumers are aware of organic cotton production in Turkey and they want to see more organic textile in the market. Today only 16% of the respondents can find but 66% of the Turkish sample willing to buy goods from organic cotton. Additionally, German consumers have increasing demand on textile but not as much as Turkish sample. Last product group on both countries is organic baby products which are depending on presence of baby in the household. As both samples were containing fewer numbers of respondents with baby results are not unpredictable. More significant issue is the increase of demand from 13% to 53% for Turkey. Half of the respondents are willing to buy organic goods for their coming baby or grandchildren.

Overall, marketer should examine the country very well before introducing a product category. Turkey can be an emerging market, but this does not mean that all product groups are expecting to be sold. Especially some sorts of goods have already saturated market like fresh and dried fruits and vegetables or conventional products are also charming. On the contrary, meat products have consumers but no producers in domestic market. Moreover, barriers such as prices, availability and variety can be a problem for Turkish consumers to buy other product categories like; herbs and spices, pulses, beverages, bakery, cereals, sugar products, textile and baby products. On the other side, Germany is a saturated market with all categories and will be difficult to introduce new product to the market. Cereals, pulses and meat products can be important goods to gain new consumers.

8.5 Comparison of organic food description and label knowledge

Organic consumers in Turkey and Germany have generally common opinions about defining organic products except certification. Organic products are described as healthy and additionally believed to contain higher nutritional value than conventional diet. Moreover, organic farming techniques are perceive dominantly according to both nations as; maintaining harmony with nature while applying animal and environmentally friendly methods by using less chemicals in the soil and on the products. Additionally, both Germans and Turkish people trust that organic products do not contain GMO varieties. (Table 8.3)

On the other hand, certification is a critical issue for Germans. Generally, people do not really know if an organic product has to be certified before reaching to a consumer or not. Only 46 percent of the respondents were sure about certification and another quarter of the sample only agree to this statement. In contrast, very high ratings come from Turkish consumers and more than third fourths strongly agree and the almost the rest agree that certification is must in organic farming. Certification knowledge is also the degree of frauds in the market. If more consumers are aware of labels on the products than less free-rider can occur. For instance, some villagers in the street bazaars in Turkey claim that their goods are organic and they advertise with signboards illegally. But when consumer asks about certification, they cannot provide a label or brand. Therefore, information networks carry vital importance in marking and must be fortify.

Table 8.3: Comparison of overall ratings in organic food description

	Turkey	Germany
Healthy	4.6	4.4
High Nutritional Value	4.3	4.2
Products are grown in harmony with nature	4.3	4.4
Free from chemical pesticides and fertilizers	4.4	4.3
Produced with environmentally / animal friendly techniques	4.4	4.4
Free from GMO	4.4	4.4
Products must be certified	4.7	3.6

(5: Strongly agree, 4: Agree, 3: Neutral, 2: Disagree, 1: Strongly disagree)

Source: Own Calculations

Further measurement is the label knowledge comparison between Turkey and Germany. Labels provide consumers to recognise and separate organic products in the sale channels and people know what they are paying for. By looking at the label recognition that is introduced by governments; "Bio-Siegel" has a great success and 94% of the German respondents have seen before and further 90% know what exactly it is. On contrary, Turkish governmental logo is not well introduced to the market and got recognition from 59% of the sample. Moreover, an imaginary logo that is designed by the researcher was shown to the consumers and 45% of Turkish organic buyers thought that they have seen it before and 44% declared that it belongs to organic products. On the other hand, Germans were more successful to distinguish the imaginary logo and only quarter of the sample thought that it is organic. Another test was the third logo in both countries where consumers are given a label of an association that could be mixed with organic farming. "Fair Trade" in Germany got a high recognition from the third fourths of the sample and a quarter of consumers confused that it represents organic goods. Likewise, "TEMA" association got a high recognition from the majority and again nearly quarter of the organic buyers thought that "TEMA" is an organic label.

All in all, government should advertise organic label better in Turkey, whereas Bio-Siegel has already accepted by German with good marketing initiatives. Therefore, Turkish consumers are two times more exposed to fake logos that can be present in the market. Additionally, quarter of consumers in both countries can confuse other environmental and/or food associations with organic labels.

8.6 Comparison of consumer motivations and barriers

Consumers' attitude towards organic products is tested on likert scale by giving statements to identify dominant motivations and barriers in Turkey and Germany. Results found out that, health is the common major motivation both for Turkish and German organic consumers whereas, high price and lack of availability is the main barriers for both consumer groups. Although, the ordering of these attitudes is same on the list, ratings are differentiating according to the countries. (Table 8.4 and Table 8.5)

To begin with motivations, Turkish consumers are highly effected with health consciousness, saving resources for future generations and supporting organic movement and sustainability. On the Germany side, again health is the first motivation and supporting organic movement and sustainability comes next and protecting environment is the third on the list which is directly followed by taste motive with slight difference. In contrast, good taste and environmental friendly practices of organic farming are the 6th and 7th motives for Turkish people. Likewise, Turkish second motive "saving resources for future" is very unimportant motivation factor for Germany. In spite of the distinct list ordering, "Supporting organic movement and sustainability" and "high quality" motives have got the almost same average rating both in Germany and Turkey.

