



EuroMARC — Mountain Agrofood products in Europe, their consumers, retailers and local initiatives



FINAL CONFERENCE OF THE EUROMARC PROJECT

THE DEVELOPMENT OF MOUNTAIN QUALITY FOOD PRODUCTS: PRODUCTION, DISTRIBUTION, CONSUMPTION



DECEMBER 3-4, 2009

MARIBOR, SLOVENIA



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



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About the conference

Organisation: University of Maribor, Faculty of Agriculture and Life Sciences (UM-FALS); Euromontana

Place: University of Maribor, Maribor, Slovenia

Languages: Slovene, English, French, German



The development of mountain quality food products: Production, Distribution, Consumption

Mountain quality food products play vital roles in the sustainable development of mountain areas. The process of production brings added value to mountain areas, and the identity of the territory is reinforced because of its association with local products, with specific methods of production. However, the data on the potential of development of mountain quality food products is very limited. The EuroMARC project intends to fill in this knowledge gap.

The main objectives of the **Euro-MARC project** are to **assess the perceptions and interests of European consumers and retailers regarding mountain quality food products**, in order to find ways of adding value to these products, hence contributing to the survival and management of mountain diversity - biological, rural, cultural, and economic.

10 teams from 6 European countries are involved in this three-year project, which started in February 2007.

In order to translate the scientific results obtained by the EuroMARC project into practical information for direct use by stakeholders and policy-makers, **the project has produced:**

- **practical guidelines for the development, promotion, and communication** of mountain quality food products, to be used by all stakeholders in the supply chains (from primary producers to retailers)
- **recommendations relating to policies to enhance the development of mountain quality food products**, for policy-makers at European, national, and regional/local levels.

This document is the proceeding of the conference and it contains all presentations that were made by speakers as well as the list of participants to the conference.

Programme

THURSDAY 3 DECEMBER

08.30 Registration

Opening Session

Chair: Andreja Borec, UM-FALS, Slovenia

9.30 Opening session

Welcome and introductory speeches:

Ivan Rozman, Rector of the Maribor University

Joze Merkus, Mayor of Hoče

State secretary from the Slovene Ministry of Agriculture Forestry and Food

Context of EuroMARC – presentation of the guidelines and introduction to the programme of the conference. Marie Guitton, Euromontana (EuroMARC project coordinator)

Session 1: What makes mountain quality food products so special?

The identity of mountain quality food products

Chair: Bernd Schuh, ÖIR, Austria

10.00 *The identity of mountain products through the perception of consumers? How do the consumers see mountain products?* SIFO, Norway

Mountain food as a local identity marker – The products from Tavarna Mare (Romania). Jim Turnbull, Director of ADEPT Foundation

The identity of Mountain quality food products throughout the supply chain – how do the actors see the products? The example of Bio vom Berg (Austria). Björn Rasmus, director of Bio vom Berg.

10.40 Comments from the Project Implementation Board

Discussion with the audience

11.20 Coffee break

Session 2: What marketing strategies for mountain quality food products?

Chair: Virginie Amilien, SIFO, Norway

11.50 *Key issues for developing the retailing of mountain quality food products.* SAC, Scotland

An integrated supply chain: Laqueuille water (France) Georges Giraud, ENITA Clermont-Ferrand

Mountain quality food products marketed as local products: Zgornjesavinjski želodec - The Upper Savinja dried meat (Slovenia). Joze Tlaker, Association of Zgornjesavinjski želodec producers

12.30 Comments from the Project Implementation Board

Discussion with the audience

13.10	Lunch
Session 3: How can tourism support mountain quality food products - and vice versa? Chair: Markus Schermer, UIBK, Austria	
14.30	<p><i>Opportunities offered by tourism – Introduction with cases encountered in the EuroMARC project.</i> Markus Schermer, UIBK, Austria</p> <p><i>Experiences of the establishment of cheese trails as tourist products in Slovenia.</i> Davorin Koren, leader of department for agriculture, forestry and RD, Triglav national Park</p> <p><i>Tourism and mountain quality food products – an example of Cairngorms Farmers Market (Scotland).</i> Fiona Young, Cairngorms Farmers Markets Organiser</p>
15.10	Comments from the Project Implementation Board Discussion with the audience
15.50	Coffee break
Session 4: How to promote mountain quality food products? Chair: Martin Price, UHI, Scotland	
16.20	<p><i>Is a mountain quality food label expected? Comparative conclusions from the project.</i> ENITA, France and UHI, Scotland</p> <p><i>A regional label: the Lactofarm Sibiu (Romania).</i> Rusu Dumitru, Marketing Manager</p> <p><i>The various promotion strategies of Björli products (Norway).</i> Virginie Amilien, SIFO</p>
17.00	Comments from the Project Implementation Board Discussion with the audience
Conclusion of the day André Marcon, President of Euromontana	
18.00	<i>Evening programme: wine tasting, common diner, cultural programme (registration required)</i>

FRIDAY 4 DECEMBER

Session 5: What policies can better support and develop mountain quality food products?

Chair: Philip Leat, SAC, Scotland

9.00	<p><i>The Mountain Foods Process: evaluation of the options offered by national and EU legislation and policies.</i> UHI, Scotland</p> <p><i>What roles can local initiatives play? Some conclusions from the analysis of LEADER-like initiatives.</i> ÖIR, Austria</p> <p><i>Political context: the evolution of the European policy of quality of products.</i> Vincent Cordonnier, Agricultural Product Quality Policy Unit, DG Agriculture and Rural Development, European Commission</p> <p><i>The Swiss “mountain” and “alpage” labels.</i> Jacques Henchoz, responsible of PDO/PGI register, Federal Office of Agriculture, Switzerland</p> <p><i>Conclusions drawn from EuroMARC: recommendations for policy.</i> Ancuta Pasca, Euromontana</p>
10.30	Coffee break
<h3>Session 6: Round table discussion - Mountain food products and policy instruments</h3> <p>Chair: Olivier Beucheurie, ISARA-Lyon, France</p>	
11.00	<p>Questions to be discussed: How can policies foster development of mountain quality food products and facilitate successful marketing strategies at European, national, regional and local levels? What policy instruments? What tools?</p> <p>Participants:</p> <p>Rareş-Lucian NICULESCU, Member of the European Parliament, Vice-President of the Agriculture Commission</p> <p>Vincent Cordonnier, Agricultural Product Quality Policy Unit, DG Agriculture and Rural Development, European Commission</p> <p>Mira Kos-Skubic, State secretary of the Slovene Ministry of Agriculture Forestry and Food</p> <p>Alenka Lipuscek-Miklavcic, director of Planika dairy</p> <p>Livia Dömölki, Consumer’s association of Hungary (OFE), member of BEUC</p> <p>Jean Gault, SARD-M coordinator, FAO</p>
<h3>Conclusions</h3>	
12.40	<p><i>Lessons from EuroMARC and future research needed.</i> Georges Giraud, ENITA Clermont-Ferrand, France (EuroMARC scientific coordinator)</p> <p>Closing remarks by Ivan Rozman, rector of the Maribor University</p> <p>Closing remarks by André Marcon, President of Euromontana</p>
13.00	Lunch

Opening session

Presentation

Welcome and introduction

Marie Guitton, Euromontana, EuroMARC overall project coordinator



What is EuroMARC?

Introduction to the project and to the conference

Marie Guitton, Euromontana



The context

- Why did we make this research:
 - Food and agricultural production in mountain areas is **more expensive** – need to look for supplementary **added value**;
 - Agriculture has a role for **preservation and valorisation of the mountain heritage** (biodiversity, culture, quality of life of European populations = Positive externalities);
 - **Clear commitment regarding consumers**: when using the word « mountain », not to be deceived



What is EuroMARC? Introduction to the project and to the conference – 05/12/2009
EuroMARC final conference, Maribor University, Slovenia

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The context

But today:

- **Absence of definition** for « mountain products » in most European countries (except France and Switzerland).
- **Many mountain products are not protected** by an official identification (PDO/ PGI/ TSG/ Organic / national identification: 39/122 products studied in the FP5 mountain product project)



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What is EuroMARC?

EuroMARC is a 3 years research project
financed by the European Union (FP6)
Feb 2007 - Jan 2010

10 Teams of researchers from 6 European
countries: Austria, France, Norway,
Romania, Slovenia, Scotland



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What is EuroMARC?

- EuroMARC objectives were to:
 - assess consumers' interest in mountain food products,
 - analyse through case studies how successful food supply chains can impact the economic situation of a region;
 - identify situation along the supply chain regarding production, processing and retailing mountain quality food products
 - bring forward materials to clarify the definition of mountain products.



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What is EuroMARC?

- The work done
 - 1904 consumers' questionnaires
 - 21 focus groups gathered 184 consumers
 - 1765 mountain food products observed in 351 retail outlets (550 shelves)
 - 22 supply chains of 4 types of mountain products (water, fruits and vegetables, meat prod. & fish, milk & dairy prod.) analyzed
 - 638 retailers surveyed (521 quest. + 117 interviews)
 - 10 cases of regional initiatives compared (5 LEADER)
 - 50 interviews with policy-makers local to European levels
- Involvement of a panel of experts, of Euromontana's members and of members of the European Commission



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EuroMARC outputs

Project findings:

- are **Guidelines for actors** of the supply chains intended to be used by stakeholders.
- Focus on:
 - The image of MQFP and consumers expectations
 - The organisation of MQFP supply chains
 - The marketing strategies
 - The promotion of MQFP
 - The links with tourism
- **Policy recommendations for policy makers** (recommendations /labeling policy in EU).



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Enjoy the conference!

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Session 1

What makes mountain quality food products so special? The identity of mountain quality food products



Presentations

How do consumers conceive mountain quality food products

Virginie Amilien, Alexander Schøll, SIFO

Mountain food as a local identity marker – The products from Tavarna Mare (Romania). Jim Turnbull, Director of ADEPT Foundation

Die Marke der Tiroler Bio-Bergbauern

Björn Rasmus, Bio vom Berg



European Mountain Agrofood products, Retailing and Consumers

How do consumers conceive mountain quality food products?

- conclusions from WP1-

Virginie Amilien and Alexander Schjøll,
SIFO



www.mountainproducts-europe.com

Objectives of WP1

- WP1 did measure the European consumers' interest, perception and expectations towards quality food products coming from mountain areas.
- Data have been collected in, Austria, France, Norway, Romania, Scotland and Slovenia.

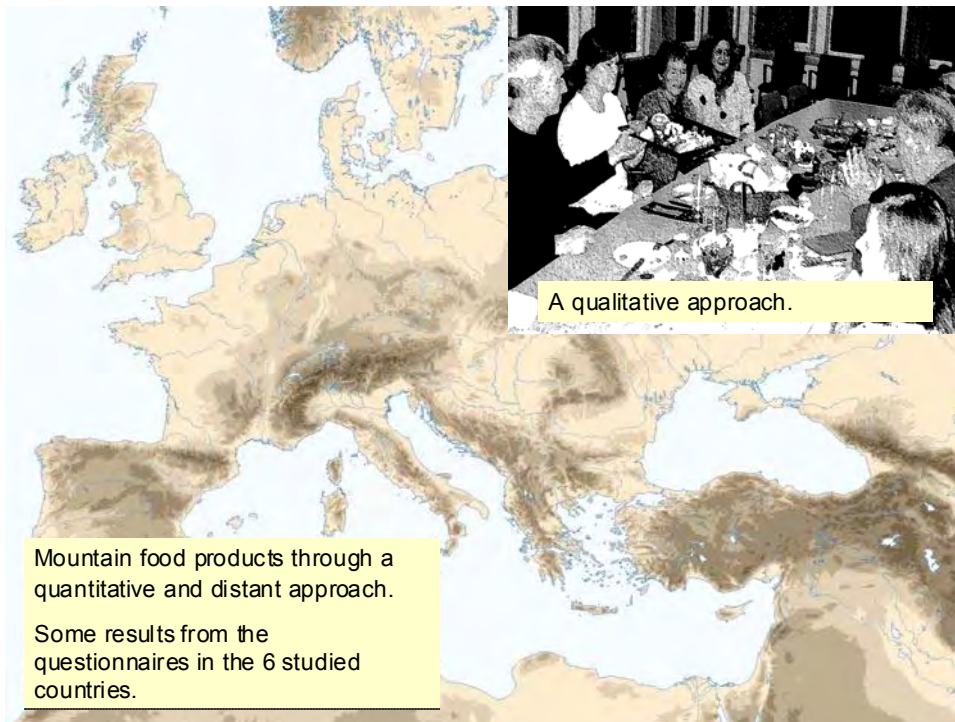


The identity of Mountain food products
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A positive image

Mountain quality food products are perceived as a **pure, traditional and quality food**, although informants know about industrial development, pollution or chemicals additives.



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Association with food from the mountains

- **Health**
- **Pureness**
- **Good raw materials**
- **Authentic**
- **Traditional**
- **Great taste**
- **Good quality**
- **Cultural value, often linked to origin**



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An ambivalent many sided image

MQFP is a composition of many different dimensions as food, mountain, nature, market product, local production or nostalgia.



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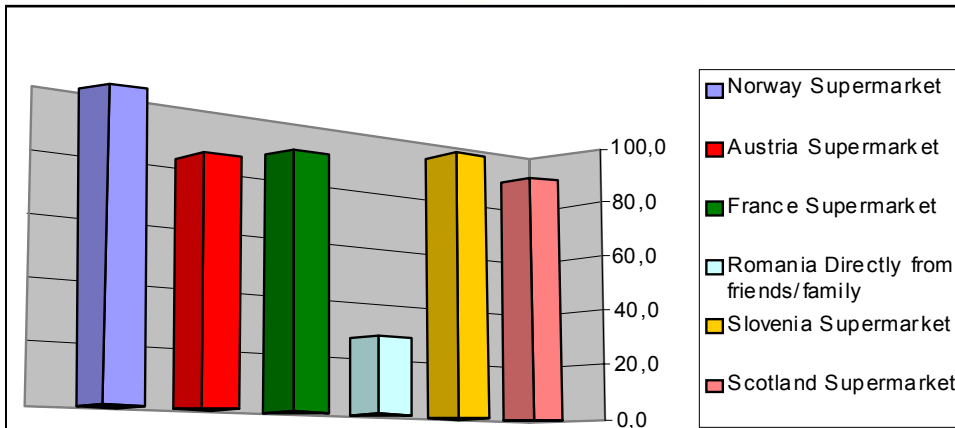


Two different perceptions?

- Meat and dairy products were the most answered product categories in both cases: dairy products (A, F, SI) and meat products (N, Sc)
- Mountain food products are better known (less no answers) than MQFP


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Where do respondents use to buy food? Every day food habits



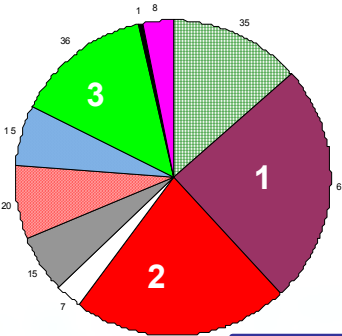
Most food purchased in the supermarkets


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Where do respondents expect to buy MQFP?

