STUDY ON OLIVE OIL USE AND CONSUMPTION HABITS IN THE HORECA CHANNEL IN SPAIN
OBJECTIVES OF THE STUDY

• Discovering and understanding the attitudes and motivations of oil users/buyers at the different types of establishments that make up the HORECA channel, highlighting the different types of olive oil, bottling ranges and selection criteria (what do they buy?, why? and how do they use it?).

• Locating the opportunities for promoting the product/promoting the increase of its consumption in this channel.

• Adjusting supply and commercial strategies to these opportunities.

METHODOLOGY

1) People responsible for the shopping in organized distribution chains. 23 thorough interviews to catering and hotel chains and catering companies and collectivities.
2) People responsible for dining halls’ shopping. 8 thorough interviews to people responsible for schools and hospitals
1) Telephone interviews to people responsible for the shopping in 1,200 independent restaurants.
2) Telephone interviews to people responsible for shopping in 300 independent hotels...
3) Telephone interviews to 200 distributors and wholesalers.
4) Mystery Shopping at 50 Cash & Carry
1) Population used to eating at restaurants
   • Quantitative stage 1,200 representative interviews of the population.
   • Qualitative stage: 4 group meetings
Use of Olive Oil in the Horeca Channel - HORECA

- Olive oil in the catering business: Olive oil, in certain commercial categories, is present in basically every restaurant and hotel in Spain and it is used mainly for raw use (69.2% of the establishments state they present extra virgin olive oil at their tables). Sometimes, the same restaurant may offer different olive oil categories (olive, virgin, extra virgin). Taste and price are determining when choosing the olive oil commercial category to be offered by the restaurant.

- Use in dishes: Use of olive oil is associated mainly with vegetables and cold dishes, and in these cases virgin/extra virgin olive oil is usually the category chosen. Confectionery and fried food are hardly associated with olive oil. It is increasingly common to offer toasts with olive oil for breakfast. However, the use of olive oil in hot dishes or for frying is not very common, except in high-standing or Mediterranean/Italian restaurants.

**Oils they buy, according to their use**

- **Total**
  - Only sunflower or other vegetable oils: 66.8%
  - Only olive and other vegetables: 13.7%
  - Only olive and sunflower or other vegetable oils: 4.5%
  - Only virgin or extra virgin olive oil: 4.5%
  - Only oil from other vegetable oils: 0.0%
  - None: 0.0%

- **Halls**
  - Only sunflower or other vegetable oils: 60.4%
  - Only olive and other vegetables: 15.0%
  - Only olive and sunflower or other vegetable oils: 10.4%
  - Only virgin or extra virgin olive oil: 5.8%
  - Only oil from other vegetable oils: 0.0%
  - None: 0.0%

- **Kitchens**
  - Only sunflower or other vegetable oils: 88.9%
  - Only olive and other vegetables: 6.3%
  - Only olive and sunflower or other vegetable oils: 5.8%
  - Only virgin or extra virgin olive oil: 0.0%
  - Only oil from other vegetable oils: 0.0%
  - None: 0.0%

**N=1507**
Use of Olive Oil in the Horeca Channel - HORECA

- **Availability of the product:** In most cases (89.1%), olive oil is at the clients’ disposal, although there is an increasing tendency to offer it just when requested. However, tradition and comfort are really important factors that may be modified.

- **Format and brand:** Most establishments offer olive oil in unlabelled cruets, as a result of the common format ususally chosen by catering companies (5 litre carafes). However, 43.9% of hotels provide monodose formats, presented in little glass/plastic bottles (versus 30.8% of restaurants). The use of non-refilling brand bottles is more common in more expensive establishments.
Consumers are convinced that restaurant’s consumption of olive oil has increased over the last years. This is a result of their increasing concern for a healthy diet.

Consumers associate olive oil to restaurant tables and not to kitchens, where they assume sunflower oil is used. In spite of this, they think it is rather important to use olive oil while cooking, and they would actually consider it a determining factor for choosing a restaurant, especially among older consumers.

