EuroMARC — Produits agroalimentaires de montagne en Europe, leurs consommateurs, distributions et démarches

# COMPTE-RENDU DU SÉMINAIRE PUBLIC DE MI-PARCOURS DU PROJET EUROMARC

# 6 NOVEMBRE 2008, BRUXELLES




FOOD QUALITY AND SAFETY

*Projet cofinancé par l'Union Européenne*

*6ème programme cadre de recherche et développement*



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# Sommaire

# Programme du séminaire

| | |
|---|---|
| **08h45** | **Ouverture des inscriptions** |
| **09h00** | **Session d'ouverture**<br>Accueil et introduction, Marie Guitton coordinatrice générale du projet, Euromontana. |
| *Session 1 : l'image des produites de montagne de qualité* | |
| **09h15** | *Entre méconnaissance et expectative : une approche consommateur des produits de montagne de qualité*, Virginie Amilien, SIFO, Oslo<br>*L'image des produits de montagne de qualité dans les filières*, Markus Schermer, UIBK, Innsbruck<br>*Opinions des panélistes:* EKPIZO – Athènes; CNIEL, ministère bavarois de l'Alimentation, de l'Agriculture et de la Forêt |
| **10h15** | Discussion avec le public |
| **10h45** | **Pause café** |
| **Session 2 : apporter de la valeur ajoutée aux produits de montagne de qualité** | |
| **11h00** | *Prime pour la différentiation des produits chez les distributeurs: le marché peut-il donner une valeur à l'attribut « montagne » ?.* Philip Leat, Cesar Revoredo-Giha, SAC, Ecosse<br>*L'influence des initiatives locales sur les chaines de produits de montagne à valeur ajoutée*, Bernd Schue, ÖIR, Vienne<br>*Opinions des panélistes :* Országos Fogyasztóvédelmi Egyesület; Eco-innovation |
| **12h00** | Discussion avec le public |
| **12h30** | **Déjeuner - Buffet** |
| **Session 3 : quelles politiques de développement des produits de montagne de qualité ?** | |
| **14h00** | *La production de produits de montagne de qualité : évaluation des possibilités offertes par les législations nationales et européennes,* Robert Mac Morran, UHI, Ecosse<br>*L'évolution des signes et labels de qualité,* Francis Fay, DG Agri<br>*Opinions des panélistes :* Province autonome de Bolzano-Haut Adige, OFAG, CNIEL |
| **15h00** | Discussion avec le public |
| **15h30** | **Conclusions**, *Plan de travail d'EuroMARC,* Georges Giraud, ENITA Clermont-Ferrand, Coordinateur scientifique d'Euromarc<br>Remerciement par le président d'Euromontana |
| **16h00** | **Fin de la journée** |

# Bilan du séminaire EuroMARC

Le séminaire EuroMARC a réuni le 6 novembre dernier dans les locaux de la délégation de la région Languedoc-Roussillon à Bruxelles une cinquantaine de participants venus échanger sur les premiers résultats du projet de recherche sur les produits agroalimentaires de montagne de qualité. En plus des 6 experts européens invités par le consortium, le public a également pu réagir et donner son opinion sur EuroMARC.

Pour les membres du consortium, la journée a eu de nombreux aspects positifs :

- Elle a permis de faire le bilan de l'avancée des travaux : après un an et demi de travail sur le projet, le séminaire aura permis de se rendre compte du chemin parcouru, et de celui qu'il reste à faire !
- Elle a été l'occasion de rassembler les pièces du puzzle puisque le projet EuroMARC comprend 5 domaines d'étude (consommation, distribution, filières, initiatives locales et politiques). Ces aspects étant traités séparément dans le travail quotidien de recherche, les présentations communes ont été l'occasion de lier tous ces dimensions dans un ensemble cohérent.
- Enfin, le séminaire a permis de recueillir des avis extérieurs : ces contributions enrichissantes ont été très largement appréciées des partenaires, pour qui les avis reçus constituent des éléments concrets pouvant enrichir les analyses à venir.

Vous trouverez dans ce compte-rendu un résumé des discussions qui ont eu lieu lors de cette journée de séminaire.

# Session 1 — L'image des produits agroalimentaires de montagne de qualité

*Modération: Georges Giraud, ENITA*

*Présentations de Virginie Amilien, SIFO, et Markus Schermer, UIBK.*

*Experts invités : Noëlle Paolo, CNIEL; Richard Balling, ministère de l'Agriculture de la Province de Bavière*

La première session a permis de présenter les résultats des recherches consommateurs et filières. En particulier, les présentations se sont concentrées sur l'analyse de l'image des produits de qualité chez les consommateurs et les différents acteurs des filières de production. Il est remarquable de noter les similitudes entre les points de vue d'acteurs aussi variés. Ainsi, d'une part l'évocation positive de la montagne, liée à une image de qualité et d'environnement propre et préservé est récurrente, et d'autre part l'importance de la qualité sanitaire des produits s'avère primordiale.

On note tout de même des différences de perception des produits en fonction du type de consommateurs considéré. Ainsi, alors qu'en zone de montagne, les consommateurs considèrent les produits de montagne comme des produits locaux, les habitants d'autres régions tendront à davantage valoriser la provenance « montagne », en raison d'une idéalisation de l'image de la montagne. Les enquêtes sur les filières ont par ailleurs permis de confirmer ces résultats et d'identifier des limites à la commercialisation des produits de montagne de qualité, d'où l'importance d'une communication plus efficace sur les produits de montagne pour les faire reconnaître en tant que catégorie spécifique. Mais au préalable, une meilleure coordination entre producteurs et acteurs des filières serait nécessaire.

Noëlle Paolo, du CNIEL, a confirmé l'intérêt des consommateurs pour les produits de montagne de qualité : une étude conduite par le CNIEL sur le lait de montagne avait produit des résultats similaires. Elle a insisté sur la nécessité d'utiliser avec précaution l'expression « produit de montagne de qualité », le terme « qualité » sous-entendant l'existence de produits de montagne de qualité inférieure, ce qui va à l'encontre de l'imaginaire de la montagne. Richard Balling,

**La montagne évoque une image de qualité et d'environnement propre et préservé ; en même temps, la qualité sanitaire des produits s'avère primordiale.**

du ministère bavarois de l'Agriculture, a abondé dans ce sens en proposant de parler plutôt de produits « provenant de zones de montagne ».

Les discussions ont ensuite permis de soulever plusieurs points :

- La difficulté de définir ce qu'est une zone de montagne, définition qui serait nécessaire pour une éventuelle mise en place d'un logo ou d'un signe de qualité
- Le besoin d'utiliser des termes appropriés, illustré par le fait qu'en Ecosse, le terme montagne (*mountain*) n'est pas associée aux reliefs locaux, appelés collines (*hills*)
- Le besoin de définir les critères éventuels à respecter pour pouvoir utiliser un logo/label.

Virginie Amilien, Markus Schermer.
*Photo : Vanessa Klepandy*

En conclusion, deux idées de développement des produits de montagne de qualité ont émergé de la discussion : pour la vente locale, l'aspect « produit local », de proximité, doit être valorisé ; le côté « montagne » des produits semble avoir un potentiel plus fort auprès des consommateurs des zones de plaines.

## Session 2 — Apporter de la valeur ajoutée aux produits de montagne de qualité

*Modération: Alexia Rouby*
*Présentations de Philip Leat, SAC, et de Bernd Schuh, ÖIR.*
*Experts invités : Frédéric Morand, Eco-innovation ; Livia Dömölki, Association nationale hongroise pour la protection des consommateurs*

**Les produits de montagne de qualité son rarement vendus à un prix plus élevé que les produits des plaines.**

Lors de la deuxième session, les membres du consortium travaillant sur les aspects distribution et initiatives locales de type LEADER ont tenté d'aborder la question de la manière d'apporter de la valeur ajoutée aux produits agro-alimentaires. Philip Leat a d'abord présenté les premiers résultats de l'analyse des études de rayonnage (voir lettre d'information n°1) qui ont notamment mis en valeur les différences de prix entre les produits qui ont été identifiés par les chercheurs comme des produits de montagne de qualité, et les autres. Les résultats ont montré de grandes variations en fonction du type de produits et des pays, allant parfois à l'encontre des idées *a priori*. Ainsi, pour les fruits, la charcuterie, et l'eau, la différence de prix entre « produits de montagne » et « produits standards » s'avère soit insignifiante, soit négative pour les produits de montagne, alors vendus moins cher. Les fromages de montagne bénéficient en revanche d'une vente à un prix supérieur, sauf en France; ceci pourrait s'expliquer par la puissance de la grande distribution dans ce pays.

Bernd Schuh a ensuite présenté le cadre d'analyse des initiatives locales. Bien que ce volet du projet ne soit pas encore suffisamment avancé pour que l'on puisse présenter des premiers résultats, des données de projets entrepris précédemment par l'ÖIR ont permis de montrer le rôle que peuvent jouer les programmes LEADER par rapport à d'autres programmes de développement : ils peuvent constituer l'élément principal des politiques de développement rural, ou bien jouer un rôle d'incubateur de nouvelles idées, ou être des programmes de niche, ou encore des programme permettant de combiner différentes initiatives au niveau local. N'ayant pas encore suffisamment de résultats sur cette partie de l'étude, il n'est pas encore possible d'établir dans quelle mesure les projets LEADER peuvent permettre de soutenir la création ou le développement de filières de produits de montagne de qualité.

Livia Dömölki, de l'Association nationale hongroise pour la protection des consommateurs, a relevé l'intérêt pour les consommateurs de pouvoir choisir entre des produits très divers, et non pas de se trouver face à un marché uniforme. Frédéric Morand, d'Eco-innovation, a quant à lui soulevé la question de la marge dont bénéficient les producteurs. En effet, une différence de prix positive entre produits de montagne et autres produits ne signifie pas pour autant que les producteurs bénéficient d'un revenu plus élevé.

Les discussions ont ensuite portées notamment sur les raisons pour lesquelles les produits de montagne ne sont pas tous vendus à des prix plus élevés que les produits provenant d'autres zones. Ainsi, une des raisons invoquées est que les produits de montagne de qualité vendus localement sont achetés par une population ayant des revenus inférieurs à la population urbaine. Ces produits doivent donc avoir des prix attractifs pour la population locale. D'autre part, certains participants ont fait remarquer qu'étant donné que les produits de montagne n'ont pour l'instant qu'une image floue, les consommateurs ne sont pas nécessairement prêts à payer un prix plus élevé. meilleure communication s'avère donc nécessaire. Enfin, le lien entre les produits et leur région d'origine ne peut être passé sous silence : une meilleure stratégie montagne, de territoire, pourra amener une plus-value aux produits.

## Session 3 — Quelles politiques pour favoriser le développement des produits de montagne de qualité ?

*Modération: Virginie Amilien, SIFO*
*Présentations de Rob McMorran, Perth College, et de Francis Fay, chef-adjoint de l'unité qualité des produits à la DG Agri*
*Livre vert sur la qualité des produits agricoles disponible sur http://ec.europa.eu/agriculture/quality/policy/index_fr.htm*
*Experts invités : Vesna Caminades, représentation à Bruxelles de la Province de Bolzano-Sud-Tyrol, Italie ; Christine Mueller, Office fédéral de l'Agriculture (OFAG), Suisse*

Virginie Amilien, Francis Fay
*Photo : Vanessa Klepandy*

**Bien que le terme de « produit de montagne » ne soit pas compris de la même façon dans tous les pays, il existe une tendance générale en faveur d'un soutien à ces produits.**

Rob McMorran a présenté les résultats d'une enquête menée auprès de personnes impliquées dans la préparation ou la mise en œuvre des politiques de développement rural ou dans la labellisation des produits. Les personnes contactées travaillent au niveau local, régional, national ou européen. Les résultats ont tout d'abord souligné que la compréhension et la définition légale des termes « montagne » ou « produit de montagne » sont très variables selon les pays. Ainsi, la France a des définitions légales précises de ces termes, alors que la Roumanie n'a de définition que pour le terme « montagne », tandis que les 4 autres pays manquent de définition. Le terme « produit de montagne » est relativement bien connu et compris en France et en Autriche, mais ne l'est par contre quasiment pas en Ecosse. Les interviews ont en outre permis de mesurer le soutien à plusieurs niveaux en faveur d'une protection légale des produits de montagne de qualité. Bien que la tendance générale soit plutôt en faveur (à une courte majorité) du soutien à une telle initiative, des questions se posent cependant : le problème de la définition des zones de montagne est encore une fois soulevé. Certains ont par ailleurs posé la question de la pertinence d'un label européen, alors que l'objectif prioritaire devrait plutôt être le soutien au développement régional, et ont donc proposé des alternatives.