Table 8.4: Comparison of motivations

Turkey		Motivations	Germany	
List order	Average rating		Average rating	List order
1	4.64	**Health**	4.52	1
2	4.61	**Saving resources**	3.86	9
3	4.50	**Support organic movement / sustainability**	4.48	2
4	4.36	**Food safety**	4.08	8
5	4.27	**High quality**	4.20	7
6	4.23	**Taste**	4.42	4
7	4.16	**Environment**	4.44	3
8	4.13	**Support local / small farmers**	4.26	5
9	4.00	**Animal welfare**	4.22	6
10	3.92	**Freshness**	3.60	10
11	3.91	**Positive image**	3.53	11
12	3.67	**Against big companies**	3.44	12
13	2.63	**Fashion**	2.56	13

(5: Strongly agree, 4: Agree, 3: Neutral, 2: Disagree, 1: Strongly disagree)

Source: Own Calculations

Moreover, food safety is a critical issue in Turkey's food sector and got the 4th place as a motive, but Germans do not facing such problems nowadays so did not give a high ranking. Furthermore, "supporting local and small farmers" and respecting "animal welfare" by organic purchasing are higher motivation factors for Germans. On the other hand, last 4 motives are same in both countries with diverse average ratings except the final statement which means that neither Turkish nor German organic consumers are affected by popularity of the products and they do not buy for its fashionable property.

Table 8.5 summaries the barriers in Turkey and Germany. Fourteen statements are given to the consumers and the average ratings over 3 are considered as a barrier in the research. According to the analyses, Turkish consumers have given over 3 points to all of the given expressions, whereas only 6 barriers are reported for Germany evaluated between 3.42 and 3.96. Apparently, no strong barrier is reported from Germany like Turkey. Dominated barriers are price and availability of organic products for both samples; however, these barriers are more efficient on the Turkish market due to the high price differences between conventional products and lack of sale channels.

Moreover, Turkish organic buyers cannot find every sort of product organically and issued as third barrier; on the German side, lack of varieties is also a barrier but with a minor importance. Additionally, both consumer groups nearly give the same rating to "lack regional origin" in organic products which is listed as 3rd barrier for Germans and 9th for Turkish respondents. High importance of this barrier can be the reaction of the consumers in Germany to huge amount of exports in organic agriculture which leads to longer food miles and its conflicting results with organic principles. Moreover, German consumers' high desire to support local farmers can be the consequence of this barrier rating.

Next similar barrier; "lack of products from season" graded in the 5th place in both sides, but effect on Turkish consumers is more strength. This effect could be correlated with the problem of "availability" in Turkish domestic market as most of the seasonal products are exported to other countries. The final common barrier is the insufficient "income level" of the organic buyers which is ranked 4th in Germany and 6th in Turkey, whereas again have higher degree of ranking in Turkish market. Moreover, demographic characteristics of the population state that sample in the both surveys have dominantly middle or low-middle income levels; therefore, purchase power is limited in both countries but particularly in Turkey due to the high prices of organic products.

Table 8.5: Comparison of barriers

Turkey		Barriers	Germany	
List order	Average rating		Average rating	List order
1	4.56	**Price**	3.96	1
2	4.45	**Availability**	3.78	2
3	4.39	**Assortment**	3.42	6
4	4.06	**Lack of media information**	< 3	-
5	4.06	**Seasonality**	3.49	5
6	4.05	**Income**	3.67	4
7	3.93	**Durability**	< 3	-
8	3.69	**Trust**	< 3	-
9	3.63	**Regional origin**	3.69	3
10	3.43	**Packaging**	< 3	-
11	3.31	**Time to look for**	< 3	-
12	3.30	**Recognition**	< 3	-
13	3.27	**Appearance and taste**	< 3	-
14	3.06	**Cooking conditions**	< 3	-

(5: Strongly agree, 4: Agree, 3: Neutral, 2: Disagree, 1: Strongly disagree)

(<3 values are not considered as a barrier)

Source: Own Calculations

Further barriers of Turkey are not reported from German consumers. Especially, “lack of media information” is on the 4th place and one of the week points of the Turkish market. In contrast, Germany have o good information network between producers and consumers that is strength by governmental and private associations.

On the whole, Turkey with a new established domestic market needs more experience and has to build organic farming schemes and programs to cope with barriers listed above. In contrast, Germany with well-designed strategies is removing the barriers that are mentioned in the previous consumer studies like; problems due to the taste and appearance, durability, trust to the organic origin and recognition of the products and labels.

