



**EuroMARC – Produits alimentaires de montagne en Europe :
Consommateurs, distribution et démarches locales**



LES ACTES

DE LA CONFÉRENCE FINALE DU PROJET EUROMARC

LE DÉVELOPPEMENT DES PRODUITS DE MONTAGNE DE QUALITÉ : CONSOMMATION, PRODUCTION ET DISTRIBUTION



3-4 DÉCEMBRE 2009

MARIBOR, SLOVÉNIE



Projet cofinancé
par l'Union Européenne
6ème programme cadre
de recherche et développement



EUROMARC

Contenu



p.3—Quelques mots sur la conférence

p.4—Programme

p.7—Présentations

p.7 Session d'ouverture

p.12 Session 1— En quoi les produits de montagne de qualité sont-ils spéciaux? L'identité des produits agroalimentaires de montagne de qualité

p.31 Session 2— Quelles stratégies de marketing pour les produits de montagne?

p.55 Session 3— Comment le tourisme peut-il favoriser les produits de montagne de qualité – et *vice versa*?

p. 73 Session 4— Comment promouvoir les produits agroalimentaire de montagne de qualité ?

p. 90 Session 5— Quelles politiques peuvent le mieux soutenir et développer les produits agroalimentaires de montagne de qualité?

p.125 Listes des participants

p.128 A propos d'EuroMARC

Quelques mots sur la conférence

Organisation: Université de Maribor, Faculté d'Agriculture et des Sciences de la vie (UM-FALS), Euromontana

Université de Maribor, Slovénie

Langues: slovène, anglais, français, allemand



Le développement des produits de montagne de qualité : Consommation, production et distribution

Les produits agroalimentaires de montagne de qualité jouent un rôle vital dans le développement durable des zones de montagne. Les différentes étapes de production amènent de la valeur ajoutée dans ces zones, et l'identité du territoire est renforcée car associées aux produits locaux et à leurs méthodes de production spécifiques. Malgré cela, peu de données sont disponibles sur le potentiel de développement des produits de montagne de qualité. Le projet EuroMARC vise à combler ces lacunes.

Le **projet EuroMARC** a comme principal objectif **d'évaluer la perception et l'intérêt des consommateurs européens et des distributeurs pour les produits agroalimentaires de montagne** afin d'identifier des stratégies de valorisation de ces produits, condition sine qua non pour la survie et la gestion des diversités biologique, rurale, culturelle et économique des zones de montagne.

10 équipes de 6 pays d'Europe sont impliquées dans ce projet de trois ans qui débuta en février 2007.

De façon à rendre les résultats scientifiques obtenus par EuroMARC directement accessibles aux acteurs des filières et aux décideurs politiques, le projet a produit :

- des **guides pratiques pour le développement, la promotion, la communication des produits** agroalimentaires de montagne, à destination de tous les professionnels des filières (de la production primaire à la distribution)

- des **recommandations sur les politiques favorisant le développement des produits agroalimentaire de montagne de qualité**, à l'intention des décideurs politiques au niveau locaux/régionaux, nationaux et européens.

Ce document regroupe les présentations qui ont été faites durant les 2 jours de conférence, ainsi que la liste des participants.

Programme

JEUDI 3 DÉCEMBRE	
08.30	Inscription – Accueil
Session d'ouverture Modération : Andreja Borec, UM-FALS	
9.30	Discours de bienvenue et d'introduction : Ivan Rozman, Recteur de l'Université de Maribor Joze Merkus, Maire de Hoče Secrétaire d'Etat du ministère de l'agriculture, de la forêt et de l'alimentation <i>Le contexte d'EuroMARC – présentation des guides pratiques et introduction au programme de la conférence.</i> Marie Guitton, Euromontana (coordinatrice générale du projet EuroMARC)
Session 1 : En quoi les produits de montagne de qualité sont-ils spéciaux? L'identité des produits agroalimentaires de montagne de qualité	
10.00	<i>L'identité des produits de montagne à travers les perceptions des consommateurs. Comment les consommateurs perçoivent les produits de montagne.</i> SIFO <i>Les produits de montagne comme marqueur d'identité – les produits de Tavarna Mare (Roumanie).</i> Jim Turnbull, directeur de la fondation ADEPT <i>L'identité des produits de montagne de qualité au long de la filière – point de vue des différents acteurs d'une filière. L'exemple de Bio vom Berg (Autriche).</i> Björn Rasmus, directeur de Bio vom Berg
10.40	Commentaires du panel d'experts du projet Discussion avec le public
11.20	Pause café
Session 2 : Quelles stratégies de marketing pour les produits de montagne? Modération : Virginie Amilien, SIFO	
11.50	<i>Points clés pour développer la distribution des produits de montagne de qualité.</i> SAC, Ecosse <i>Une filière intégrée : l'eau de Laqueuille (France)</i> <i>Les produits de montagne de qualité en tant que produits locaux : le Zgornjesavinjski želodec – viande séchée de la haute Savinja (Slovénie).</i> Joze Tlaker, Association of Zgornjesavinjski želodec producers
12.30	Commentaires du panel d'experts du projet Discussion avec le public

13.10	Déjeuner
Session 3 : Comment le tourisme peut-il favoriser les produits de montagne de qualité – et <i>vice versa</i>?	
14.30	<p><i>Les opportunités offertes par le tourisme – introduction et cas rencontrés au cours du projet EuroMARC.</i> Markus Schermer, UIBK</p> <p><i>L'expérience de la mise en œuvre d'une route des fromages comme produit touristique en Slovénie.</i> Davorin Koren, chef du département d'agriculture, forêt et développement rural, Parc national du Triglav.</p> <p><i>Le marché paysan de Cairngorms dans le parc national de Cairngorms : le rôle du tourisme et de la distribution des produits alimentaires et autres produits (Ecosse).</i> Fiona Young, organisatrice du marché paysan de Cairngorms</p>
15.10	<p>Commentaires du panel d'experts du projet</p> <p>Discussion avec le public</p>
15.50	Pause café
Session 4 : Comment promouvoir les produits agroalimentaire de montagne de qualité ? Modération : Martin Price, UHI	
16.20	<p><i>Un label pour les produits de montagne ? conclusions comparatives du projet.</i> ENITA Clermont-Ferrand, France – UHI, Ecosse</p> <p><i>Exemple d'un label régional : le label Lactofarm de Sibiu (Roumanie).</i> Dumitru Rusu, manager marketing</p> <p><i>Les différentes stratégies de promotion des produits Björli (Norvège)</i></p>
17.00	<p>Commentaires du panel d'experts du projet</p> <p>Discussion avec le public</p>
Conclusion de la journée André Marcon, Président d'Euromontana	
18.00	<i>Programme de soirée : visite de caves vinicoles de Maribor, dîner commun et programme culturel</i>

VENDREDI 4 DÉCEMBRE

Session 5: Quelles politiques peuvent le mieux soutenir et développer les produits agroalimentaires de montagne de qualité?

9.00	<p><i>Leçons issues de l'analyse des politiques d'EuroMARC</i></p> <p><i>Quel rôle jouent les initiatives collectives? Quelques conclusions sur les approches de type LEADER.</i></p> <p><i>Contexte politique: l'évolution des politiques européennes de qualité des produits.</i> Vincent Cordonnier, unité politique de qualité des produits agricoles, DG agriculture et développement rural, Commission Européenne</p> <p>Les mentions suisses "produit de montagne" et "produit d'alpage".</p> <p><i>Conclusions d'EuroMARC : présentation des recommandations politiques.</i> Ancuta Pasca, Euromontana</p>
10.30	Pause café
<h3>Session 6: Table ronde</h3> <h3>Les produits agroalimentaires de montagne de qualité et les outils politiques</h3>	
11.00	<p>Comment les politiques favorisent le développement des produits de montagne de qualité et le succès de stratégies de marketing aux niveaux local, régional, national et européen ? Quels outils politiques faut-il mettre en œuvre ? Quelles mesures ?</p> <p>Discussion avec</p> <ul style="list-style-type: none"> Rareș-Lucian NICULESCU, Député européen, Vice-Président de la commission Agriculture Vincent Cordonnier, chef adjoint de l'unité politique de qualité des produits agricoles, DG agriculture et développement rural, Commission Européenne Mira Kos-Skubic, secrétaire d'Etat pour la sécurité alimentaire de Ministère Slovène pour l'Agriculture, la Forêt et l'Alimentation Alenka Lipusec-Miklavcic, director of Planika dairy Livia Dömölki, Association des consommateurs de Hongrie (OFE), membre du BEUC Jean Gault, coordinateur du projet SARD-M, FAO
<h3>Conclusions</h3>	
12.40	<p><i>Leçons tirées d'EuroMARC et futures recherches.</i> Georges Giraud, ENITA Clermont-Ferrand (Coordinateur scientifique)</p> <p>Conclusion Ivan Rozman, recteur de l'Université de Maribor</p> <p>Mot de la fin par André Marcon, président d'Euromontana</p>
13.00	Déjeuner

Session d'ouverture

Présentation

What is EuroMARC— Introduction to the project and to the conference

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

2





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)



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

3



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



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

4



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.



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

5



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



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

6





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).



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

7



Enjoy the conference!

