

# **Palm oil perception**

## **- TNS 5<sup>th</sup> report -**

**March / Sept 2015**

**1.000 interviews per country / year**

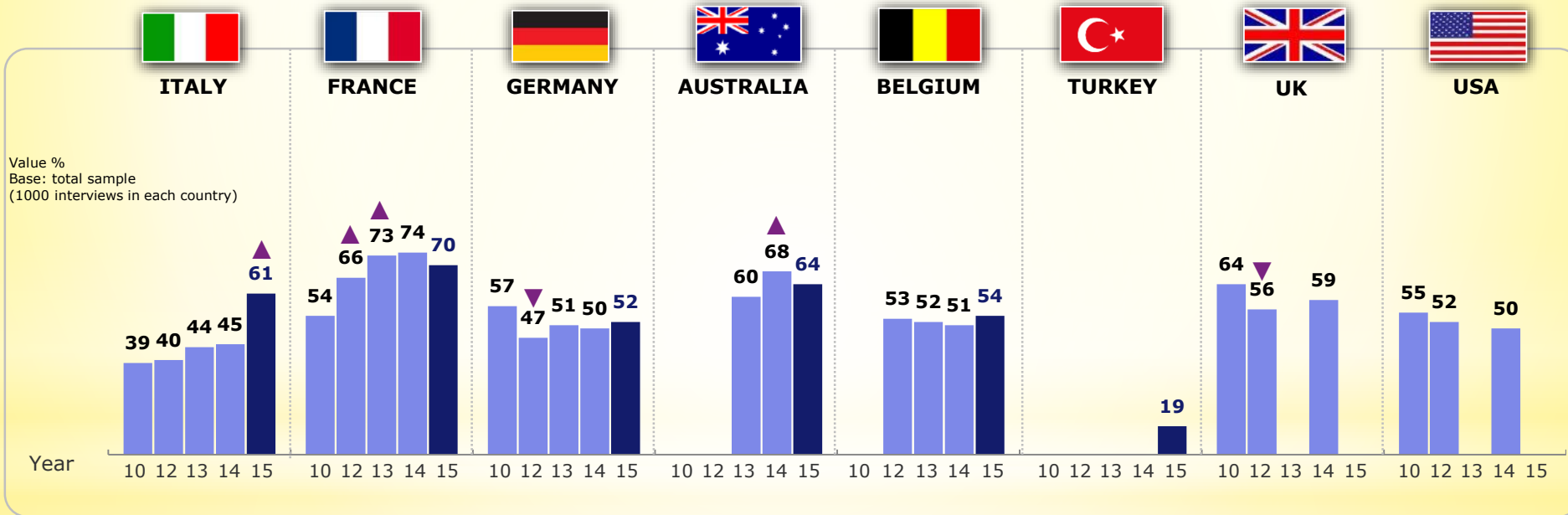
**2015 : Italy - France - Germany - Australia - Belgium - Turkey**

