

Palm oil perception

- TNS 5th report -

March / Sept 2015

1.000 interviews per country / year

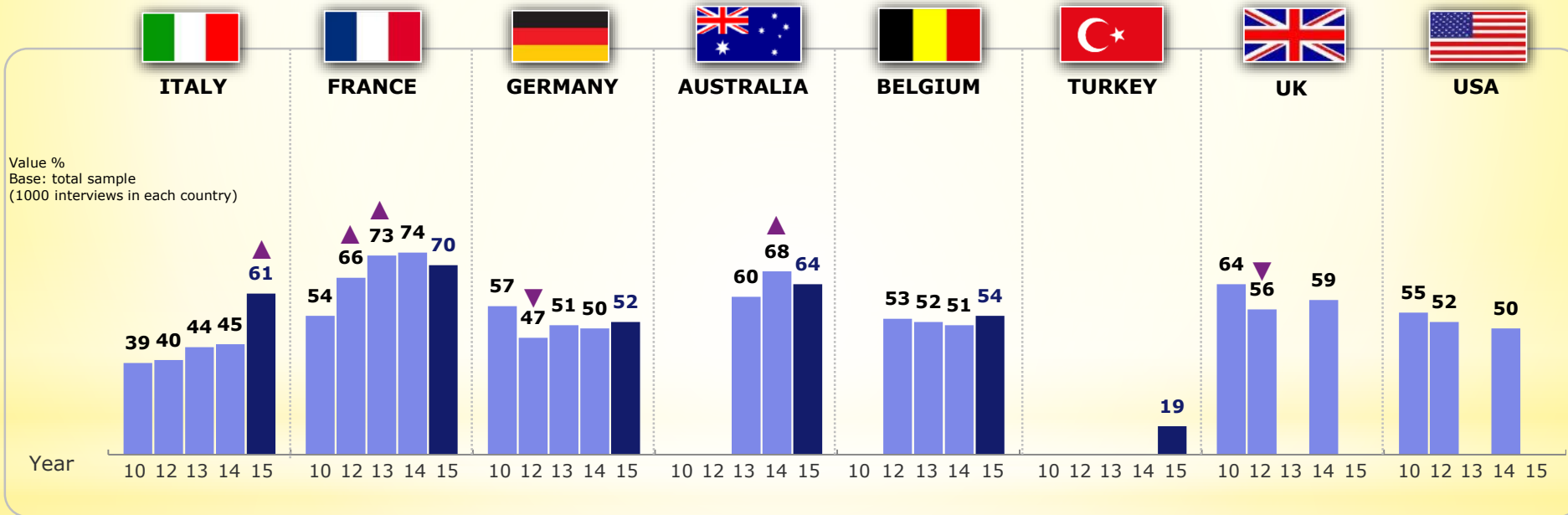
2015 : Italy - France - Germany - Australia - Belgium -Turkey

2014 : UK - USA

TNS SURVEY - 2015

DO YOU KNOW OR HAVE YOU HEARD ABOUT PALM OIL ?

AWARENESS: large increase in Italy, slight decrease in France, stable in other countries.



Symbols

▲ or ▼ difference statistically significant at 95% (vs previous wave)