Most would be even willing to pay a little more. Most prefer dipping bread in olive oil than in butter while waiting for their dishes.

Most consumers have declared that they would appreciate it if more consumer information was provided concerning olive oil through the availability of labelled bottles or monodose formats instead of the cruet usually found at restaurants.

Aliño de platos fríos en la mesa

Aceite de oliva (80-90%)

El uso del aceite de oliva para aliño de platos fríos como ensaladas, verduras, gazpacho, salmorejo, etc. se da por sentado en la gran mayoría de los restaurantes.

Cocina

Aceite de girasol (80-90%)

El consumidor cree que el aceite de oliva se utiliza muy poco en cocina, sólo para preparar alguna salsa o aderezar algún plato, y siempre se asigna su uso a restaurantes de categoría.

Los más optimistas consideran que como máximo el 20% de los aceites que se consumen en HORECA son aceites de oliva, ya que el volumen que se consume en sala es insignificante respecto al que se consume en cocina.
Use of Olive Oil in the Horeca Channel - CITIZEN

- Consumers prefer finding olive oil directly at their tables, even though they admit that asking for it to the waiter gives them a feeling of hygiene and security. The glass monodose bottle is the favourite option among consumers. Secondly, they go for traditional cruets and finally for labelled bottles. Other options are incidental.
- The option of using non-refilling bottles is undoubtedly very appreciated by citizens, who consider very interesting the initiative of making it compulsory, especially as regards security and quality guarantees.

### CONSUMIDORES: ¿Cómo prefiere que le ofrezcan un aceite de oliva?

<table>
<thead>
<tr>
<th>Option</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Le da lo mismo/ le resulta indiferente</td>
<td>6.3%</td>
</tr>
<tr>
<td>Botella con etiqueta de la marca</td>
<td>24.8%</td>
</tr>
<tr>
<td>Aceitera de acero inoxidable (sin marca/rellenable)</td>
<td>0.8%</td>
</tr>
<tr>
<td>Aceitera de cristal transparente (sin marca/rellenable)</td>
<td>26.2%</td>
</tr>
<tr>
<td>Mono-dosis en sobres de plástico</td>
<td>40.5%</td>
</tr>
<tr>
<td>Mono-dosis en botellita de cristal</td>
<td></td>
</tr>
</tbody>
</table>

**N= 1200**

### Options:
- **En la mesa**
  - COMODIDAD
    - “Es acogedor”. “Da sensación de bienvenida”
- **A petición del cliente**
  - HIGIENE/ SENSACIÓN DE LIMPIEZ
  - **Servirlo espontáneamente junto con el pan y las bebidas**
  - Envases mono-dosis (preferentemente botellitas de vidrio pequeñas)

**Study on Olive Oil Use and Consumption Habits in the Horeca Channel in Spain**
Regarding oil consumption in schools, there is an increasing concern about healthy diets, although right now Pupils’ Mothers and fathers Associations do not participate in the elaboration of the school menus and there are no requests on that sense. 71.6% of parents ignore what oil is being used at their children’s schools, but they all think it is important to use olive oil.

There is a greater knowledge of olive oil than in other channels, although they all agree there is a lack of information.
Brands and DO

HORECA

- Denomination of Origin (DO): Most restaurateurs do not have much information on olive oil's denomination of origin and most do not take it into account when buying oil. Among those who do buy olive oil with DO, they do not usually remember their extra virgin olive oil's DO. The price is a determining factor when choosing a DO. The use of DOs is based on the positive effect it has on the dishes. Of course, the promotional aspect of the products of the zone is also a relevant factor when going for a specific DO.

- Brands: Restaurateurs do not usually use distributor brands and are faithful to the brand regularly used. The use of distributor brands is larger in bar/coffee houses (26.4%), smaller in restaurants (16.0%) and even smaller in hotels (8.3%).

Do you know any extra virgin olive oil with DO?

HORECA (ind.)

- Conoce alguna D.O.
- No conoce ninguna D.O.

- 52.6%
- 47.4%

Do you by any extra virgin olive oil with DO?