Euromontana
2 place du champ de mars
B-1050, Bruxelles
+32-22-80-42-83
Marie.guitton@euromontana.org



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

8



Session 1

En quoi les produits de montagne de qualité sont-ils spéciaux? L'identité des produits agroalimentaires de montagne de qualité



Présentations

How do consumers conceive mountain quality food products

Virginie Amilien, Alexander Schøll, SIFO

Les produits de montagne comme marqueur d'identité – les produits de Tavarna Mare (Roumanie), Jim Turnbull, directeur de la fondation ADEPT

Die Marke der Tiroler Bio-Bergbauern

Björn Rasmus, Bio vom Berg



EuroMARC
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
Maribor December 3rd 2009

Euro-MARC

2





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.



The identity of Mountain food products
Maribor December 3rd 2009

Euro-MARC

4



Association with food from the mountains

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



The identity of Mountain food products
Maribor December 3rd 2009

Euro-MARC

5



An ambivalent many sided image

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



The identity of Mountain food products
Maribor December 3rd 2009

Euro-MARC

6



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



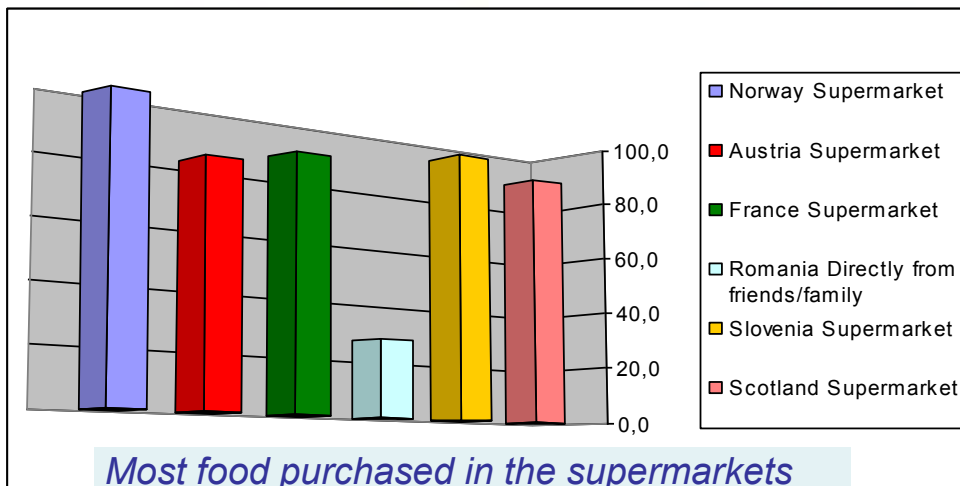
The identity of Mountain food products
Maribor December 3rd 2009

Euro-MARC

7



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



The identity of Mountain food products
Maribor December 3rd 2009

Euro-MARC

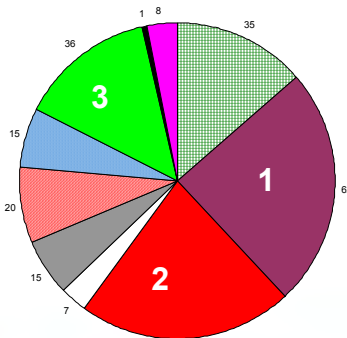
8



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



Regular grocery shops or supermarkets
 Directly from the producer
 Farmers' market and other markets
 Restaurant
 On-farm workshop/ factory outlet
 From own household
 From friends or family
 Special shop (exc butcher)
 Other
 No answer at all



The identity of Mountain food products
 Maribor December 3rd 2009

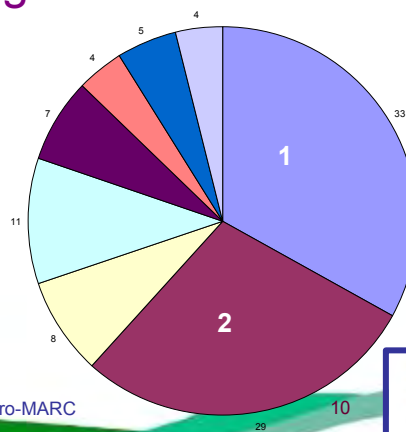
Euro-MARC



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



Trying something new Weekend use Visit a partical mountain area Special occasion Dinner with friends/family Do not buy Everyday use Do not know



The identity of Mountain food products
 Maribor December 3rd 2009

Euro-MARC



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
Maribor December 3rd 2009

Euro-MARC

11



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



The identity of Mountain food products
Maribor December 3rd 2009

Euro-MARC

12



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
Maribor December 3rd 2009

Euro-MARC

13



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

Euro-MARC

14



A TASTE OF TRANSYLVANIA

An Integrated Approach to Promoting Product and Territory

Linking the traditional characteristics of the product with local life

Final Conference of the EuroMARC Project
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

Slow Food®
Tarnava Mare

Saxon Village Presidium

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

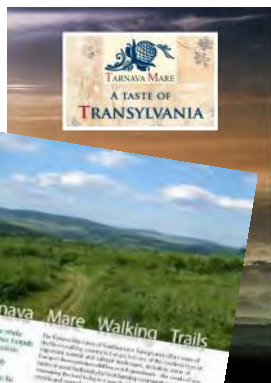
Slow Food Markets

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.





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 zliefernden 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?

Présentations

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

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

Une filière intégrée: l'eau de 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





EuroMARC European Mountain Agrofood products, Retailing and Consumers

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



www.mountainproducts-europe.com

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

Philip.Leat@sac.ac.uk
Cesar.Revoredos@sac.ac.uk
Beata.Kupiec@sac.ac.uk
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



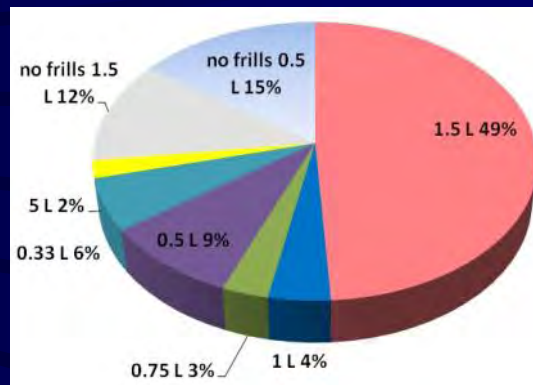
Distributor private label
Marque Repère



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

6

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 domača mesnina, ki jo že več stoletij izdelujejo na območju Zgornje Savinjske doline.

Način izdelave je tradicionalen. Sveže svinjsko meso od gnjati in pleč zmeljejo in premešajo z na kocke narezano trdo slanino. Nadev začinjijo z morsko soljo, poprom in česnovno vodo.

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

Dobro osušen se nareže na tanke rezine in ponudi kot narezek ali predjed. Domačini ga uživajo skupaj s črnim domačim kruhom in jabolčnikom.

- *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 skewered, 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 ŽELODECA
THE UPPER SAVINJA VALLEY – THE HOMELAND OF ŽELODEC



- Lega: v severnem delu Slovenije *Geogr. position: north of Slovenia*
- Površina: 507 km² *Area : 507 km²*
- Nadmorska višina kmetij : 300 – 1.327 m *Altitude of farms: 300-1.327 m*
- Podnebje : predalpsko, alpsko *Climate: subalpine, alpine*
- Prebivalstvo : 16.400 *Population: 16.400*
- Teritorialna delitev : 7 občin *Territorial partition: 7 municipalities*
- OMD območje: 100 % *OMD area : 100 %*



DETELA VISOKOGORSKIH KMETIJ / THE COUNTRY OF HIGH-MOUNTAIN FARMS

Levo: Turistična kmetija Bukovnik, 1327 m n.v., najvišje ležeča v Sloveniji
Left: The tourist farm Bukovnik, 1327 m alt., the highest located in Slovenia

Desno: Visokogorska kmetija Klemenšek nad Logarsko dolino (1145m)
Right: High-mountain farm Klemenšek above the Logarska Valley (1145 m)



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

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

Georg V, The King of England



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

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 želodec. 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 zaščiten. 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, sirnek, sveži sir in salama.
- *Expecting guests: bread, tokec(apple wine), želodec, sirnek, 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.*

RAZLIKE Z INDUSTRIJSKIMI MESNINAMI
THE DISTINCTION FROM INDUSTRIAL MEAT PRODUCTS

LASTNOST / Characteristic	INDUSTRIJSKI ŤELODEC Industrial product	ZGORNJESAVINJSKI ŤELODEC
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	 geografska oznaka Republika Slovenija Ministrstvo za kmetijstvo, gozdarstvo in prehrano
Tradicija izdelave / Tradition of making	15 let / 15 years	Preko 100 let/ over 100 years

TRŤENJE / MARKETING

- **A/ 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.*

DI/ 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



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.*

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 želodec, it would take the entire production of the past 4 years.*

Naša razvojna strategija bo upoštevala priporočila in smernice naslednjih projektov:
Our development policy shall respect recommendations and guidelines of the following projects:



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



Projekt praktične realizacije geografske zaščite želodca sofinancirata Ministrstvo za kmetijstvo, gozdarstvo in prehrano Republike Slovenije ter Evropski kmetijski sklad za razvoj podeželja (EKSRP) preko pristopa LEADER.