Pour approfondir la discussion, Francis Fay, chef-adjoint de l'unité qualité des produits à la DG Agri, a présenté le Livre vert sur la qualité des produits agro-alimentaires. Le lancement de ce document le 15 octobre dernier a en effet ouvert une période de consultation générale sur la politique européenne relative à la qualité des produits, première phase d'une réflexion et de discussions qui devraient aboutir à une réforme de cette politique en 2010. Dans le Livre vert, la Commission européenne s'interroge en particulier sur la nécessité éventuelle de mettre en place de nouveaux systèmes pour mieux protéger certaines catégories de produits.

L'intervention de Vesna Caminades, du bureau de représentation à Bruxelles de la région italienne du Sud-Tyrol, a apporté un exemple de politique locale en faveur des produits. Dans cette province, l'accent est mis sur l'aspect local des produits, qui de fait inclut l'idée de montagne puisque la province est une région très montagneuse. Vesna Caminades a conclu en soulevant les difficultés de mise en œuvre d'un label, souci qu'a confirmé Christine Mueller, de l'OFAG. En effet, depuis 2006, la Suisse a promulgué une loi pour distinguer et préserver les produits de montagne et les produits d'alpage. L'application de cette loi pose cependant encore certaines difficultés. Les débats ont ensuite tourné autour de la question d'un label montagne : est-ce le meilleur outil pour le développement régional, ou un autre type de protection pour le terme montagne doit-il être favorisé ?

L'enjeu de la communication au consommateur a également été abordé lors des discussions : la mise en place d'un signe de qualité, logo ou autre marque de reconnaissance des produits devra aller de paire avec une communication sur la signification de ce signe.

# Conclusion — Quelles recommandations pour une meilleure protection des produits de montagne ?

L'actualité de la politique européenne aidant, les débats de la journée ont largement été orientés sur la manière de protéger les produits de montagne. Emergent du débat deux types de stratégies possibles :

- La stratégie locale, fondée sur la connaissance du territoire par les acheteurs. Dans ce cas, les acheteurs connaissent l'origine du produit et savent *de facto* qu'il provient d'une zone de montagne
- La stratégie longue distance, pour laquelle les producteurs vont faire appel à l'imaginaire des consommateurs et à leurs aspirations concernant la montagne. Du fait de la distance, le consommateur aura alors davantage besoin d'être rassuré quant à la provenance du produit. Un label ou un signe officiel prouvant l'origine montagne pourrait alors apporter une plus-value au produit.

Ces premières tendances devront être confirmées par l'analyse des résultats attendus, avant d'être incluses dans les guides pratiques et les recommandations qui seront préparés en 2009.

La présentation des résultats finaux aura lieu début décembre 2009 à Maribor, en Slovénie.

# Remerciements à nos sponsors :

Lors du déjeuner, les participants du séminaire ont pu se délecter de quelques exemples de produits de montagne de qualité offerts par plusieurs producteurs. Nous tenons donc à remercier :

- Zillertaler (Autriche) pour les fromages Bergkäse et Almkäse ;
- Les producteurs des Pommes et poires de Savoie (France) ;
- Les producteurs de porc de montagne (France) pour le saucisson et les saucisses sèches de montagne.

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**POUR EN SAVOIR PLUS…**

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Fax : +32-(0)-2-280.42.85
Email: mountainproducts-europe@euromontana.org

# Session introductive

Présentation :

*Accueil et introduction*

**Marie Guitton**, coordinatrice générale du projet, Euromontana.

European Mountain Agrofood products, Retailing and Consumers

# EuroMARC
# Seminar 06/11/2008

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FOOD QUALITY AND SAFETY

Project co-financed by the European Union 6th framework programme for Research and Technological Developement

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## Some historical data

- Mountain quality food products as a working theme for Euromontana for almost 10 years
  - Reflections led within Euromontana since 1999
    - 3 seminars and the second convention – DG Agri
  - 2002-2004: research project to characterise mountain quality food products (MQFP)
    - DG Research – 13 partners – 8 countries – 10 studied areas – 122 products studied
  - 2005: launch of the European charter of mountain quality food products
    - 69 signatories – 12 countries – 4 governements

Euro-MARC 1
Introduction Session – 06/11/2008
Euromarc Seminar, delegation of the region of Languedoc-Roussillon, Brussels, Belgium

EUROMONTANA

# What is EuroMARC?

- Research project, FP6
- 2007-2010
- 10 teams, 6 countries


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What is EuroMARC?

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# EuroMARC: General Objectives

- Measurement of European consumers' interest for mountain food products: verbal responses, actual attitudes, buying behaviour
- Assessment of share of added value along supply chain of mountain food products
- Strengthening rural development by implementation of original market-oriented strategy, enabling the maintenance of a living countryside and healthy environment



# Scientific objectives of EuroMARC

- To assess the interest, perception & expectations of European consumers for mountain food products
- To identify specific consumer segments sensitive to mountain food products, by means of cluster analysis
- To analyse the supply chains of mountain food products, with focus on bottle-necks and constraints, in order to emphasise the opportunities offered by distribution channels and consumer segments
- To identify factors for success or failure in local initiatives devoted to marketing of mountain food products

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## Relevant research questions from EuroMARC

- Consumers and mountain: image vs knowledge
- Consumers and small scale producers in mountain area
- Mountain food products, marketing channels and promotion incl. tourism

Are mountain-quality food products attractive because they are from any mountain or from a specific local or far away place?

Possible overlapping between Mountain & Origin



## EuroMARC: how to proceed?

- 2007-mid 2008: phase of research
  - Consumers study
  - Retailers study
  - Supply chain analysis
  - Local development analysis
  - Policy analysis
- Mid 2008 – 2009: preparation of guidelines and policy recommendation
- Today: presentation and discussion of the first results

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# Session 1

## L'image des produits de montagne de qualité

Présentations :

*Entre méconnaissance et expectative : une approche consommateur des produits de montagne de qualité*

**Virginie Amilien**, SIFO, Oslo

*L'image des produits de montagne de qualité dans les filières*,

**Markus Schermer**, UIBK, Innsbruck


EuroMARC
European Mountain Agrofood products, Retailing and Consumers
Between lack of knowledge and strong expectations:
A consumer approach of Mountain
Quality Food Products –MQFP-
Virginie Amilien and Alexander Schjøll
SIFO, Oslo
–National Institute for Consumer Research-
FOOD QUALITY AND SAFETY
www.mountainproducts-europe.com


Main objective of WP1
To measure consumers' interest, perception and expectations towards quality food products coming from mountain areas in the 6 studied European countries.
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# Methodological approaches

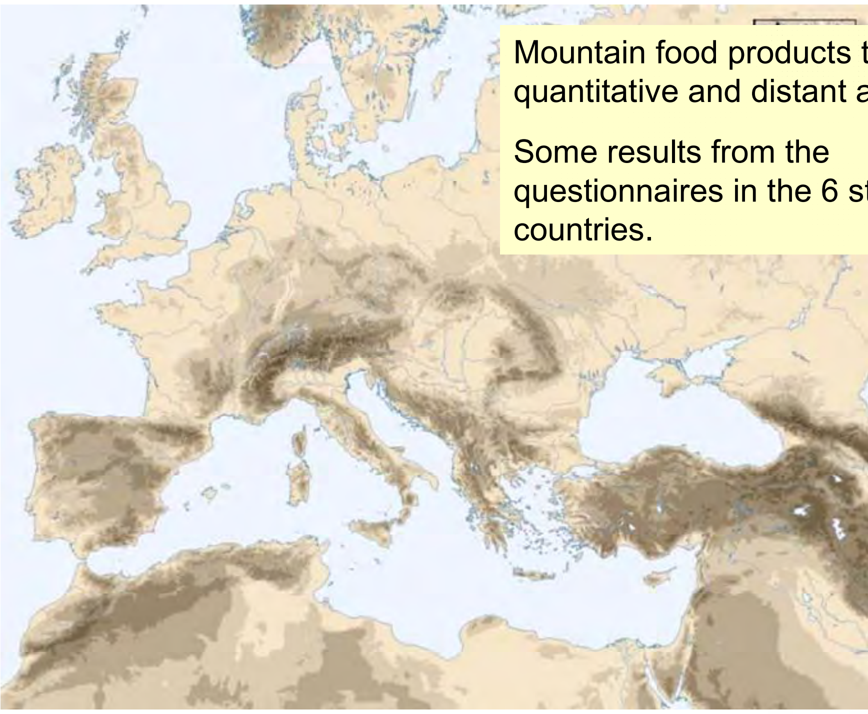
Data have been collected in Austria, France, Norway, Romania, Scotland and Slovenia

through three different methods in each of the six countries:

- Focus groups
- Quantitative questionnaire (min. 300 per country)
- Conjoint analysis



# Quantitative approach



Mountain food products through a quantitative and distant approach.

Some results from the questionnaires in the 6 studied countries.

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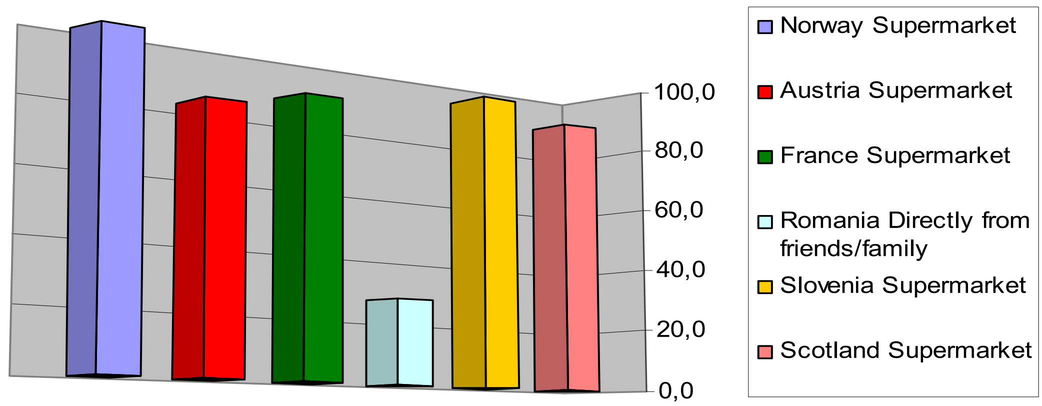
# Every day food habits

Food is mostly bought at the supermarket.




*Case: fruits and vegetables*



# Five most important attributes for respondents when buying everyday food

- Price/value for money
- Few additives
- Appearance
- Support to small scale production
- Local origin

## From general food habits to mountain food products

- Dairy products
- Meat
- Water
- Some few fruits and vegetables
- Other



## The two statements most of respondents agree most upon

- Mountain products are part of the cultural identity of local communities / connected to specific cultural areas
- Mountain products have to comply with industrial standards of hygiene

## Where do respondents expect to buy MQFP?

- Directly from the producer
- Farmers' market and other markets
- Special shop (ex: butcher)

- From friends or family
- Regular grocery shops or supermarkets

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## When do respondents use MQFP?

- Tourism or visit at the production place
- Trying something new

- Every day use
- Week end use
- Dinner with family and friends

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# The preferred sticker for MQFP?


- Price: Low
- Label: Yes
- Origin: Local domestic
- Affect context: Photo of mountain


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# Qualitative approach

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SIFO Statens institutt for forbruksforskning National Institute for Consumer Research


Mountain is a common good
Cultural knowledge, agriculture
or/ and technology
transform
“natural” qualities
into mountain food product qualities.
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Mountain food
is a part of the green world
pure
traditional
local
quality food
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## Different expectations in different situations

Eating, considering, expecting or perceiving MQFP is directly connected to a situated consumption:

one individual, consumer or “eater”, do not have the same opinion about, or expectation from,  MQFP in different situations.



Different expectations in different situations

Eating, considering, expecting or perceiving MQFP is directly connected to a situated consumption:

one individual, consumer or “eater”, do not have the same opinion about, or expectation from,  MQFP in different situations.