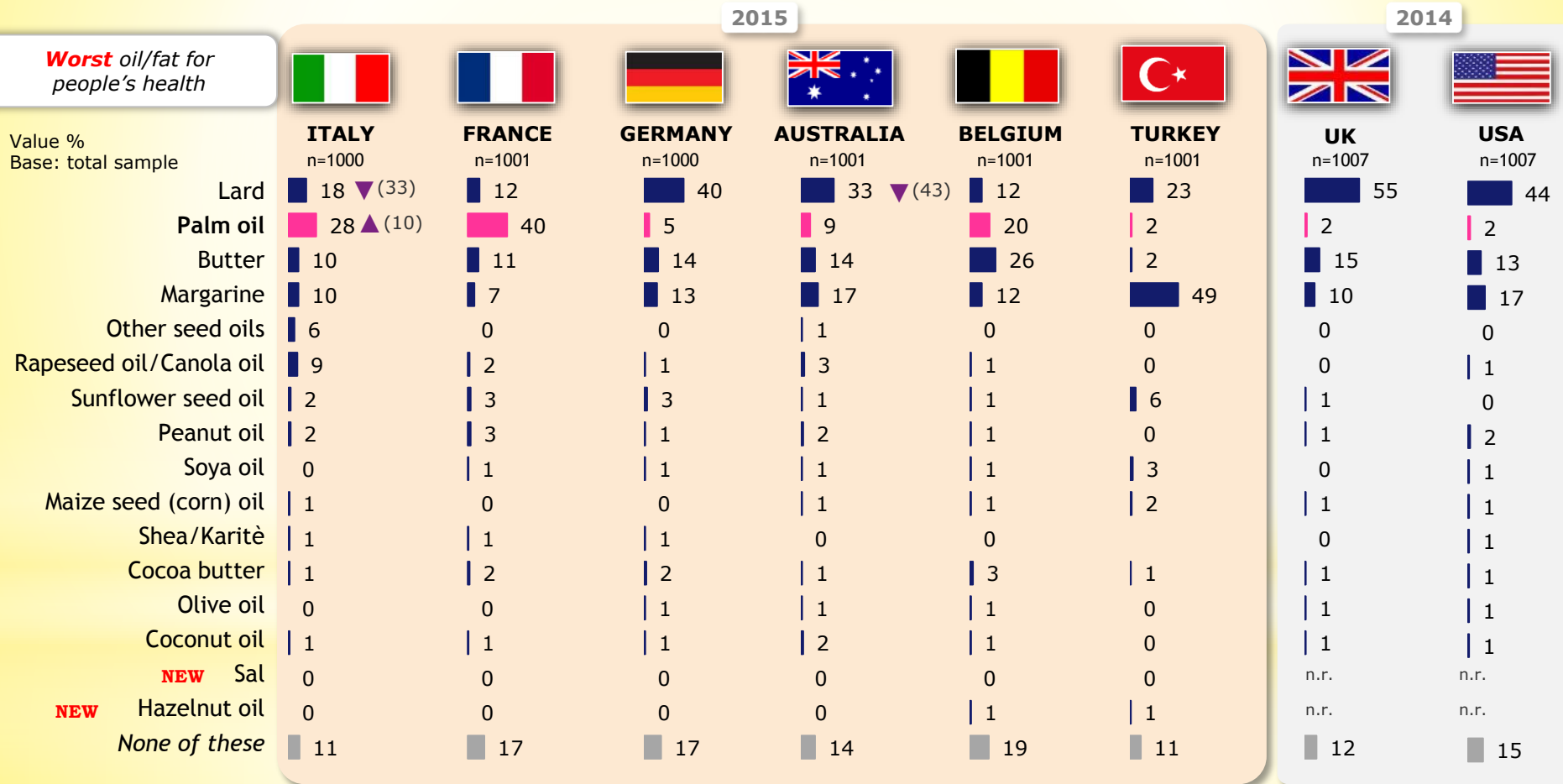
TNS SURVEY - 2015

WHICH OIL / FAT IS THE WORST FOR PEOPLE'S HEALTH?

Palm oil is considered the **worst** in **France**, **Italy** and **Belgium south**.