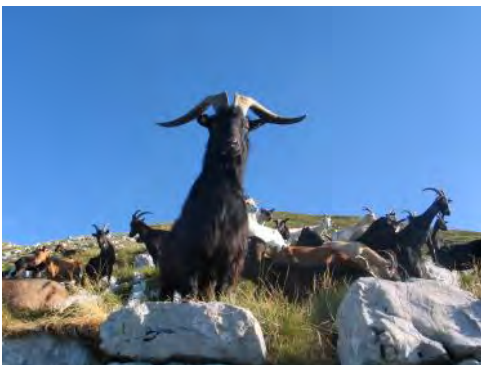
The project of realization of the protected geographical indication is co-financed by the Ministry of Agriculture, Forestry and Food of the Republic of Slovenia and The European Agricultural Fund for Rural Development (EAFRD) by the LEADER approach.



Author: Jože TLAKER, univ.dipl.oec.
 MS Power Point editor + translator: Jasna Tlaker
 December, 2009

Session 3

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



Présentations

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

Markus Schermer, UIBK



Cirarske ceste kot turisticni product

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/farm-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





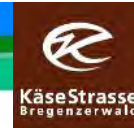
- <http://www.kaes.at>
- Internetshop for 7 farmers from the Bregenzerwald, Vorarlberg /Austria.
 - Webshop sending cheese all over Austria and Germany
 - Different cheese varieties
 - Recently also cheese from Swiss farmers
 - Founder of a further project for internet sale of rare products (in co-operation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




- <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 Bregenzewald



- <http://www.kaesestrasse.at/>
- The region of **Bregenzewald** 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 TURISTIČNI PRODUKT

Davorin KOREN, Triglavski narodni park

December 3-4, 2009
Maribor, Slovenia

KISLO MLEKO

Izdelek naravne a kislega polnomastnega surovega mleka. Na sobni temperaturi nastane po enem dnevu čvrsti izdelek brez grudic. Mo ga zajemamo z žlico, se čisto toni in je povsem poročevalno gladka. Okus je omevljuže ideal.



SKUTA

Izdelava je iz polnega ali posvetlega mleka, ki se šest noč zgošči a pomočjo ustrezne temperaturo in risavne ali dotone mlačnolaki mlaka mlačnolaka. Bledci odstopanje v prilo ali na ovčkah. Okus je prijetno kiselkast. Skuto uporabimo za pripravo žitnjake, zapitkov, namazov ali pa jo prejemo svežo, brez dodankov.

SIRARSKA SKUTA

To je izdelek iz skuta, ki jo skuti v kotlu močno segreje in vohati dodajo ke mleki mleka. Pri tem splavajo na površino skuta velika kupa mlačnih beljakovin, ki jih skuta pohane a skuta lepoto in udobje v prilo. Okus skuta je prijeten, sladki in jo lahko pojemo svežo ali pa uporabimo za gladko kreme namazov surovega mleka.

POLTUDI SIR

Gre izdelajo iz polnega ali delno posvetlega mleka. Mleko odgredajo, uležajo a stidam in ko jo vasaiba koka dovolj čvrsta, jo razrežajo a kudo. Nato zredil dogranje in mešanje a žmežam, dokler ni skuto zmoči dovolj čvrsto. Zmo pravevajo v oblikevle, v katerih se sir stiska, dobi lep obliko in izgubi odvečno skuto. Bledci sajjanje siru in an maso zaranje in negovanje a pritravnih prostovih.



MOHANT

To je pikantna posebnost na sirarski poti. Izdelek je iz polnega ali delno posvetlega mleka a uležanjem in ko se skuto zmo usode na črno koda, ga oblikujejo v kupo in v skuta priprilo skuta a oblikujejo in postajo se dobro odstopanje. Čvrstine in odstopane koda nalažijo v leone pasode. Vsašina prakujejo tar oblikajo, da se koda pravevajo skuta. Po nekaj tednih do letih maso pravevajo koda homogena, plavčino, ima specifičen, močan vonj in okus in dolga letina a koda prijeten in oblikih. Lahko pa ga uporabimo tudi pri pripravi moznih jedi, omak in omele paste.

SUROVO MASLO

Si posvetljenjem mleka se dobi skuta ali koda koda, ki jo skuta pravevajo v skuto maslo. V gani jo mešajo, dokler ne nastanejo maslena skuta, iz katerih se jo koda prijeten. Zmo pogrejejo v gladko skuto maslo, ki ga nato oblikujejo in skuta na koda. Prijetno je prijetnega skuta skuta. In je oblikih dober omevljen respitak.



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



projekt sofinancira EU



Turistična sirarska pot po Bohinjskih planinah

Sirarska pot

Sirarska pot je svetovno priznana, kjer pridelujejo največjega deleža v Evropi, skoraj celotno deležo v svetu. V Sloveniji so se razvile različne vrste sirarske potne, ki so priljubljene po vsej Sloveniji. Priljubljen je tudi sirarstvo domače proizvodnje, ki je priljubljeno po vsej Sloveniji. Priljubljen je tudi sirarstvo domače proizvodnje, ki je priljubljeno po vsej Sloveniji.

Planica Dvojčka
Miroslav Pradel
44100 Planica
Tel.: 041 463-437

Planica Mergel
Urban Štanič
32240 Mergel
Tel.: 041 463-448

Planica Črna
Jozeta Štanič
32240 Mergel
Tel.: 041 463-448

Planica Črna
Jozeta Štanič
32240 Mergel
Tel.: 041 463-448

Bovško - sožitje z naravo

Bovško sožitje z naravo je svetovno priznana, kjer pridelujejo največjega deleža v Evropi, skoraj celotno deležo v svetu. V Sloveniji so se razvile različne vrste sirarske potne, ki so priljubljene po vsej Sloveniji. Priljubljen je tudi sirarstvo domače proizvodnje, ki je priljubljeno po vsej Sloveniji.

Planica Mlekuč
Igor Hvalič
32240 Mergel
Tel.: 041 463-448

Planica Ostan
David Ostan
32240 Mergel
Tel.: 041 463-448

Sveže mleko na vrzlu

Nabiranje mleka

Jezerski mleko v kupa

Mlečni mleki

Mlečni mleki

Mlečni mleki

Mlečne planine v Zgornjem Posočju

Bilo je nekoč ...

V Zgornjem Posočju je bilo nekoč ...

... in je še danes

V Zgornjem Posočju je še danes ...

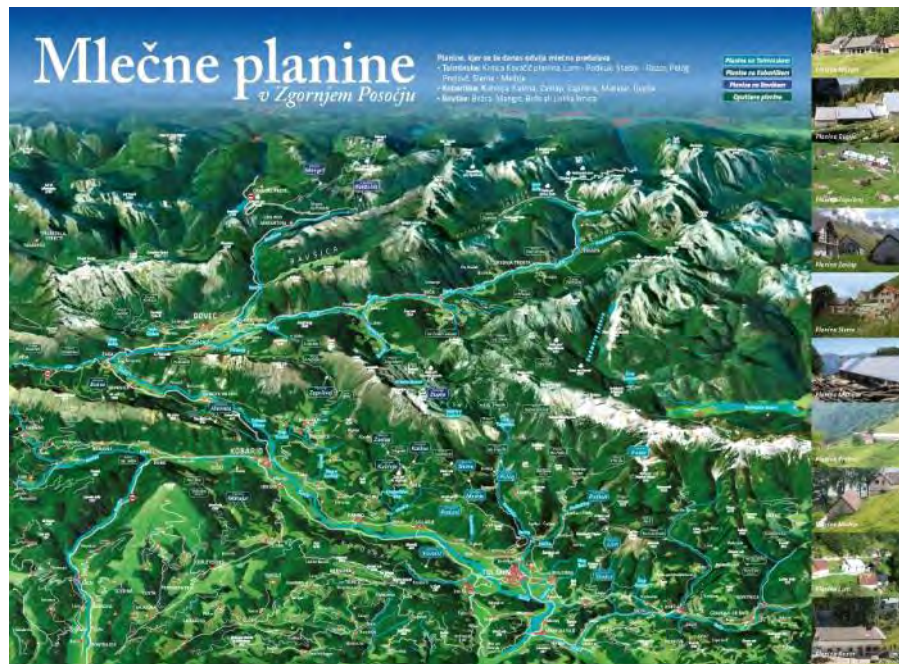
Siri, skuta, sirovka

Na planinskih ...

Nazaj v planinski raj!

Planinsko mlečno planinsko ...





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
Isle of Skye
Inverness
Cairngorms National Park
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?



Présentations

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

ENITA, France and UHI, Scotland

Exemple d'un label régional : le label Lactofarm de Sibiu (Roumanie).

Dumitru Rusu, manager marketing

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. Tebby, G. Giraud, 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. Tebby, G. Giraud, R. McMorran, M. Price

4



Do retailers think a label would be appealing? Which label?

- “Do you think the label : {“mountain product”
“mountain quality food product”
might increase the appeal of such products?”
- “Do you think that labelling products as coming from a specific mountain area (*examples*) would enhance their appeal?”

	Austria	France	Norway	Romania	Scotland	Slovenia	Overall
Appeal of “mountain product” label	3.8	4.1	4.1	4.3	3.4	3.8	3.9
Appeal of “MQFP” label	4.2	3.7	4.2	4.4	3.4	3.9	4.0
Appeal of specific mountain area label	4.0	4.2	4.1	4.4	3.8	4.0	4.1

- → “Agree”, but preferences vary according to country



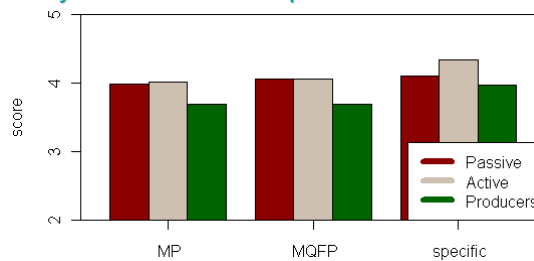
Is a Mountain label expected? C. Tebby, G. Giraud, R. McMorran, M. Price

5



Do retailers think a label would be appealing? Which label?