**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)

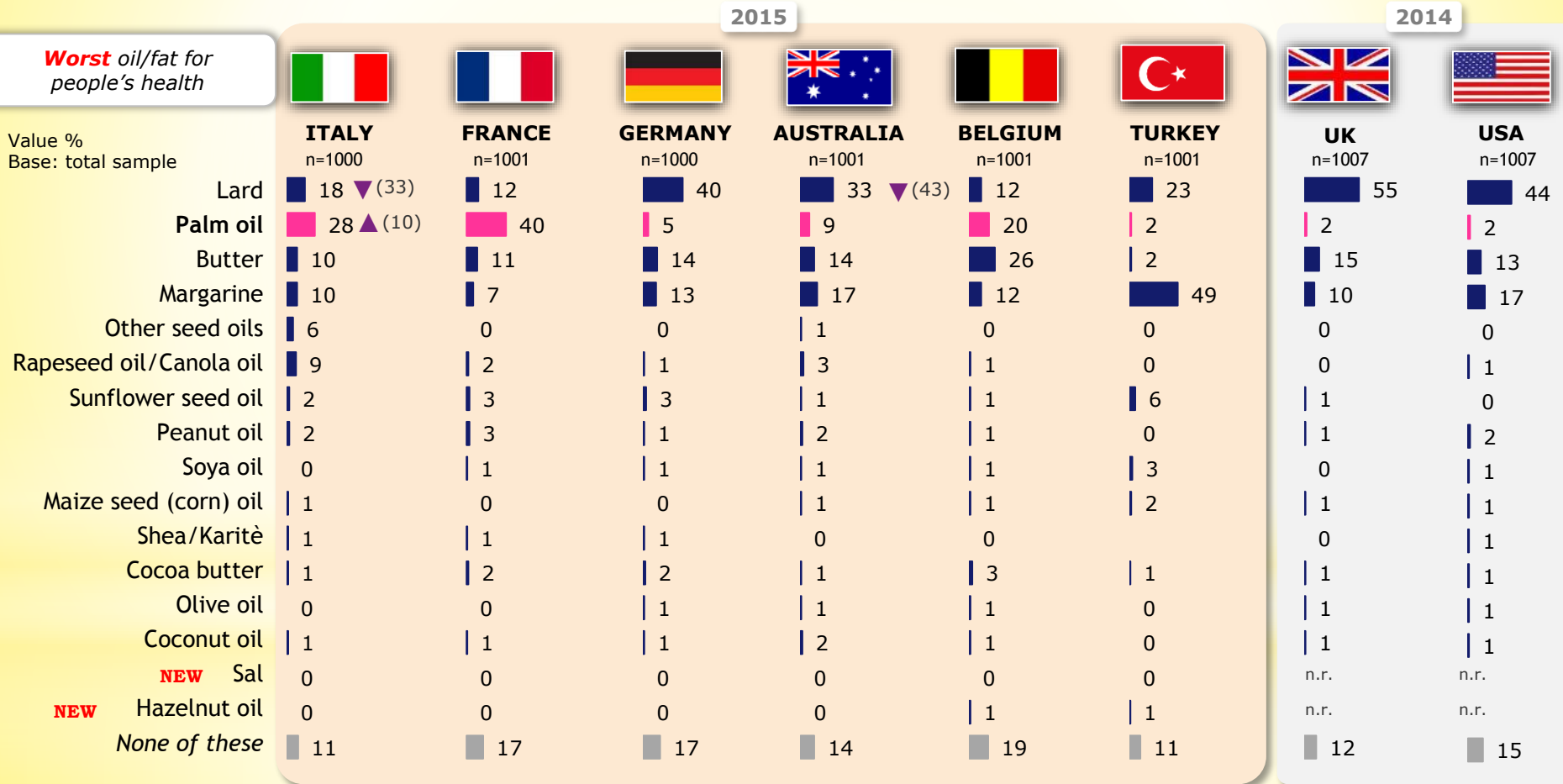
# TNS SURVEY - 2015

## 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



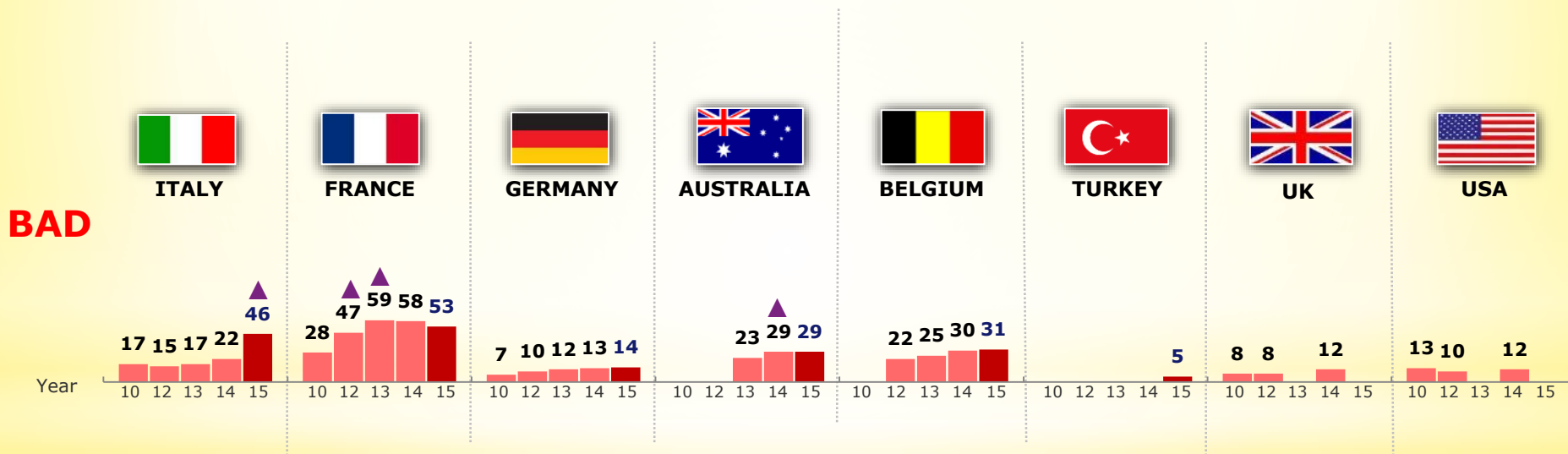
### Symbols

▲ 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.



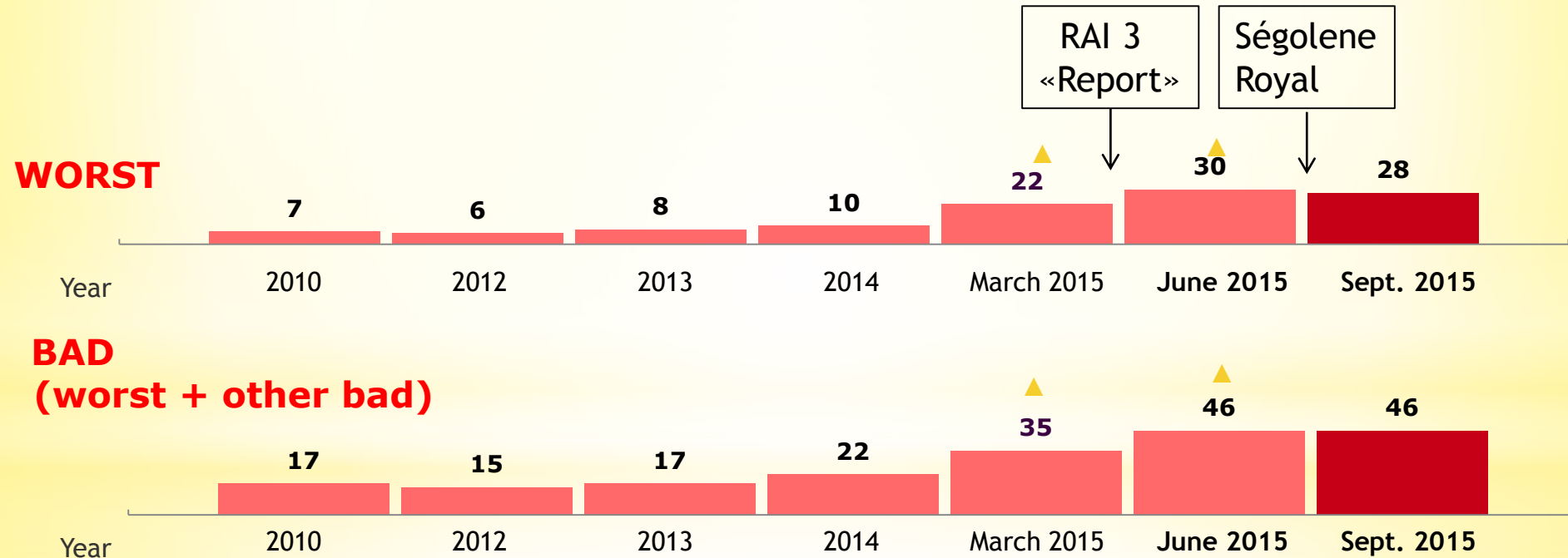
## Symbols

▲ 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
<b>I have heard/read about it</b>	26 ▲ (18)	34	12	35 ▲ (22)	46 ▲ (35)	24	17	19
<input checked="" type="checkbox"/> <b>It contains harmful fats</b>	12 ▼ (22)	13	25 ▲ (19)	27 ▲ (21)	18	12	4	43
<input checked="" type="checkbox"/> <b>Harmful / bad for the health (generic)</b>	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"/> <b>It is fatty / too high in fats</b>	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