- No compra con D.O.
- Compra con D.O. pero no recuerda el nombre
- Compra con D.O. y recuerda el nombre

- 49.2%
- 33.6%
- 17.2%

TOTAL
DISTRIBUTOR

- Denomination of Origin (DO): Distributors specialized in catering do not usually work with extra virgin olive oil with DO (55.1% do not work with DOs at all). Multiproduct distributors, on the other hand, use DOs more often. Almost a third part of the distributors does not find any advantage in the use of extra virgin olive oil with DO, being price the most remarkable barrier for its commercialization.

- Brands: The more specialized the distributor, the less he works with different brands (62.7 of those distributors completely specialized usually work with a single brand). The bigger the company, the more brands it uses.

Ventajas DO

- 55.1% do not commercialize extra virgin olive oil with DO.
- 44.9% commercialize extra virgin olive oil with DO.
Most of them do not remember having received the choice of extra virgin olive oil with DO at restaurants, although they find it an especially important element, due to the positive effect that it would have on the quality perception of the establishment and on the taste of its dishes.

After the organoleptic properties, the brand/DO (even when if are not very well-known) and the price are the elements mostly used by the consumer to decide the quality of olive oil (olive, virgin or extra virgin).

CONSUMIDORES: ¿Conoce alguna D.O. de aceite de oliva virgen extra?  
N= 1200

Have you ever been offered extra virgin olive oil with DO at a restaurant?

- No, nunca (24.5%)
- Sí, en alguna oportunidad (75.5%)
- Sí, varias veces (13.7%)
- No contestaron (7.0%)
Knowledge of olive oil benefits and properties

HORECA

- Consumers regard olive oil as a unique and unreplaceable product on the table of restaurants.
- The catering sector thinks consumers know very well about olive oil properties (48.2%) and especially about its benefits (79.7%). The image transmitted to consumers through olive oil is considered relevant by restaurateurs.
- Given the current situation and the reduction of prices, they agree this is a good moment to promote olive oil consumption.
- Just 16.7% of restaurants and 24.6% of hotels have ever participated in an olive oil event. Their participation in ceremonies, conferences, etc. is quite low, being greater in hotels and larger or more expensive establishments. In general, there is little information about this subject (71.5% have not received nothing at all), and the information they get usually derives from promotional material and specialized magazines.

¿Cuál/es son los factores de decisión más importante/s en la elección del aceite de oliva que utiliza en su establecimiento?

<table>
<thead>
<tr>
<th>Factores</th>
<th>Peso (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sabor</td>
<td>53.0</td>
</tr>
<tr>
<td>Olor/ aroma</td>
<td>28.8</td>
</tr>
<tr>
<td>Acidez</td>
<td>21.9</td>
</tr>
<tr>
<td>Color</td>
<td>21.8</td>
</tr>
<tr>
<td>Relación precio-calidad</td>
<td>42.2</td>
</tr>
<tr>
<td>Precio</td>
<td>17.0</td>
</tr>
<tr>
<td>Descuentos/ofertas</td>
<td>5.3</td>
</tr>
<tr>
<td>Que sea una marca conocida</td>
<td>9.0</td>
</tr>
<tr>
<td>Denominación de origen</td>
<td>7.8</td>
</tr>
<tr>
<td>Seguridad/confianza aprovisionamiento</td>
<td>7.7</td>
</tr>
<tr>
<td>Es el que tiene mi proveedor</td>
<td>3.9</td>
</tr>
<tr>
<td>Practicidad/tamaño del envase</td>
<td>6.0</td>
</tr>
<tr>
<td>Siempre hemos usado el mismo/tradición</td>
<td>6.8</td>
</tr>
<tr>
<td>Haberla probado/experiencia</td>
<td>6.0</td>
</tr>
<tr>
<td>Otros</td>
<td>2.3</td>
</tr>
<tr>
<td>Características del aceite:</td>
<td>79.7</td>
</tr>
<tr>
<td>Precio:</td>
<td>53.3</td>
</tr>
<tr>
<td>Calidad/ Marca:</td>
<td>16.4</td>
</tr>
<tr>
<td>Logística y almacenamiento:</td>
<td>11.8</td>
</tr>
<tr>
<td>N= 1507</td>
<td></td>
</tr>
</tbody>
</table>