9 Conclusion

In this paper, organic consumption is examined by the help of questionnaires directed to organic buyers in Turkey and Germany. Similarities and differences are summarized by comparison method in the discussion part. In spite of the limited respondent number, this research can give an overview about consumers' attitude and behaviour towards organic products.

Socio-demographic analyses in both countries indicate that, organic consumers in Turkey are belonging to younger age groups, whereas, Germany has also adopted elder consumers to organic market. Turkish organic sector needs more information network and better infrastructure to reach more age groups to convince people for changing their shopping habits. Generally, female is dominant in Germany, on the other side Turkey has achieved a success by reaching also the male in the market. Marketers should pay attention to the household structures in both countries since, German organic consumers are generally singles or couples but, Turkish households are particularly consist of 4 and more people and with children. Moreover, some similarities have found between two nations that, generally organic consumers have high education levels, a full-time job and belonging to middle income groups.

Furthermore, conventional retail chains are the most preferred place for organic buyers in Turkey, due to the lack of other sale channels. In contrast, Germans mostly prefer organic shops but also supermarket chains still have a significant preference rate. Future expectations of Turkish consumers are to find more organic shops in there area and to see more organic products in bazaars, discounts and specialized shops. However, supermarkets maintain their first place on the future preference list as they have conjugated with Turkish lifestyle in every socio-group. On the Germany side, place preferences is not expected to change in the future except, discounts is likely to have more demand than farms.

Another point in this paper studies the product preferences in both countries. Fresh fruits and vegetables are the main nutritional groups in Turkish and German diet. Future demands of these products are also expecting to be the same. Owing to the lack of product assortment in Turkish market, respondents have high future demands on each product groups. Especially, meat and milk products can be the new future of domestic bazaar, whereas dried fruits and vegetables already have a matured market. Moreover, Turkish organic market should be fortified with beverages, pulses, sweets and bakery products. Actually, baby products need to be introduced to the Turkish market due to the high demand from the half of consumers. In contrast, Germany with several organic products is not expecting big changes in the future. Particularly, meat and milk products, cereals and pulses can find more consumers in future.

The following research is done to measure the knowledge about organic products, production methods and labels. Majority of the Turkish and German respondents thought that organic food is healthy and contain high nutritional value. Moreover both of them agree on that, organic practices are in harmony with nature, environment and animals are getting respect from organic farmers who do not use chemicals and GMOs in farming. On the other hand, certification as must of the organic production is not well known in Germany, but Turkish consumers are aware of this. However, national logo is better recognised by German consumers and Turkish consumers have lack of knowledge in labels and they are more exposed to fake logos in the market. Therefore, certification as a must should be taught to German consumers and Turkish consumers should be more informed about the labels especially originating from the government.

Last step of this paper quests the consumer attitude by looking at motivations and barriers towards organic consumption. Health is the common first motivation and supporting organic movement and sustainability has got the same ratings in each surveys. Moreover, Turkish people are highly motivated for saving resources for future generations, food safety problems and effected by the taste of the organic products. On the other hand, Germans are buying because they want to save environment, support small and local farmers and similarly they like the taste of the organic products. In addition, high price and less availability are the major barriers for two respondent groups. However, there is fact that degree of the barriers is very highly reported in Turkey due to the new establishment of the domestic market and 14 given statements in the survey is stated as barrier. In contrast, Germany has only declared 6 barriers except from the first two list follows as; lack of regional products, insufficient income, lack of seasonal products and assortments. In contrast, lack of media information was on the top 6 barrier list of Turkey instead of regional origin. Additionally, Turkey has 8 more barriers which can be handled within organic programs and education seasons by government, associations or private sector.

When we look at the whole picture; two market structures, matured and emerging, with different and similar problems from the consumer side is drawn in this research. Turkey need more research and development activities on organic agriculture combined with subsidies to enlarge the share of organic area and number of producers. Therefore, increase in production can reduce same barriers like, high prices, availability and accessibility on the market. Especially, production aims of Turkish farmers should be directed to domestic bazaar and national consumers' preferences should be more taken into account rather than export market. Similarly, both countries should inform more consumers about certification and true labels. Additionally, Germany should make harmonization studies on private labels for better consumer protection and reduce confusions. Another important thing for German marketers is the raising awareness of consumers towards regional products to support their area and farmers. If more organic products can carry an indicator of the region, sale is expecting to increase.

In conclusion, further research with an expanded survey and increased number of respondents can report better results. Apparently, Turkey should make more consumer studies research and carefully examine the market barriers before implementing a policy, whereas Germany should follow up the new trends with continuous updated studies on consumer side for further policy developments.