Buy MQFP in other sales channels as where they buy their food:

1. Directly from the producer
2. Farmers' markets and other markets
3. Special shops, i.e. butcher



The identity of Mountain food products
Maribor December 3rd 2009

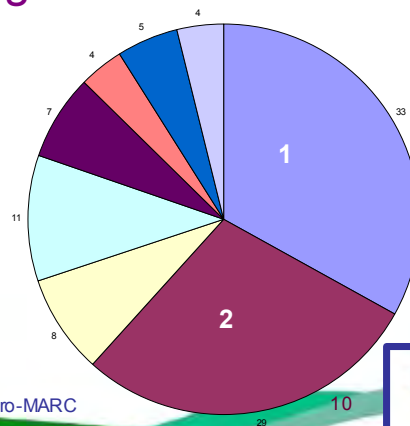
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When do respondents use MQFP?

1. Tourism / visit at the production place
2. Trying something new

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



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Local identity and standards of hygiene

Connection to the local area: cultural identity and local employment

A standard hygiene quality as good as for regular food products

4 preferred attributes for MQFP:

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



The identity of Mountain food products
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Importance of a visible link to mountain

- Respondents underline the lack of common definition/ understanding, of what is a mountain food product?
- Comments on the packaging
- Question about trust or doubts about product information / real mountain origin



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A positive ambivalence?

MQFP is a composition of many different dimensions as food, mountain, nature, market product, local production or nostalgia:

- its specificity is just situated in the interrelation between the different values
- one individual consumer does not have the same expectation from MQFP in different situations
- all respondents were potential consumers for MQFP



The identity of Mountain food products
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The identity of mountain products

General characteristics:

- To taste good / good quality / original product
- To come obviously, and really, from a mountain area
- To be found in special shops/ not ordinary distribution channels
- To be used in a special situation / not ordinary consumption
- Everybody is a potential consumer of MQFP



The identity of Mountain food products
Maribor December 3rd 2009

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A TASTE OF TRANSYLVANIA

An Integrated Approach to Promoting Product and Territory

Linking the traditional characteristics of the product with local life

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Maribor, Slovenia

December 2009



Agriculture & Environment



Economic Development

- What products to produce?
- What services to offer?
- What and where is the market?
- Visitors had not planned any time in area in their itineraries;
- Visitors enjoyed meeting local people, but no activities on offer;
- Visitors were asking to buy honey and preserves to take home, but none available in suitable packaging;
- Reviewed range of local food products from self sufficient producers;
- Introduced the concept of food and culture tourism;
- Created demand for local food products by developing tourism;
- Introduced appropriate training in food hygiene for micro producers;
- Established a route to market for local products.



Local Food Products

- Flavour – like it used to taste – low environmental impact
- Preserved using traditional methods – memories of childhood
- Traditional recipes handed down over many generations
- Natural but not certified organic
- Jams characterised by:
 - unusual wild fruits from the forests and meadows
 - cultivated fruits from the orchards and courtyard gardens
 - high fruit content and low added sugar
 - bursting with flavour
 - no preservatives or other additives
- Jam making widespread but recipes and fruits are traditional to the area
- Packaging and labelling must be of high standard
- Name of the producer is included on the jar label
- Fair price to producer, but not cheap in price sensitive domestic market
- Tie-on label tells the story, adding value to the product



Demand for Food Products

- Tourists are looking for readily transportable gift items that relate to their holiday experience;
- Large city urban Romanians are looking for quality well packaged products that are comparable to the choice now offered by supermarkets;
- Small city urban Romanians still have links to home production, are very price sensitive and tend to taste but not buy;
- Export markets are looking for unusual quality products with a story, packaging and labelling that fully complies with EU legislation. They require larger volumes and are very price sensitive.



Promoting Local Food

Saxon Village Preserves – a presidium project supported by the Slow Food Foundation for Biodiversity



Good, clean and fair



Created umbrella “brand” as marketing tool



A Taste of Transylvania
experience the food, culture and
landscape

Logo now being used
on produce, road signs
and literature;

Hexagonal glass jars for jam,
honey & pickles provides
part of the brand;

Tie-on labels link product
with landscape;

Now recognised as quality brand
in local markets.



Providing Information & Local Produce



- Tourist Information Centre, Saschiz;
- Conversion of building funded jointly by ADEPT, Pro Patrimonio & Town Hall;
- Providing retail outlet for quality local produce;
- Web site to promote the area and products – www.DiscoverTarnavaMare.org;

- All creating demand for products and services;
- Putting money into local economy.



Promoting Other Traditional Products

- Honey;
- Sun dried herbs;
- Pickles;
- Syrups;
- Tinctures.



New Products



such as mature cheese – easier to market than the traditional fresh cheeses

Transnational LEADER project provided expertise in cheese making and the recipe which was combined with traditional skills to produce a unique cheese





Târgul Țăranului

Bucharest Farmers Market

(approved by Slow Food as Earth Market in Nov 09)



cheap and effective route to market for small producers

Slow Food Markets

Bucharest – weekly Apr to Oct

Brasov - monthly Apr to Oct



Developing Tourism Activities



Food & Culture Brochure;

Walking Brochure;

Encourages tourists to stay in the area and spend money in the community.



Meet the Bees



Conclusions

- We focus on creating market demand for quality products rather than increasing production;
- We focus on those who want to be helped;
- We promote the stories linking landscape and culture to product and producer to consumer;
- We advocate transparent and fair pricing with a short supply chain;
- We focus on providing solutions, not identifying problems.

FUNDATIA
ADEPT

Thank you

FUNDATIA ADEPT

www.fundatia-adept.org
www.DiscoverTarnavaMare.org





Die Marke der Tiroler Bio-Bergbauern



Die Genossenschaft Bioalpin e.Gen

- Gegründet 2002 mit dem Ziel Produkte aus der Tiroler Bio-Berglandwirtschaft verbessert zu vermarkten
- Ca. 40 Mitglieder der Genossenschaft vermarkten die Produkte von etwa 500 z liefernden Bio-Bauern aus Tirol
- Schwerpunkt Milchprodukte (Käse, Milch, Butter, Joghurt) aber auch Fleischwaren, Obst und Gemüse, Eier, Brot
- Partner sind der LEH in Tirol und Österreich, Deutschland. Umsatz derzeit ca. 4 Mio. €
- BIO vom BERG Produkte müssen Tiroler Ursprung haben, die Betriebe müssen einem Bio-Verband angeschlossen sein



- *Darstellung der Funktion der Genossenschaft am Beispiel der Vermarktung eines Milchproduktes: Tiroler Bio-Käse*
- *Versuch der Darstellung der notwendigen Qualitätsparameter:*
 - *1. Anforderungen des zentralisierten Lebensmittelhandelns*
 - *2. Anforderungen an ein „Bio-Bergprodukt“ aus der Marketingsicht von BIO vom BERG*



- Zentralisierter Lebensmittelhandel und Bio-Bergprodukt
- *Standards wie: IFS, Milchhygienekontrolle, Milchqualität, Verkehrsfähigkeit, EAN, Deklaration, Ordereinheiten*
- *Produktstandards wie: garantierte Restlaufzeiten, standardisierte (passende) Gebindegröße, Vorlaufzeiten, generelle Handelstauglichkeit, Standardisierung des Produktes, Mengenplanung, Lieferfähigkeit*
- *Umsetzbarkeit: Preis, Einbettung in das vorhandene Sortiment, Optik*
- *Geschmack und Regionalität*



„Marketingtauglichkeit“ für BIO vom BERG

- *Bio-Bergprodukt muss zur Markenwelt passen. Muss als Bio-Bergprodukt erkennbar sein*
- *Die Ansprüche des LEH müssen erfüllt sein (s.v.)*
- *Die Herkunft muss erkennbar sein und je mehr „Lokalkolorit“ desto besser*
- *Darf nicht zu besonders sein, da man im Lebensmittelhandel schon sehr besonders ist (keine Drehung)*
- *Preis/Leistungsverhältnis muss passen*



Danke für Ihre Aufmerksamkeit

Session 2

What marketing strategies for mountain quality food products?

Presentations

Key issues for developing the retailing of mountain quality food products (MQFPs)

Philip Leat, Cesar Revoredo-Giha, Beata Kupiec-Tehan, Chrisa Lamprinopoulou, SAC

Laqueille, Auvergne, France.

Georges Giraud, ENITA Clermont-Ferrand

Mountain quality food products marketed as local food products: Zgornjesavinjski želodec - The Upper Savinja dried meat (Slovenia)

Jože Tlaker, Association of Zgornjesavinjski želodec producers





Key issues for developing the retailing of mountain quality food products (MQFPs)

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

Scottish Agricultural College – Edinburgh, UK
Maribor, December 2009



Content

- Understanding customers and markets: MQFPs differentiation;
- Creating values: price, margins and premia;
- Communicating values: promotion/education;
- Delivering values: availability, infrastructure and locality distribution.
- Concluding remarks.



Understanding customer

- What are we selling?

Products, stories, experiences, unique and exceptional taste...



Creating values: MQFPs

- Communication of product attributes is crucial for effective retail positioning by producers and retailers.
- Perceptual vs. factual differentiation (specification based).
- Differences in sensory characteristics, nutrition and health value. Do they exist?
- Attributes pertaining to social sustainability of mountain products: support for local communities, resilience of businesses located in mountain areas.
- Marketing function of retail outlets:
 - make available;
 - inform (educate consumers);
 - reassure (about quality and origin etc.);
 - create retail experience (as a part of a trip, tour, adventure etc.)



Creating values: prices, margins, premiums

Any retailer selling MQFPs should address the following

Should MQFPs be more expensive?

- Due to unique characteristics, cost of production and distribution, perceived value....

Should MQFPs be cheaper than average price for similar product?

- It is local, costs less to transport and market, should be price competitive in relation to mass market leaders...

Should the MQFPs prices reflect market situation?

- Price should take into account product category, recent market volume/value and competition...



Prices and Premia: results of EUROMARC price check retail study.

- Not all mountain products received a premium and in some cases the non-mountain products were more expensive.
- MQFPs premia appeared to be very situation specific – depending on the product type, the mountain area, the other value creating attributes embodied in the product, and the existence of substitutes.



MQFPs – creating values

- Pricing total experience:
has to be recognized in setting prices, developing promotional campaigns and establishing brands that command long term loyalty...



Communicating values

- Objectives:
 - To generate Awareness, Interest, Desire, Action (AIDA) i.e. Informing, educating, persuading, facilitation of purchase.
- Tools – retail focus:
 - Product exposition, POS strategies;
 - Mobile direct sales – e.g. farmers markets
 - Mass media communication?????



Communicating values

▪ Labelling issues

- Legislation, register of products, control, creation of meanings;
- Conflicting messages from different sources (labelling proliferation);
- Can mountain origin be a separate “geographical” brand (separate from place brand)?
- Is ‘mountain origin’ supported as differentiation factor by individual retailers?



Communicating values: MFQPs labels EuroMARC results on MFQPs retailing

Labels:

- might be associated with a particular provenance (a mountain area, a mountain range, a particular mountain locality – thereby fitting with the interest in local or locality food);
- should be justified by a sustained high quality, that reflects attributes well valued and understood by consumers;
- should be promoted so that retailers and consumers become aware of the label’s existence and its defining characteristics (e.g., communicating advantages and disadvantages of food production in mountain areas) and
- need to be introduced in a way that avoids confusion and conflict with existing certification labels.



Labels and packaging – main communication vehicle at the point of sale



Communicating values: EuroMARC results on retailing MQFPs

- MQFPs are inadequately promoted with a overreliance on product packaging and labelling – in the form of an image, symbol or key mountain-related words - to convey a mountain provenance. Promotional efforts vary greatly amongst countries and products' groups.
- Personal communication, in the form of direct interaction between the seller and purchasing consumer was mainly practiced in farm shops, market stalls and specialist retailers.



Delivery of values

- Direct sales
- Local shops
- Multiple retailers
- Web based mail order sales
- Tourism related outlets and catering (restaurants, event related service)

Loch Arthur farm shop



Factors inhibiting market development

- Small scale production frequently gives rise to limited supplies (Slovenia, Norway, France, Scotland).
- Also occasional inconsistency of quantity and quality (Austria, Slovenia, Norway).
- Seasonality of supplies in Norway and Austria.



Concluding remarks

- Diversity of products and markets requires **individual approaches** when developing MQFP retailing.
- MQFPs **do not always command a premium price** and in some cases the non-mountain products are more expensive.
- In many instances the “mountain” attribute of MFQPs is **not communicated effectively** – they therefore require better promotion.
- Conflicting messages and associations complicate the exposition of mountain provenance – **associations with local identity/ brand** are often stronger.



Thank you for your attention

Scottish Agricultural College

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Chrysa.Lamprinopoulou@sac.ac.uk





High Nature Value Location

- 3 deep drillings, 1200 m altitude , on ancient volcano “Banne d’Ordanche” 6 km from factory
- Untainted site
- Only pasture
- No cropping
- No village
- No nitre 0.4 mg/L
- No pesticide
- Allowed for 300 000 m³ bottled /year



Beautiful natural site for modern factory



- 11 000 m² covered, 27 Mio € investment, operates since Sept 2005, capability 300 Mio L, currently 125 Mio L/year

3

High-tech Automated Processing

- 1 line 27 000 b/h for 1L50, top modern machinery
- 1 line 13 600 b/h small bottles, top modern
- 1 traditional line 1800 b/h for 5L



- 30 highly skilled employees

Wide Range of Products



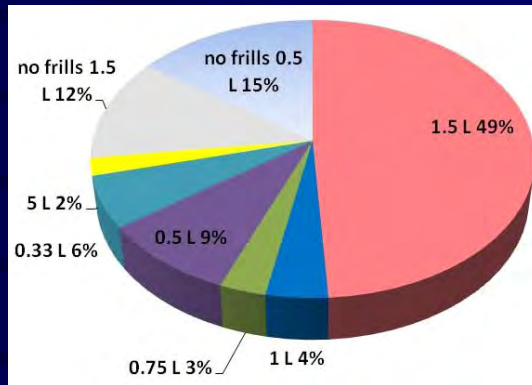
Distributor private label
 Marque Repère



No frills brand
 ECO +

Market Perspectives

laqueuille mountain spring water	
distributor brand	trend 2009
1.5 L	+ 16 %
1 L	+ 260 %
0.75 L	+ 1 %
0.5 L	+ 3 %
0.33 L	+ 38 %
5 L	+ 8 %
no frills 1.5 L	+ 31 %
no frills 0.5 L	+ 51 %



- France mineral water -8.6%, Leclerc chain -5.9%
- France spring water -4.1%, Leclerc chain -3.6%, Laqueuille mountain water +10%
- Turnover 20 Mio € including 5 Mio for transportation costs
- Direct delivery from factory to 300 stores /500, lower costs and CO² fingerprint
- Delivery into 14 logistic platforms of the chain instead of 4 previously

Management Facts

- 27 Mio € investment, including 10 Mio € for high-tech equipments
- None subsidy from Government nor regional or local authorities
- 300 K€ annual royalties for municipality (owner of drillings)
- All 30 employees living in the county of Rochefort-Montagne
- Personnel costs 6% average cost
- Keep costs under control by increasing bottling & platforms delivery
- Allows to reduce in-store price by 10% in 2009
- Possible in-store gross margin varying from 10 to 30% per product
- Paradox for manager: non profit factory
- Investment will be paid back in 2016

Zgornjesavinjski želodec – kvalitetni gorsko hribovski proizvod
Mountain quality food products marketed as local products: Zgornjesavinjski želodec – The Upper Savinja dried meat (Slovenia).