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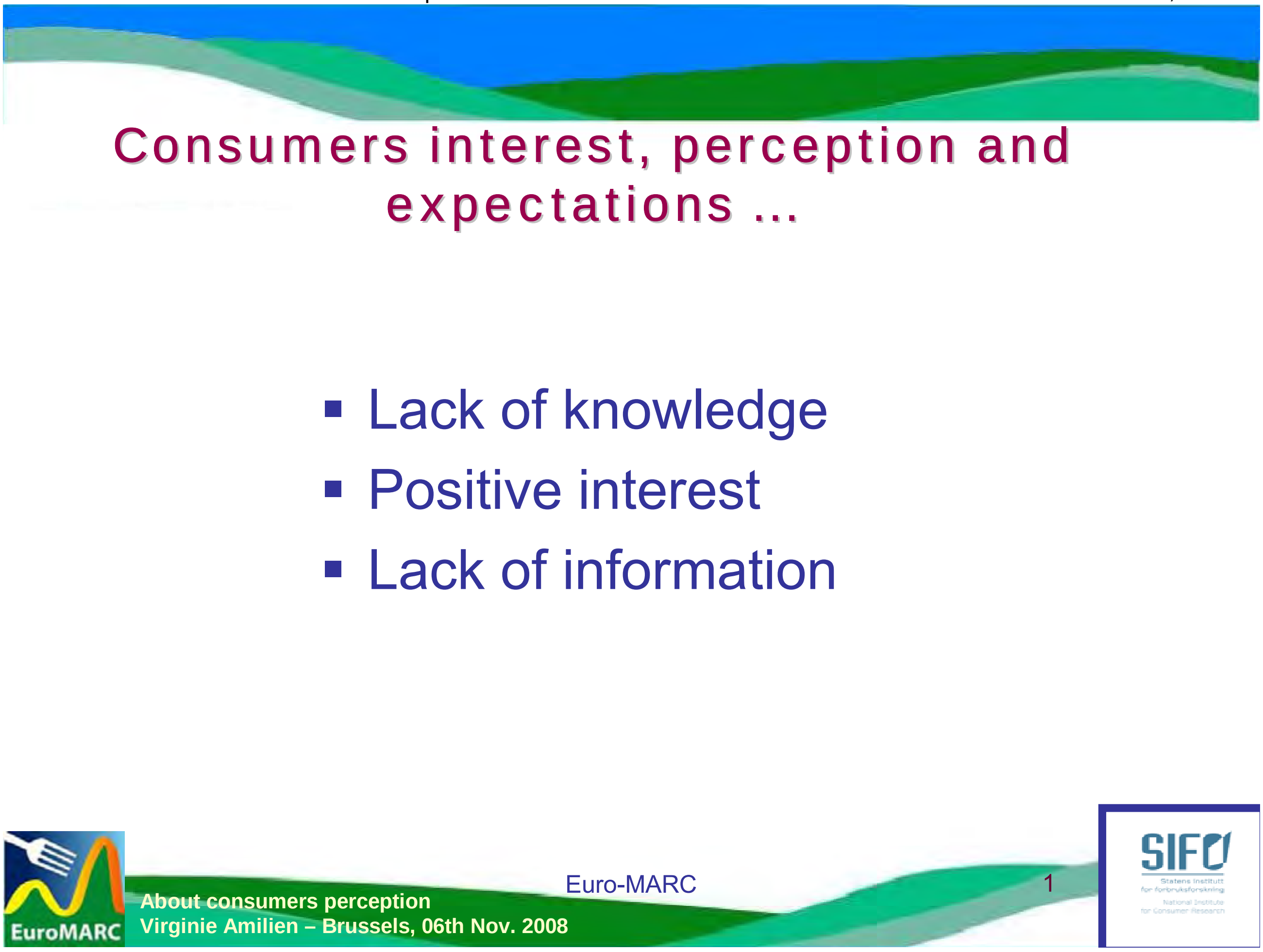
Consumers interest, perception and expectations ...
Lack of knowledge
Positive interest
Lack of information
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# The image of mountain quality food products along the supply chain

Markus Schermer & Anja Matscher,
University of Innsbruck – Austria

November 06, 2008

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## Content

- Approach and supply chains

**Preliminary Results:**

- Quality perception of mountain quality food products
- Promotion: suggestions on improvement and chracteristics which should be promoted
- Bottlenecks
- Conclusion

# Approach

Example: The cheese supply chain „Bio vom Berg“

Farmer → Cheese-maker → Manager of the dairy → Manager of „Bio vom Berg“ → Retailer MPreis

Over all 19 case studies from AT, N, FR, SL, UK,:

- 27 Farmers and agricultural delegates
- 21 Processors
- 39 Retailers, caterers

Σ 87 Interviews

# So far evaluated supply chains

| | Fruit/Vegetable | Water | Dairy products | Meat |
|---|---|---|---|---|
| **Austria** | | Montes<br>Obladiser | Bio vom Berg<br>Sennerei Zillertal<br>Kaes.at | |
| **Scotland** | | | | Balliefurth Farm<br>Great Glen Game |
| **France** | Pommes et poires de Savoie<br>Fraises des Monts Du Lyonnais | Laqueuille | | |
| **Slovenia** | | | Mlekarna Planika<br>Tolminc cheese<br>Bovški cheese | Zgornjesavinjski želodec<br>Mesnine Bohinja |
| **Norway** | Fjellmandel poteter from Oppdal<br>Fjellmandel poteter From Vågå | | Fenalår from Lofotlam<br>Fenalår from Bjorli Fjellmat | |

# Quality perception of mountain food products

## Are the case study products mountain food?

**Farmers:**

- Case study products are **absolutely „mountain products**“ (except Scottish farmers)
- Scottish farmers think quality is **due to handling** and not because of mountain

**Processors:**

- Case study products are **absolutely „mountain products“** (except Scottish processors)

**Retailers:**

- Retailers around the Alps (SL, AT, FR) perceive the case study products as **“mountain products”** unlike Scottish retailers
- Norwegian retailers value the **marketing** aspect
- For consumers the **local provenance** and the **quality** is more important than the **mountain origin** (N, UK)
- “Local products” are “short-travelled” and include often **“mountain food”**

# Influences of „mountain“ on quality

**No major differences** according to country or stakeholder group regarding to quality perception:

**Mountain:** high quality of input - high quality of output

- Extensive, small scale and **manual vs. intensive** mass production in lowlands
  - less use of pesticides
  - less polluted environment, pureness
  - less concentrate feed
  - silage-free and GMO-free production
- Forage/grass: high variety of herbs and grass species
- Pasturing: positive influence on the final product (meat and cheese)
- Climate: aroma for fruits
- Alpine conditions influence the ripening process (drying of meat)

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# Quality aspects related to the „mountain“ provenance

Mountain conditions make the product unique:

- Nice taste
- Colour of the product
- Content e.g.:
  - high content of Omega fatty acids
  - without artificial additives
  - healthy ingredients (e.g. minerals), etc.
- Few do not regard quality as related to mountain provenance (UK, N)

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# Suggestions for improvement of promotion

## Suggestions for improvement I

There is never enough marketing but ...

- ... critical if only **small quantities** produced (SL, AT) → **higher demand than supply**, only for short supply chains
- Stronger promotion of mqfps especially in **non mountain areas**
- Strengthening the consciousness of **children and younger people** regarding mqfp
- Better **organisation** of small producers/processors
- (Stronger) **cooperation** between **producers/processors** and actors of the **tourism** sector (SL)
- Stricter defintion of **what is** a „mountain product“
- Clear distinction between **tradional small** processors and **industrial** processors of a mqfp

## Suggestions for improvement II

**Packaging:**

- design of **packaging/labels** (pictures of the area of production)
- more **information** on mqfp on the packaging

**Improvements at the point of sale:**

- organising **tastings** at the point of sale
- special trainings for the **salespersons**
- providing **promotion material** (folders, flyers) to retailers

**Stronger communication in the mass media needed:**

- TV, radio, **lifestyle and health magazines**

**Other suggested means of communication were:**

- installation of a **museum** about cheese
- offering **games** with prizes for solving riddles
- **certificates** for gastronomy
- **collective actions**: regional advertising campaign (UK)
- **unified marketing concept** for the alpine region (AT): only silage and GMO
- free dairy products

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## Characteristics to be better promoted

**Combinations should be promoted, instead of single characteristics**

**Characteristics of production/processing**

- natural environment within production takes place
- environmental friendly production, organic, GMO free
- traditional, small scale production, animal welfare

**Characteristics of the product**

- contents (like Omega 3 fat acids)
- taste

**The (hi)story around the product**

- authenticity and honesty
- scarcity and traditions

**Side effects of the consumption of mqfp (SL, AT):**

- securing farmer’s livelihood
- preservation of the landscape for tourists and local people
- preservation of local jobs

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# Bottlenecks in the marketing of mountain products

- Mountain related bottlenecks
- Scale related bottlenecks

## Mountain related bottlenecks

**Farmers:**

- **Costly** production
- Fluctuating, **seasonal** demand (tourism regions)
- High **transport costs** due to remoteness
- Difficult **management conditions** on mountain farms (manual work, expensive machinery)
- **Climate** related peculiarities in mountain areas (shorter vegetation period)

**Processors:**

- Difficulties to comply with **hygiene regulations** (traditional processing plants)
- **Bad accessibility** of the processing plant
  - poor road conditions
  - remote location
  - higher transport costs

**Retailers:**

- **Limited** product range (no exotics)

## Scale related bottlenecks

**Farmers:**

- **Limited production capacity** → Higher demand than possible supply (SL, AT)
- Constraints in **packaging and labelling**
- Farmers and food manufacturers have **no business training**
- No adequate **transport/distribution** system
- No collective **market organization** of small scale producers

**Processors:**

- **Shortage** of raw material
- Traditional processing practices **laborious**
- Difficulties to find **appropriate machinery** for SME's (e.g. mineral water)
- **Lack of standards** leads to varying qualities and appearance
- To be listed in **retail chains**: high contributions, bar code
- Small scale businesses have **little negotiating power** (discounter)
- No small/independent retailers (concentration)

**Retailers:**

- Mqfp are **too expensive** (esp. gastronomy)
- Fluctuation in the **product quantities** (seasonality) and **qualities**

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## Conclusions

- Mountain products are especially connected to **alpine countries**
- Mountain products have **unique characteristics** which should be promoted **specifically**
- Currently **little consciousness** that mountain products could be a **specific product category**
- Promotion should focus on **combinations** not single features
- Specific needs:
  - better coordination of **producers**
  - better coordination **along the SC**
  - better education in **marketing** for SME and direct marketers

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# Thank you for your attention

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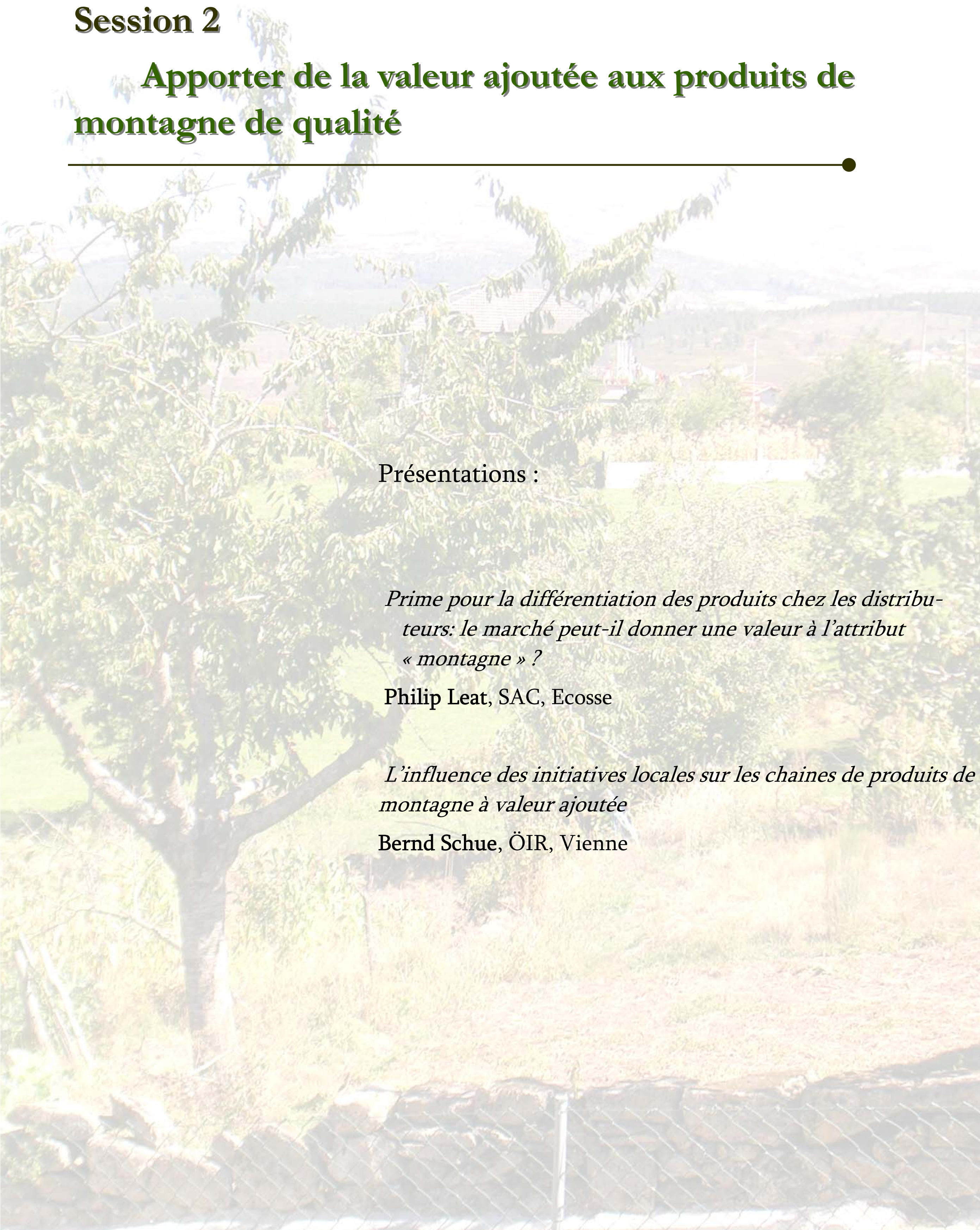