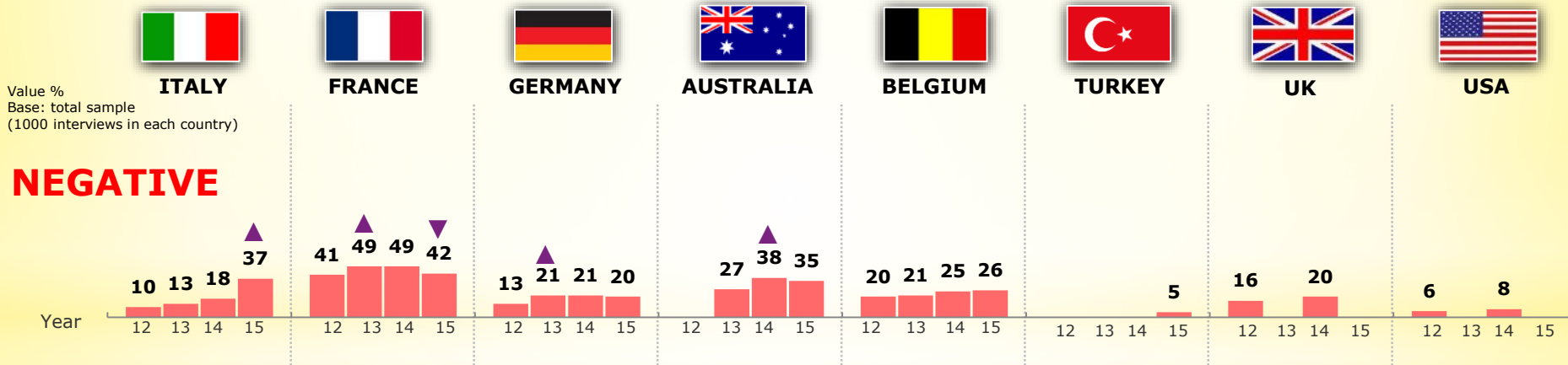
(in brackets previous wave results)

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)

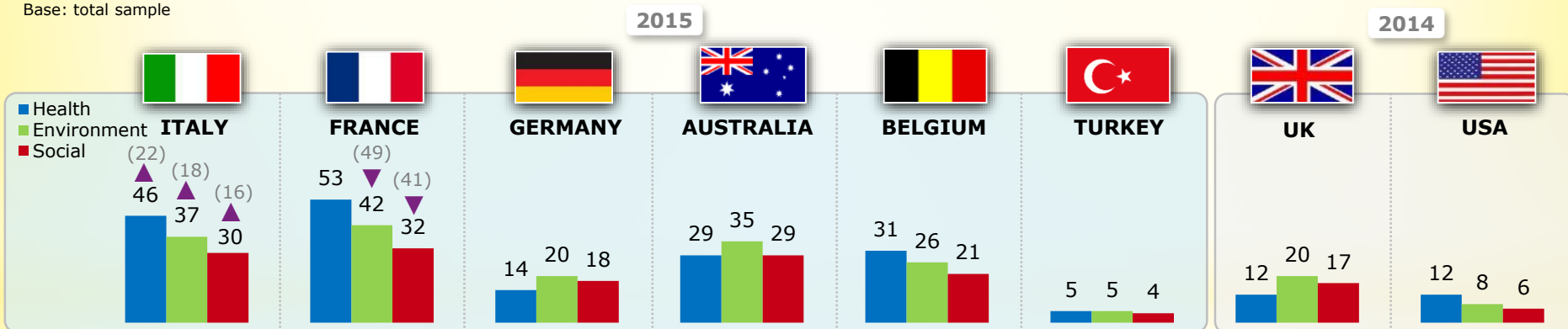


# TNS SURVEY - MAY 2015

## 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

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

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**