Jože Tlaker, Association of Zgornjesavinjski želodec producers



Zgornjesavinjski želodec je sušena domaća mesnina, ki jo že več stoletij izdelujejo na območju Zgomje Savinjske doline.

Nacin izdelave je tradicionalen. Sveže svinjsko meso od gnjati in pec zmeljejo in premešajo z na kocke narezano trdo slanino. Nadev zacinijo z morsko soljo, poprom in cesnovo vodo.

Dobro premešana masa se pdni v svinjske mehurje, izdelek se zašije, odcedi in stisne za nekaj dni, nato pase v leseni sušilnici postopno suši, kar traja 4-5 mesecev.

Dobro osušen se nareže na tanke rezine in ponudi kot narezek ali predjed. Domacini ga uživajo skupaj s crnim domacim kruhom in jabolcnikom.

- *Zgornjesavinjski želodec is a local dried meat product and has been produced in the Upper Savinja Valley for hundreds of years.*
- *The želodec is nowadays still produced in a traditional manner. For the stuffing, fresh pork ham and shoulder meat are ground and mixed with cubes of bacon. The stuffing is spiced with sea salt, pepper and garlic water.*
- *The stuffing should be well mixed and filled into a pig's bladder, which is then sewed up and skewed, strained and pressed for a few days. Then it is left to gradually dry for 4-5 months.*
- *When dried well, the želodec is served cut into thin slices as an appetizer. The locals like to have it with some homemade black bread and apple wine.*

ZGORNJA SAVINJSKA DOLINA – DOMOVINA ŽELODCA
THE UPPER SAVINJA VALLEY – THE HOMELAND OF ŽELODEC



**Mountain quality food products marketed as local products:
Zgornjesavinjski želodec - The Upper Savinja dried meat (Slovenia)
Jože Tlaker, Association of Zgornjesavinjski želodec producers**

PRODUCT PRESENTATION

Zgornjesavinjski želodec is a local dried meat product and has been produced in the Upper Savinja Valley, Slovenia for hundreds of years.

The želodec is nowadays still produced in a traditional manner. For the stuffing, fresh pork ham and shoulder meat are ground and mixed with cubes of bacon. The stuffing is spiced with sea salt, pepper and garlic water.

The stuffing should be well mixed and filled into a pig's bladder, which is then sewed up and skewered, strained and pressed for a few days. Then it is left to gradually dry to 4-5 months.

When dried well, the želodec is served cut into thin slices as an appetizer. The locals like to have it with some homemade black bread and apple wine.



**ZGORNJA SAVINJSKA DOLINA – DOMOVINA ŽELODCA
THE UPPER SAVINJA VALLEY – THE HOMELAND OF ŽELODEC**



- Lega: v severnem delu Slovenije
- Površina: 507 km²
- Nadmorska višina kmetij : 300 – 1.327 m
- Podnebje : predalpsko, alpsko
- Prebivalstvo : 16.400
- Teritorialna delitev : 7 občin
- OMD območje: 100 %

Geogr. position: north of Slovenia

Area : 507 km²

Altitude of farms: 300-1.327 m

Climate: subalpine, alpine

Population: 16.400

Territorial partition: 7 municipalities

OMD area : 100 %



**DVA ZGODOVINSKO DOKAZANA LJUBITELJA ŽELODCA
TWO HISTORICAL PROVEN ADMIRERS OF THE ŽELODEC**

**ANGLEŠKI KRALJ JURIJ V.
(1865-1936)**

**JUGOSLOVANSKI KRALJ
ALEKSANDER I. KARAOĐORVIČ
(1888-1934)**

Georg V, The King of England



The King of »Old« Yougoslavia



Leta 1933 sta oba kralja po diplomatskem lovu odšla na malico v hotel Plesnik v Logarsko dolino. Postregli so jima želodec. Kralj Jurij je bil tako navdušen, da je naročil za več naslednjih let pošiljanje te specialitete na svoj kraljevi dvor v London.

In 1933, after a diplomatic hunt, the two kings visited hotel Plesnik in the Logarska Valley where they were served a plate of zelodec. King George was so impressed with it that he ordered a several years' supply for his royal court in London..



GEOGRAFSKA ZAŠČITA IZDELKA GEOGRAPHICAL PROTECTION OF PRODUCT



- Združenje izdelovalcev je leta 2004 realiziralo geografsko zaščito zgornjesavinjskega želodca – geografsko označbo. Od tedaj je izdelava tega suhomesnatega izdelka zemljepisno omejena in zaščitena. To je kulinarčna in gastronomska specialiteta. Domačini in gostje so ponosni nanjo.
- *The protected geographical indication of the želodec from the Upper Savinja Valley was obtained by the association of producers in 2004. Since then, the production of this dried meat product is geographically limited and protected. It is a culinary and gastronomic speciality. The locals and guests are proud of it.*
- V pričakovanju gostov: kruh, tokec, želodec, sirek, sveži sir in salama.
- *Expecting guests: bread, tokec(apple wine), želodec, sirek, fresh cheese and salami.*



ZAŠČITNI ZNAK IN EMBALAŽA TRADE MARK AND PACKAGING

- Zaščitni znak zgornjesavinjskega želodca je ovalni emblema prašička v naravnem okolju. Izdelek se najprej embalira v vakuumsko PE folijo, nato pa vloži v posebno šeststransko kartonsko škatlo z deklaracijo in nalepko zaščitnega znaka.



- *The trade mark of Zgornjesavinjski Želodec is presented as an oval emblem of a piglet in its natural environment.
The product is packed in a vacuum PE foil and put in a specially six-side pasteboard box with declaration and trade mark label.*


OCENJEVANJE KVALITETE ŽELODCA THE SENSORIAL ASSESSMENTS OF ŽELODEC

- Združenje izdelovalcev zgornjesavinjskega želodca s sedežem na Rečici ob Savinji vsako leto organizira senzorično ocenjevanje zgornjesavinjskega želodca.
- Komisija ocenjuje sledeče lastnosti : zunanji izgled, izgled in barvo prereza, teksturo, vonj in okus. Njena ocena služi za izobraževanje izdelovalcev, izboljšanje kvalitete izdelkov in večjo motivacijo za izdelavo želodca.



- *The Association of the Upper-Savinja želodec producers, located in Rečica ob Savinji, yearly organizes sensorial assessments of the želodec.*
- *Their commission assesses the following attributes: the physical appearance of želodec, the appearance and colour of the cut, its texture, aroma and taste. Their elaborate assessments contribute to the education of producers, to improve quality of the product and to increase the producers motivation.*

RAZLIKE Z INDUSTRIJSKIMI MESNINAMI
THE DISTINCTION FROM INDUSTRIAL MEAT PRODUCTS

LASTNOST / Characteristic	INDUSTRIJSKI ŽELODEC Industrial product	ZGORNJESAVINJSKI ŽELODEC
Izdelovalec / Producer	mesna industrija/ meat industry	kmetije /home farms
Meso (svinjsko) / Meat (pork)	z velikih farm / from big farms	domači hlev / home pigstys
Vsebnost mesa / Meat content	75 %	85-90 %
Dodano meso / Supplement meat	govedina / beef	---
Aditivi / Supplements	E 250 – Na nitrit (konzervans) E 310 – propil galat (antioksidant) E 316 – Na izoaskorbat (antioksidant) E 621 – Na glutaminat (ojačevalec okusa) taste amplifier dekstroza / dextrose	ne / no česen / garlic česen / garlic ne / no sladkor / sugar
Klima sušenja / Drying climate	umetna – kontrolirana Artificial - controlled	naravna natural
Čas sušenja, zorenja / Drying time	2 meseca / 2 months	4-5 mesecev / 4-5 months
Geografska zaščita Geographical protection	ne / no	
Tradicija izdelave / Tradition of making	15 let / 15 years	Preko 100 let/ over 100 years

TRŽENJE / MARKETING

- **AI NEPOSREDNA PRODAJA / DIRECT SALE**
 Kupec = potrošnik Buyer = consumer
IZDELOVALEC → POTROŠNIK / PRODUCER → CONSUMER
 - Prodaja na domu / Selling at home
 - Prodaja na kmečkem turizmu / Selling at tourist farms
 - Prodaja v lokalnih gostiščih / Selling in local guest houses



Zgornjo Savinjsko dolino letno obiše preko 150.000 obiskovalcev.
 Prodaja na gostoljubnih turističnih kmetijah je naš največji prodajni adut.
 To je naša tržna niša.
 The Upper Savinja Valley is yearly visited by over 150.000 visitors.
 Our best and strongest sale method is selling in hospitable local guest houses.
 This is our market niche.

- Prodaja na lokalnih/regionalnih kmečkih tržnicah
Selling on local and region farm markets



- V načrtu : prodaja obiskovalcem Mozirskega gaja kot spominek
- *Plan: selling želodec as a souvenir to visitors of the Mozirje Flower Park*

PARK CVETJA
Mozirski gaj



B/ POSREDNA PRODAJA / INDIRECT SALE

Kupec ni tudi potrošnik/ *The buyer is not also the consumer*

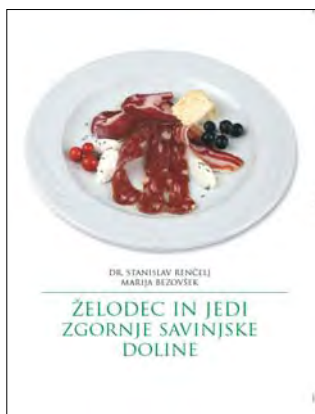
- Prodaja podjetjem, bankam,... za pogostitve in reprezentančna darila
Selling to companies , banks ... for catering and representation gifts
- Prodaja občinam in državnemu protokolu.
Selling to municipalities and the state protocol.



C/ POSREDNA PRODAJA PREKO TRGOVINE / INDIRECT SALE OVER TRADE

- Zaradi relativno malih kapacitet izdelave, dragega certificiranja in visokih trgovskih marž, trenutno prodaja preko trgovske mreže ni predvidena.
- V 2. fazi – po povečanju proizvodnje leta 2012, načrtujemo tudi prodajo v izbranih trgovinah z lokalno tipičnimi zaščitnimi proizvodi.
- *Because of the relative small number of producing capacities, very expensive certifying and high trade margins, selling over commercial networks is not seen as appropriate.*
- *In the second phase – after increasing the production in 2012 , the product is planned to be traded in specialized markets with typical local protected products.*

D/ POSPEŠEVANJE PRODAJE / PROMOTION OF SALE



Monografska publikacija:

ŽELODEC IN JEDI

ZGORNJE SAVINJSKE DOLINE

Avtorja: dr. Stanislav Renčelj

Marija Bezovšek

COBISS: 232386560 Rečica ob Savinji, 2007

Monographic publication:

ŽELODEC AND DISHES

OF UPPER SAVINJA VALLEY

Authors: dr. Stanislav Renčelj

Marija Bezovšek

COBISS: 232386560 Rečica ob Savinji, 2007

PRIZNANJA / AWARDS



POTRDILO O KVALITETI (NAD 15 TOČK)

BRONASTA PLAKETA (17-18 TOČK)

SREBRNA PLAKETA (18-19 TOČK)

ZLATA PLAKETA (19-20 TOČK)

CERTIFICATE OF QUALITY (OVER 15 PTS)

BRONZE PLAQUETTE (17-18 PTS)

SILVER PLAQUETTE (18-19 PTS)

GOLD PLAQUETTE (19-20 PTS)

IZHODIŠČA TRŽNE POLITIKE STARTING POINTS OF THE MARKETING POLICY

- ❖ lokalno in regionalno prepoznavna trajna mesna specialiteta
 - ❖ veliko število malih izdelovalcev (okrog 1.500)
 - ❖ skupna letna proizvodnja 30.000 do 50.000 kg želodca
 - ❖ delež eksterne prodaje cca 30 %, lastna poraba 70%
 - ❖ visoka dodana vrednost živega dela izdelovalcev (75%)
 - ❖ visoka prodajna cena izdelka (30 - 40€/kg)
 - ❖ ne potrebuje subvencij
 - ❖ presežno povpraševanje glede na ponudbo
 - ❖ relativno cenovno neelastična ponudba $\eta_s = \Delta s / \Delta p$ in neelastično povpraševanje $\eta_d = \Delta d / \Delta p$, katerih vrednost < 1
 - ❖ izdelovalci še niso pridobili uradne certifikacije
 - ❖ **sedanja recesija** je zmanjšala turistične tokove za okrog 10%. Nekaterim izdelovalcem njihove stalne stranke niso prevzele lani naročenih izdelkov.
-
- ❖ *Locally and regionally recognizable permanent meat speciality*
 - ❖ *Large number of small manufacturers (about 1.500)*
 - ❖ *Common annual production 30.000 – 50.000 kg of Želodec*
 - ❖ *Share of outside sale around 30%, own consumption 70%*
 - ❖ *High adding value to the producers own labour input (75%)*
 - ❖ *High sale price of product (30 – 40 €/kg)*
 - ❖ *Require no direct support*
 - ❖ *Excess demand in comparison to supply relatively price non-elastic supply $\eta_s = \Delta s / \Delta p$ and non-elastic demand $\eta_d = \Delta d / \Delta p$, which are both < 1*
 - ❖ *The producers have not gained a certificate yet*
 - ❖ *The current recession reduced tourist streams for about 10%. Some of the regular customers have not picked up products they ordered last year from their producers.*



CILJI TRŽNE POLITIKE / GOALS OF MARKETING POLICY

- Kvalitetna in količinsko zadostna trajna ponudba želodca
 - Geografsko zaščito pridobiti tudi v prostoru Evropske unije
 - Razviti čimbolj enotno tehnologijo, kontrolo in označevanje
 - Potrošnikom / turistom dati koristne informacije o kvaliteti, pristnosti in ekološki prijaznosti izdelka brez umetnih aditivov
 - Povečati ekonomski interes izdelovalcev za dopolnilno dejavnost
 - Izobraževati izdelovalce v tehnoloških in tržnih znanjih.
-
- *Sufficient supply of želodec of good quality*
 - *Geographical indication to expand on EU region*
 - *Development of uniform technology, control and labeling of the product*
 - *Supplying the consumers / tourists with useful information on quality, authenticity and environmental friendliness of the product containing no artificial additives*
 - *Increasing of producers' economical interest for the supplemental activity*
 - *Technological and marketing education of the producers.*



NOČNA MORA ŽELODCA
NIGHTMARE OF ŽELODEC



Želodec zaide v akcijsko prodajo med poceni delikatese velikih diskontnih trgovskih verig.