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11 Appendix

11.1 Questionnaire in English

Questionnaire (Only for the organic product consumers)

I am M.Sc student from University of Hohenheim conducting a survey on organic product consumers for my thesis in "Organic Food Chain Management". I would be pleased if you participate in my survey. It will take about 10 minutes.

Q1. Who is generally responsible in your household for the food shopping?

1. **Me**
2. **Another person**
3. **Me and another person together**

Q2. How often do you buy organic products?

1. **5-7 times in a week**
2. **1-2 times in a week**
3. **2-3 times in a month**
4. **Once in a month**
5. **Less than once in a month**

Q3. Approximately when did you buy your first organic product?

1. **More than 5 years**
2. **3- 5 years**
3. **1-3 years**
4. **Last year**
5. **Last 6 months**

Q4. How would you describe organic products?

	Strongly agree	Agree	Neutral	Disagree	Strongly disagree	Don’t Know
Healthy						
High Nutritional Value						
Products are grown in harmony with nature						
Free from chemical pesticides and fertilizers						
Produced with environmentally / animal friendly techniques						
Free from Genetically modified organisms (GMO)						
All products coming from organic agriculture are certified						

Q5. Where do you buy organic foods today?

1. **Supermarket chains**
2. **Discount markets**
3. **Organic shops**
4. **Open/Street Market**
5. **Specialized Shops (Bakery, Butcher…)**
6. **Farm shop**

Q6. Which organic shopping places you like to see more in the future?

1. **Supermarket chains**
2. **Discount markets**
3. **Organic shops**
4. **Open/Street Market**
5. **Specialized Shops (Bakery, Butcher…)**
6. **Farm shop**

Q7. I buy organic products, because…

	Strongly agree	Agree	Neutral	Disagree	Strongly disagree	Don't Know
Healthy for me and my family						
They have high safety level of guarantee and control						
Animals are treated better						
Environment is less polluted						
Taste good						
Fresher than conventional food						
High quality						
Support local / small farmers						
Support organic movement / sustainability						
Not willing to support big multinational companies						
Saving resources for next generations						
It has positive image						
It is fashion to consume						

Additional remarks:

Q8. I would like to buy more organic products if…

	Strongly agree	Agree	Neutral	Disagree	Strongly disagree	Don't Know
More cheap prices						
More income						
More accessibility in the market						
More assortment availability						
Better appearance and taste						
More time to look for organic food						
More recognizable label and products						
More trust to origin/production						
More seasonal products						
More products from my local region						
Longer shelf life						
Less packing material						
More information in the media						
Better/shorter cooking conditions						

Additional remarks:

Q9. Please select the product group(s) from the table that you consume today.

	Today consumption
Fresh vegetables	
Fresh fruits	
Meat and meat products	
Milk and milk products	
Cereals	
Bread and bakery products	
Pulses	
Baby products	
Dried fruits and nuts	
Beverages	
Oil	
Sugar Products	
Herbs and Spices	
Textile products	

Q10. Which product groups in the table you would like to consume in the future

	Future Consumption
Fresh vegetables	
Fresh fruits	
Meat and meat products	
Milk and milk products	
Cereals	
Bread and bakery products	
Pulses	
Baby products	
Dried fruits and nuts	
Beverages	
Oil	
Sugar Products	
Herbs and Spices	
Textile products	

Q11. Could you recognize any of these labels? Do you have an idea if these labels belong to organic products?

(This question is prepared according to Turkey and Germany.

The fist logos represent two countries' governmental organic guarantee

The second logo is the imaginary and used in both surveys only with difference in the translation of "Organic Agriculture" in German and Turkish languages.

Third logos are the most closed associations to organic farming in each country that consumer may mix with organic farming.)

Labels		Do you know it?	Does it represent organic products?
Used in Germany's Survey	Used in Turkey's Survey	Yes… ☐ No… ☐	Yes… ☐ No… ☐ No idea… ☐
Used in Germany's Survey	Used in Turkey's Survey	Yes… ☐ No… ☐	Yes… ☐ No… ☐ No idea… ☐
Used in Germany's Survey	Used in Turkey's Survey	Yes… ☐ No… ☐	Yes… ☐ No… ☐ No idea… ☐

General Information for Statistical Use

Q12. How old are you?

1. **0-24 Years**
2. **25-34 Years**
3. **35-50 Years**
4. **50-64 Years**
5. **More than 64 Years**

Q13. Sex:

1. **Female**
2. **Male**

Q14. How many people live in your household?

1. **Only me**
2. **2**
3. **3**
4. **4 and more**

Q15. Are there any children living in your household?

Yes… ☐ **No….** ☐

If yes, what is the age of the children? Please sign for every child.

1. **0-2 years…**
2. **2-6 years…**
3. **6-14 years…**
4. **More than 14 years…**

Q16. What is the highest education level you have completed?