Worst oil/fat for people's health

Value %
Base: total sample



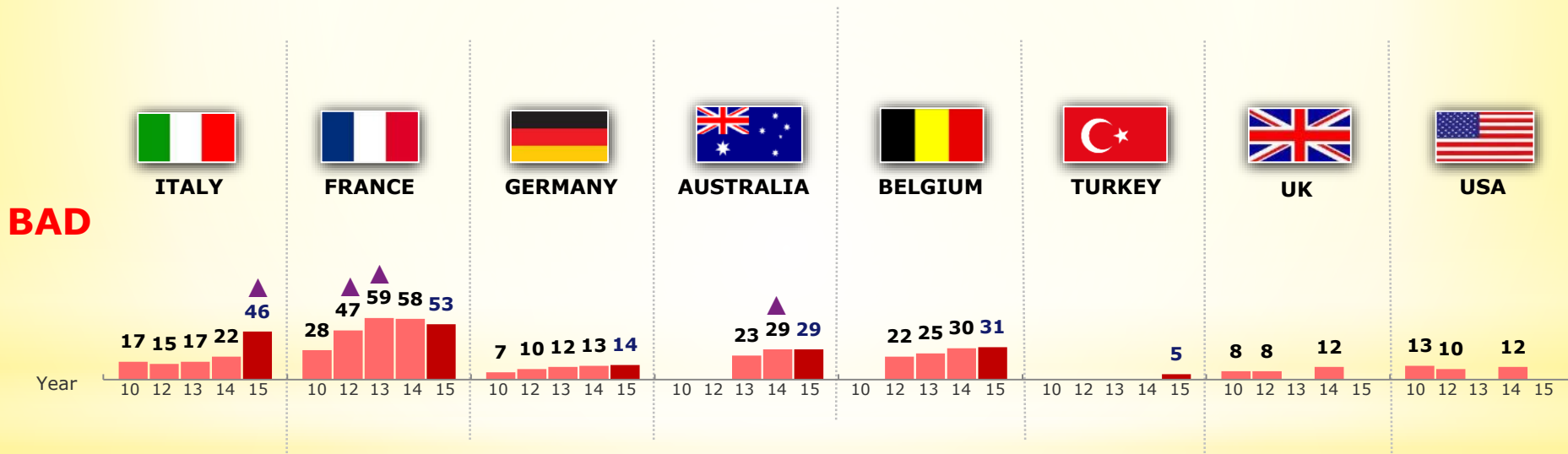
Symbols

▲ or ▼ difference statistically significant at 95% (2015 vs. 2014)

TNS SURVEY - 2015

DO YOU THINK THAT PALM OIL IS GOOD, NEUTRAL OR BAD FOR YOUR HEALTH ?

Bad perception is increasing significantly in Italy, whereas it's slightly improving in France and it's remaining stable in the remaining countries.