*Respuestas múltiples.
Knowledge of olive oil benefits and properties

**DISTRIBUTION**

- Distributors consider final consumers know more about olive oil than their HORECA clients.
- According to distributors, the main priority is developing market education, both to restaurateurs and consumers, on the benefits of olive oil. Nutritional and cooking benefits must be explained, as well as differential aspects of olive oil as regards other vegetable oils. 64.4% of current distributors carry out actions to promote the sales of this product in the Horeca channel.
- They are generally a public concerned about the eagerness of information. 65.4% are informed about the novelties of olive oil, mainly through specialized magazines, but also through fairs and events of the olive oil and general food sectors.

**DISTRIBUIDORES:** Cuando Usted quiere convencer a un restaurador de comprar un aceite de oliva en lugar de otro aceite vegetal, ¿qué argumentos de venta utiliza?

<table>
<thead>
<tr>
<th>Argument</th>
<th>1º mención</th>
<th>Todas las menciones</th>
</tr>
</thead>
<tbody>
<tr>
<td>Relación precio-calidad</td>
<td>33,7%</td>
<td>54,1%</td>
</tr>
<tr>
<td>Sabor/olor/aroma</td>
<td>18,5%</td>
<td>32,2%</td>
</tr>
<tr>
<td>Mejora el sabor de las comidas</td>
<td>14,2%</td>
<td>43,4%</td>
</tr>
<tr>
<td>Mayor rendimiento</td>
<td>7,3%</td>
<td>42,0%</td>
</tr>
<tr>
<td>Que sea una marca conocida</td>
<td>2,9%</td>
<td>24,9%</td>
</tr>
<tr>
<td>Es de calidad</td>
<td>2,4%</td>
<td>2,4%</td>
</tr>
<tr>
<td>Mejor resultado de las frituras/los alimentos no se impregnan en aceite</td>
<td>2,0%</td>
<td>12,7%</td>
</tr>
</tbody>
</table>
Knowledge of olive oil benefits and properties

Most consumers think that they can tell the difference between olive and vegetable oil, but only 18.3% are completely sure when it comes to distinguish between plain olive oil and extra virgin olive oil.

Consumers’ knowledge about olive oil is vague, especially among young people.

The most frequent oil categorization among consumers is established around its taste (soft-intense) or acidity level, instead of its commercial category.

They usually relate oil properties to the its quality, instead of its price, origin or aroma.

**Characteristics of olive oil:**
- Sabor: 80.8%
- Color: 56.3%
- Olor/ aroma: 46.3%
- Acidez: 32.3%
- Densidad: 2.8%
- Denominación de origen: 14.9%
- Que sea una marca conocida: 8.5%
- Precio: 14.3%
- Haberla probado/ experiencia: 10.1%
- Confianza/ seguridad en el restaurante: 0.8%
- Otros: 0.7%
- Que sea de vidrio: 3.4%
- Tipo de envase: 0.3%
- Que sea en lata: 0.2%
- Ns/Nc: 2.0%

**Marca:** 21.7%

**Precio:** 14.3%

**Otros:** 10.5%

**Envase:** 3.6%

**N= 1200**

Study on olive oil use and consumption habits in the HORECA channel in Spain
CONSUMER: Knowledge of olive oil benefits and properties

KNOWLEDGE OF OLIVE OIL

- Mediterranean Diet, health and taste, in this order, are the aspects that people identify most with olive oil.
- For consumers, the main advantage of olive oil refers to its benefits, even though their knowledge on this matter is not thorough. 10% know nothing about olive oil benefits. Nutritional, natural and of easy digestion. These are the main characteristics associated to the benefits of olive oil.
- As regards its cooking advantages, the most important for them is taste, followed by its performance (it goes further, temperature...).