(This question is revised according to education levels in Germany's survey and directly translated in Turkey's survey)

1. **No education**
2. **Primary education**
3. **Secondary education**
4. **High School**
5. **University education and higher**

Q17. What is your employment status?

1. **Working fulltime**
2. **Working halftime**
3. **Retired**
4. **Working at home**
5. **Student**
6. **Unemployed**

Q18. In what range is your approximate maximum monthly net-household income?

(This question is revised according to currency and income levels in Turkey's survey and directly translated in Germany's survey)

1. **up to 750€**
2. **from 750€ up to 1500€**
3. **from 1500€ up to 2500€**
4. **from 2500€ up to 4000€**
5. **4000€ and more**

Thank You for your participation!

11.2 Questionnaire in Turkish

<u>Anket Formu (Sadece Organik Ürün Tüketicileri için)</u>

Aşağıdaki anket organik ürün tüketicilerine yönelik olarak Almanya Hohenheim Üniversitesi "Organic Food Chain Management" Yüksek Lisans programı bitirme tezinin bir bölümüdür. Anket yaklaşık 10 dakika sürmektedir. Değerli zamanınızı ayırdığınız için teşekkür ederim.

1. Genellikle evinizde gıda alışverişlerinden kim sorumludur?

☐ **Ben**

☐ **Bir başkası**

☐ **Ben ve bir başkası birlikte**

2. Yaklaşık olarak ne kadar sıklıkla organik ürün alırsınız?

☐ **Haftada 5–7 kere**

☐ **Haftada 1–2 kere**

☐ **Ayda 2–3 kere**

☐ **Ayda bir**

☐ **Ayda birden daha az**

3. Tahminen ilk defa organik ürün tüketmeye başlamanız ne kadar zaman önceydi?

☐ **5 yıldan fazla**

☐ **3–5 yıl arası**

☐ **1–3 yıl arası**

☐ **Geçen sene**

☐ **Son 6 ay içinde**

4. Organik ürünleri aşağıdaki tabloya göre tanımlar mısınız?

	Tamamen katılıyorum	Katılıyorum	Kararsız	Katılmıyorum	Kesinlikle katılmıyorum	Bilgim yok
Sağlıya Yaralı						
Besleyici						
Doğal yollarla üretilir						
Kimyasal ilaçlar ve gübreler içermez						
Çevreye ve hayvanlara duyarlı üretim yapılır						
Genleri değiştirilmiş organizmalar içermez						
Tüm organik ürünler sertifikalanmak zorundadır						

5. Organik ürünleri genelde nerelerden alırsınız? (Birden çok işaretleyebilirsiniz)

- ☐ **Süpermarket zincirleri (Migros, Tansaş, Kipa…)**
- ☐ **Ucuzluk mağazaları (Şok, Bim, Dia…)**
- ☐ **Organik/Doğal ürün mağazaları**
- ☐ **Semt/Halk pazarı**
- ☐ **Özelleşmiş dükkânlar (Manav, Kasap, Şarküteri, Fırın)**
- ☐ **Çiftlik / Bahçe**

6. İleriki yıllarda en çok nerelerden organik ürün almak istersiniz?
(Birden çok işaretleyebilirsiniz)

- ☐ **Süpermarket zincirleri (Migros, Tansaş, Kipa…)**
- ☐ **Ucuzluk mağazaları (Şok, Bim, Dia…)**
- ☐ **Organik/Doğal ürün mağazaları**
- ☐ **Semt/Halk pazarı**
- ☐ **Özelleşmiş dükkânlar (Manav, Kasap, Şarküteri, Fırın)**
- ☐ **Çiftlik / Bahçe**

7. Organik gıda tüketiyorum, ÇÜNKÜ…

(Lütfen her biri için seçimizi yapınız, bilginiz yok ise en sonu işaretleyiniz)

	Tamamen katılıyorum	Katılıyorum	Kararsız	Katılmıyorum	Kesinlikle katılmıyorum	Bilgim yok
Benim ve/veya ailem için sağlıklı						
Gıda güvenliğimi garanti ediyor						
Üretimde hayvanlara daha iyi muamele yapılıyor						
Üretimde çevreyi daha az kirletiyor						
Daha lezzetli buluyorum						
Daha taze buluyorum						
Daha kaliteli buluyorum						
Yerel/Küçük çiftçiye destek vermek istiyorum						
Organik Tarıma ve Sürdürülebilirliğe destek vermek istiyorum						
Uluslararası konvansiyonel gıda şirketlerine karşıyım						
İleriki nesiller için doğal kaynakları korumak istiyorum						
Olumlu imajı var						
Çok moda buluyorum						

Eklemek İstedikleriniz:

8. Organik ürünleri daha fazla alırdım, EĞER…

(Lütfen her biri için seçimizi yapınız, bilginiz yok ise en sonu işaretleyiniz)

	Tamamen katılıyorum	Katılıyorum	Kararsız	Katılmıyorum	Kesinlikle katılmıyorum	Bilgim yok
Daha ucuz olsalardı						
Daha yüksek gelirim olsa						
Piyasada daha çok bulabilsem						
Daha çok ürün çeşitliliği olsa						
Daha iyi görünümlü ve lezzetli olsalar						
Organik ürün aramaya daha çok vaktim olsa						
Organik ürünleri ve logoları daha iyi tanıyabilsem						
Gerçekten organik olarak üretildiğine inansam						
Daha fazla mevsimden ürün olsa						
Daha fazla benim bölgemden ürün olsa						
Daha uzun süre dayanıklı olsalar						
Daha az paketleme içerse						
Medyada daha çok bilgi olsa						
Daha iyi/kısa pişme süresine sahip olsa						

Eklemek İstedikleriniz:

9. Lütfen aşağıdaki ürün gruplarından organik olarak tükettiklerinizi seçiniz.
(Birden çok işaretleyebilirsiniz)

	Tükettiklerim
Taze Sebze	
Taze Meyve	
Et ve Et ürünleri (et, tavuk, balık, salam, sosis...)	
Süt ve Süt Ürünleri (süt, peynir, yoğurt…)	
Tahıllar (makarna, pirinç, bulgur, un…)	
Ekmek ve pastane ürünleri (unlu mamuller)	
Bakliyatlar (nohut, fasulye, mercimek…)	
Bebek Ürünleri	
Kurutulmuş meyve ve kuruyemiş	
İçecekler (meyve suyu, çay, şarap…)	
Yağ (margarin, zeytinyağı …)	
Şekerli yiyecekler (Bal, reçel, çikolata…)	
Baharat ve şifalı bitkiler (kekik, nane, adaçayı…)	
Tekstil Ürünleri (organik pamuklular…)	

10. Lütfen ileride organik olarak tüketmek istediğiniz ürün gruplarını seçiniz.
(Birden çok işaretleyebilirsiniz)

	Tüketmek İstediklerim
Taze Sebze	
Taze Meyve	
Et ve Et ürünleri (et, tavuk, balık, salam, sosis...)	
Süt ve Süt Ürünleri (süt, peynir, yoğurt…)	
Tahıllar (makarna, pirinç, bulgur, un…)	
Ekmek ve pastane ürünleri (unlu mamuller)	
Bakliyatlar (nohut, fasulye, mercimek…)	
Bebek Ürünleri	
Kurutulmuş meyve ve kuruyemiş	
İçecekler (meyve suyu, çay, şarap…)	
Yağ (margarin, zeytinyağı …)	
Şekerli yiyecekler (Bal, reçel, çikolata…)	
Baharat ve şifalı bitkiler (kekik, nane, adaçayı…)	
Tekstil Ürünleri (organik pamuklular…)	

11. Aşağıdaki tabloda yer alan amblemleri (logo) tanıyor musunuz? Sizce hangisi / hangileri organik ürünleri temsil eder?

Amblem (Logo)	Tanıyor musunuz?	Organik ürünlere ait mi?
	Evet… ☐ Hayır… ☐	Evet… ☐ Hayır… ☐ Bilgim yok… ☐
	Evet… ☐ Hayır… ☐	Evet… ☐ Hayır… ☐ Bilgim yok… ☐
	Evet… ☐ Hayır… ☐	Evet… ☐ Hayır… ☐ Bilgim yok… ☐

Genel İstatistiksel Bilgiler

12. Kaç yaşındasınız?

- ☐ **0–24 Yaş**
- ☐ **25–34 Yaş**
- ☐ **35–50 Yaş**
- ☐ **50–64 Yaş**
- ☐ **64 Yaş üstü**

13. Cinsiyetiniz;

- ☐ **Kadın**
- ☐ **Erkek**

14. Hane halkınız kaç kişiden oluşmaktadır?

- ☐ **1**
- ☐ **2**
- ☐ **3**
- ☐ **4 ve üstü**

15. Hanenizde çocuk bulunuyor mu?

Evet… ☐ **Hayır…** ☐

Evet, ise kaç yaşında(lar)? Lütfen her çocuk için işaretleyiniz.