# Session 2

## Apporter de la valeur ajoutée aux produits de montagne de qualité

Présentations :

*Prime pour la différentiation des produits chez les distributeurs: le marché peut-il donner une valeur à l'attribut « montagne » ?*

**Philip Leat**, SAC, Ecosse

*L'influence des initiatives locales sur les chaines de produits de montagne à valeur ajoutée*

**Bernd Schue**, ÖIR, Vienne

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European Mountain Agrofood products, Retailing and Consumers

# Premia for differentiated products at the retail level: can the market put a value on the mountain attribute?

Philip Leat, Cesar Revoredo-Giha, Chrysa Lamprinopoulou
and Beata Kupiec-Tehan

Scottish Agricultural College – Edinburgh, UK

November 06, 2008

Euromontana, ENITA - Clermont, UIBK -Innsbruck, SAC - Scotland, UM FK - Maribor, OIR—Vienna, ISARA - Lyon, Perth College, ICDM - Sibiu, SIFO - Oslo

FOOD QUALITY AND SAFETY

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## Content

- Brief overview of the WP2 research
- Motivation for the presentation
- 'Mountain' as a differentiating attribute
  - Quality attributes and cues
  - Empirical approach
  - Results
- Conclusions and Discussion

## Brief overview of the WP2 research - 1

### Objectives of WP2 survey work

- To identify and analyse:
  - the market channels that are, and could be, used for mountain quality-food products
  - retailers' interest, perceptions and expectations of mountain quality-food products
  - the marketing attributes of mountain quality-food, and
  - factors inhibiting the marketing development of mountain quality-food products.

- To propose strategies to improve and expand the marketing of mountain quality-food products.

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## Brief overview of the WP2 research - 2

- DL3 - contains a review of the marketing of mountain quality food products for each country in the project.
- 3 retailers' surveys have been carried out:
  - (1) shelves surveys, 90 per country (completed)
  - (2) face to face surveys, 20 per country (completed)
  - (3) postal surveys, 90 per country
- The shelves surveys were targeted at retailers who are actually selling mountain food products.
- The face to face and postal survey involved all food retailers.
- The structure of the DL8 document has been circulated, also summaries of the shelves surveys results for partners to write their country comments.
- Summaries of the postal questionnaire results are being generated and will be circulated in November.

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Premia for differentiated products at the retail level:
can the market put a value on the mountain attribute?

## Motivation

- The concept of a mountain quality-food product is a complex one, because it evokes different images for different consumers.
- The purpose of this paper is to explore whether the market puts a value on the 'mountain' attribute at the retailer level
- This is studied using prices from representative products from several European mountain ranges - Highlands, Alps, Massif Central, Norway.

## Quality attributes – 3 types

### Search attributes

- ascertained prior to a product's purchase (e.g. colour of meat, marbling, etc).

### Experience attributes

- cannot be determined prior to purchase, but can be ascertained during consumption (e.g. taste and texture).

### Credence attributes

- cannot be determined prior to purchase or during consumption (attributes which are believed to exist – e.g. the welfare conditions experienced during a lamb's life or whether a product's ingredients were actually produced in a mountain area).

## Categorisation of potential 'process' & 'product' quality attributes of organic meat from a mountain area

| Process Attributes | Product attributes | | | | |
|---|---|---|---|---|---|
| | Food Safety | Nutrition | Sensory | Functional | Image |
| Animal welfare (C) | Absence of Residues (C) | Fat content (S, E, C) | Appearance (S) | Product life (S and E) | Prestige Value (S, E, C) |
| Biotechnology (C) | Absence of artificial Hormones (C) | Energy content (C) | Taste (E) | Preparation Convenience (S and E) | |
| Organic production (C) | Absence of Additives (C) | Vitamins and minerals (C) | Texture (E) | Consumption Convenience (E) | Prestige value (S,E,C) |
| Traceability (C) | Absence of Toxins (C) | | Tenderness (E) | | |
| Feed and Feeding system (C) | Absence of Physical contaminants (E and C) | | Juiciness (S and E) | | |
| Mountain Production Environment (C) | | | Freshness and Taste (S and E) | | Prestige value (S,E,C) |
| Treatment(s) in processing (C) | | | Smell (S and E) | | |

Note: S = Search attribute, E = Experience attribute, C = Credence attribute. The classification of the attributes into search, experience and credence is that of the authors.
Source: Developed from Northen (2000).

## Communication of Quality Attributes

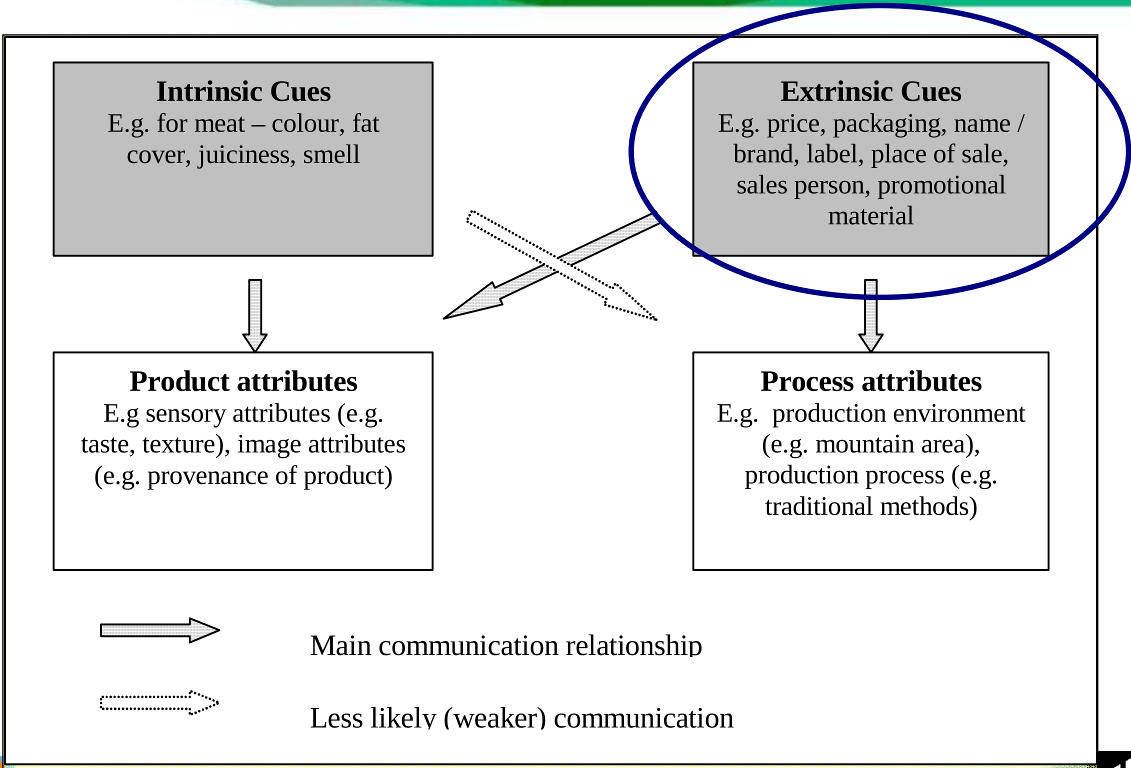
- Consumers' perceptions of quality prior to purchase are based on **quality cues**:
  - stimuli which lead to the perception of certain quality attributes being present and which determine when, where and how a person responds (Kotler, 1980).
- **Intrinsic quality cues**
  - cannot be changed or manipulated without changing the physical characteristics of the product itself.
- **Extrinsic quality cues**
  - are related to the product but are not physically part of it.

## Venison cues

- Intrinsic, e.g.
  - colour, leanness, fat cover, juiciness, type of cut, origin, etc.
- Extrinsic, e.g.
  - price, brand name, packaging, label information, point of sale information, presentation of product in sales outlet, reputation of outlet, activities of salesperson, other promotional activity, etc.

The influence of marketing

## Cues and attributes




## The shelves survey and its data

- What Mountain Quality Food Products are available – how are they marketed?
- 351outlets, 564 shelves, 1765 products.
- 60% from mountain area shops, 40% elsewhere.
- 18 product categories – combined into 6 product groups: beverages, fruits, dairy, meat, meat products and other.
- Supermarkets, speciality shops, mini-markets and farmers' markets

## Empirical approach

- Based on information collected by shelves survey, hedonic price regressions were estimated for several products (apples, sausages, water and cheese) and countries (Austria, France, Norway, Scotland and Slovenia).
- The aim was to estimate whether the market is paying a premium for 'mountain' food quality products over the price paid for equivalent 'non-mountain' food products.

## Hedonic price regression

- The hedonic price method is a useful approach to study the price-quality relationship of a product.
- The method consists of a regression analysis of the price on the selected product characteristics. It has been widely used for both durable (e.g., automobiles) and non-durable goods (e.g. wine, cereals, foods).
- The implicit price of a characteristic is defined as the derivative of the price with respect to the product attribute.

## Results

| | Austria | France | Norway | Scotland | Slovenia |
|---|---|---|---|---|---|
| Apples | -- | •No price difference between mountain and non-mountain products<br>•Small non-specialised shops sell cheaper | -- | -- | -- |
| Sausages | -- | •Non-mountain product receives a premium | •No price difference between mountain and non-mountain products | -- | -- |
| Water | •Non-mountain product receives a premium.<br>•Mountain shops are more expensive.<br>•Non specialised shops sell at a cheaper price.<br>•Flavoured water is more expensive. | •Non-mountain product receives a premium.<br>•Specialised shops sell at a more expensive price. | -- | -- | -- |
| Cheese | •Mountain product receives a premium. | •Non-mountain product receives a premium. | •Mountain product receives a premium. | •Supermarkets sell at a cheaper price.<br>•Hard cheese shows prices below average, and blue cheese the opposite | •Mountain product receives a premium.<br>•Prices in mountain area stores are cheaper.<br>•Hard cheese is more expensive than the average and cream cheese is cheaper. |

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## Conclusions and Discussion

- The theoretical framework on attributes and cues helps to reveal the nature of the "mountain" attribute in product marketing.
- The cues which convey the "mountain" attribute may in some instances be intrinsic (e.g. a distinctive taste or smell).
- In many instances the "mountain" attribute and its various aspects may need to be communicated by extrinsic cues (well-designed marketing effort) in the form of: labeling, packaging, a relatively high price, information from the sales person, etc.

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# Discussion point

## Differentiation and the value of the 'mountain' attribute

| Degree of Differentiation | Product provenance | Role of the 'mountain' attribute |
|---|---|---|
| **Homogeneous product (no differentiation)** | The product is produced in **both** mountain and non-mountain areas. | The attribute 'mountain' does not produce any discernible differentiation. |
| **Partially differentiated product** | The product is produced in **both** mountain and non-mountain areas. | The attribute 'mountain' may differentiate the product, relative to the non-mountain substitute product, due to a special raw material, production environment, or production process.<br>The 'mountain' attribute may create value, relative to the non-mountain product, and can be combined with other value creating attributes (e.g. Cairngorm Mountain Farmhouse Cheese).<br>The 'mountain' attribute can be the basis of a quality label. |
| **Totally differentiated product** | The product is **only** produced in mountain areas. | With no direct substitute, the 'mountain' attribute may be enhanced with other value creating attributes (e.g. Cairngorm Mountain Heather Yoghurt) for differentiation from other mountain products.<br>However, 'mountain' can still be the basis for a 'quality' label. |

# Conclusions - 1

- The analysis has sought to test whether the 'mountain' attribute carries or attracts a price premium relative to non-mountain products.
- A premium was only found in the case of cheese and only for Austria, France (though favouring non-mountain products), Norway and Slovenia
  - In Austria the premium was 1.125 €/Kg
  - In Norway, the premium was more substantial and equal to 23.1 €/Kg.(requires further investigation)
  - In Slovenia the premium was 2.5 €/Kg.

## Conclusions - 2

- Whilst the diversity of products creates challenges for the comparison, overall the results indicate that not all mountain products receive a premium, but in some cases the non-mountain products are more expensive.
- Thus, the existence of a premium appears to be very situation specific – depending on the product type, the mountain area (and possibly its association with food), the other value creating attributes embodied in the product, and the existence of substitutes.