- Retailers surveyed sold mountain products:
 - After a producer or a wholesaler contacted them or following a central purchasing decision **PASSIVE**
 - Having approached a producer or a wholesaler **ACTIVE**
 - Because they retailed their own produce **PRODUCERS** (Scotland)



- Producers (direct retailers) are not as favourable towards the labels



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

6



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. Tebby, G. Giraud, R. McMorran, M. Price

7



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. Tebby, G. Giraud, R. McMorran, 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. Tebby, G. Giraud, R. McMorran, 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. Tebby, G. Giraud, R. McMorran, M. Price

10





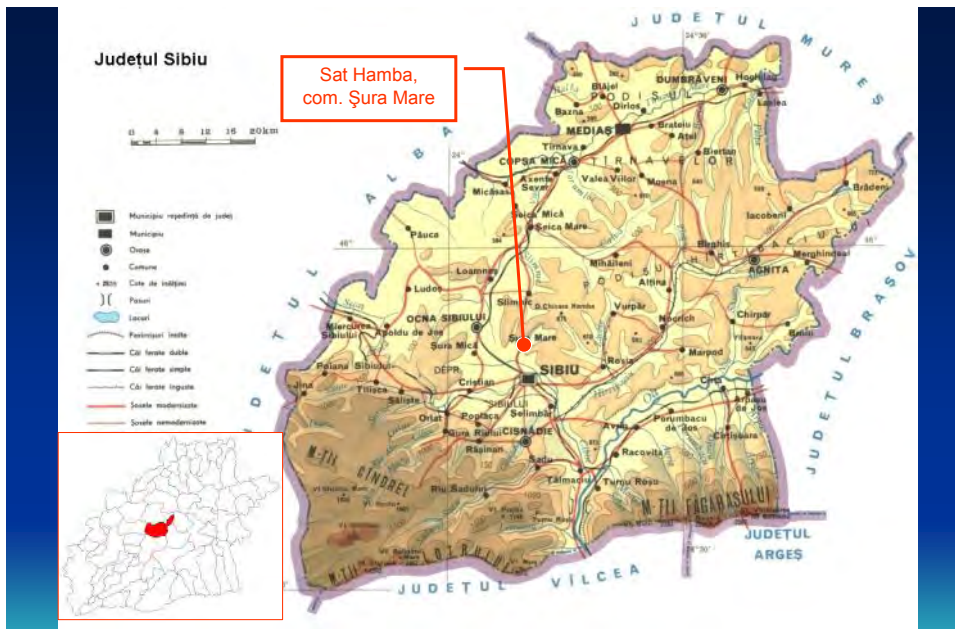
L'entreprise Lactofarm : vente de charcuterie de montagne en Roumanie

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.





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

-S.C."LACTOFARM"-HAMBА – 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 HAMBА – 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.



Certification

-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 créé 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
ROMANIA
OFICIUL DE STAT PENTRU INVENTII SI MARCI

Prezenta hotărâre se conține de:
 LACTOFARM S.R.L.,
 STR. PRINCIPALĂ NR. 335, 557265,
 HAMBĂ, SB, RO

O.S.I.M.
REGISTRATURA GENERALĂ
 14 IUL 2009
 Nr.: 10

HOTĂRĂREA Nr. 3/94 din 29.05.2009

Camăra de examinare de specialitate din Oficiul de Stat pentru Invenții și Mărci (notificat de):
 Președinte: Inim. Hăduțiu Mihaila
 Examinatori: bicetian, Crețu Adina
 Examinator: Ing. Marina Anca

PREZENTĂȚI
 (21) Nr. 4 2005 SERIEI 579 din data depunerii: 12.06.2008
 (54) TITLUL PROCEDUREI DE OBTINERE DE PRODUSE DIN CARNE: FUNCȚIONALE, DE PROTECȚIE A ORGANISMULUI UMAN
 (73) Solicitant: LACTOFARM S.R.L., HAMBĂ, RO
 (72) Inventator: HĂDUȚIU MIHAILA, 20081, RO
 Pentru motivele prezentate pe versul 2 al formularului art.20 alin. 1 din Legea nr.347/2001 privind brevetarea de invenții, republicată în Monitorul Oficial al României, Partea I, nr.541 din 8 august 2007:

HOTĂRĂȘTE:

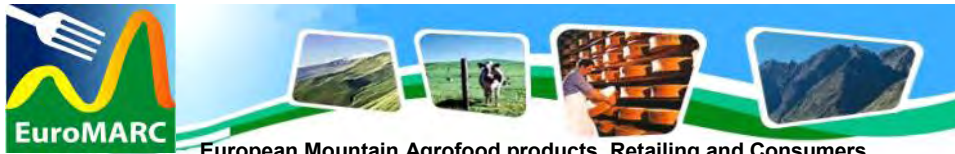
Se acordă brevet pentru invenția cu titlul:
 (54) PROCEDURE DE OBTINERE A UNOR PRODUSE DIN CARNE
 (73) Titular (73) LACTOFARM S.R.L., STR. PRINCIPALĂ NR. 335, 557265, HAMBĂ, SB, RO

Președinte: Inim. Hăduțiu Mihaila
 Examinator: bicetian, Crețu Adina
 Examinator: Ing. Marina Anca

Formular B02

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 legg]
as a case study-**

Virginie Amilien, SIFO



www.mountainproducts-europe.com

Bjorli mountain food



– DEN GODE FJELLSMAKEN

The good mountain taste



Local employment and rural development

- Co-operation with Bjorli/ the commune of Lesja to build the enterprise, as well as governmental support
- Co-operation with local mountain meat producers
- 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



“Fenalår” [Cured mutton legg] from Norway as a PGI ???



How to promote mountain quality food products?
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



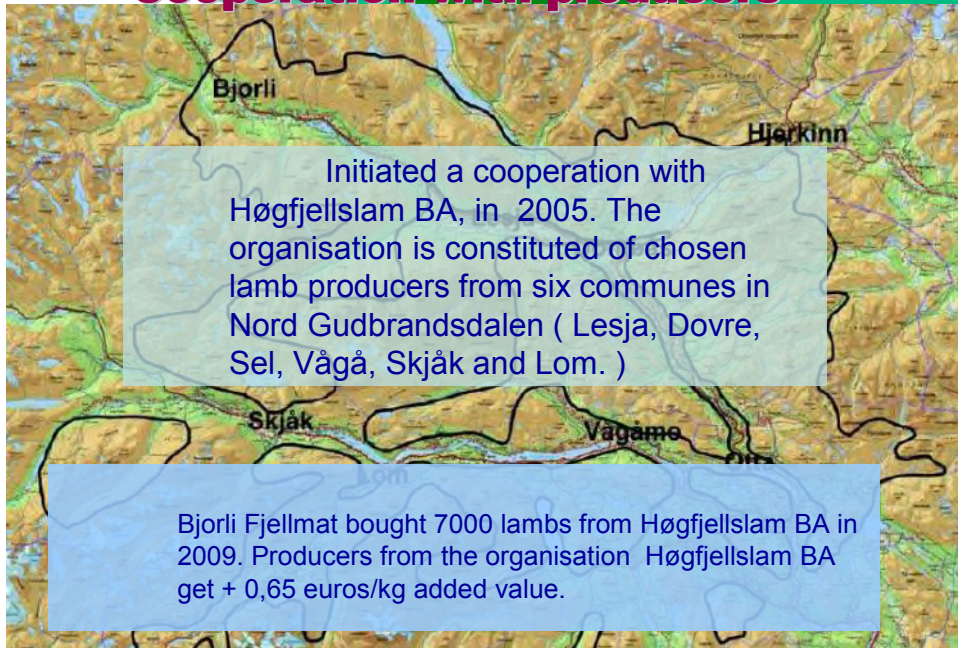
How to promote mountain quality food products?
Maribor 3rd december 2009

Euro-MARC

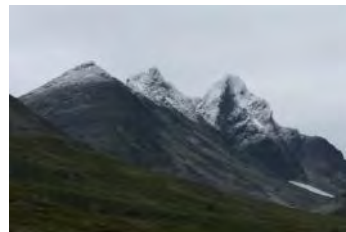
8



Cooperation with producers



National park - Tourism



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

Euro-MARC

10



Picture of the packaging "Fenalår fra Bjorli fjellmat"