Želodec gone the wrong way in an action sale among low price groceries in big discount trade chains.

NAJOKUSNEJŠE JE NA IZVORU
THE TASTE IS BEST AT THE SOURCE



MESTO LYON, FRANCIJA
LYON, FRANCE



- ❖ Na predstavitvi v okviru projekta EuroMARC v Lyonu je naš izdelek naletel na veliko zanimanje, odobravanje in povpraševanje.
- ❖ Če bi hoteli vsakemu prebivalcu tega francoskega mesta postreči samo 1 porcijo (10 dag) želodca, bi morali tja peljati našo kompletno proizvodnjo 4 let.
- ❖ *As part of the EuroMARC project, the product was presented in Lyon, where it gained much attention, approval and demand.*
- ❖ *To be able to serve each resident of this city only one helping (10 dag) of zelodec, it would take the entire production of the past 4 years.*

Our policy shall respect recommendations and guidelines of the following projects



Twinning project SI06/IB/AG/02/TL:
"Food Quality products"



REPUBLIKA SLOVENIJA
MINISTRSTVO ZA KMETIJSTVO,
GOZDARSTVO IN PREHRANO

The project of realization of the protected geographical indication is co-financed by the Ministry of Agriculture, Forestry and Food of the Republic of Slovenia and The European Agricultural Fund for Rural Development (EAFRD) by the LEADER approach.

Autor: Jože TLAKER, univ.dipl.oec.

Maribor, December 2009

Session 3

How can tourism support mountain quality food products and vice versa?



Presentations

Opportunities offered by tourism—Introduction with cases encountered in the EuroMARC project

Markus Schermer, UIBK

Cirarske ceste kot turistični produkt

Davorin Koren, Triglav National Park

Tourism and mountain quality food products—an example of Cairngorms farmers market

Fiona Young, Cairngorms farmers market organisation



"How can tourism support mountain quality food products - and vice versa?"




Some Opportunities offered by tourism

Product	Advantage	Precondition / disadvantage
Breakfast on Farm (Holiday on Farm)	High revenue	Labour intensity, regional on-farm processing of products
Farmers breakfast in hotels	Defined, fixed program	Collective organisation
Menu on own farm/summer farm	High revenue	Seasonality
Supply of restaurants	Quantity	Logistics, control, only best pieces (meat)
Culinary souvenir - farm shop - cooperation with hotel - Internet sale	Durable products	Speciality connected to region image
Seasonal culinary events	High turnover in short time	Collective organisation
Regional product trail etc.	Regional added value	Even distribution of benefits necessary



"How can tourism support mountain quality food products - and vice versa?"

Examples:

- Buschenschank, Hofschank: South Tyrol/Italy
 > <http://www.redrooster.it/en/farm-bars/>

- Co-operation with local restaurants: „Stubaier Kostbarkeiten“ Tyrol/Austria
 > <http://www.stubaier-kostbarkeiten.at/>
 > <http://www.stubai.at/xxl/lang/en/season/at2/area/unterubArea/743948/index.html>

- Culinary souvenir: Internet sales of mountain cheese Vorarlberg/Austria
 > <http://www.kaes.at/de/products/basiclist/0/20/0/de/list.html>
- Seasonal culinary events: /Skye and Lochalsh food trail
 > <http://www.skyefoodtrek.co.uk/>
 > <http://www.taste-local.co.uk/skye/events/index.html>

- Permanent regional product trail: Käsestrasse Bregenzerwald
 > <http://www.kaesestrasse.at/>



Buschenschank, Hofschank: South Tyrol Italy

- <http://www.redrooster.it/en/fam-bars/>
- The 'Mountain Inn Guide' published by the Farmers' Union of South Tyrol lists two types of « farm bars »
 - traditional country inns ('**Buschenschänke**'), serve a glass of wine and home-made food for both locals and tourists.
 - farms serving food without own vineyards '**Hofschänke**' serve home made products
 - Both need strict quality controls in order to receive the 'Red Rooster' logo



„Stubaier Kostbarkeiten“ Tyrol/Austria



- <http://www.stubaier-kostbarkeiten.at/>
- The label “ Stubaier Kostbarkeit (Treasure)”
 - farmers, tourism employees and craftspeople cooperate in the association "Fürs Stubai (for Stubai)". The label "Stubaier Kostbarkeit" was created to preserve the charm of the landscape by active farming.
- Delicatessen
 - Besides traditional culinary highlights such as Kaminwurzeln, Speck, and Grammelschmalz, you can find rarities such as goatsmilk – Schnapps or handwoven sheepwool – cardigans and spelt – pillows. Eggs, honey – products, fruit, vegetables, cereals and juices round off the product choice.
- Free culinary guide
 - with addresses of producing and selling farmers and health food shops, restaurants, inns and huts



kaes.at

- <http://www.kaes.at>
- Internetshop for 7 farmers from the Bregenzerwald, Vorarlberg /Austria.
 - Webshop sending cheese all over Austria and Germany
 - Different cheese varieties
 - Recently also cheese from Swiss farmers
 - Founder of a further project for internet sale of rare products (in co-operation with slow food <http://www.vielfalt.com/>)
- Possibility for tourists to get the specialities of their holiday region also during the year

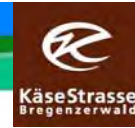


Skye and Lochalsh food trail

- <http://www.skyefoodtrek.co.uk>
- "Your holiday isn't complete without a Taste of Local Food"
 - combines walking trail with visiting local food producers
- **Skye and Lochalsh Food Link** is a Community Interest Company on the isle of Skye embracing an area including the Cuillin Mountains and part of the North West Highlands of Scotland.
- The members are:
 - salad and herb growers, fruit growers, fishermen, farmers, smallholders, crofters, shellfish farmers, scallop divers, organic growers, processors, meat producers, cheese makers, confectioners, bakers, jam and chutney makers, smoke houses, retailers, hoteliers, restaurateurs and local food supporters.
- One of the most notable achievements has been the Food Link Van which basically distributes food from 26 producers, twice a week, to over 60 hotels, restaurants, visitor attractions and retailers throughout the area, thereby assisting distribution and helping to maximise the linkage between food production and visitors to the area, as well as local consumers.



Käsestrasse Bregenzerwald



- <http://www.kaesestrasse.at/>
- The region of **Bregenzerwald** in Austria is a successful example of selling mountain products at farm level and organising a regional tourism strategy around these products.
- **The Käsestrasse** (cheese route) is based on the association of farmers, dairies, alpine huts, restaurants, commercial enterprises, and tourism under the thematic topic of cheese.
- Currently, the association created around the route has 200 members. Producers in the region produce more than 30 types of cheese. Product promotion is ensured through the organisation of many events along the cheese route, but also by signboards fixed on all shops, hotels, restaurants, sky lifts and craft enterprises on the route.
- The region is “sold” together with mountain cheeses in Austria and abroad.





TRIGLAVSKI NARODNI PARK

Final conference of the EuroMARC project
The development of mountain quality food products:
Production, Distribution, Consumption

SIRARSKE CESTE KOT TURISTICNI PRODUKT

Davorin KOREN, Triglavski narodni park

December 3-4, 2009
Maribor, Slovenia

KISLO MLEKO

Izdelek nastane s kvasjenjem polnomastnega surovega mleka. Na sobni temperaturi nastane po enem dnevu čvrst izdelek brez grudic. Ko ga zajamemo z žlico, se ostru kornj in je površna poročastost gladka. Okus je osvežujoče kisel.



SKUTA

Izdelan je iz polnega ali polmaščnega mleka, ki se brez noč zgošči s pomočjo ustrezne temperature in naraščajoči vsebnosti mikroorganizmov. Glavni odločilni dejavnik je priložnost. Okus je prijetno kiselkast. Skuto uporabimo za pripravo žurjancev, žepnikov, namazov ali pa jo pojedemo svežo, brez dodankov.

SIRARSKA SKUTA

To je izdelek iz skrota, ki jo pripravijo v kotlu močno segrejejo in vlastni dodajo še nekaj mleka. Pri tem ogrejejo na površino skrota velike lerce mlačnih beljakovin, ki jih sirar počrta s sirarsko lepato in odcedi v prilo. Okus skrota je prijeten, slaček in jo lahko pojedemo svežo ali pa uporabimo za sladke kreme namazov surovega mleka.

POLTRDI SIR

Sir izdelajo iz polnega ali delno polmaščnega mleka. Mleka dogrejejo, lairajo s sifidami in ko je vsebina kotla dovolj čvrsta, jo razrežejo s hruščo. Nato sledi dogrevanje in mešanje s hrustom, dokler ni sirno črna dovolj čvrsta. Zrna posevajo v oblikovalce, v katerih se sir stisne, dobi lepo obliko in izgubi odvečno vlago. Sledi sušenje sira in pri maso zorenja in negovanja v prijetnih prostorih.



MOHANT

To je pikantna posebnost na sirarski poti. Izdelek je iz polnega ali delno polmaščnega mleka z užitjem in ko se sirno zrna uvoščijo na črno kocko, ga oblikujejo v kupo in v sirijskem potoku rahlo v oblikovniku in postopno za dobro odležajo. Črna in osoljena hrustična nastajajo v lošene posode. Vsebinsko prekrivajo ter obkajajo, da se brzo preostane skrota. Po nekaj tednih do šest mesecev postane testo homogarno, plastično, ima specifično, močan vonj in okus in dobro lačne s krompirjem v oblikah. Lahko pa ga uporabimo tudi pri pripravi mesnih jedi, omak in mila pastv.

SUROVO MASLO

S polnomastnim mleka se dobi slačka ali bela smetana, ki jo aler gredala v surovo maslo. V priji jo mešajo, dokler ne nastanejo maslena zrna, iz katerih se je ločilo prijeten. Zrna pogrejejo v gladko surovo maslo, ki ga nato oblikujejo in sušenjo na hladnem. Prijetno je prijetnega slačnatega okusa. In je ohlajen dober osvežen napitek.



PONUDBA MLEČNIH IZDELKOV NA KMETIJAH IN PLANINAH NA OBMOČJU OBČIN BOHINJE, BLEDE IN KRANJSKA GORA



projekt sofinancira EU



Turistična sirarska pot po Bohinjskih planinah

Ministrstvo za kmetijstvo, gozdarstvo in prehrano Republike Slovenije
 po Sloveniji planinam
 Ministrstvo za kmetijstvo, gozdarstvo in prehrano Republike Slovenije
 Ministrstvo za kmetijstvo, gozdarstvo in prehrano Republike Slovenije
 Ministrstvo za kmetijstvo, gozdarstvo in prehrano Republike Slovenije
 Ministrstvo za kmetijstvo, gozdarstvo in prehrano Republike Slovenije

planine

- 1 Planina PEČANA
- 2 Planina LIZ
- 3 Planina KRSTENICA
- 4 Planina VELO POLJE
- 5 Planina KONČICA
- 6 Planina UROŠNICA
- 7 Planina PRAPRETIČKA
- 8 Planina ZAJAMNIKI
- 9 Planina GORJENSK

znamenitosti

- 1 OŠČINA SPREMLJ
- 2 ŠKOP CRMEČKA
- 3 ALJOSIŠI ČRMEČI
- 4 ČERVEN SV. JANEŽA
- 5 Mlinički muzej in planinarski Opatovna hiša
- 6 Korita in slap Neumrtice
- 7 OŠČINA REZDO
- 8 POHLJUBA LUČINA
- 9 Spomenik padlim v 1. svetovni OŠČINA KRANJSKA GORA
- 10 MČ OŠČINA DOBRIČAČA
- 11 ALJOSIŠI ČRMEČI
- 12 MARTIŠIŠI SLAPON
- 13 Planina GRAPŠČKA

kmetije

- 1 Juref ROZMAN
- 2 Ljilja ODAR
- 3 Marija BARTIČ
- 4 Anđelj SOKLIČ
- 5 Gregor ČAVTAR
- 6 Rušelj CVETIČ
- 7 Anton ŠKOLJ
- 8 Irena ŠARHARČIČ
- 9 Zlatko ŽURAN
- 10 Irena VLJANIČA
- 11 Marjeta Rava 3a, 4264 Belh, Matrica
- 12 Legosna 6, 4264 Belh, Matrica
- 13 Borec 4, 4264 Belh, Matrica
- 14 Polje 24, 4264 Polh, Matrica
- 15 Štadler 3a, 4267 Srednja vas v Bohinju
- 16 Srednja vas 22, 4267 Srednja vas
- 17 Podlje 28, 4267 Srednja vas
- 18 Podlje 13, 4267 Srednja vas
- 19 Babevna 14, 4267 Zgornja Gora
- 20 Srednja 8, 4268 Gornj Matrožak
- 21 MČ KRANJAC
- 22 MČ ČREČOVNI
- 23 MČ PRANČIČEK
- 24 MČ TONČEK
- 25 MČ DOPLJANEC
- 26 MČ ULČANEC
- 27 MČ GORJAC
- 28 MČ KURČMAN
- 29 MČ KLEMEN
- 30 MČ VEŠKAVA

Zgodovinska dejstva

Za slovenski človek Bovec pa sta Bovec prva evropska mesta v zgodovini. Prva je v zgodnji tisoletni. Leta 1278 so se na njegovem planju prvi Bovec, leta 1339 (1340) in 1400 (1401) vsaka svojo planjo pridobila (vlastno) v last.

Leta 1277 je bil prvič omenjen za človeka za otoc 500 ovinčenih v barani sta, skupaj pa sestaja 27 barani ovinčenih 10 kg.

Sto se je zgodilo? Isti slovenski človek, 7 otroci so bili prvič ovinčeni (vlastno) v last. In so bili prvič ovinčeni v last. In so bili prvič ovinčeni v last.

Leta 1876 je bilo na Bovec 16.485 cov, leta 1904/05 13.456, najvišji pa leta 1952, pri 23.515, leta 2007 pa 10.000.

O izvorni barani Bovec sta sile bili stotine cov in zgodovinske barani, leta 1904, da je bil prvič ovinčen na barani Bovec sta sile 1888 na Bovec prvič ovinčen prvič.

Barani sta sile 1888 na Bovec prvič ovinčen prvič. Barani sta sile 1888 na Bovec prvič ovinčen prvič. Barani sta sile 1888 na Bovec prvič ovinčen prvič.

