

Trends from the consumer's viewpoint

Insight into a consumer survey by the HSW

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To be able to understand and evaluate the olive oil market and individual products better, it is helpful to analyse the characteristic sensory qualities of different olive oils, consumer preferences and their reasons, and also the behaviour of olive oil consumers. For this purpose the sensory properties of olive oil have been analysed and evaluated in Switzerland annually since 2001, at the International Olive Oil Award – Zurich.

The diversity of olive oils

The sensory diversity of native olive oils is well known and has many reasons. One of the most important factors is the species of olive, which is above all responsible for the characteristic properties of an oil. In Europe only the species “*Europaea*” of the “*Olea*” genus is cultivated. Worldwide, however, there are more than 50 other varieties of this genus. Moreover, there are many subclasses within the “*Olea europaea*” class, of which about 150 are significant in Europe. The various subclasses, or varieties, show clear differences in the characteristics of their fruits and the resulting oils (Table 1). Apart from the olive variety, other factors also have a considerable influence on the character of the olive oil, for example the region of cultivation, where the prevailing climatic conditions and soil quality play a significant role. Other influences are the time of harvest, the harvesting process and the processing method – how the olives are pressed.

Table 1 Sensory characterisation of olive oils from some of the more important Europa varieties (VOSSEN, 2006)

Variety	Description
Arbequina	Famous for an aromatic, ripe fruitiness; slightly bitter and peppery
Coratina	Pronounced “green” aroma; bitter, peppery
Cornicabra	Very fruity and aromatic; moderately bitter and peppery
Frantoio	Very fruity and aromatic; moderately bitter and very peppery
Hojiblanca	Fruity and aromatic; mildly peppery and only slightly bitter
Koroneiki	Very fruity; mildly bitter and peppery
Lechin de Sevilla	Very fruity; mildly bitter and peppery
Leccino	Moderately fruity, only slightly bitter and peppery
Manzanillo	Fruity, aromatic; moderately bitter and pronounced pepperiness
Moraiolo	Very fruity; moderately bitter and peppery
Picudo	Very aromatic, ripe fruitiness; moderately peppery and mildly bitter
Picual	Fruity and aromatic; moderately bitter (if harvested early)
Picholine	Very fruity and aromatic; moderately fruity, bitter and peppery
Taggiasca	Mild fruitiness; only slightly bitter and peppery

Olive oils put to the test by consumers

How do consumers perceive these properties of olive oil, though? How much do they know about olive oil? What are their preferences? A survey of consumer behaviour and a consumer test carried out at the University of Applied Sciences Waedenswil in the winter of 2006/2007 showed the following results, among others.

The consumer survey (n=522) included questions on various aspects of product knowledge, such as nutritional effectiveness, fatty acid composition, origin, production process, factors influencing shelf and storage life, and the quality of olive oil in comparison to rapeseed oil. Other questions related to details about the consumers themselves, such as frequency of consumption, willingness to pay, preference for certain countries of origin, type of use and taste preferences. Sociodemographic details were also collected, such as gender, age, size of household, education, area of work. The consumer test (n=85) was designed to find out the level of popularity of six oils from different parts of Italy. The evaluation of the survey and the consumer test showed that olive oil is extremely popular among all age groups. It is noticeable that men tend to like olive oil more than women. In the consumer test a selection of exclusively Italian oils from various regions and with various characteristics were sampled. The results showed that mild to at most moderately intensive oils (intensity of fruitiness between 2.5 and 3.5) are generally preferred – in this test for example oils from Liguria (Taggiasca), the DOP Region Garda (Casaliva) or Appulia (Coratina). Intensely fruity oils (intensity of fruitiness between 4.0 and 5.0) from Tuscany (Frantoio, Moraiolo, Lecchino), Appulia (Coratina) and Sicily (Tonda Iblea) were less popular. The reasons include their more pronounced bitterness and pepperiness – basically very typical and positive characteristics of olive oil – but here, too, tastes vary.

The consumers' willingness to pay is, as expected, considerably greater for the more popular oils than for the less favoured ones. 15-20 Swiss Francs seems to be the price range most consumers will accept for 500 ml of a preferred oil. Fewer were prepared to pay as much as 20 to 25 Swiss Francs. Logically, consumers are not prepared to pay as much for oils that they don't like: here 10 Swiss Francs was the norm.

References / Sources:

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