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



Session 5

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



Présentations

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**



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

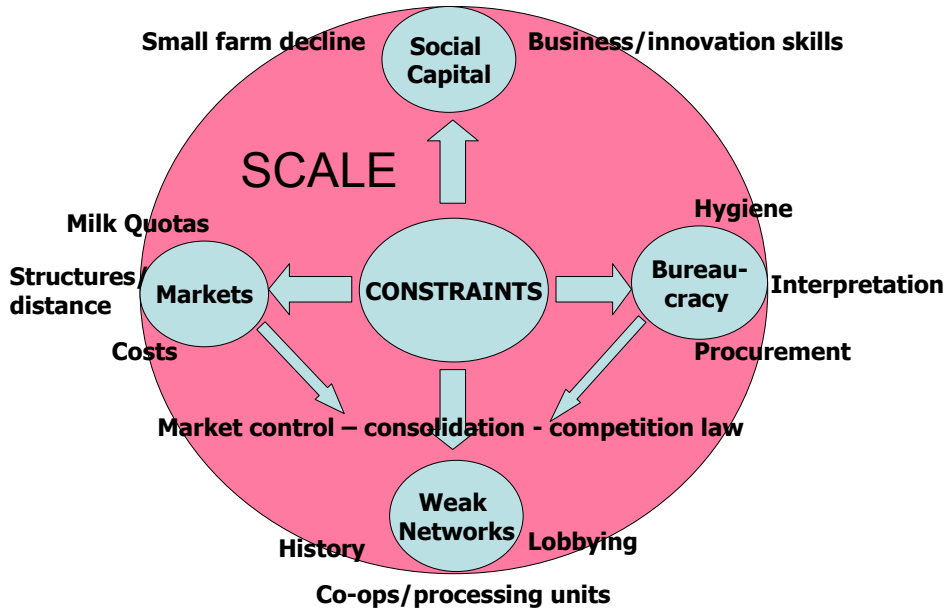
- Other terms – speciality, farm, traditional, regional (foods) – preferred by some
- Norwegian / Scottish respondents:
 - Support all disadvantaged farmers!
 - „Mountain Foods“ inappropriate
- 60% support (EU) definition of mountain regions / foods
- EU less supportive – support national initiatives



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



MOUNTAIN FOODS PROCESS - POLICY



MOUNTAIN FOODS PROCESS - POLICY



Existing EU-Labelling Schemes – KEY ISSUES

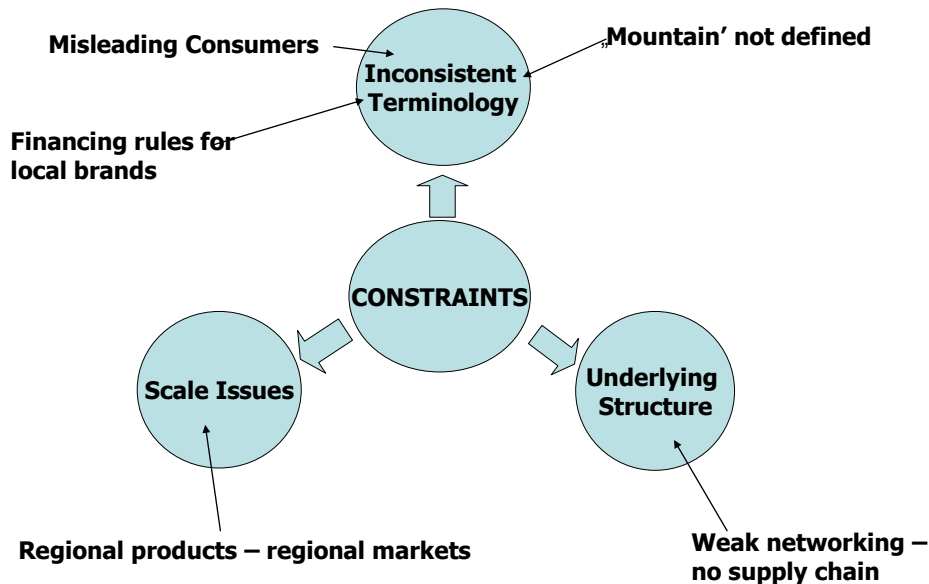
PDO / PGI / TSG / Organic



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

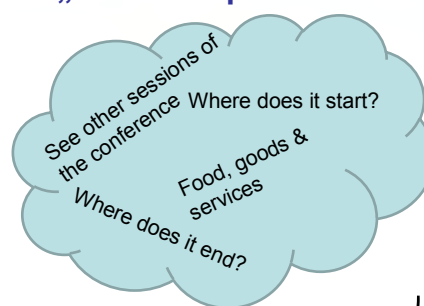


The tricky terminology:

„local initiatives“



„mountain products“



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



What has been done in Euro-MARC?

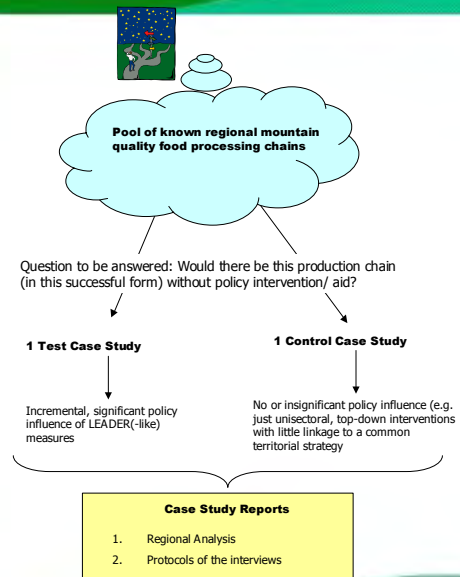
The guiding objective among others in Euro-MARC will be, to identify factors for success or failure in local initiatives devoted to marketing of mountain quality-food products.

- 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

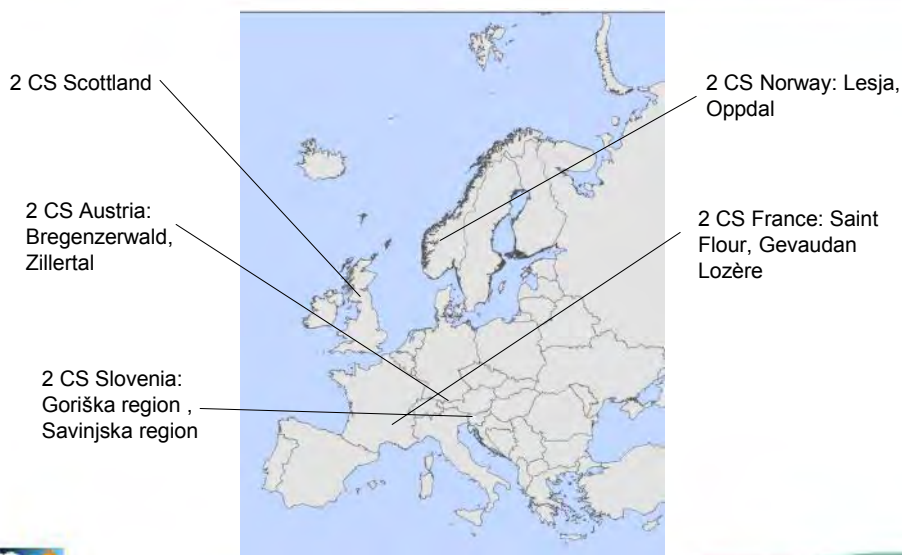


What has been done in Euro-MARC – part 2?

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



The Case Studies:



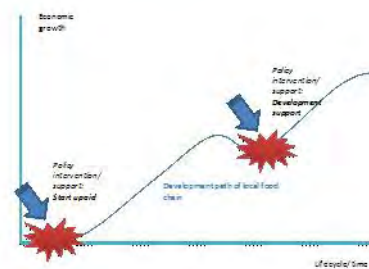
The guiding principles of analysis:

- 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:

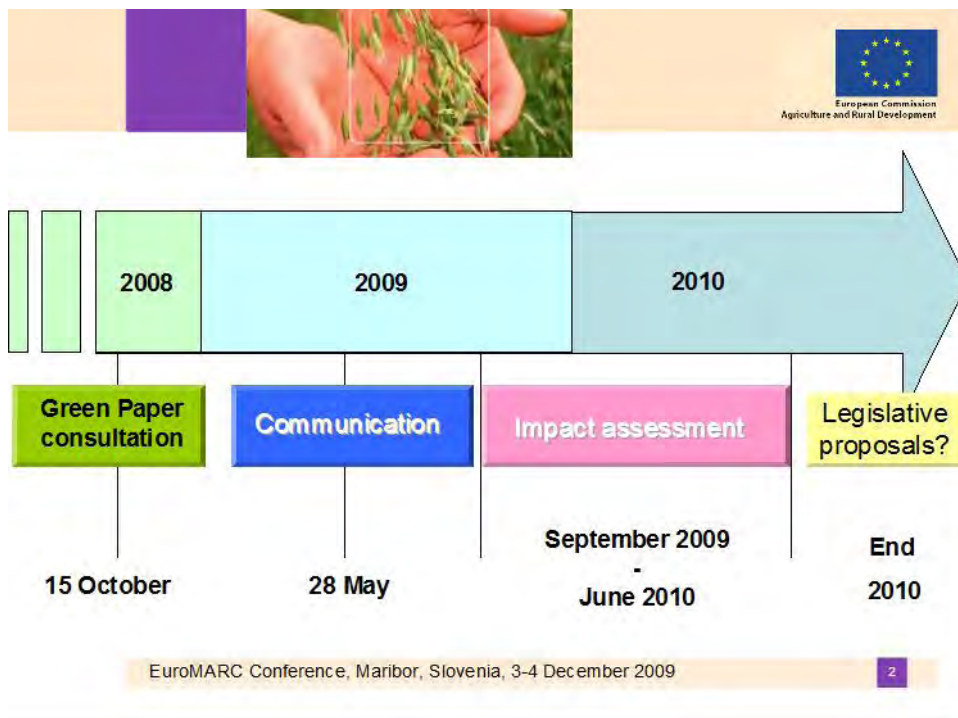
- Streamlining of territorially supportive EU programmes – Structural Funds and Rural Development – one stop shops as delivery mechanisms
- Stop crowding out of the innovators and highly qualified by contradicting „support messages“ – luring out the better trained, innovative work force from agriculture 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)