ITALIJA

SLOVENIJA

Bovec

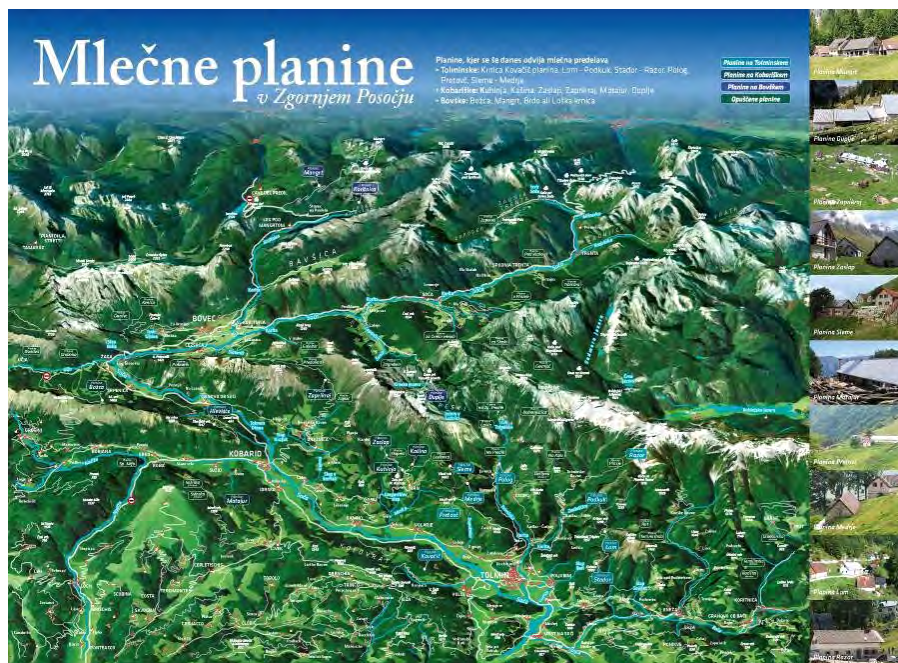
Po stezah bovske ovce

Bovšči s'z geografskim poreklom

V dolini ovčjega sira

Bovšči s'z

www.povse.si



Sirarska cesta

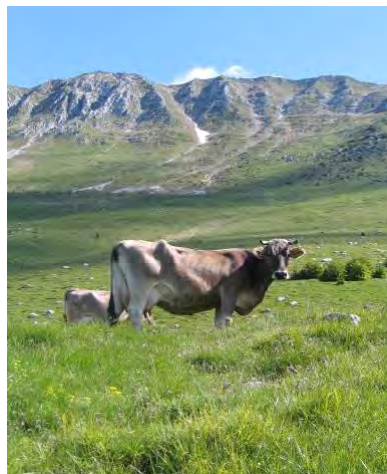


Predpogoji:

- samoiniciativnost nosilcev;
- oblikovani programi delovanja;
- izvajanje programov s strani nosilcev ali zunanje podpore;
- participativnost nosilcev (zagotovljeno financiranje in profitabilnost).

Sirarska cesta

- stalna ponudba;
- urejen prostor;
- usposobljeno osebje;
- izpolnjene zakonske zahteve;
- oblikovan programski del iniciative.



Hvala za pozornost!

Tourism and mountain quality food products - an example of Cairngorms Farmers Market



The Cairngorms National Park

John O'Groats
Inverness
Aberdeen
Fort William
Glasgow
Edinburgh

- Newest & largest in UK, 3,800 sq. km.
- 17 Cairngorms Farmers Markets annually
- Largest towns:
Aviemore: 2,600
- Grantown: 2,200

Cairngorms
Farmers Market
QUALITY FROM THE NATIONAL PARK



- **Tourism worth £134m (1.5 million EUR) to the local economy; providing up to 3900 jobs.**
- **Cairngorms Farmers Market operates in Aviemore and Grantown.**
 - **Resident population of CNP 17,000.**
 - **Visits to area 1.2million**



The Cairngorms Farmers Market:

Serving tourism and local community.



Development of Cairngorms food

- 1998 First Farmers Market in Scotland
- 2004 Pilot Markets in Cairngorms
- market research: Farmers Market attracts day visitors to town.
- Local public support for a local Farmers Market.
- 2006 Cairngorms Farmers Markets launched - funding from Leader, Cairngorms National Park Authority, Councils + enterprise company.
- 8 Markets in 06, average 6 stalls - products: beef, lamb, bread, fruit, honey, cheese, veg, tablet.



Benefits of the Cairngorms Farmers Market

- Low cost entry to retail – CFM fundamental to 6 business start ups.
- Face to face interactions with customers.
- Reconnects people with their food and the land.
- Contributes to the local economic development + sustainability.
- Provides fresh healthy food with minimal additives or preservatives.
- Environmental benefits – lower food miles, reduced unnecessary haulage.
- Links with tourism – holiday makers and day visitors.



The Cairngorms Farmers Market 2009

- Stall numbers 9 – 18
- 17 Markets per year.
- Good customer base, Grantown best.
- Growing volumes of produce through Market.
- Producers looking for more outlets, some to employ staff.



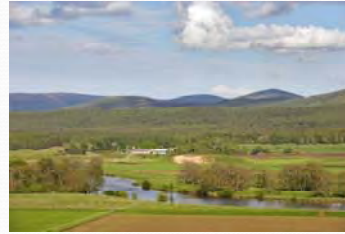
Food Producers developed niche markets

- **Balnafettach:** Time shares – weekly deliveries of beef, lamb, eggs.
- **Balliefurth:** Tourist diversifications holiday cottages, B&B, farm tours, links farming and food production.
- **Achnahannet:** New business Dec 07. Outlets CFM + local shops.
- **Delfour Hatchery:** New business Aug 06. Outlets CFM, local shops, other Farmers Markets. Won National awards + now negotiating contract with major high class food retailer.



Tourism + Farm Produce

- Balliefurth – Leaf Farm (Linking Environment and Farming) Source of household income 2008/9
 - Farm 47%
 - Tourism 20%
 - Off Farm 33%
- Of which 15% direct sales



Cairngorms
Farmers Market
QUALITY FROM THE NATIONAL PARK

Consumer awareness



- LEAF Open Day - opportunity to invite the general public on to a farm
- CFM team work together with mini market + interpretation activities.
- Builds loyalty, awareness, understanding through innovative and educational approach.

Cairngorms
Farmers Market
QUALITY FROM THE NATIONAL PARK

Interpretation at CFM



- Interpretation materials link farming, wildlife, landscape and people.
- Raffle – fun, draws people into conversation.



Integrated policies

- Value home produced food products
- Farm subsidy assessment must encompass whole farm
- Make local food a priority across ALL Government departments need joined up policy
- Planning and Licence punitive hurdles
- Public benefits:
 - Protects landscape
 - Enhances the environment
 - Carbon efficient
 - Quality food supply



Branding CFM



Challenges ahead

- Increase number of food producers – many farmers very traditional in approach.
- Bureaucracy – time consuming + costly (Market Licence, Planning permission). Initial costs in o6 - £180, 09 - £1000+
- Public support for agriculture lacks focus on food products sold direct.
- Major challenge for CFM to be viable and self sustaining in 2010.



The Cairngorms Farmers Market a long term future?

*We hope you can continue to take a slice of the
Cairngorms home with you!*



Session 4

How to promote mountain quality food products?



Presentations

Is a mountain quality food label expected? Comparative conclusions from the project.

ENITA, France and UHI, Scotland

A regional label: the Lactofarm Sibiu (Romania). Rusu Dumitru,

The various promotion strategies of Björli products (Norway)

Virginie Amilien, SIFO



Is a Mountain Quality Food Label expected?

Comparative conclusions from the project

C. Tebby, G. Giraud, Enita Clermont
R. McMorran, M. Price, Perth College



A label for mountain products?

- What does a label imply?
 - protection for mountain products,
 - promotion tool, enabling quick identification by consumers,
 - certification and control → Implies additional costs.
- How can a label be successful?
 - if the definition and eligibility criteria suit mountain area producers and processors,
 - if consumers are aware of it and able to recognise it,
 - if its definition answers consumers' expectations.
- → need to investigate perceptions and expectations regarding mountain products



Is a Mountain label expected? C. Tebby, G. Giraud, R. McMorran, M. Price

2





The labelling issue in EuroMARC

- In EuroMARC, we studied
 - mountain producers' and processors' perceptions of their products (quality characteristics)
 - consumers' expectations regarding mountain products.
- Labelling issue specifically approached:
 - In focus groups with consumers,
 - In written consumer surveys,
 - In written retailer surveys,
 - Also came up in face-to-face interviews.


 Is a Mountain label expected? C. Tebbly, G. Graud, R. McMorran, M. Price 3
 




Do consumers think there should be an official label?

- **Focus groups:** At the end of the discussion, consumers feel there is a need for information on the origin of the products, and whether products are really from mountain areas.
- “Do you think that for mountain quality food products there should be a governmental/EU label to certify that these products really are mountain products?”

	Austria	France	Norway	Romania	Scotland	Slovenia	Overall
Yes (%)	83	83	64	100	64	92	81
No (%)	10	11	19	0	12	6	10
Number of respondents	338	359	303	300	302	302	1904

- → “Yes” although not as prominent in Norway and Scotland


 Is a Mountain label expected? C. Tebbly, G. Graud, R. McMorran, M. Price 4
 


Is a label expected?

Results from supply chain interviews

- A label requires a strict **definition** of what a mountain product is.
- The issue of **free-riding using images of mountains** on packaging (esp. bottled water) came up more often.
- Having **too many labels** would confuse consumers.
- **Geographical origin labels** can sometimes convey sufficiently the mountain origin, even though some consumers are supposedly not interested in the geographical origin.
- “An official label” is **rarely spontaneously mentioned** as a way to improve promotion of mountain products, and only by producers or processors.
- Slovenians are particularly supportive of a label (geographical or quality)
- A label may be **too expensive** for low-volume supply chains
- Can/should the label be specific to **small scale** supply chains?



Is a Mountain label expected? C. Tebbly, G. Graud, R. McMoran, M. Price

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Is a Mountain Quality Food label expected?

Yes	But
Consumers are generally favourable. There is a need for information on the origin of the products	They are favourable when asked. No market study conducted.
Retailers are generally favourable	Direct retailers (producers, more concerned by the issue) are less favourable. They are not all in favour of the same type of label (MP, MQP, specific mountain range).
Face-to-face interviews with supply chain actors showed a divergence of opinions. They are generally aware of the issues of labelling.	



Is a Mountain label expected? C. Tebbly, G. Graud, R. McMoran, M. Price

8



Marketing and labelling policy analysis

Multiple advantages recognised by stakeholders

- Consumer-producer link is critical
 - Milk quota gap
 - Clarify terminology – align non-EU Schemes?
- 50-60% supportive (Round 1 Stakeholder interviews)
 - 60%+ supportive (Round 2 Stakeholder Interviews)

But.....

- Why mountains specifically? (Other landscapes etc.)
- EU schemes unsuited to regional marketing?
- HNV Scheme – conflict or complementary?



Is a Mountain label expected? C. Tebbly, G. Graud, R. McMoran, M. Price

9



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. **Define key terms in EU Marketing Standards** (optional reserved terms); “Mountain Product”
4. **EU Strategy for Non-EU labelling schemes** (definitions; criteria)

OR – EU High Nature Value (HNV) label (extensive agri)



Is a Mountain label expected? C. Tebbly, G. Graud, R. McMoran, M. Price

10





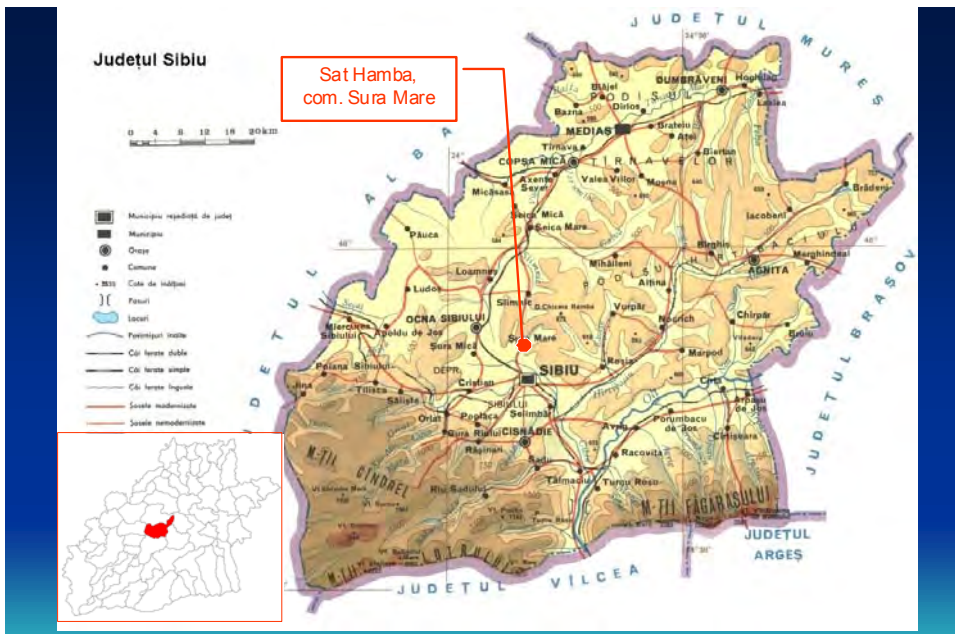
L'entreprise Lactofarm : vente de charcuterie de montagne en Roumanie

PRESENTATION GENERALE


Historique

- La compagnie **S.C."LACTOFARM"-HAMBA** – a pris naissance dans le but d'approvisionner les consommateurs avec les meilleurs produits de charcuterie de la région de Sibiu.
- La motivation reste en permanence le service aux clients et l'augmentation du nombre d'emplois dans la région. Notre société est ainsi actuellement parmi les meilleurs producteurs locaux en charcuterie.



Lactofarm est basée à Hamba, à 12km de Sibiu, dans une zone de basses montagnes.




L'entreprise Lactofarm : vente de charcuterie de montagne en Roumanie

-S.C."LACTOFARM"-HAMBA – est une compagnie à capital 100% roumain, crée il ya plus de 12 ans.

A travers le temps, l'innovation et des investissements permanents ont contribué au développement graduel de la compagnie et de la qualité des produits. Elle dispose d'un abattoir et de ses propres magasins et emploie 49 personnes.

La mission de la compagnie

- La mission de la compagnie restera la production et la promotion des charcuteries de montagne d'une qualité supérieure.
- Devenir une référence sur les marchés local et national avec des produits de charcuterie traditionnels de montagne.
- Satisfaire les exigences les plus hautes d'une gamme varié de consommateurs.
- Créer des nouveaux lieux de travail dans la région.



L'entreprise Lactofarm : vente de charcuterie de montagne en Roumanie

Données générales.

-LACTOFARM HAMBA – utilise des équipements technologiques très performants pour assurer un niveau constant de qualité :

- Utilisation des matières premières de la meilleure qualité, sélectionnées et achetées dans la région, chez les agriculteurs locaux, produits sans des substituts ni additifs.
- Laboratoires pour pouvoir faire des analyses tous les jour, assurer des produits sûrs et augmenter qualité des produits.
- Moyens de transport frigorifiques pour la marchandise, offrant les conditions nécessaires pour le respect des normes d'hygiène-sanitaire.
- Un réseau propre de magasins pour commercialiser les produits.