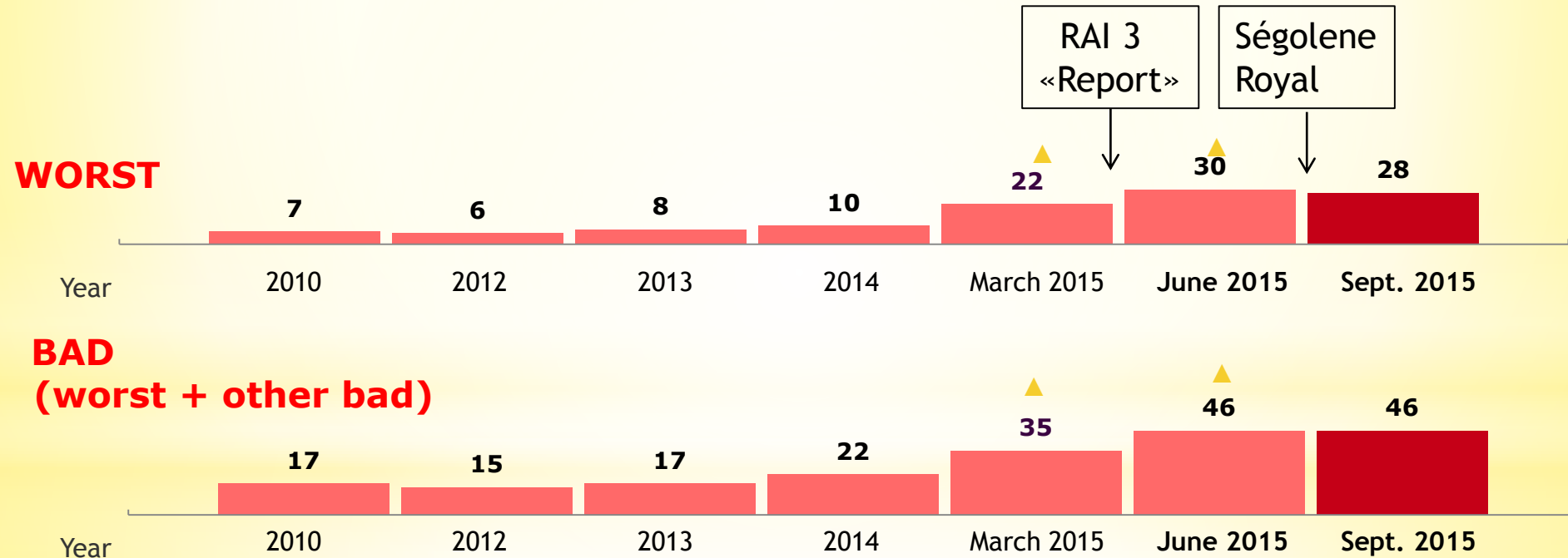
Symbols

▲ or ▼ difference statistically significant at 95% (vs previous wave)



TNS SURVEY - 2015

ITALY : TREND IN THE PERCEPTION OF PALM OIL'S EFFECTS ON PEOPLE'S HEALTH



Symbols

▲ or ▼ difference statistically significant at 95% (vs previous wave)

WHY IS PALM OIL THE WORST FOR HEALTH ?

People provide mostly generic answers

2015

2014



ITALY

FRANCE

GERMANY

AUSTRALIA

BELGIUM

TURKEY

UK

USA

Health related topic

Value %

Those who consider palm oil the worst

At least one mention

I have heard/read about it

It contains harmful fats

Harmful / bad for the health (generic)

It causes cardiovascular diseases

It is cancerogenous / cancer-forming

It increases / contains cholesterol

Bad / poor quality product

It is fatty / too high in fats

Deforestation

It is over-used

Heavy/not easy to digest

Harmful / bad for the environment (generic)

It contains chemical / unnatural substances

Hydrogenated fat

It is a mix/hotspot of ingredients / uncertain ingredients

Industrial / excessively industrial product

It has been withdrawn from the market

It is low cost / low cost production

n=280

n=399

n=51*

n=94

n=203

n=17*

n=23*

n=21*

PALM OIL

PALM OIL

	ITALY	FRANCE	GERMANY	AUSTRALIA	BELGIUM	TURKEY	UK	USA
At least one mention	93	89	84	93	94	100	87	90
I have heard/read about it	26 ▲ (18)	34	12	35 ▲ (22)	46 ▲ (35)	24	17	19
<input checked="" type="checkbox"/> It contains harmful fats	12 ▼ (22)	13	25 ▲ (19)	27 ▲ (21)	18	12	4	43
<input checked="" type="checkbox"/> Harmful / bad for the health (generic)	26 ▲ (11)	11	8	18 ▲ (12)	9	12	17	5
<input checked="" type="checkbox"/> It causes cardiovascular diseases	9	8	-	5	4	18	4	5
<input checked="" type="checkbox"/> It is cancerogenous / cancer-forming	8 ▼ (15)	5	-	-	5	-	-	-
<input checked="" type="checkbox"/> It increases / contains cholesterol	3 ▼ (9)	6	2	2	6	-	-	5
<input checked="" type="checkbox"/> Bad / poor quality product	5 ▼ (10)	4	8	-	5	-	13	-
<input checked="" type="checkbox"/> It is fatty / too high in fats	6	12	10 ▲ (3)	4	14 ▲ (6)	-	4	10
Deforestation	3	4	4	11	2	-	13	5
It is over-used	3	3	-	1	2	6	13	-
Heavy/not easy to digest	3	-	-	-	-	-	-	-
Harmful / bad for the environment (generic)	1	6	14	10	2	-	13	5
<input checked="" type="checkbox"/> It contains chemical / unnatural substances	1	2	2 ▼ (11)	1	1	12	-	5
<input checked="" type="checkbox"/> Hydrogenated fat	1	2	-	-	2	-	4	-
<input checked="" type="checkbox"/> It is a mix/hotspot of ingredients / uncertain ingredients	-	1	2	-	1	6	4	-
Industrial / excessively industrial product	1	3	4	1	1	6	-	-
It has been withdrawn from the market	-	3	-	1	-	-	-	-
It is low cost / low cost production	-	2	6	-	1	-	-	-