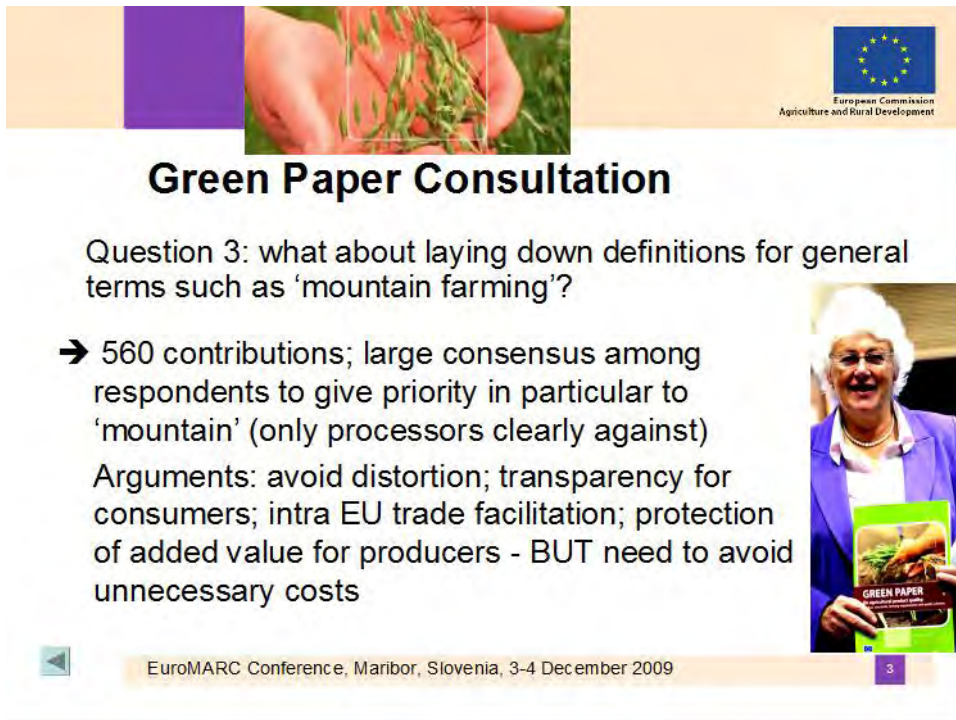





The evolution of the European agricultural product quality policy

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






European Commission
Agriculture and Rural Development

Green Paper Consultation

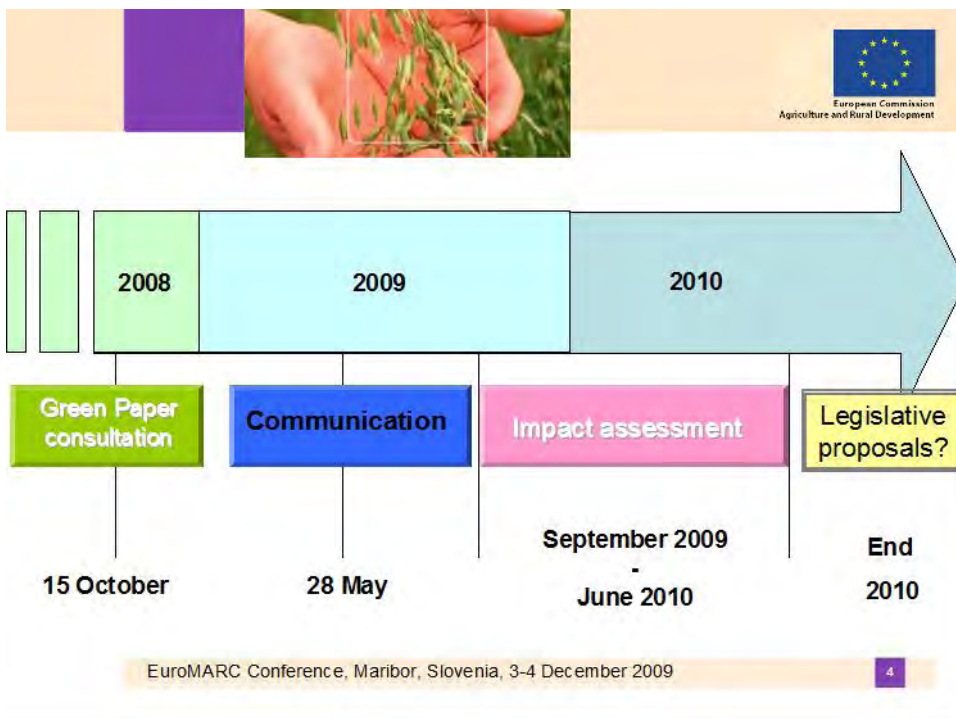
Question 3: what about laying down definitions for general terms such as 'mountain farming'?

→ 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



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



European Commission
Agriculture and Rural Development

	2008	2009	2010
	Green Paper consultation	Communication	Impact assessment
	Legislative proposals?		
	15 October	28 May	September 2009 - June 2010
			End 2010

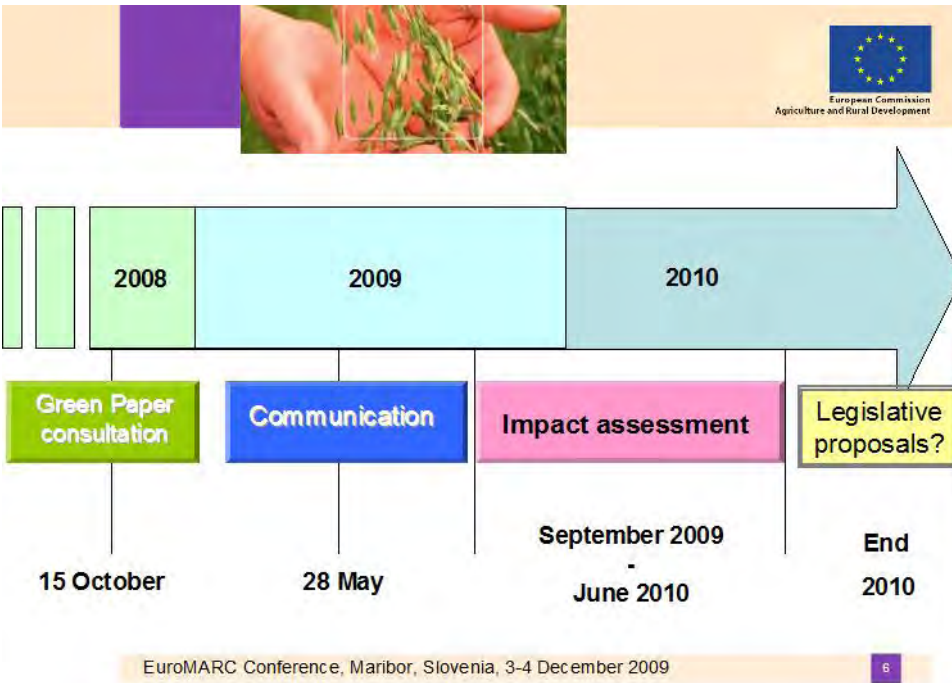
EuroMARC Conference, Maribor, Slovenia, 3-4 December 2009



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

EuroMARC Conference, Maribor, Slovenia, 3-4 December 2009 5



2008	2009	2010	
Green Paper consultation	Communication	Impact assessment	Legislative proposals?
15 October	28 May	September 2009 - June 2010	End 2010



EuroMARC Conference, Maribor, Slovenia, 3-4 December 2009 6



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

EuroMARC Conference, Maribor, Slovenia, 3-4 December 2009 8



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:** ...

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

9




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

10




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

EuroMARC Conference, Maribor, Slovenia, 3-4 December 2009 11

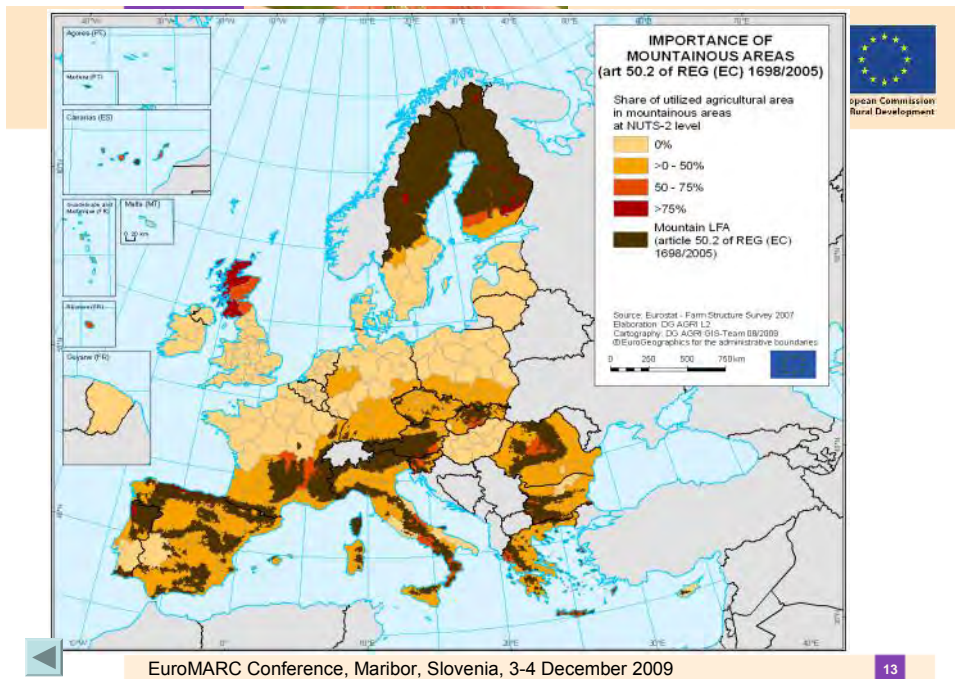


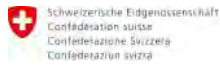
Mountains in Rural Development

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 12





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

Protection des désignations suisses „montagne“ - „alpage“

4 décembre 2009

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



Instrument de soutien et de différenciation

- Ordonnance sur les contributions d'estivage
- Ordonnance « montagne » et « alpage »

Objectifs de la protection des désignations

- Règles du jeu / sécurité du droit
 - Outil pour les producteurs (différenciation, segmentation de l'offre)
 - Garantie pour les consommateurs
- Depuis le 1^{er} janvier 2009, les produits étiquetés « Montagne » ou « Alpage » doivent être certifiés.