En valorisant les matières premières d'origine animale produites dans les petites et moyennes exploitations, notre entreprise contribue au développement de ces exploitations et des régions de montagne en général.



L'entreprise Lactofarm : vente de charcuterie de montagne en Roumanie

PRODUITS LACTOFARM HAMBA

– Une grande diversité de produits (71 sortes de charcuteries), pour adresser un nombre large des consommateurs:

- Les produits de charcuteries traditionnels
- Les produits de spécialités charcutières
- Les produits de charcuteries de volaille, frais
- Les produits de charcuterie fumée
- Les produits de charcuteries surgelés
- Les saucisses





L'entreprise Lactofarm : vente de charcuterie de montagne en Roumanie

CLIENTS

-Vente des produits par 4 agents de marketing qui font les marchés et contactent des nouveau distributeurs et à travers des grands magasins dans la région

- Trident Trans Tex 
- Unives'All 
- Trans Agape 
- Alcomsib 
- Penny XXL 
- Rioviry 
- Vel Pitar, etc




Les 4 agents de vente qui se déplacent à travers la région en essayant de promouvoir directement auprès des distributeurs les qualités des produits. La recherche de points de vente se fait en présentant des catalogues et des échantillons des produits.



Certificati

-Lactofarm croit qu'en plus de la qualité et du marketing, le succès est basé sur l'innovation continuelle de nos produits.

-Notre société a crée ainsi un produit nouveau, plus sain, qui remplace une grande quantité du sel des charcuteries par des minéraux (Calcium et Phosphore) **«Produits bons pour la santé»**. C'est un produit accessible aux personnes ayant un régime alimentaire pour des raisons de santé – des nouveau acheteurs.

-Ces nouveaux produits, sont certifiés et protégés par l'Office d'Etat pour invention et marques de Bucarest.

OSIM

**NOTĂRĂRE REPUBLICĂȚĂ
OFICIUL DE STAT PENTRU INVENȚII ȘI MĂRCI**

București, România
Strada Șosei de Centură nr. 109, Sector 4
Tel: +40 21 312 38 18
Fax: +40 21 312 38 19
Cămin 109
Cod Poștal 060011

Prezentă hotărâre se comunică în:
LACTOFARM S.R.L.,
STR. PRINCIPALĂ NR. 335, 557266,
HAMBA, SE, RO

**O.S.I.M.
REGISTRATURA GENERALĂ**

14 IUL 2009

Nr.: 10

HOTĂRĂREA Nr. 3/94 din 29.05.2009

Comisia de Examinare de Specialitate din Oficiul de Stat pentru Invenții și Mărci (compusă din):
Președinte: Avram, Hărăduț-Monica
Examinator: bichimic Crețu, Adriana
Examinator: Ing. Marina Anca

Amplasament nou în domeniul de brevet de invenție
(54) Titlu: PROCEDUL DE OBTINERE DE PRODUSE DIN CARNE, FUNCȚIONALE, DE PROTECȚIE A ORGANISMULUI UMAN
(71) Solicitant: LACTOFARM S.R.L., HAMBA, RO
(72) Inventor: NICOLAE CORNELIU, SEBIU, RO
Brevetul nou este prezentat pe versul, în temeiul art.26 alin. 1 din Legea nr. 363/2001 privind procesul de invenție, creație și activități de invenție și activități de invenție și activități de invenție în Mădularul Oficial al României, Partea I, nr.541 din 8 august 2007.

HOTĂRĂȘTE:

Se acordă brevet pentru invenția cu titlul:
(54) PROCEDUL DE OBTINERE A UNOR PRODUSE DIN CARNE
Titular (73) LACTOFARM S.R.L., STR. PRINCIPALĂ NR. 335, 557266, HAMBA, SE, RO

Președinte
chim: HĂRĂDUȚ-MONICA
Examinator bichimic Crețu, Adriana
Examinator Ing. Marina Anca

Formular B03

Lactofarm Romania

- La diversification des produits permetts d'adresser une large catégorie des consommateurs.
- Notre ambition est de pouvoir vendre des charcuterie de qualité à travers le pays et l'Europe.
- Cette croissance aura des bénéfices pour les habitant de la région de montagne (emploi et maintien de la population dans la région, valeur ajouté pour les matières premières, promotion de la région)



European Mountain Agrofood products, Retailing and Consumers
The various promotion strategies of
Bjorli products (Norway)
- "Fenalår" [Cured mutton leg]
as a case study-

Virginie Amilien, SIFO

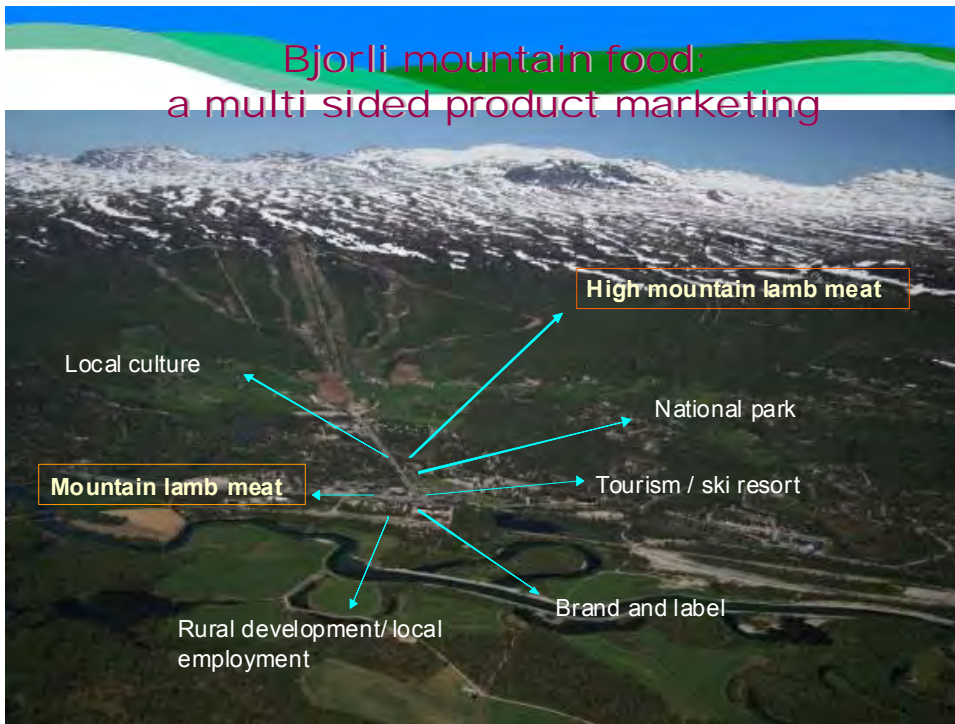


www.mountainproducts-europe.com

Bjorli mountain food

Bjorli Fjellmat AS is situated in Bjorli. Altitude 600 meters

– DEN GODE FJELLSMAKEN
The good mountain taste



Local employment and rural development

Co-operation with Bjorli/ the commune of Lesja to build the entreprise

Co-operation with mountain meat processors to get mountain know how and local identity



How to promote mountain quality food products?
Maribor 3rd december 2009

Euro-MARC

4





Official speciality label

“Fenalår” [Cured mutton legg] from BJORLI Fjellmat has a quality label



How to promote mountain quality food products?
EuroMARC
Maribor 3rd december 2009

Euro-MARC

From local to regional strategy

**Careful
processing
and choice
of raw
material**



How to promote mountain quality food products?
Maribor 3rd december 2009

Euro-MARC

7



Cooperation with retailers

- Co-operation with 3 of the 4 main distribution channels:
Coop Norway: Obs, Coop Mega / Ica Maxi / Norges gruppen: Matvarehuset Ultra.
- Distribution in speciality shops
- Distribution at local level: from own outlet to special shelves in Bjorli grocery shop



How to promote mountain quality food products?
Maribor 3rd december 2009

Euro-MARC

8



Cooperation with producers



Initiated a cooperation with Høgfjellslam BA, in 2005. The organisation is constituted of chosen lamb producers from six communes in Nord Gudbrandsdalen (Lesja, Dovre, Sel, Vågå, Skjåk and Lom.)

Bjorli Fjellmat bought 7000 lambs from Høgfjellslam BA in 2009. Producers from the organisation Høgfjellslam BA get + 0,65 euros/kg added value.

National park - Tourism



How to promote mountain quality food products?
Maribor 3rd december 2009

Euro-MARC

10



et. Tradisjonærrik apekemat fra fjell

Traditional dried cured meat from **mountain**

Mountain dried and special matured

Picture of the packaging "Fenalår fra Bjorli fjellmat"

Official label for quality food

Private brand for High mountain lamb

BJORLI FJELLMAT
Fjelltørket og spesialmodnet
FENALÅR
Fjelltørket fenalår av lam
Inngredensar: Kjøtt av lam (150 g pr. 100 g ferdigvare), SKÅRET, Salt og sukker.
Oppbevares 0-10°C.
Best før: 30.09.05 | Pris kr/kg: 0.114 | Nettvekt: PRIS
SPECIALISERT NORGE
HØYFJELLS LAM
Tradisjonærrik apekemat fra fjellet
Bjorli Fjellmat AS, 2669 Bjorli, www.bjorlifjellmat.no

How to promote mountain quality
EuroMARC Maribor 3rd decemb

Session 5

What policies can better support and develop mountain quality food products?



Presentations:

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

Philip Leat, SAC

The influence of local initiatives on mountain product value-added chains

Bernd Schue, ÖIR

The evolution of the European agricultural product quality policy

Vincent Cordonnier, European Commission, DG Agri

The Swiss “mountain” and “alpage” labels.

Jacques Henchoz, Federal Office of Agriculture of Switzerland

Conclusions drawn from EuroMARC: recommendations for policy.

Ancuta Pasca, Euromontana



**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



www.mountainproducts-europe.com

WP5 Objectives

1. Policy review - Constraints & opportunities
2. Review policies relevant to the promotion & labelling of mountain quality-foods
3. Identify synergies & discrepancies
4. Recommendations

Method: 50 Interviews



The Mountain Foods Process: Evaluation of the options offered by National and EU Legislation and Policy.
Rob Mc Morran and Martin Price, Brussels, 27 November 2008



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



Terminology - Key Points

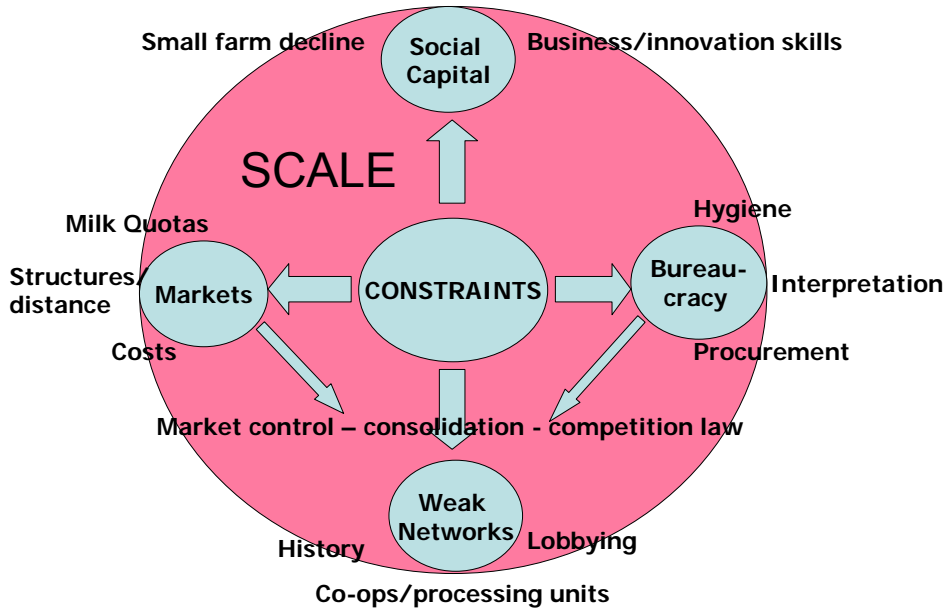
- Other terms – speciality, farm, traditional, regional (foods) – preferred by some
- Norwegian / Scottish respondents:
 - Support all disadvantaged farmers!
 - 'Mountain Foods' inappropriate
- 60% support (EU) definition of mountain regions / foods
- EU less supportive – support **national** initiatives



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



MOUNTAIN FOODS PROCESS - POLICY



MOUNTAIN FOODS PROCESS - POLICY



Existing EU-Labelling Schemes – KEY ISSUES

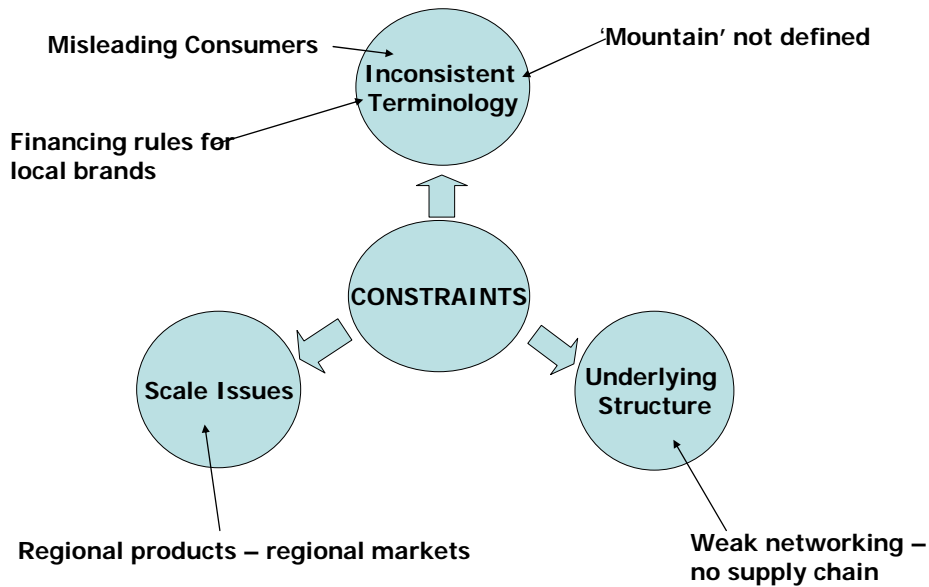
PDO / PGI / TSG / Organic



PDO/PGI – Mountain label conflict or mountain criteria?
TSG – uptake/intellectual property/inconsistent → A new definition?
Organic – not extensive
Promotion and awareness
Not suited to small producers → A new small producer scheme?



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



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)





What roles can local initiatives play?

Some conclusions from the analysis of LEADER-like initiatives

B. Schuh (Austrian Institute for Regional Studies and Spatial Planning – OIR)



Content:

- Local initiatives in EuroMARC – what did we do
- The definitions and hypotheses
- The findings and conclusions

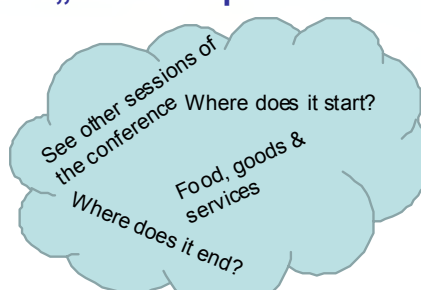


The tricky terminology:

„local initiatives“



„mountain products“



defined in EuroMARC: LEADER (like) measures, quality mountain food, mountain regions



What has been done in Euro-MARC?