Symbols

▲ or ▼ difference ± 5 (2015 vs 2014)

* small bases

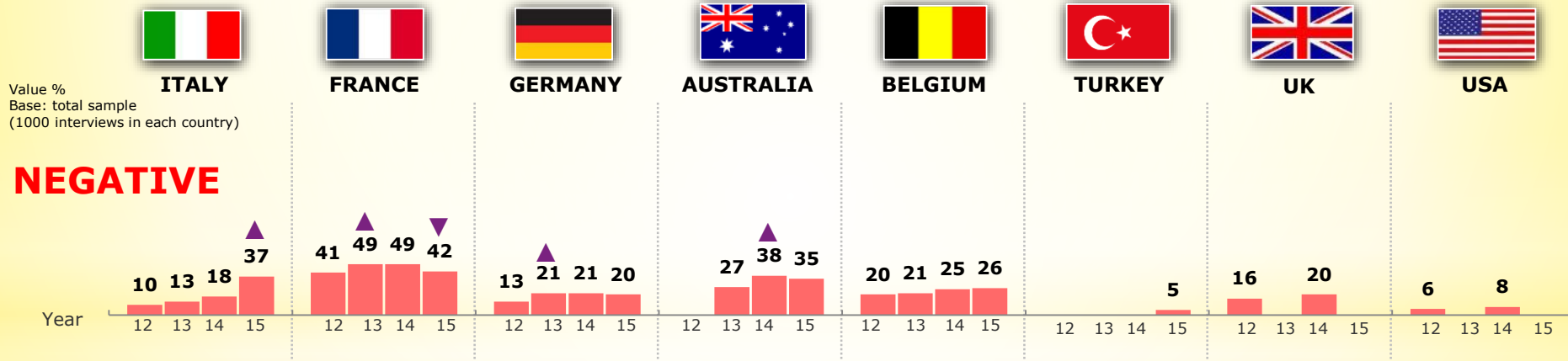
(in brackets previous wave results)

D.5bis Why is the worst for people's health?

TNS SURVEY - MAY 2015

DO YOU THINK THAT PALM OIL IS GOOD, NEUTRAL OR NEGATIVE FOR THE **ENVIRONNEMENT** ?

Negative perception **increases significantly** in **Italy**, **decreases** in **France** and remains **stable** in remaining countries.



Symbols

▲ or ▼ difference statistically significant at 95% (vs previous wave)

WHY IS PALM OIL THE WORST FOR ENVIRONMENT?

Answers are mostly linked to deforestation

	2015						2014	
	ITALY	FRANCE	GERMANY	AUSTRALIA	BELGIUM	TURKEY	UK	USA
Value %	PALM OIL						PALM OIL	
Those who consider palm oil the worst	n=284	n=367	n=158	n=300	n=195	n=34*	n=153	n=34*
<i>At least one mention</i>	88	88	91	95	82	91	95	88
<input checked="" type="checkbox"/> Deforestation	52 ▲ (31)	64	61	59 ▼ (67)	48	32	60	53
<input checked="" type="checkbox"/> Harmful / bad for the environment (generic)	6	8	14	22 ▲ (16)	11 ▲ (5)	24	17	18
<input checked="" type="checkbox"/> Intensive monoculture	9	4	18	4	8 ▼ (19)	-	7	6
I have heard/read about it	6	9	3	10	5	12	7	3
<input checked="" type="checkbox"/> A production process that causes pollution	2 ▼ (10)	2	-	1	3	-	-	-
<input checked="" type="checkbox"/> Pollutant waste products /not biodegradable	3 ▼ (8)	-	-	-	1	3	1	-
<input checked="" type="checkbox"/> Because of the manufacturing process (generic)	2	2	2	3	2	-	3	-
Harmful / bad for the health (generic)	7	2	-	-	2	6	-	-
Animals extinction	7 ▲ (0)	-	-	-	-	-	-	-
Exploitation of the workers / profit of the multinationals	3	1	5	2	2	-	-	-
It contains chemical / unnatural substances	-	2	1	-	2	9	2	-
It is an imported / not a local product	1	2	5	-	3	-	-	-
It is over-used	1	3	1	1	1	-	5	-
Bad / poor quality product	- ▲ (6)	2	1	-	2	-	1	3
It is fatty / too high in fats	1 ▼ (6)	-	-	1	1	3	1	3
Waste of resources / natural resources (generic)	1	1	4	-	1	9	-	6
Industrial / excessively industrial product	-	3	1	-	3	3	-	-