## Thank you for your attention

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European Mountain Agrofood products, Retailing and Consumers

# The Influence of Local Initiatives on Mountain Product Value-added Chains

Bernd Schuh, ÖIR

Euromontana | ENITA - Clermont | UIBK -Innsbruck | SAC - Scotland | UM FK - Maribor
OIR—Vienna | ISARA - Lyon | Perth College | ICDM - Sibiu | SIFO - Oslo

FOOD QUALITY AND SAFETY

Project co-financed by the European Union 6th framework programme for Research and Technological Developement

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## Content:

- The vocabulary – agricultural value chains: how to capture them
- Are mountain products any different?
- Our approach in Euro-MARC
- The hypotheses
- Some preliminary findings

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Local Initiatives and Mountain product value-addad chains, Schuh – Brussels, Nov 6th

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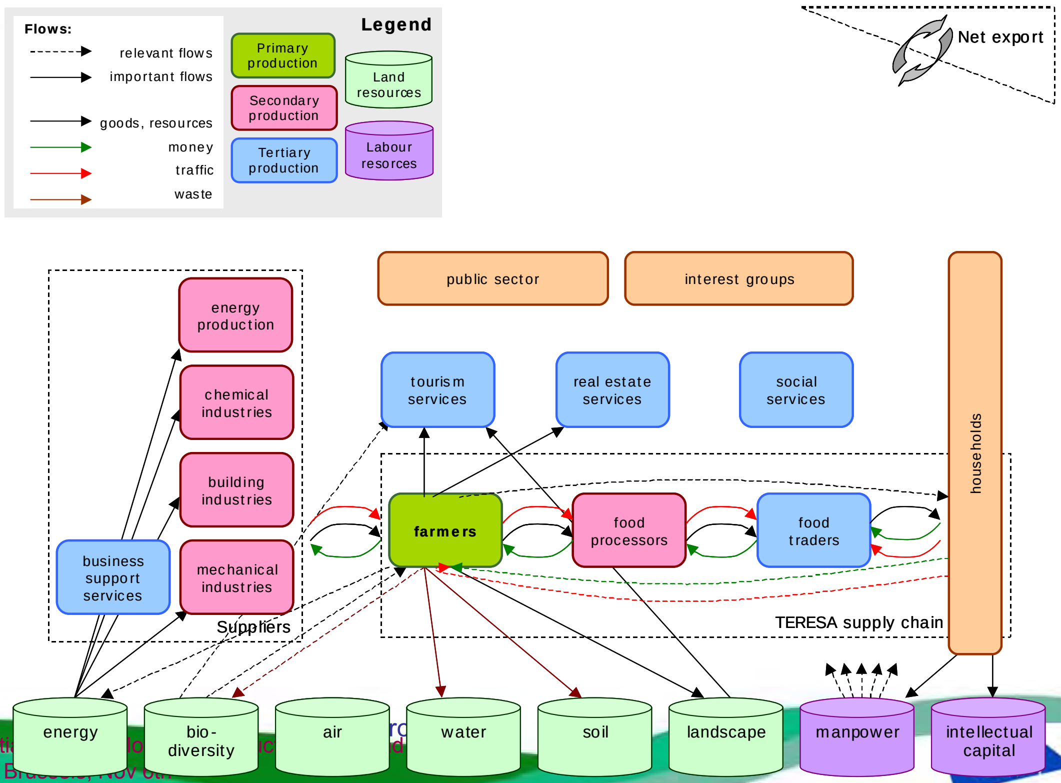
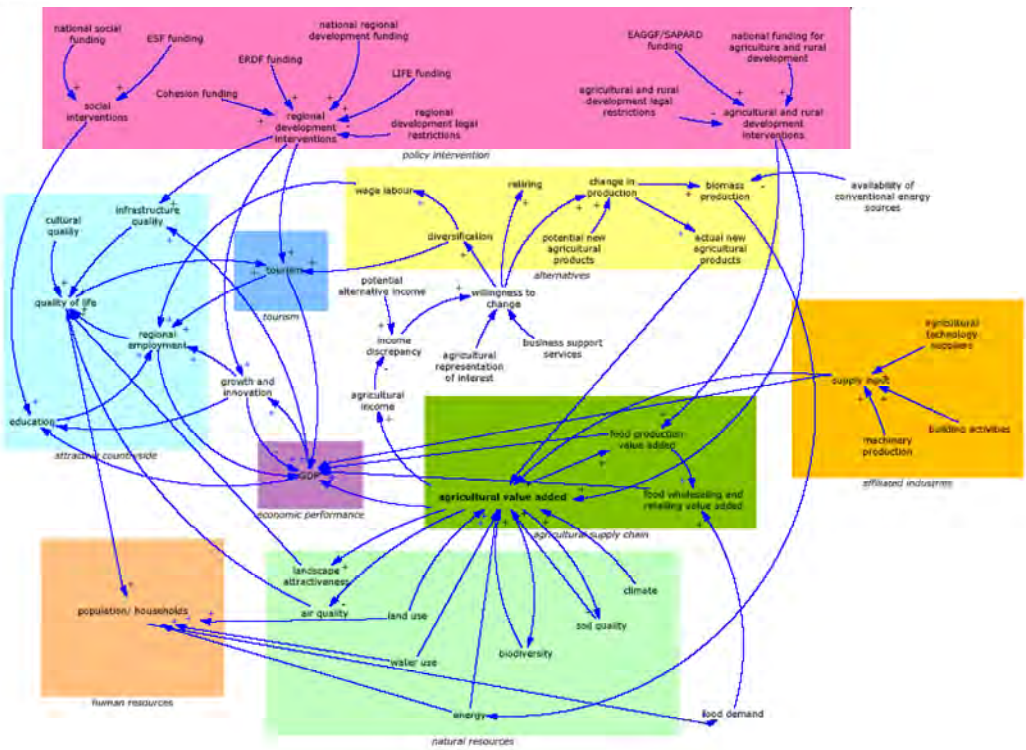
# Agricultural value chains – how to capture them:

Example from – **TERESA** (types of interaction between environment, rural economy, society and agriculture in European regions) – 6th RD FWP




# Agricultural value chains – the complexity of interactions:

Example from – **TERESA** (types of interaction between environment, rural economy, society and agriculture in European regions) – 6th RD FWP



## Are Mountain Products any different?

**Mountain product value chains**

- Relatively narrow range of possible products
- Geographical disadvantages (esp. Accessibility)
- ...leads to lower probability of a critical mass of entrepreneurial, innovative spirit

**Non-mountain product value chains**

- Wider range of possible products
- Smaller physical barriers
- Higher probability of building critical masses of entrepreneurial, innovative spirit (see e.g. Volcano Land – Styria)



## Our Approach in Euro-MARC

The guiding objective among others in Euro-MARC will be, to identify factors for success or failure in local initiatives devoted to marketing of mountain quality-food products.

- In order to do so the main aim within this WP will be to test whether and how far LEADER/ LEADER like measures – as mainstreamed principle of rural development programmes of the EU, provides a basis for supporting (in the first place) the supply side of local food chains in mountain areas.
- WP-4 will therefore consist of an analysis of territorial local initiatives (inside and outside the LEADER programme) oriented towards marketing of mountain food products

# Our Approach in Euro-MARC II

Pool of known regional mountain quality food processing chains

Question to be answered: Would there be this production chain (in this successful form) without policy intervention/ aid?

1 Test Case Study

Incremental, significant policy influence of LEADER(-like) measures

1 Control Case Study

No or insignificant policy influence (e.g. just unisectoral, top-down interventions with little linkage to a common territorial strategy

Case Study Reports

1. Regional Analysis
2. Protocols of the interviews

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# The Case Studies:

2 CS Scottland

2 CS Norway: Lesja, Oppdal

2 CS Austria: Bregenzerwald, Zillertal

2 CS France: Saint Flour, Gevaudan Lozère

2 CS Slovenia: Goriška region , Savinjska region

2 CS Romania

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# What is a LEADER-like measure (LEADER principles)

**Seven operational principles** and one programmatic principle, which are commonly epitomized as the “**LEADER approach**” or “**LEADER method**”:

- The area-based approach
- The bottom-up approach
- The local partnership
- The multi-sectoral, integrative approach
- Innovation
- Territorial cooperation
- Networking

and

- Decentralised management and financing



# What are those measures supposed to effect - hypotheses

LEADER has …

- addressed and fostered **local identities**, the sense of belonging, and feelings of allegiance, and turned them into drivers for local development;
- **strengthened the capacities of local people** and their representatives to articulate their needs and to get access to adequate resources to achieve their aims;
- provided an **organisational framework** to plan, implement, monitor and evaluate territorial development concepts at local level;
- unbound new options and dynamics for local development by putting the emphasis on the **linkages between different sectors**, as well as between private, public and civic activities;
- fostered **social interaction and organisational ties** between different actors, contributing to a more balanced representation of interests at local level;
- prompted local actors to **create positive images and strategic visions** based on endogenous resources and values, thus improving the competitiveness of their area in the context of a globalised economy;
- contributed to **building up local governance structures** capable to cope with complex tasks and to assume responsible roles with regard to sustainable development.

(Source: Lukesch, Schuh: The Legacy of LEADER – Final Conference of the LEADER Observatory Network 2007)

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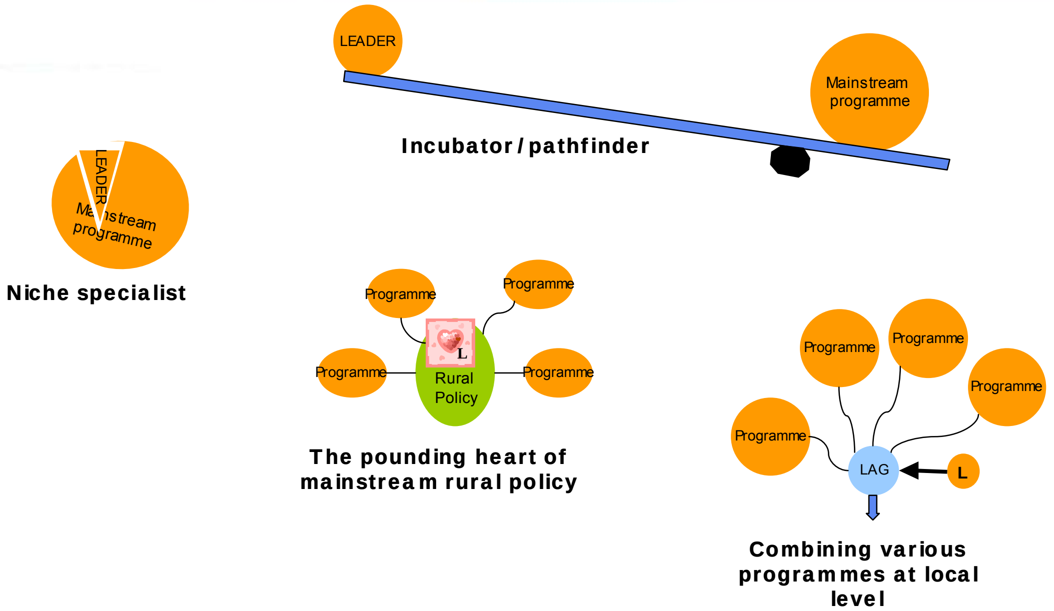
## ... but LEADER played quite different roles:




... therefore not always the same outcome and effect on the regional scale.



## Some preliminary findings:

- LEADER/ LEADER like measures certainly supported value chains – in different roles: seed money, initiator, bridging function between sectors

**BUT...**

- LEADER is not everything → without critical mass of entrepreneurs, innovative thinkers and some risk – no development in regional setting of rural areas (incl. Mountain areas is possible)
- Thus mountain product value chains rely on people in place capable and willing to carry on this development.
- Policy support can not replace the disadvantages of mountain areas – accessibility, lack of services, brain drain, demographic change, but may offer remedies to symptoms.