CONSUMIDORES: ¿Conoce las ventajas nutricionales y para la salud?

- Es natural: 41,3%
- Es nutritivo: 35,2%
- Fácil digestión: 32,2%
- Contiene ácido oleico: 20,3%
- Es importante para la piel por su aporte de vitamina E: 19,7%
- Es el que más vitaminas aporta: 18,3%
- Es beneficioso para el crecimiento óseo: 7,8%
- Es beneficioso para el desarrollo del cerebro y del sist. nervioso: 7,1%
- Reduce los niveles de colesterol/Previene el colesterol: 4,7%
- Antioxidante: 1,8%
- Otros: 2,8%
- No conoce ninguna: 10,0%

N= 1200

STUDY ON OLIVE OIL USE AND CONSUMPTION HABITS IN THE HORECA CHANNEL IN SPAIN
HORECA: Purchasing process

- Price is very important in the HORECA channel
- Olive oil does not praise its image of exclusive product.
- Widespread ignorance of its qualities, characteristics and benefits poses a disadvantage for the product at the purchase moment.
- The elements on which improvement is based in the purchase process are its quality for organized catering and its impact on image for independent catering.
- Consumers' support might be essential for improving olive oil's marketing in the HORECA Channel.

¿Cuáles son los factores de decisión más importante en la elección de un establecimiento/proveedor en la compra de estos productos?

- Buena relación calidad/precio: 45,7%
- Buenos precios, a parte de ofertas: 22,8%
- Buenas ofertas: 21,9%
- Atención al cliente: 18,8%
- Rapidez en compra: 15,8%
- Continuidad de aprovis.: 15,4%
- Dan sugerencias/ consejos: 14,8%
- Calidad de los productos: 14,1%
- Variedad de productos: 10,7%
- Homogeneidad del prod.: 9,6%
- Variedad de marcas: 8,4%
- Disponib. de marca propia: 5,4%
- Proximidad: 27,3%
- Horario: 21,9%
- Centro comercial (var. de tiendas): 18,8%
- Parking: 15,8%
- Tarjeta/prog. de fidelización: 14,8%
- Folleto/publicidad: 12,3%
- Tarjeta de compra: 11,7%
- Costumbre: 11,1%
- Otros: 2,7%

*Respuestas múltiples.

N=1507
DISTRIBUTORS: Sales process

- There is a huge lack of knowledge about the product.
- In spite of this lack of information, the degree of involvement of distributors with olive oil is very high, both in economic (high % of invoicing) and production terms (olive oil bottling).
- The example of wine shows an appropriate approach that highlights the key elements of the project.
- Client's loyalty provides us margin to improve and provide innovation to sales processes.

¿Cuál/es son las principales trabas que encuentra en la venta de los aceites de oliva a clientes del sector de la hostelería y restauración?

<table>
<thead>
<tr>
<th>Traba</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Precio del producto frente a otros ac. vegetales</td>
<td>60,5</td>
</tr>
<tr>
<td>Mis precios no son competitivos con los de grandes cadenas (Cash &amp; Carry o similares)</td>
<td>14,1</td>
</tr>
<tr>
<td>Situación económica de los establecimientos</td>
<td>11,2</td>
</tr>
<tr>
<td>Plazos de pago (si son diferentes del resto de productos)</td>
<td>3,4</td>
</tr>
<tr>
<td>Priorizan el precio sobre la calidad del producto</td>
<td>15,1</td>
</tr>
<tr>
<td>Desconocimiento sobre las categorías y calidades de los diferentes ac. de oliva</td>
<td>6,8</td>
</tr>
<tr>
<td>Cada cocinero tiene su forma de hacer, si no usa un ac. de oliva, no va a cambiar</td>
<td>1,0</td>
</tr>
</tbody>
</table>

Baja valoración del producto y su calidad: 22,0

Coste: 76,6
The MARM has collaborated with this initiative. The opinions contained in this document are the sole responsibility of Organización Interprofesional del Aceite de Oliva Español and do not represent the views of the MARM.

Thank you for your attention