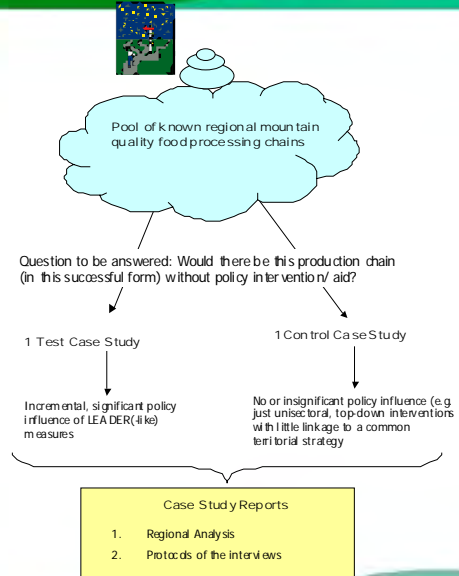
The guiding objective among others in Euro-MARC will be, to identify factors for success or failure in local initiatives devoted to marketing of mountain quality-food products.

- 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, provide 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

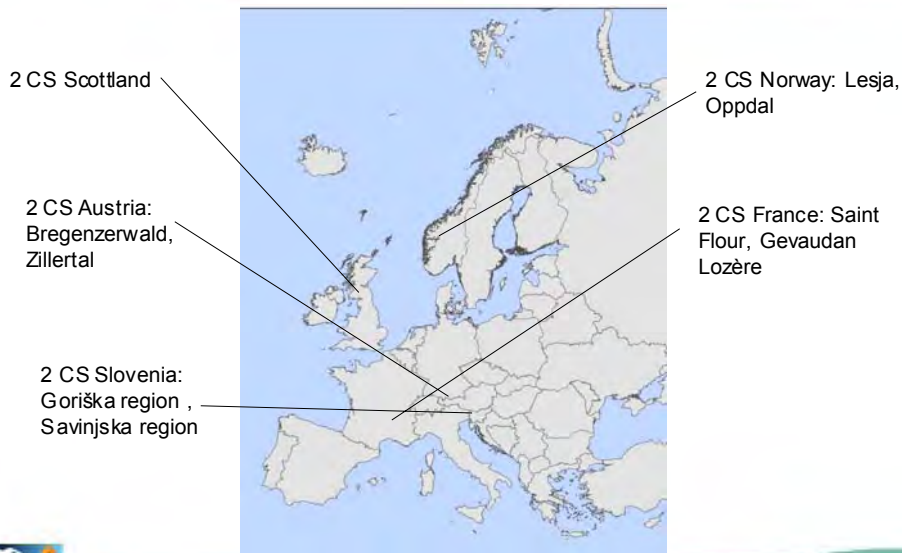


What has been done in Euro-MARC – part 2?

- 10 Case Studies
- 28 Interview protocols
- Hypotheses building
- Analysis grid for the case studies
- Quantification of results

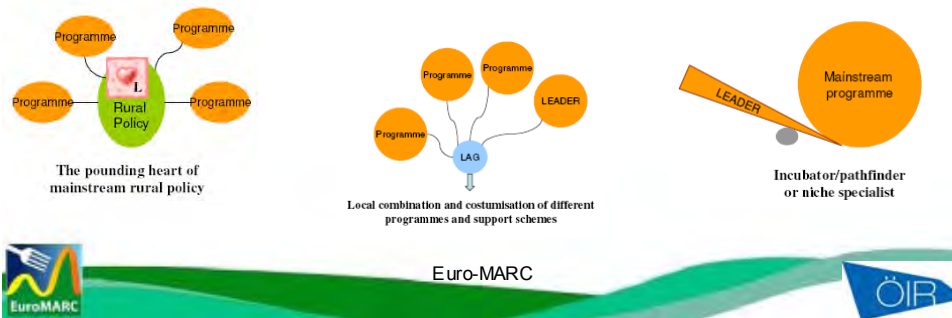


The Case Studies:



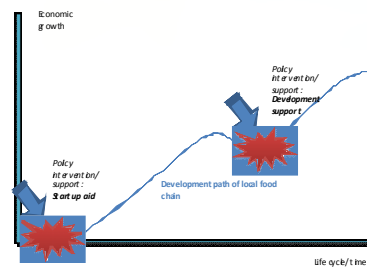
The guiding principles of analysis:

- The eight modes of governance
 - Sustenance, allegiance, charisma, planning, competition, conciliation, strategic vision, shared responsibility
- The three modes of operation
 - Animation, structuring, consolidating



The hypotheses on potential effects of LEADER on MQF supply chains:

- The start-up case
 - innovative entrepreneur (or a group of innovative entrepreneurs) → policy as supporter
 - societal regional identity, local knowledge and traditions → policy as facilitator
- The development support case
 - economic thinking, analysis and good business administration skills → policy as supporter
 - direct support strengthening the economic basis of the enterprises involved → policy as facilitator



General Conclusions:

- Successful regional mountain food supply chains enhance economic, social and environmental sustainability. **Regional embeddedness** is a key factor of success. Strengthening both, regional identity and the local image, farmer associations create new jobs and more diversity.
- LEADER initiatives can function as **Start up Aid** as well as **Development Support** for food supply chains in structural changes, strengthening the cooperation amongst the different actors/firms, enabling financing investments for being more successful and competitive and optimizing organisational structures.
- Taking the three LEADER actions “Animation”, “Structuring” and “Consolidation” into account, LEADER can play an important role for building up and developing successful mountain food supply chains.
- It is important, that LEADER (like) initiatives not only offer/use their own funding possibilities and instruments, but use **multiple sources of financing** projects that are of interest for different organisations. → delivery mechanisms shape the regional supply chains



Euro-MARC



Some caveats due to the narrow definitions in EuroMARC:

The underestimation of the power of LEADER:

- Missing systemic linkages outside the quality mountain food supply chain → see *Appennino Genovese*
- Missing the cross-sectoral benefits of LEADER – especially in the service sector or crafts → see “*Verein Pillerseetal – Leogang*”
- 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



Results from the regional development perspective:

- No clear indication, that mountain food supply chains are different from food supply chains in remote rural areas all over Europe (accessibility, demographic change, economic decline)
- Findings:
 - Entrepreneurial spirit is a "conditio sine qua non" for the set up and development of quality food initiatives
 - Policy support – also through bottom-up measures (like LEADER) will only support and facilitate → mostly enabling networking and linking food supply chains to other sectors (tourism)
 - Regional identity, traditions, social ties are both the seed bed for quality food initiatives and a possible benefit from their establishment
- Lessons for EU policy: better think how to foster entrepreneurial spirit and innovative behaviour among farmers and food processors, rather than support infrastructure alone or sales support



Recommendation:

Strengthen the entrepreneurial spirit and innovative behaviour among farmers and food processors:

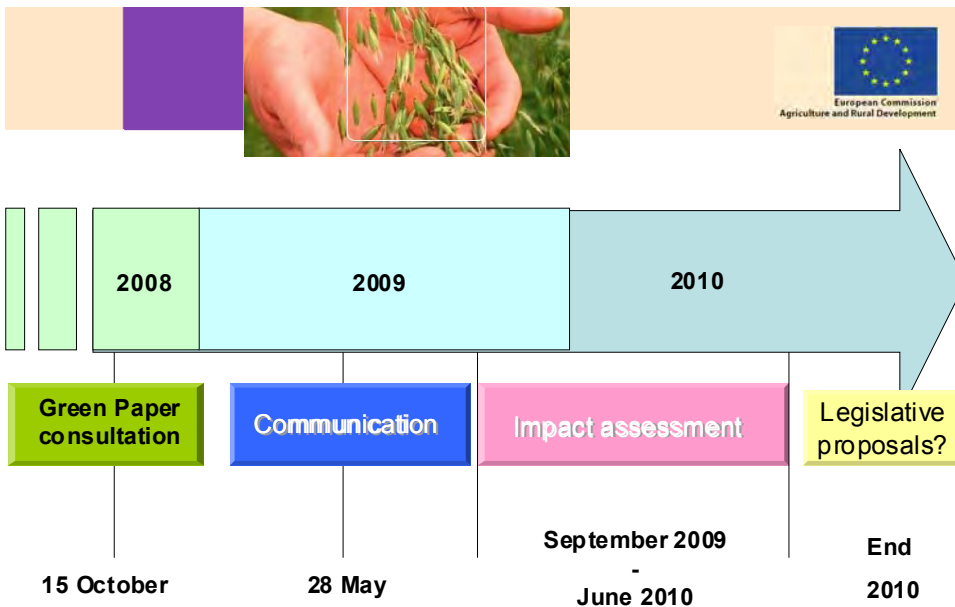
- Streamlining of territorially supportive EU programmes – Structural Funds and Rural Development – one stop shops as delivery mechanisms
- Stop crowding out of the innovators and highly qualified by contradicting „support messages“ – luring out the better trained, innovative work force from agriculture into secondary and tertiary sector
- Establish policy delivery mechanisms oriented towards the needs of regions (i.e. of the local population) by enabling bottom-up processes and unified development strategies (one region one programme)
- Reward innovative behaviour, by buffering the risk for the single entrepreneur (venture capital)





The evolution of the European agricultural product quality policy

Vincent Cordonnier
Euro MARC final conference – 3-4.12.2009
Maribor, Slovenia





Green Paper Consultation

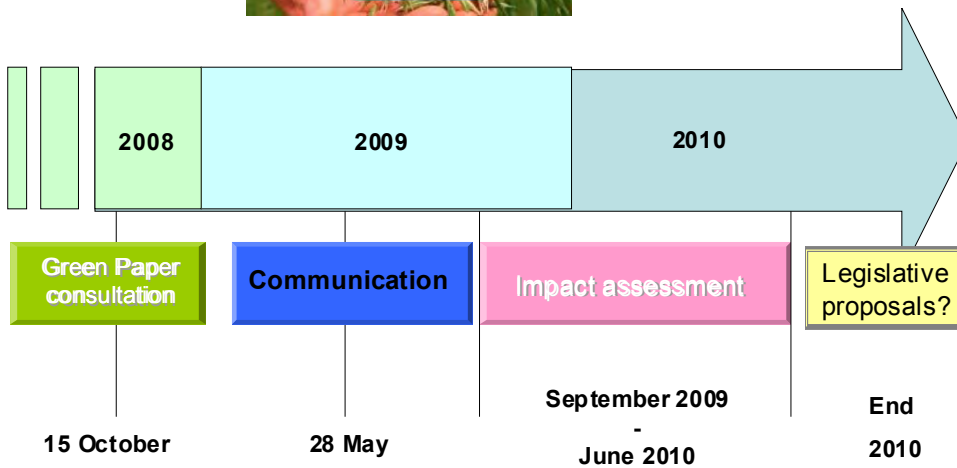
Question 3: what about laying down definitions for general terms such as 'mountain farming'?

- 560 contributions; large consensus among respondents to give priority in particular to 'mountain' (only processors clearly against)
- Arguments: avoid distortion; transparency for consumers; intra EU trade facilitation; protection of added value for producers - BUT need to avoid unnecessary costs



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3



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4



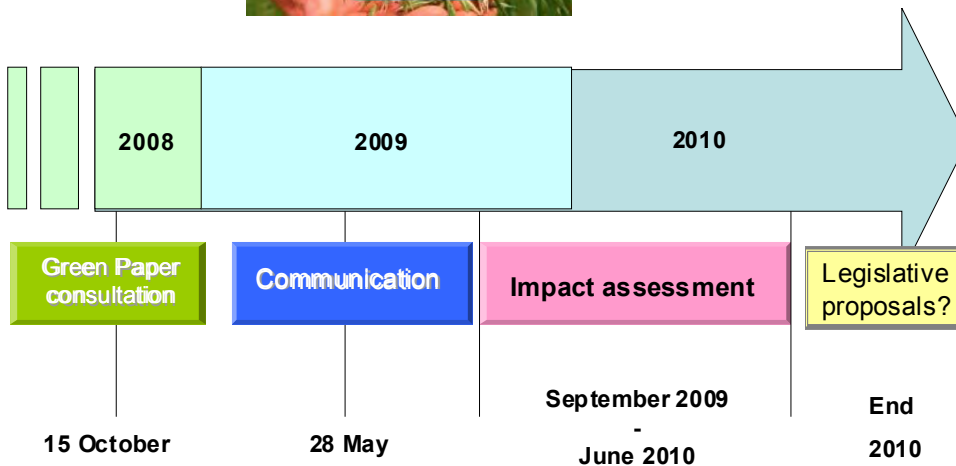
To improve communication between farmers and consumers

- **Reserved terms:** investigate the feasibility of introducing an optional reserved term: 'product of mountain farming'
- **Geographical indications:** benefits to mountain products but no specific "Mountain PDO"; guidelines on sustainability criteria
- **Private and national food certification schemes:** guidelines to reduce consumers confusion and red-tape on farmers



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Technical analysis that support any legislative proposals

- Identify **problems** and **objectives** first
- Define **options**
- Analyse economic, social and environmental impacts of each option
- **Need data**

- Assists political choice

EuroMARC Conference, Maribor, Slovenia, 3-4 December 2009

7



Problems: e.g.

- Mountain products not well identified in marketplace
→ farmers in mountain areas do not get a value-added price premium / consumers not sure they can trust claims
- Definitions of mountains not coherent and most MS do not have any definition
- If consumers cannot identify products produced on farms delivering environmental benefits, they will be reluctant to purchase these products / pay a premium

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Options for term 'mountain' in IA

- **Option 1:** status quo (same as 'no EU action')
- **Option 2:** reserve the term 'product of mountain farming' for agricultural products
- **Option 3:** enable a specific labelling for mountain products
- **Option 4:** define guidelines to use a specific labelling for products of mountain farming
- **Option 5:** ...