Protection des produits de montagne et d'alpage

Les désignations « montagne » et « alpage » ont une valeur!

La stratégie sur la qualité

La qualité est l'un des principaux atouts de l'agriculture suisse; elle permet aux produits du pays de rester compétitifs dans le pays comme à l'étranger.



Ordonnance sur les contributions d'estivage

- **Art. 1 Champ d'application**

1 Les contributions d'estivage sont versées pour l'estivage d'animaux de rente consommant des fourrages grossiers (unités de gros bétail fourrages grossiers UGBFG).

- **Art. 7 Fixation de la charge usuelle en bétail**

1 Le canton fixe, pour chaque exploitation d'estivage, de pâturage et de pâturages communautaires, la charge usuelle en:

- a. moutons, brebis laitières exceptées;
- b. autres UGBFG.



Ordonnance sur les contributions d'estivage

- **Art. 15 Fumure des surfaces pâturables**

1 La fumure des pâturages doit favoriser une composition floristique équilibrée et riche en espèces et correspondre à une utilisation modérée et échelonnée des pâturages.

La fumure doit être effectuée en principe à l'aide des engrais produits sur l'alpage.



Ordonnance sur les contributions d'estivage

- **Art. 17 Apport d'aliments pour animaux**

1 Pour pallier des situations exceptionnelles dues aux conditions météorologiques, 50 kg, au plus, de fourrage sec ou 140 kg de fourrages ensilés par PN et par période d'estivage peuvent être utilisés.

2 Pour les vaches traites et les brebis et chèvres laitières traites, un apport complémentaire de 100 kg de fourrage sec et de 100 kg d'aliments concentrés par PN et par période d'estivage est autorisé.

4 Tout apport d'aliments pour animaux (date, type, quantité, origine) doit être consigné dans un journal.



Ordonnance sur les désignations « montagne » et « alpage »

- **Art. 1 Objet et champ d'application**

1 La présente ordonnance règle l'utilisation des désignations « montagne » et « alpage » pour des produits agricoles végétaux et animaux, et pour des produits agricoles végétaux et animaux transformés.

- **Art. 3 Certification**

1 Les désignations « montagne » ou « alpage » ne peuvent être utilisées que si le respect des exigences a été certifié.



Désignation « montagne »

- **Art. 4 Utilisation de la désignation «montagne»**

La désignation «montagne» peut être utilisée pour:

- a. les produits agricoles produits dans la région d'estivage ou une zone de montagne définies dans l'ordonnance du 7 décembre 1998 sur les zones agricoles.

Art. 1* Zones et régions

1 La surface utilisée à des fins agricoles est subdivisée en régions et en zones dans le cadastre de la production agricole.

* Ordonnance sur les zones agricoles du 7 décembre 1998



Désignation « montagne »

2° La région d'estivage comprend la surface utilisée par tradition pour l'économie alpestre.

3° La région de montagne comprend:

- a. la zone de montagne IV;
- b. la zone de montagne III;
- c. la zone de montagne II;
- d. la zone de montagne I.

* Ordonnance sur les zones agricoles du 7 décembre 1998



Désignation « montagne »

Art. 2^o Critères appliqués pour la délimitation des zones dans les régions de montagne et de plaine

- a. les conditions climatiques, notamment la durée de la période de végétation;
- b. les voies de communication, notamment la desserte à partir du village ou du centre le plus proche;
- c. la configuration du terrain, notamment la part des terrains en pente et en forte pente.

* Ordonnance sur les zones agricoles du 7 décembre 1998



Désignation « montagne »

- b. les produits agricoles transformés tirés des produits agricoles visés à la let. a et transformés dans la région d'estivage ou dans une commune dont tout ou partie du territoire se trouve en zone de montagne ou dans la région d'estivage.

La désignation « montagne » peut aussi être utilisée:

- a. pour le lait: lorsque la transformation du lait cru en lait prêt à la consommation a lieu en dehors de la zone selon l'al. 1;
- b. pour le fromage: lorsque l'affinage a lieu en dehors de la zone selon l'al. 1.3



Désignation « montagne »

- **Art. 5 Fourrages**

Pour les produits portant la désignation «montagne», 70 % au moins de la ration des ruminants calculée en matière sèche doivent provenir de la région d'estivage ou d'une zone de montagne.

- **Art. 6 Ingrédients**

Pour les produits portant la désignation «montagne», les ingrédients agricoles doivent provenir de la région d'estivage ou d'une zone de montagne.



Désignation « montagne »

2 Les ingrédients agricoles ne provenant pas de la région d'estivage ou d'une zone de montagne peuvent être utilisés lorsque l'exploitant est en mesure de prouver à l'organisme de certification qu'aucun ingrédient correspondant issu de la région d'estivage ou d'une zone de montagne n'est disponible.

3 Ils doivent être désignés en conséquence dans la liste des ingrédients. Leur part ne peut dépasser 10 % des ingrédients agricoles par rapport au poids enregistré au moment de la transformation. Le sucre et les ingrédients d'origine non agricole ne sont pas pris en compte.



Désignation « montagne »

- **Art. 7 Prescriptions particulières concernant la production de viande**

- 1 Pour les produits portant la désignation «montagne», les animaux de boucherie doivent avoir passé au moins deux tiers de leur vie dans la région d'estivage ou dans une zone de montagne.

- 2 Les animaux peuvent être abattus hors de la région d'estivage ou d'une zone de montagne à condition que l'abattage ait lieu dans un délai de deux mois au maximum après leur départ de la région d'estivage ou d'une zone de montagne.



Désignation « alpage »

- **Art. 8 Utilisation de la désignation «alpage»**

- 1 La désignation «alpage» (par ex. fromage d'alpage) peut être utilisée pour:
 - a. les produits agricoles produits dans la région d'estivage définie dans l'art. 1, al. 2 de l'ordonnance du 7 décembre 1998 sur les zones agricoles;
 - b. les produits agricoles transformés tirés des produits agricoles visés à la let. a et transformés dans la région d'estivage.

Désignation « alpage »

- 1bis La désignation « alpage » peut aussi être utilisée:
- a. pour le lait: lorsque la transformation du lait cru en lait prêt à la consommation a lieu en dehors de la zone selon l'al. 1;
 - b. pour le fromage: lorsque l'affinage a lieu en dehors de la zone selon l'al. 1.

Art. 9 Dispositions spéciales relatives aux produits d'alpage

- 1 Pour les produits portant la désignation « alpage », les ingrédients agricoles doivent provenir de la région d'estivage. (exceptions idem que pour « montagne »)

Organisme de certification

• **Art. 10 Contrôle par l'organisme de certification**

- 1 Le contrôle du respect des exigences de la présente ordonnance doit être effectué au minimum une fois tous les deux ans pour les entreprises utilisant les désignations « montagne » ou « alpage » sur les produits finaux (utilisateurs), par un organisme de certification désigné par l'utilisateur ou un service d'inspection mandaté par cet organisme de certification.