- ☐ **0–2 yaş…**
- ☐ **2–6 yaş…**
- ☐ **6–14 yaş…**
- ☐ **14 yaşından büyük…**

16. En son mezun olduğunuz okul itibariyle eğitim durumunuz?

- ☐ **Okul eğitimi yok**
- ☐ **İlkokul**
- ☐ **Ortaokul**
- ☐ **Lise / Meslek Lisesi**
- ☐ **Üniversite ve üstü**

17. Çalışma durumunuz:

- ☐ **Tam zamanlı**
- ☐ **Yarı zamanlı**
- ☐ **Emekli**
- ☐ **Ev hanımı**
- ☐ **Öğrenci**
- ☐ **Çalışmıyor**

18. Evinizin aylık toplam net geliri hangi aralıktadır?

- ☐ **0–1000 YTL**
- ☐ **1000–2000 YTL**
- ☐ **2000–4000 YTL**
- ☐ **4000–6000 YTL**
- ☐ **6000 YTL üstü**

Katılımınızdan dolayı çok teşekkür ederim!

11.3 Questionnaire in German

Fragebogen (Nur für die Verbraucher des Bioprodukte)

Ich bin Studentin der Univ. Hohenheim. Für meine Masterarbeit im Studiengang "Organic Food Chain Management" führe ich eine Umfrage über Bio-Lebensmittel durch. Sie würden mir sehr helfen, wenn Sie den folgenden Fragebogen ausfüllen. Die Beantwortung dauert ungefähr 10 Minuten.

1. Wer kauft in Ihrem Haushalt normalerweise ein?

- ☐ **Ich**
- ☐ **Eine andere Person**
- ☐ **Ich mit einer anderen Person zusammen**

2. Wie oft kaufen Sie Bioprodukte?

- ☐ **5-7 mal in der Woche**
- ☐ **1-2 mal in der Woche**
- ☐ **2-3 mal im Monat**
- ☐ **einmal im Monat**
- ☐ **seltener als einmal im Monat**

3. Vor wie vielen Jahren haben Sie schätzungsweise zum ersten Mal ein Bioprodukt gekauft?

- ☐ **Vor mehr als 5 Jahren**
- ☐ **Vor 3- 5 Jahren**
- ☐ **Vor 1-3 Jahren**
- ☐ **Letztes Jahr**
- ☐ **In den letzten 6 Monaten**

4. Wie würden Sie Bio-Lebensmittel beschreiben?

	Stimme voll zu	Stimme zu	Neutral	Bin dagegen	Bin sehr dagegen	Weiß nicht
Gesund						
Viele Nährwerte						
Naturnaher Anbau						
Frei von chemischen Pestiziden und Düngern						
Umwelt- und Tierfreundlich hergestellt						
Gentechnikfrei						
...sind alle zertifiziert						

5. Wo kaufen Sie Bio-Produkte ein? (Mehrfachnennungen möglich)

- ☐ **Lebensmitteleinzelhandel (wie Edeka, Tengelmann)**
- ☐ **Discount (wie Aldi, Lidl)**
- ☐ **Bio-Fachhandel**
- ☐ **Wochenmarkt**
- ☐ **Spezialgeschäfte (Bäckerei, Metzger)**
- ☐ **Hofladen**

6. In welchem Umfeld würden Sie in Zukunft gerne Ihre Bio-Lebensmittel einkaufen? (Mehrfachnennungen möglich)

- ☐ **Lebensmitteleinzelhandel (wie Edeka, Tengelmann)**
- ☐ **Discount (wie Aldi, Lidl)**
- ☐ **Bio-Fachhandel**
- ☐ **Wochenmarkt**
- ☐ **Spezialgeschäfte (Bäckerei, Metzger)**
- ☐ **Hofladen**

7. Ich kaufe Bio-Produkte, WEIL ...

	Stimme voll zu	Stimme zu	Neutral	Bin dagegen	Bin sehr dagegen	Weiß nicht
... sie sind gesund für mich und meine Familie						
... sie werden in hohem Maße kontrolliert						
... die Tiere artgerecht gehalten werden						
... die Umwelt weniger verschmutzt wird						
... sie gut schmecken						
... sie sind frischer als konventionelle Lebensmittel						
... sie haben hohe Qualität						
... ich damit regionale und kleine Bauern unterstütze						
... ich damit Bio-Landwirtschaft und Nachhaltigkeit unterstützte						
... ich nicht bereit bin internationale Großkonzerne zu unterstützten						
... damit Ressourcen für zukünftige Generationen eingespart werden						
... sie ein positives Image haben						
... Bio mittlerweile jeder kauft						

Platz für weitere Bemerkungen:

8. Ich würde mehr Bio-Produkte kaufen, WENN …

	Stimme voll zu	Stimme zu	Neutral	Bin dagegen	Bin sehr dagegen	Weiß nicht
... sie billiger wären						
...ich mehr verdienen würde						
... man Bio überall kaufen könnte						
... wenn die Auswahl größer wäre						
... die Aufmachung und der Geschmack besser wären						
...ich mehr Zeit hätte						
... die Kennzeichnung besser wäre						
... sie vertrauenswürdiger wären						
... das saisonale Angebot höher wäre						
... das regionale Angebot höher wäre						
... das Mindesthaltbarkeitsdatum länger wäre						
... die Verpackung weniger wäre						
... es mehr Informationen über die Medien gäbe						
... wenn die Zubereitung einfacher wäre						