Symbols

▲ or ▼ difference ± 5 (2015 vs 2014)

* small bases

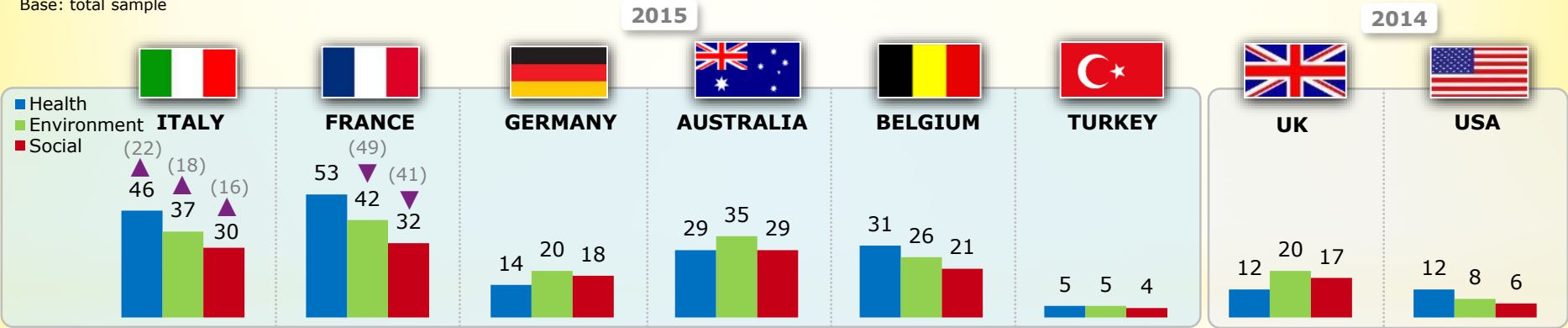
(in brackets previous wave results)

TNS SURVEY - MAY 2015

WHAT IS PALM OIL NEGATIVE FOR ?

Negative perception of Palm oil ...

Value %
Base: total sample



TNS SURVEY - MAY 2015

Most respondents never heard of sustainable palm oil, green palm and RSPO

Symbols
▲ or ▼ difference statistically significant at 95% (2015 vs 2014)

Value %
Base: those aware of Palm Oil



ITALY

n=610



FRANCE

n=698



GERMANY

n=519

2015



AUSTRALIA

n=640



BELGIUM

n=542



TURKEY

n=188

2014



UK

n=596



USA

n=500

Sustainable

Have you **ever heard** of **Sustainable Palm Oil**?

% YES

16

11

12

19▲(12)

13

21

13

5

% YES on total population 10

8

6

12

7

4

8

3

Have you **ever heard** about an **organization** called **RSPO**?

% YES

10

5

5

8

7

19

6

2

% YES on total population 6

3

3

5

4

4

4

1



Have you **ever seen** this **logo**?

% YES

6

3

3

5

6

23

5

4

% YES on total population 4

2

2

3

3

4

3

2

TO SUM UP ...

➤ Countries dynamics

- **France**: perception is still very negative, but slightly improving
- **Italy**: alarming increase in negative perception
- **Other surveyed countries**: rather stable

➤ Key findings

- Negative perception mostly driven by **health** and **environment** concerns
- Environment concerns mainly linked to **deforestation**
- Health concerns have **no main, clear rational**
- Palm oil has the poorest **health** perception of any fat in **France & Italy**
- People are **not aware** of sustainable Palm oil

Thank you