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# Session 3

## Quelles politiques pour favoriser le développement des produits de montagne de qualité?

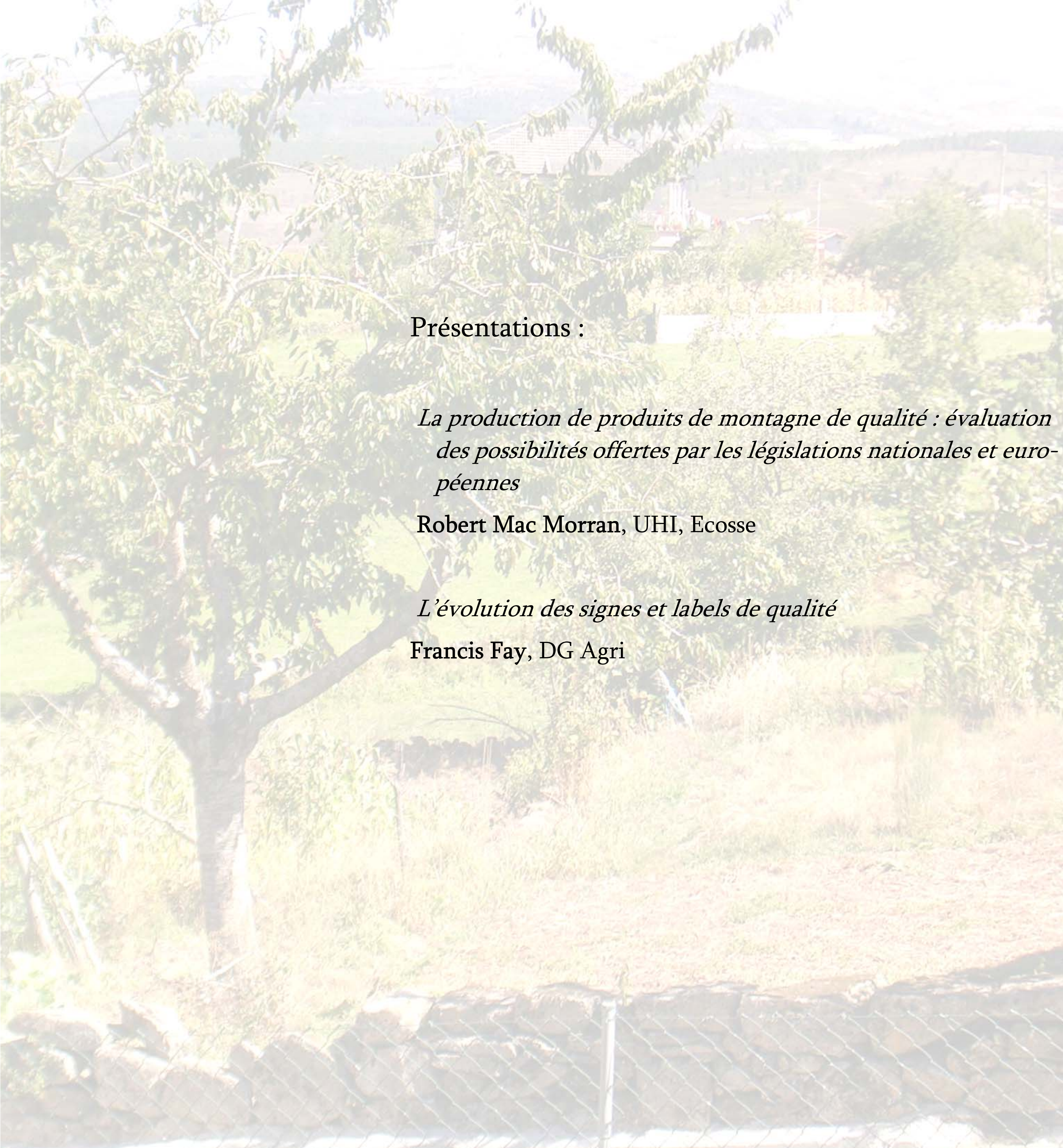
Présentations :

*La production de produits de montagne de qualité : évaluation des possibilités offertes par les législations nationales et européennes*

**Robert Mac Morran**, UHI, Ecosse

*L'évolution des signes et labels de qualité*

**Francis Fay**, DG Agri



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European Mountain Agrofood products, Retailing and Consumers

# The Mountain Foods Process: Evaluation of the options offered by National and EU Legislation and Policies

Euro-MARC WP5: Rob Mc Morran and Martin Price
Centre for Mountain Studies, UHI - Perth College

Euromontana · ENITA - Clermont · UIBK -Innsbruck · SAC - Scotland · UM FK - Maribor · OIR—Vienna · ISARA - Lyon · Perth College · ICDM - Sibiu · SIFO - Oslo

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## WP5 Objectives

1. Multi-scale policy review - key <u>constraints & opportunities</u> for mountain foods

2. Review policies relevant to the <u>promotion & labelling</u> of mountain quality-foods

3. Identify <u>synergies & discrepancies</u> between policies

4. Recommendations

## Mountain and Labelling Policy Reviews

- **Phone interviews**
  - **Mountain policy (30)**
  - **Labelling policy (20)**
- **National / EU:**
  - **Government / NGOs / Researchers / Regional agencies**

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CENTRE FOR MOUNTAIN STUDIES

## Use of Terminology at the policy level

| Country | Level of definition and understanding of….. | | |
|---|---|---|---|
| | The term 'mountain' in national policy | The term 'mountain foods' in national policy | The term 'mountain foods' among the general populace |
| Norway | No criteria/definition | Not used/defined | Understood as a general term; not in common usage |
| Slovenia | No national criteria (LFA) | Not used/defined in policy | Used as a term but not in common usage |
| Scotland | No national criterion (LFA) *'Agriculture not occurring in mountains'* | Not used/defined in policy | Not used or well understood |
| France | Defined: LFA system and national policy (Mountain Law) | Mountain Food can use French Mountain Label from Mountain Law | Relatively well known. Consumers not always clear on meaning of labels |
| Romania | Defined using LFA system and national policy | Not used/defined in policy | Reasonably well-known, perhaps not in frequent usage |
| Austria | Defined using LFA system | Not used/defined in policy | Relatively well known |

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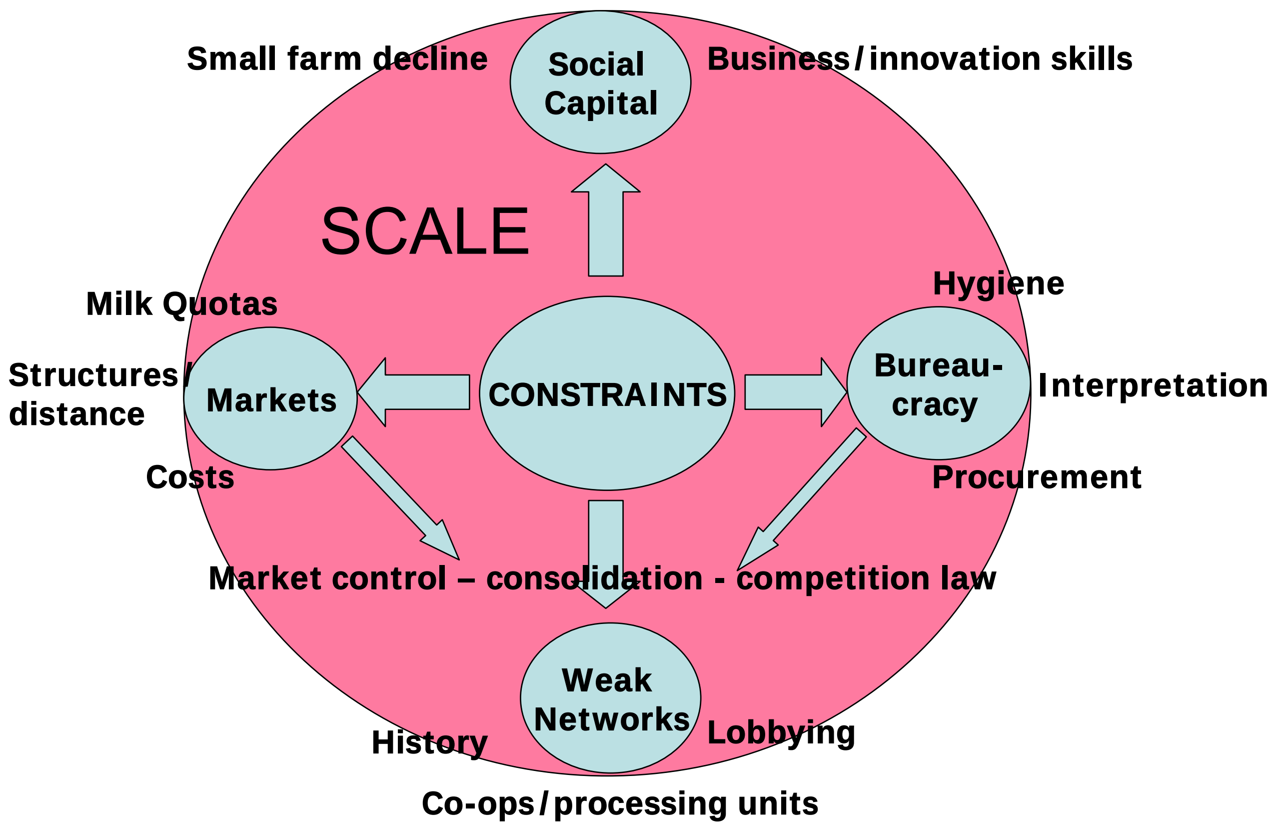
## Terminology – Key Points

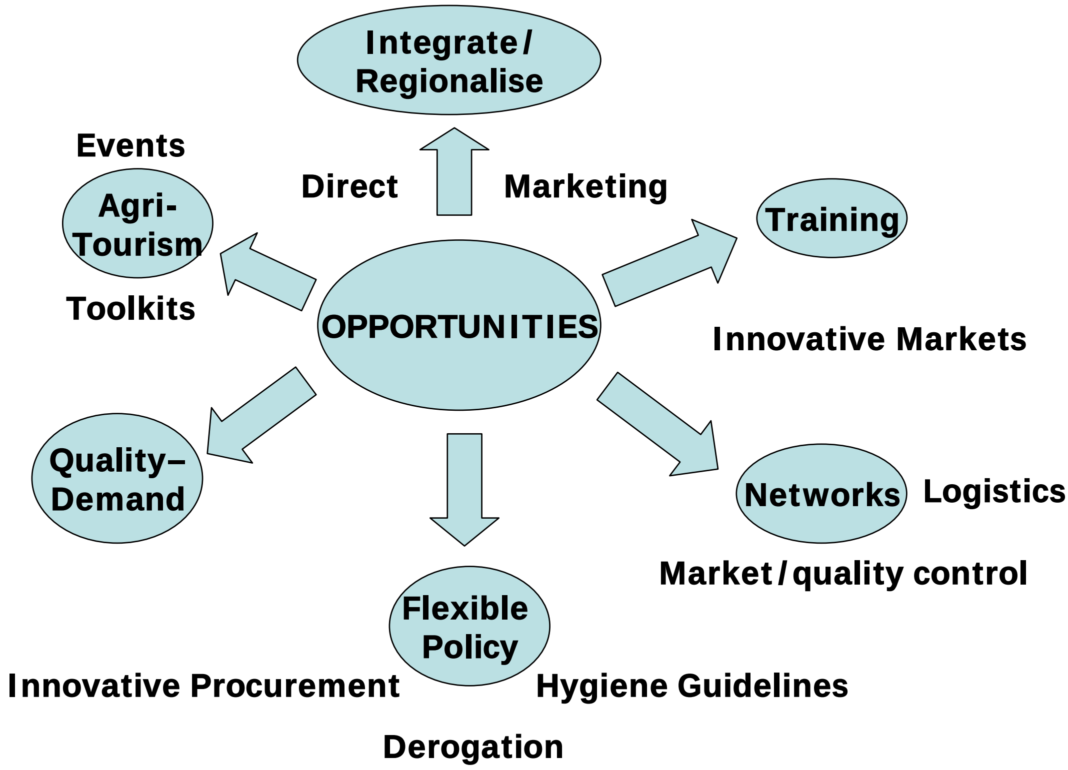
- Other terms – speciality, farm, traditional, regional (foods) – preferred by some
- Norwegian / Scottish respondents:
  - Support all disadvantaged farmers!
  - ‘Mountain Foods’ inappropriate
- 60% support (EU) definition of mountain regions / foods
- EU less supportive – support **national** initiatives

The Mountain Foods Process: Evaluation of the options offered by National and EU Legislation and Policy.
Rob Mc Morran and Martin Price, Brussels, 6th November, 2008.