Platz für weitere Bemerkungen:

9. Bitte kreuzen Sie im Folgenden die Produktgruppen an, die Sie schon kaufen. (Mehrfachnennungen möglich)

	Momentaner Konsum
Frisches Gemüse	
Frisches Obst	
Fleisch und Wurstwaren	
Milch und Milchprodukte (Käse, Joghurt..)	
Getreideerzeugnisse (Mehl, Nudeln …)	
Brot und Backwaren (Kuchen…)	
Hülsenfrüchte (Linse, Bohne…)	
Babynahrung	
Getrocknete Früchte und Nüsse	
Getränke (Säfte, alkoholische, Kaffee…)	
Öl (Olivenöl, Butter…)	
Süßwaren (Honig, Marmelade…)	
Kräuter und Gewürze	
Kleidung (Von organischer Baumwolle)	

10. Bitte geben Sie nun an, welche Produktgruppen Sie in Zukunft kaufen möchten. (Mehrfachnennungen möglich)

	Zukünftiger Konsum
Frisches Gemüse	
Frisches Obst	
Fleisch und Wurstwaren	
Milch und Milchprodukte (Käse, Joghurt..)	
Getreideerzeugnisse (Mehl, Nudeln …)	
Brot und Backwaren (Kuchen…)	
Hülsenfrüchte (Linse, Bohne…)	
Babynahrung	
Getrocknete Früchte und Nüsse	
Getränke (Säfte, alkoholische, Kaffee…)	
Öl (Olivenöl, Butter…)	
Süßwaren (Honig, Marmelade…)	
Kräuter und Gewürze	
Kleidung (Von organischer Baumwolle)	

11. Erkennen Sie die folgenden Logos? Wissen Sie, welches der Logos etwas über Bio oder nicht aussagt?

Logos	Kennen Sie es?	Steht es für Bio?
	Ja… ☐ Nein… ☐	Ja… ☐ Nein… ☐ keine Ahnung… ☐
	Ja… ☐ Nein… ☐	Ja… ☐ Nein… ☐ keine Ahnung… ☐
	Ja… ☐ Nein… ☐	Ja… ☐ Nein… ☐ keine Ahnung… ☐

Allgemeine Angaben für die Statistik

12. Wie alt sind Sie?

- ☐ 0-24 Jahre
- ☐ 25-34 Jahre
- ☐ 35-50 Jahre
- ☐ 50-64 Jahre
- ☐ Mehr als 64 Jahre

13. Geschlecht

- ☐ **Weiblich**
- ☐ **Männlich**

14. Wie viele Personen wohnen in Ihrem Haushalt?

- ☐ **eine Person**
- ☐ **zwei Personen**
- ☐ **drei Personen**
- ☐ **vier Personen und mehr**

15. Leben Kinder in Ihrem Haushalt?

Ja…. ☐ **Nein….** ☐

Wenn ja, wie alt sind sie? Bitte kreuzen Sie für jedes Kind.

- ☐ **0-2 Jahre…**
- ☐ **2-6 Jahre…**
- ☐ **6-14 Jahre…**
- ☐ **älter als 14 Jahre…**

16. Was ist Ihre höchste Schulbildung?

- ☐ **kein Schulabschluss**
- ☐ **Haupt- /Volksschulabschluss**
- ☐ **mittlerer Bildungsabschluss**
- ☐ **Abitur / Fachabitur**
- ☐ **Hochschulabschluss / Fachhochschulabschluss**

17. Was ist Ihre derzeitige Berufstätigkeit?

☐ **Voll berufstätig**

☐ **Teilzeit berufstätig**

☐ **Rentner/in**

☐ **Hausfrau / -mann**

☐ **in Ausbildung, Student/in**

☐ **vorübergehend Arbeitslos**

18. Wie hoch ist ihr monatliche Netto-Haushaltseinkommen, nach Abzug von Steuern und Sozialabgaben?

☐ **Bis unter 750€**

☐ **750€ bis unter 1500€**

☐ **1500€ bis unter 2500€**

☐ **2500€ bis unter 4000€**

☐ **4000€ und mehr**

Vielen Dank für Ihre Hilfe!

12 Declaration

I hereby declare

- that, I have written this thesis without any help from others and without the use of documents and aids other than those stated above,

- that, I have mentioned all used sources and that I have cited them correctly according to established academic citation rules,

- that, this thesis is not used or submitted to graduate in another program.

Furthermore, I agree with displaying of this document in the library of the Institute of Agricultural Policy and Markets implying the possibility of its exploration and borrowing by others.

Stuttgart, October 15th, 2007

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Nihan MUTLU