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Conclusions

- Until June 2010: preparation of impact assessment – **(quantitative) data needed**, feedback from stakeholders expected
- (2nd semester) 2010: possible presentation of the guidelines and legislative proposals – to be adopted by Council of ministers and European Parliament

EuroMARC Conference, Maribor, Slovenia, 3-4 December 2009

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Thank you for your attention

Vincent CORDONNIER
 DG Agriculture and Rural Development
 Unit H.2 – Agricultural product quality policy

Communication: http://www.ec.europa.eu/agriculture/quality/policy/communication_en.htm

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

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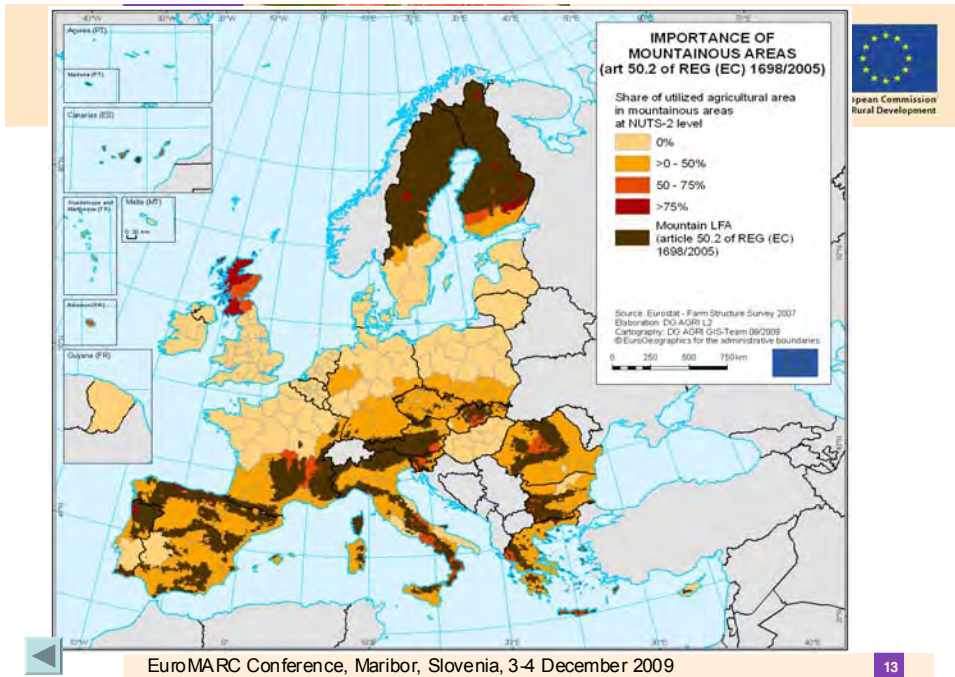
Mountains in Rural Development

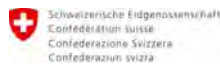
Definition as Least Favoured Areas in Regulation (EC) 1257/1999, art. 18:

- Characterized by considerable limitation of the possibility for using the land and appreciable increase in cost of working
- Existence because of altitude of difficult climatic conditions (shorter growing season)
- At lower altitude, presence of steep slopes requiring the use of expensive equipment
- Areas north of the 62nd Parallel and certain adjacent areas

EuroMARC Conference, Maribor, Slovenia, 3-4 December 2009

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Département fédéral de l'économie DFE
Office fédéral de l'agriculture OFAG

Protection of the Swiss designations „mountain“ and „alp“

4 December 2009

Référence: [Fabasoft Nr. der Unterlage/Fichier interne]

Instruments of support and differentiation

- Ordinance on contributions to summer pasture
- Ordinance « mountain » and « alp »





Objectives of the protection of labels

- Rules of the game / security of the law
 - Tools for the producers (differentiation, segmentation of the offer)
 - Garantie for the consumers
- The products labelled « mountain » or « alp » must be certified since 1 January 2009.



Protection of the products from the mountains and alps

The labels « mountain » and « alp » have a market value!

Quality Strategy

Quality is one of the main axes of Swiss agriculture; it enables the products to stay competitive within the country and on the attractive markets abroad.



Ordinance on contributions for summer pastures



- **Art. 1 Scope**

1 The contributions for summer pastures are distributed for grazing animals on summer pastures. (*expressed as livestock units fodder dry matter LUFDM*).

- **Art. 7 Issuing the *admissible load with livestock***

1 The canton issues, for each summer pasture unit, pastures and pasture communities, *the admissible load* in:

- a. sheep, except ewes;
- b. other *LUFDM*.



Ordinance on contributions for summer pastures

- **Art. 15 Fertilization of the possible pasture surfaces**

1 The fertilization of the pastures must favour a balanced floral diversity, rich in different varieties. It has to comply with moderate and graduated utilisation of the pastures.

In principle, fertilizers must come from the summer pasture unit itself.



Ordinance on contributions for summer pastures

- **Art. 17 Additional feedingstuff**

1 To alleviate exceptional situations due to meteorological situations, it shall be permitted to use up to 50 kg of fodder dry matter or 140 kg of silage fodder per normal ration NR (ration for 100 days per animal) and per summer pasture period.

2 For the lactating cows and milk sheep and goats, an additional supply of 100 kg of fodder dry matter and of 100 kg of concentrated feedingstuff per NR and per summer pasture period is allowed.

4 Detailed records must be kept (date, type, quantity, origine) of the use of additional fodder.

Protection des désignations suisses | EuroMARC Maribor
Jacques Henchoz / OFAG / 4 décembre 2009

7



Ordinance on the designations « mountain » et « alp »

- **Art. 1 Scope**

1 This ordinance shall apply to the use of the designations «mountain» et «alp» for unprocessed agricultural crop and livestock products and for processed agricultural crop and livestock products.

- **Art. 3 Certification**

1 These products can only be labelled as «mountain» or «alp» if the compliance with the requirements has been certified.

Protection des désignations suisses | EuroMARC Maribor
Jacques Henchoz / OFAG / 4 décembre 2009

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designation « mountain »

- **Art. 4 Use of the label « mountain »**

The label « mountain » may be used for:

- a. Agricultural products produced in a summer pasture region or in a mountain area as regulated in the Ordinance on Agricultural Areas of 7 December 1998.

Art. 1* Areas and regions

1 The surface used for agriculture is sub-divided in areas and regions in the cadastre of the agricultural production.

* Ordinance on Agricultural Areas of 7 December 1998



Designation « mountain »

2* The region of summer pasture comes up to the surface used by tradition for the alpine economy.

3* The mountain regions :

- a. mountain area IV;
- b. mountain area III;
- c. mountain area II;
- d. mountain area I.



* Ordinance on the Agricultural Areas of 7 December 1998



Designation « mountain »

Art. 2^o Criteria for the delimitation of areas in mountain and lowland regions

- a. Climatic conditions, first of all the duration of the vegetation period;
- b. Channels of communication, first of all the links from the village or from the closest centre;
- c. the configuration of the ground, first of all the terrain in slope and in steep slope.

* Ordonnance on Agricultural Areas du 7 Décembre 1998



Designation « mountain »

- Processed agricultural products from agricultural products within the meaning of let. a and processed in the summer pasture regions or in a community that is fully or partly in the mountain area or in the summer pasture region.

The label « mountain » may also be used:

- For milk: if the processing of the raw milk to drinking milk has taken place outside of the area according to paragraph 1;
- For the cheese: if the ripening has taken place outside of the area according to paragraph 1.3





Designation « mountain »

- **Art. 5 Feedingstuff**

For the products labelled « mountain », at least 70 % of the ration of the ruminants calculated in dry matter must be from the summer pasture region or from a mountain area.

- **Art. 6 Ingredients**

For the products labelled « mountain », the agricultural ingredients must be from the summer pasture region or from a mountain area.



Designation « mountain »

- The agricultural ingredients which do not come from the summer pasture region or from a mountain area, may be used provided the farmer is able to satisfy the certification body that insufficient ingredients are available from the summer pasture region or from a mountain area.
- The percentage of these ingredients may not exceed 10 % of the agricultural ingredients in the total of the weight registered at the moment of processing. Sugar and the original non-agricultural ingredients shall not be included.



Designation « mountain »

- **Art. 7 Particular prescriptions concerning the production of meat**
 - 1 For the products labelled « mountain », the animals for slaughter must have spent at least two thirds of their lives in the summer pasture region or in a mountain area.
 - 2 The animals may be slaughtered outside of the summer pasture region or mountain area, provided the slaughtering takes place within no more than two months after their departure from the summer pasture region or a mountain area.



Designation « alp »

- **Art. 8 Use of the designation « alp »**
 - 1 The label « alp » (e.g. cheese from the alp) may be used for:
 - a. Agricultural products produced in the summer pasture region regulated in the Ordinance on Agricultural Areas of;
 - b. Processed agricultural products originating from agricultural products regulated in letter a and processed in the summer pasture region.



Designation « alp »

1bis The designation « alp » may also be used:

- a. for milk: if the processing of the raw milk to drinking milk takes place outside of the area;
- b. For cheese: if the ripening takes place outside of the area.

Art. 9 Special provisions for products from the alps

- 1 For the products with the label «alp», the agricultural ingredients must be from a summer pasture region (exceptions idem as for « mountain »).



Certification body

• Art. 10 Inspection by the certification body

- 1 The inspection of compliance with the requirements of the ordinance at hand shall be carried out at the holdings that use the labels « mountain » or « alp » on their final products (users) at least once every two years. The inspections are carried out by
 - a certification body appointed by the user or
 - an inspection body mandated by the certification body.



Certification bodies

- **Art. 12 Certification bodies**

1 For their activities the certification and inspection body must be:

- a. Accredited in Switzerland;
- b. Approved by Switzerland within an international agreement, or
- c. Authorized or approved for the activity within Swiss law.

2 The certification body shall together with the user draw up a report including the elements of control.



Thank you for your attention





Policy recommendations from the EuroMARC research project

Ancuta PASCA, Euromontana



The official outputs of EuroMARC

- **Policy recommendations** for stakeholders at every decision-making level: European, country, regional/local
- **Guidelines for actors** in mountain product supply chains, advisory services, tourism sector



2



Key points

- What EuroMARC tells us:
 - There is a latent demand for MP
 - Supply chains are not organised enough to use that opportunity

- MP potential could be further exploited with:
 - Better identification of mountain products
 - Better organisation of supply chains
 - Better communication and marketing towards consumers

- What could be the role of EU institutions and EU policies in fostering development of MP?



3



The latent demand: The positive image of mountain products

- Respondents have, in general, a positive image of mountain products:
 - **Consumers** associate the word “mountain” with nature and purity and they consider mountain food as special, natural, products of good quality.
 - **Retailers and members of supply chains** characterize MQFP by their taste, provenance, traditional type of production and natural environment. The official labels were not main characteristics.

→ How can we help them to identify these products?



4

Recommendation 1

A European protection framework

Why a framework at EU level:

- Countries/regions taking action
- Distortion of the single market (abundance of products and no definition)

3 options:

- **A minima: Harmonised definition of the mountain areas and of mountain products at the EU level**
- **Creation of a reserved term for the mountain products**
- **Establishment of a Mountain Products « Label »**



5

- EuroMARC consumers very supportive for the creation of a Mountain Products label
from 64% in Norway and Scotland (least supportive) to 92% in Slovenia (most supportive)

	Austria	France	Norway	Scotland	Slovenia	Overall
Yes (%)	83	83	64	64	92	81
No (%)	10	11	19	12	6	10
Number of respondents	338	359	303	302	302	1904

- The retailers agree only under some conditions:
 - strong communication of the label
 - promotion of the mountain provenance
 - promotion of products' qualities

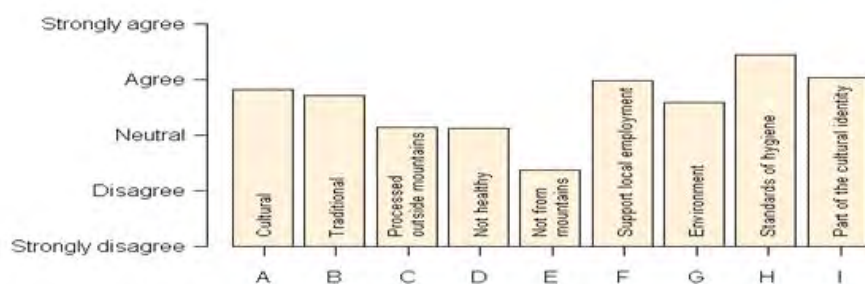


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Recommendation 1

Defining clear criteria for a protection of mountain quality food products

What is important for consumers?



Recommendation 2

Maintaining and using possibilities of the interpretation of European legislation

Respondents pointed out that the existing regulatory systems, especially those on hygiene, can disadvantage mountain (small-scale) producers, as costs linked to their enforcement can be very high.





Recommendation 3

Raising awareness on the opportunities that MQFP represent for actors of supply chains

An awareness raising campaign should be launched to make actors in the food chains aware of the potential interest in mountain quality food products and to organise themselves in relation to market trends.



9



Recommendation 4

Fostering the production of mountain quality food products

- Supporting environmentally-friendly methods of production in mountain areas
- Developing producers business skills
- Supporting innovation in the mountain quality food products supply chain
- Prioritising the development of infrastructures in mountain areas



10



Recommendation 5

Fostering collaboration inside mountain quality food products' supply chains

- Giving special assistance to low-volume supply chains
- Helping actors to overcome bottlenecks of mountain production



Recommendations 6

Supporting market penetration by communication about mountain quality food products to consumers

- Communicating about mountain quality products as a specific category of products
 - *First step definition of a marketing term*
 - *Communication of the mountain products as a category*
- Giving value to cross-fertilising communication on products and the presentation of production regions



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About EuroMARC

What is EuroMARC?

The EuroMARC project “European Mountain Agrofood products, retailing and consumers” (project no. SSPE-CT-2006-044279) is a three-year research project, involving 10 partners from six countries under the overall coordination of Euromontana and the scientific coordination of ENITA Clermont-Ferrand.

The research project considered the **perception and interest of the European consumers in mountain foods** as well as **supply chains for mountain food products** in six different countries (Austria, France, Norway, Romania, Scotland and Slovenia) and was commissioned against a background of changing European quality food policies. New developments (e.g. interest in clarifying the systems of quality certification, in improving their communication to the European consumer, and the need to provide consumers more information about food products on the market) present challenges and opportunities for all actors of the food sector in mountain areas, from farmers to retailers.

Euro-MARC provides a representative overview of the different opinions and expectations regarding mountain food products, along the food chain from farmers, processors and retailers to consumers, as well as a panorama of the policies supporting mountain products.



The work carried on

To obtain this overview, the EuroMARC partners undertook a multi-faceted research programme:

- 1904 consumers answered a questionnaire and another 184 persons participated in discussion groups which focused on some specific mountain products
- 1765 mountain products were observed on the shelves of outlets in the 6 countries,
- 638 distributors were interviewed (of which 514 by a written questionnaire)
- 4 types of products were analysed along the entire supply chain (water, fruits and vegetables, meat products, milk and milk products),
- 10 cases of regional food initiatives (LEADER-like or not) in mountain areas were compared, and
- 50 policy makers from local to the European level were interviewed

The guidelines and the policy recommendations as well as more information on the project are available on the EuroMARC webpage on:

www.mountainproducts-europe.org

The outputs

Practical guidelines: their objectives are to provide advice and hints to further develop the production of mountain quality food and to increase the financial return from their marketing for all actors of mountain supply chains. They are dedicated to:

- **all actors in supply chains for mountain products** (farmers, processors, retailers);
- **enterprises and people working in related sectors**, like the tourism sector;
- **extension services (public or private)** working with enterprises in the mountain products supply chains.

Policy recommendations: based on the results of EuroMARC, a list of political recommendations for **policy-makers** have been prepared. For each policy level; **European, country and regional/local**, a summary of the recommendations has been adapted.

FOR FURTHER INFORMATION..

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