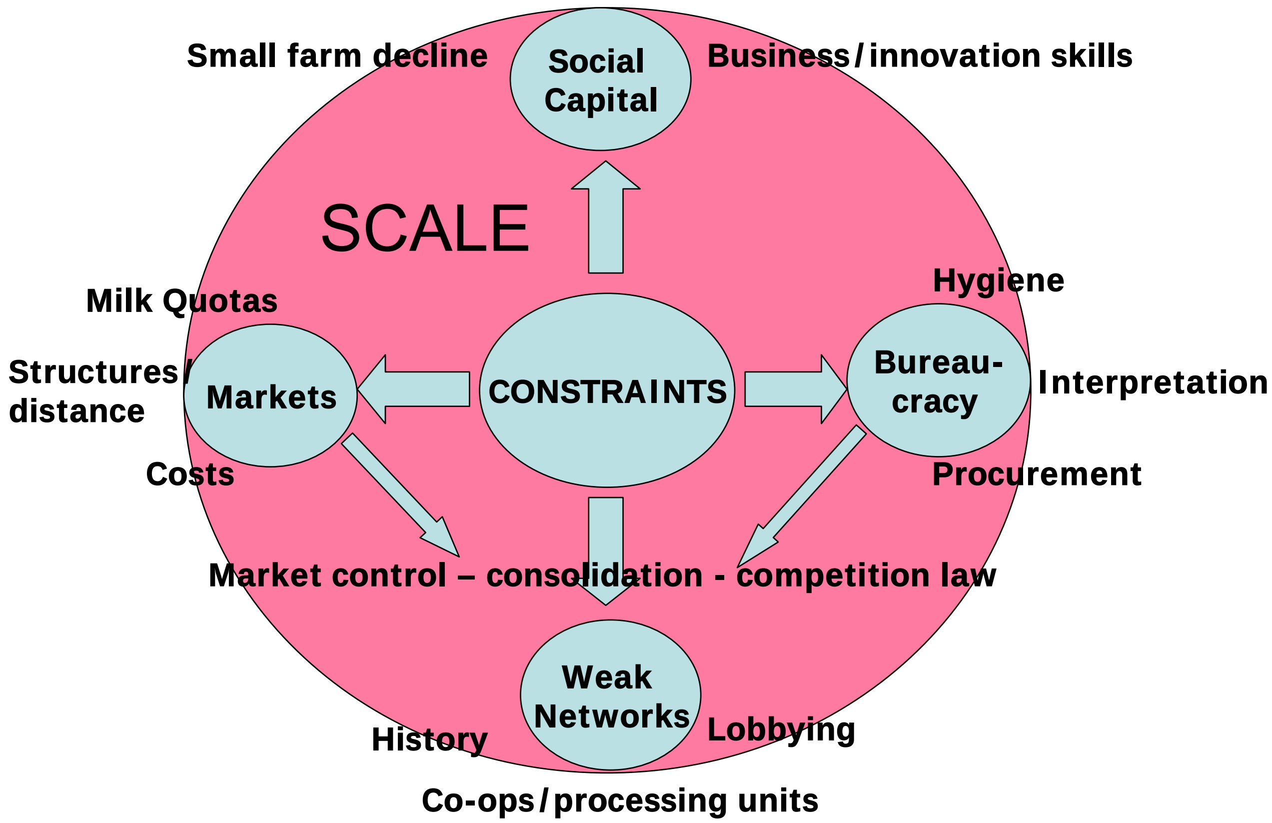
## MOUNTAIN FOODS PROCESS - POLICY



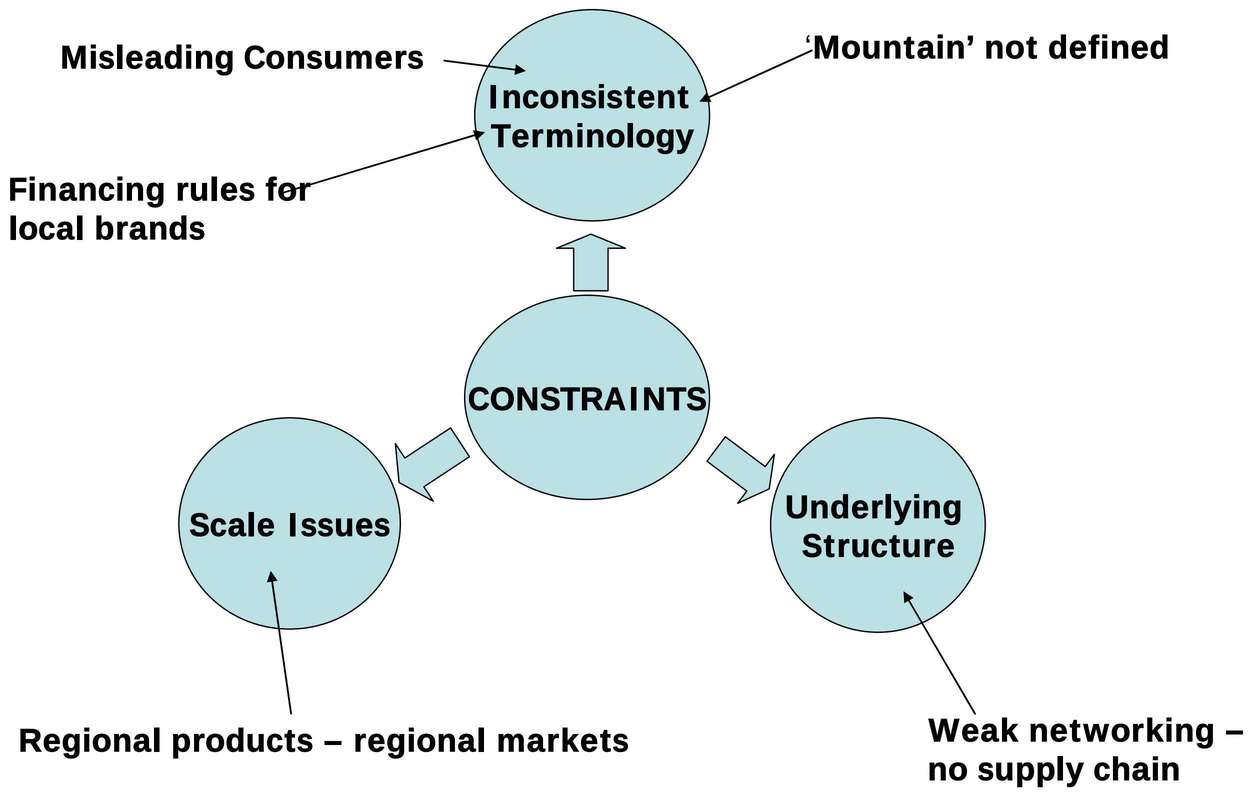
# MOUNTAIN FOODS PROCESS - POLICY




# MOUNTAIN FOODS PROCESS - POLICY



# Non-EU Schemes - CONSTRAINTS




## Non-EU Schemes - OPPORTUNITIES

- Marketing standards – reserved terms
- EU Labelling Strategy (70-80%)
  - Clarify use of regional names
  - Define key terms (criteria)
- Regional development – Food networks
  - Lead regional products

Scottish Crofting Produce
Highlands and Islands Croft Origin

## An EU Mountain Quality Food Label ?

**Why an EU Label?**

- Generic constraints – high benefits
- Consumer-producer link at EU level – high-profile
- Milk quota gap
- Clarify terminology – align non-EU Schemes
- Mountain Foods Charter

- 50-60% supportive (Round 1)
- 60%+ supportive (Round 2)

## An EU Mountain label – CONSTRAINTS

- Scottish / Norwegian / EU respondents less supportive
  - -most **effective** and **efficient** way?
- Why Mountains? – Not defined outside LFA
- '**Confusion Hypothesis**'
- EU labels = international marketing tools: unsuited to regional marketing?
- **HNV Scheme** – conflict or complementary?

## Possible Levels of Action for EU Mountain Food Labelling

1. **EU Regulated Mountain Products Scheme (criteria?)**
   **PDO/PGI – beyond origin? – stocking densities? – organic?**

2. **NGO-led / private collaborative EU Mountain Quality Scheme** & label; centrally monitored or self-regulating?

3. **D**efine **key terms in EU Marketing Standards** (optional reserved terms); "Mountain Product"

4. **EU Strategy for Non-EU labelling schemes** (definitions; criteria)

## Possible Levels of Action for EU Mountain Food Labelling

- **OR** – EU High Nature Value (HNV) label (extensive agriculture)

- **OR** development of a holistic EU **'sustainable foods'** labelling system (e.g. **'Gut So' in Austria**)

## WP5 Conclusions and Recommendations

1. MQFL – Difficult at EU Level - Labelling alone insufficient; - -integrate policy & recognise benefits
2. EU-wide food labelling strategy and national strategies – major potential
3. Member State policy interpretation / implementation guidelines
4. Regional development: high-quality regional lead products / networks
5. Integrate regional agriculture / food in sustainable regional initiatives (e.g. biosphere reserves, organic regions, national parks)

Respond to the Green Paper!

THANK YOU !

European Commission
Agriculture and Rural Development

# Evolution of labelling schemes

*Green Paper on agricultural product quality:*
*farming requirements, product standards, and quality schemes*

*EuroMARC seminar*
*Brussels*
*6 November 2008*

European Commission
Agriculture and Rural Development

Evolution of labelling schemes
Green Paper on agricultural product quality:
farming requirements, product standards, and quality schemes
EuroMARC seminar
Brussels
6 November 2008

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Agriculture and Rural Development

# Quality is a strength of EU agriculture

- Farmers need to respond to:
  - Globalisation
  - Consumer demand
- EU Farmers compete on quality
  - Baseline production requirements and marketing standards
  - Higher value-added farming attributes

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# EU intends to improve its quality policy to help farmers:

- provide products with the qualities that consumers want;
- guarantee these qualities, and
- effectively communicate these qualities to their buyers and to consumers

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# Policy development: consultation

- Step by step approach
- 2008: Consultation of all those involved in the food chain from the farmers to the consumers, the traders to the retailers (**Green Paper**)
- May 2009: Strategic policy orientations also open for consultation (Communication)
- 2010: Legislative proposals to adapt the EU quality policy

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# Green Paper: 3 parts

I. Production requirements and marketing standards

II. EU quality schemes:

PDO/PGI, TSG

Organic farming

Outermost regions

Other…?

III. Food quality certification schemes

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# I. Farming requirements and marketing standards

- Farming:
  - How to make better known EU farming requirements?
  - EU label?
- Products:
  - Simplification of marketing standards
  - Use of reserved terms:

    *'farmhouse', 'mountain' ?*
  - Retail sale of 'unaesthetic' product?

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# II. EU quality schemes

- PDO-PGI: major policy review
- TSG: 20 registrations in 15 years
- Outermost regions: impact and development of scheme
- Organic farming: functioning of the EU market
- What else is needed?

  *Mountain? High nature value? Ecolabel?*

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# III. Certification schemes

- Private and national/regional
- Build on conference 2007
- Issues:
  – Consumer confidence
  – Farmer burdens of multiple certification
  – Functioning of single market
- Guidelines?

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# Case for a labelling scheme

- What is the problem?
- How best to address the problem?

  *Public / Private scheme; national / regional/ EU level*
- Simplicity and clarity for participants

  *Costs and benefits for farmers and consumers*
- Control burdens:
  – Certification structure:

  *Competent authority; control body; accreditation authority*

  – Labelling mechanism in marketing standard:

  *CMO control*

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# Future developments

- Reminder: consultation on the Green Paper **15.10.2008 — 31.12.2008 only**
- Stakeholder responses: on-line
- Summary report *planned* March 2009
- Czech Presidency Quality Conference *planned* March-April 2009
- ‘Communication’ (strategic orientations): May 2009

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## Thank you for your attention!

**Francis FAY**
Deputy Head of Unit
DG Agriculture and Rural Development

**Quality:** http://www.ec.europa.eu/agriculture/quality/index_en.htm

**Green Paper:** http://www.ec.europa.eu/agriculture/quality/policy/index_en.htm

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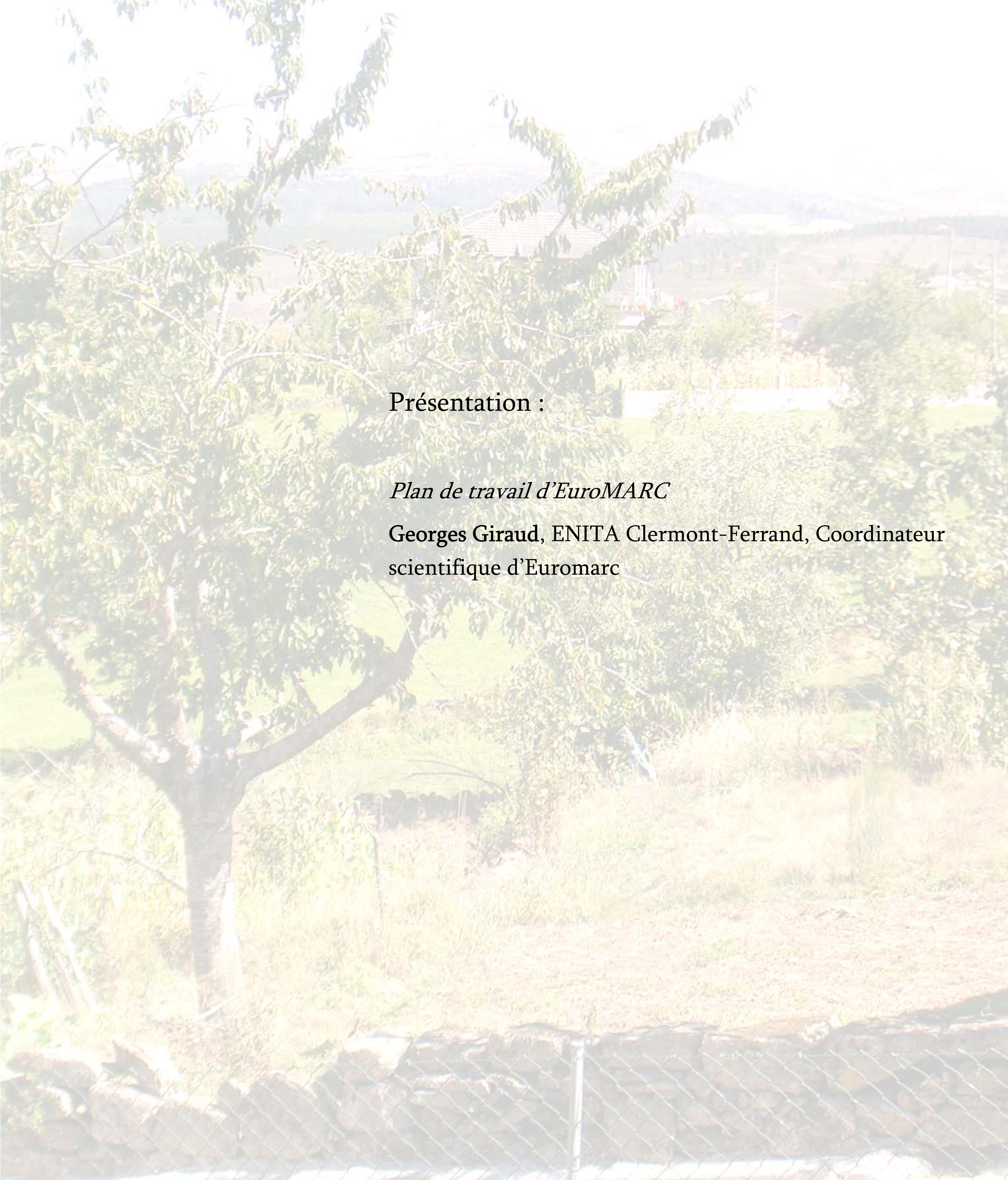
# Session de conclusion



Présentation :

*Plan de travail d'EuroMARC*

**Georges Giraud**, ENITA Clermont-Ferrand, Coordinateur scientifique d'Euromarc

EuroMARC

European Mountain Agrofood products, Retailing and Consumers

# EUROMARC
# Perspectives & Workplan

G. Giraud

ENITA Clermont

Euromontana · ENITA - Clermont · UIBK -Innsbruck · SAC - Scotland · UM FK - Maribor · OIR—Vienna · ISARA - Lyon · Perth College · ICDM - Sibiu · SIFO - Oslo

FOOD QUALITY AND SAFETY

Project co-financed by the European Union 6th framework programme for Research and Technological Developement

www.mountainproducts-europe.com

## Initial Work Plan

| | 2007 | 2008 | 2009 |
|---|---|---|---|
| month | F M A M J J A S O N D J | F M A M J J A S O N D J | F M A M J J A S O N D J |

| WP | Task |
|---|---|
| WP-1 | Survey of consumers' perception of mountain quality-food products |
| WP-2 | Survey of retailing of mountain quality-food products |
| WP-3 | Survey of food supply chain actors' strategy towards mountain quality-food products |
| WP-4 | Local initiatives case studies oriented towards mountain quality-food products |
| WP-5 | Mountain policy: rural development, quality food, labelling, regional policy |
| WP-6 | Integrating framework; cross-tabulated analysis and modelling |
| WP-7 | Guidelines for marketing and promotion |
| WP-8 | Publication and dissemination to the stakeholders, integration of their feedback |
| WP-9 | Coordination |

- Data collection almost achieved, time to harvest
- Implementation of diverse protocols, unequal but congruent
- Slight delay of data formatting for integration into same WP

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## Consumers and mountain: image vs knowledge

- **RQ1:** What do consumers comprehend as mountains and/or as mountain areas?
- **RQ2:** What do consumers comprehend as mountain products?
- **RQ3:** Which general symbolic values do consumers connect with mountain products?
- **RQ4:** What level/range of knowledge do different consumer groups have about the production of
  - mountain products produced by small scale farmers
  - products marketed by adopting images of mountains?

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## Consumers and small scale producers in mountain area

- **RQ5:** How do consumers differentiate between mountain products produced by small scale farmers and (mass) products marketed through adopting images of mountains?
- **RQ6:** What are the congruencies, what are the discrepancies between (small scale) producers and consumers concerning their perception of and values linked to mountain products?
- **RQ7:** What are possible strategies to improve the communication between (small scale) producers and existing and potential consumers of mountain products?
- **RQ8:** What are possible strategies to increase consumers' comprehension of the processing pattern concerning the production of mountain products?

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## Mountain food products, marketing channels and promotion incl. tourism

- **RQ9:** What are the optimal ways to take benefits from the tourism-related (rural or ski-resort) opportunities of consumers' experience of mountain-quality food products?
- **RQ10:** What are the distinguishing features and implications of the marketing environments – incl. urban, rural and mountain locations - within which mountain food products are marketed?
- **RQ11:** Which marketing channels are most effective, within these marketing environments, with respect to markets performance and wider economic, environmental, social and cultural benefits?
- **RQ12:** What strategies can be promoted by rural development agencies and organisations to support and disseminate good practice with respect to the marketing of mountain foods?

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## Issues raised from first results analysis

- Mountain food products seen by consumers:
  - Dairy: At, Fr, Slo
  - Meat: No, Sco
  - Spring water: Fr
- Mountain quality food products / consumers :
  - Low responses for MQFP, higher for MFP
  - No response MQFP/MFP: +38% No, Sc, x4 At, Fr
- Direct sale, farmer's market & self-production
- Lack of familiarity & knowledge MQFP

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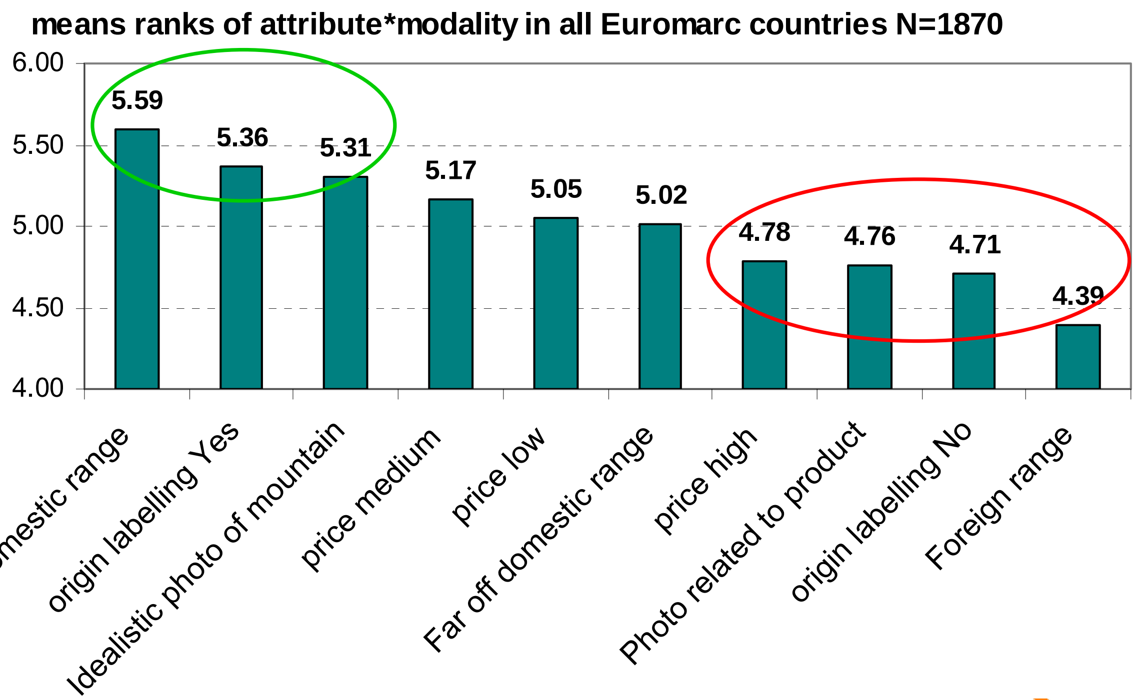
## Main expected vs rejected mountain attribute

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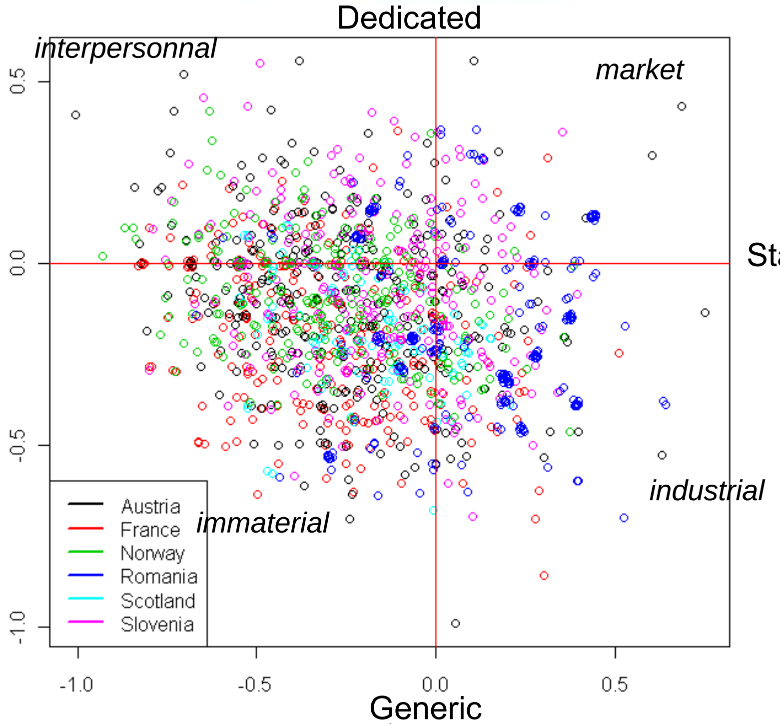
## MFQP mainly perceived through immaterial and interpersonnal relationships




**N= 1443**

**Individuals' map according to their responses on 8 items related MQFPs**

MFPs under contextual effect

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## First results from retailers, supply chains & local initiatives

- Strengths & weaknesses
  - Intrinsic attributes better perceived than extrinsic ones
  - None price premium for MQFPs / retailors' brand strategy
  - Mountain origin is not *per se* leading to better quality
  - Local provenance & quality more than mountain origin
  - PDO & PGI coverage limiting factor
  - Positive side effects of MQFPs consumption
- Opportunities
  - Agri-tourism & tourism as positive contextual effect
  - Higher demand than supply
  - Networking & local collaboration & initiatives, a key issue
  - Policy shift towards products not production

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## Workplan

- Forthcoming activities
  - Integrating framework, cross-tabulated & deeper analysis, and modelling
  - Guidelines for marketing and promotion of mountain quality-food products
  - Publication, dissemination to stakeholders, integration of their feedback
- Dissemination & publications
  - Good practice example for production of traditional quality food? Conference Institute of Agricultural Economics, Belgrade, Dec 07, UM FK
  - Consumers and their perception of mountain quality food – using the example of two mountain food products from Austria, German Jal of Agricultural Economics, UIBK, 2008
  - The role of consumers within localized agrofood systems in Mountain area, Oct 2008, IV° SYAL congress, ENITAC
  - Consumers' perceptions of mountain quality food products in Norway & Slovenia, EAAE congress, Aug 08, Ghent, SIFO, UM FK
  - Spatial marketing for MFP, INRA-SFER-CIRAD, Paris, Dec 08, ENITA-C, ISARA-L
  - Consumers' perception of the concept of mountain food products, Conference Institute of Agricultural Economics, Belgrade, Dec 07, UM FK SIFO

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# Liste des experts invités, participants et modérateurs

| **Nom** | **Organisme** |
|---|---|
| **Experts invités** | |
| Balling Richard | Ministère de l'Agriculture de Bavière, Allemagne |
| Caminades Vesna | Province autonome de Bolzano-Haut-Adige, Italie |
| Christine Mueller | OFAG, Suisse |
| Frédéric Morand | Eco-innovation, Belgique |
| Livia Dömölki | OFE, Hongrie |
| Noëlle Paolo | CNIEL, France |
| **Intervenants et modérateurs** | |
| Francis Fay | DG Agri, Commission Européenne |
| Alexia Rouby | Euromontana |
| Bernd Schuh | ÖIR |
| Georges Giraud | ENITAC |
| Marie Guitton | Euromontana |
| Markus Schermer | UIBK |
| Martin Price | Perth College |
| Philip Leat | SAC |
| Rob McMorran | Perth College |
| Virginie Amilien | SIFO |

Préparation du compte-rendu
Marie Guitton; Alexia Rouby, Virginie Amilien
Avec l'aide de : Ilias Papageorgiu, Frank Gaskell, Martin Price, Philip Leat