Organisme de certification

- **Art. 12 Organisme de certification**

- 1 Conformément à l'ordonnance du 17 juin 1996 sur l'accréditation et la désignation¹², les organismes de certification et d'inspection doivent être, en vue des activités relevant de la présente ordonnance:
 - a. accrédités en Suisse;
 - b. reconnus par la Suisse dans le cadre d'un accord international, ou
 - c. habilités ou reconnus d'une autre manière selon le droit suisse.
- 2 Les organismes de certification doivent élaborer, en collaboration avec l'utilisateur, un concept réglant l'exécution des contrôles visés à l'art. 10, al. 2. 13

EuroMARC | Maribor
Jacques Henchoz / 4 décembre 2009

19

Merci de votre attention



EuroMARC | Maribor
Jacques Henchoz / 4 décembre 2009

20



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

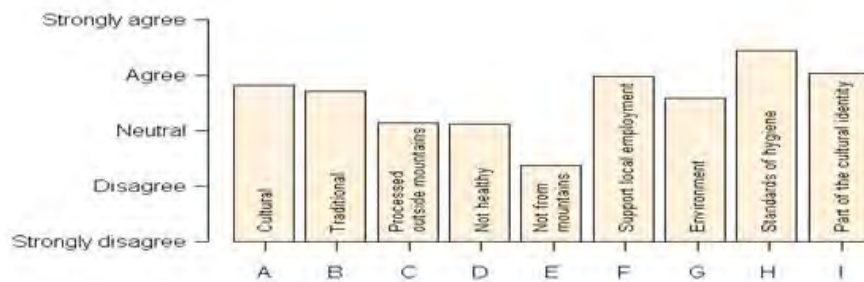


6

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



11



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



12

Listes de participants

Membres du consortium EuroMARC

NOM	PRENOM	ORGANISATION	PAYS
Amblard	Corrine	Enita Clermont	France
Amilien	Virginie	SIFO	Norway
Baritiaux	Virginie	Enita Clermont	France
Beucheurie	Olivier	ISARA-Lyon	France
Borec	Andreja	Faculty of Agriculture and Life Sciences	Slovenia
Bueno-Ambrosini	Larissa	Enita Clermont	France
Costin	Emilia	Institute of Montanology Cristian Sibiu	Romania
Giraud	Georges	ENITA Clermont	France
Guitton	Marie	Euromontana	Belgium
Kupiec-Teahan	Beata	SAC	UK
Leat	Philip	SAC	UK
Majkovič	Darja	University of Maribor, Faculty of agriculture and life sciences	Slovenia
Matscher	Anja	University Innsbruck	Austria
Mc Morran	Rob	Centre for Mountain studies, Perth College-UHI	Scotland
PASCA	Ancuta	Euromontana	Belgium
Price	Martin	Centre for Mountain studies, Perth College-UHI	UK
Revoredo-Giha	Cesar	SAC	UK
Rusu	Mariana	Institute of Montanology Cristian Sibiu	Romania
Schermer	Markus	University Innsbruck	Austria
Schjøll	Alexander	National Institute for Consumer Research (SIFO)	Norway
Schuh	Bernd	Austrian Institute for Regional Studies and Spatial Planning (OIR)	Austria
SERIEYS	Michel	ISARA-Lyon	France
Tebby	Cleo	Enita Clermont	France

Intervenants

NOM	PRENOM	ORGANISATION	PAYS
Cordonnier	Vincent	European Commission	Belgique
Kos Skubic	Mira	Ministry of Agriculture, Forestry and Food	Slovenia
Lipuscek-Miklavcic	Alenka	Director of Planika dairy	Slovenia
Marcon	André	UCCIMAC, Euromontana	France
Merkuš	Jožef	mayor of Hoce	Slovenia
Niculescu	Lucian-Rares	Member of European Parliament	Romania
Rasmus	Bjorn	Bio vom BergInnsbruck	Austria
Rozman	Ivan	recteur of Maribor University	Slovenia
Rusu	Dumitru	Lactofarm Sibiu	Romania
Tlaker	Joze	Združenje izdelovalcev zgornjesavinjskega želodca	Slovenia
Turnbull	Jim	ADEPT Foundation	UK
Young	Fiona	Cairngorms Farmers Markets Organiser	UK

Membres du panel d'experts d'EuroMARC

NOM	PRENOM	ORGANISATION	PAYS
Balling	Richard	Bavarian Ministry of Agriculture	Germany
Cristovao	Artur	UTAD	Portugal
Dömölki	Livia	Consumer's association of Hungary (OFE)	Hungary
Forray	Laurent	CNIEL	France
Gault	Jean	FAO	Italie
Henchoz	Jacques	Office fédéral de l'agriculture	Suisse
Morand	Frédéric	Eco-Innovation	Belgium
Pazeller	Martin	Autonomous Province of Bolzano-South Tyrol - Department of Agriculture	Italy
Peterman	Marjana	Slovenian consumers' association	Slovenia

Participants

NOM	PRENOM	ORGANISATION	PAYS
Ahmetaj	Luan	Albanian Association of Organic Horticulture- Bioplant Albania	Albania
Ambrož	Barbara	Faculty of Agriculture and Life Sciences-student	Slovenia
Andonovski	Vlatko	Makmontana	Macedonia
Arrieta	Eider	IKT	Spain
Asamer-Handler	Maria	ÖAR Regionalberatung GmbH	Austria
Bardhi	Roland	Mountain Areas Development Agency	Albania
Baric	Darja	Razvojna agencija Sora	Slovenia
Besovsek	MARIJA	Združenje izdelovalcev zgornjesavinjskega želodca	Slovenia
Bieulac-Scott	Maggy	Cniel/Ocha	France
Bogataj	Tatjana	Razvojna agencija Sora	Slovenia
Bohak	Zarja	Faculty of Agriculture and Life Sciences	Slovenia
Caffi	Carlo	IREALP	Italy
Cela	Judmir	UACA / ALB MONTANA	Albania
Cirnski	Lea	Verus d.o.o.	Slovenia
Cloye	Guillaume	APCA	France
Cop	Tatjana	Kmetijska založba, d.o.o.	Slovenia
Di Bella	Elena	Provincia di Torino	Italie
Dioli	Enrico	IREALP	Italy
Djaloshi	Sabah	AGROPUKA	Albania
Dounies	Bruno	Association Porc Montagne	France
Erhart	Vesna	Zavod Ekometer	Slovenia
Ferrari	Fabrizio	IREALP	Italy
Frelih	Anica	Kmetijsko gozdarska zadruga Skofja Loka	Slovenia
Gautschi	Anders	SAB-Swiss Group for Mountain Regions	Switzerland
Geiser	Astrid	Fachschule für Landwirtschaft	Italy
Gitan	Danut	CEFIDEC-Vatra Dornai	Romania
Gomboc	Danijela	Faculty of Agriculture and Life Sciences-student	Slovenia
Gomboc	Urška	Verus d.o.o.	Slovenia
Gradišek	Nejc	Center za razvoj Litija	Slovenia

Grasek	Vlasta	MKGP	Slovenija
Grešak	Nada	KGZS-Zavod Ljubljana	Slovenija
Holumsnes	Ann Marit	Hedmark County Council	Norway
Horvat	Lidija	Faculty of Agriculture and Life Sciences-student	Slovenia
Horvat	Mateja	Faculty of Agriculture and Life Sciences-student	Slovenia
Janeski	Nikolce	Suport & Development Foundation-Prilep	R.Macedonia
Jeraj	Vinko	Municipality Rečica ob Savinji-Mayor	Slovenia
Jurše	Karin	Municipality of Selnica ob Dravi	Slovenia
Koci	Miti	UACA / ALB MONTANA	Albania
Kolarič	Ines	Faculty of Agriculture and Life Sciences-student	Slovenia
Koren	Davorin	Triglav National park	Slovenia
Kozic	Anja	Faculty of Agriculture and Life Sciences-student	Slovenia
Kranjec	Matej	Faculty of Agriculture and Life Sciences-student	Slovenia
Kunej	Ana Nusa	KGZS, Kmetijsko gozdarski zavod Novo mesto, Kmetijska svetovalna služba Krško	Slovenia
Leask	Norman	Scottish Crofting Foundation	Shetland
Iopes	jose	AD ELO - Assoc. D.L.B.M.	portugal
Lukac	Marjana	Združenje izdelovalcev zgornjesavinjskega želodca	Slovenia
Markoja	Valentina	Faculty of Agriculture and Life Sciences-student	Slovenia
Marmier	Sylvain	FNSEA	France
Merli	Giuseppe	Umbria Region	Italy
Miklavčič	Kristina	Razvojna agencija Sora d.o.o	Slovenia
Monjed Abd El-salam	Murtaja	AL Azhar University	Palestine
Nazzaro	Concetta	University of Sannio (Benevento) - Italy	Italy
Orlovic	Vida	Združenje izdelovalcev zg.savinj. želodca	Slovenia
Petek	Alojz	Združenje izdelovalcev zgornjesavinjskega želodca	Slovenia
Ploj	Denis	Faculty of Agriculture and Life Sciences-student	Slovenia
Pompe	Mojca	Center za razvoj podeželja Posavje	Slovenija
Poncet	raymond	comite francais des fromages de montagne	France
Prijol	Sabina	Faculty of Agriculture and Life Sciences-student	Slovenia
Rozmarič	Aleš	Faculty of Agriculture and Life Sciences-student	Slovenia
Savy	Pierre	FNSEA	France
Scherer	Evelyn	Fachschule für Land- und Hauswirtschaft Salern	Italy
Skok	Metka	Faculty of Agriculture and Life Sciences-student	Slovenia
Slemenik	Bogdan	Občina Mislinja	Slovenia
Smrekar	Nataša	Center za razvoj Litija	Slovenia
Svenšek	Jerneja	Verus d.o.o.	Slovenia
Tlaker	Jasna	Združenje izdelovalcev zgornjesavinjskega želodca	Slovenia
Tolar	Ales	Chamber of Agriculture and Forestry of Slovenia	Slovenia
Tonoli	Alessandro	European Commission, DG Agri	Belgique
Topolovec	Maja	VERUS d.o.o	Slovenia
Turkl	Grega	Faculty of Agriculture and Life Sciences-student	Slovenia
Uribarri	Alazne	Fundacion Kalitatea Fundazioa	Espagne
Vaagen	Kjell	Hedmark County Council	Norway
Verhovnik	Tanja	Verus d.o.o.	Slovenia
Weixlbaumer	Norbert	University of Vienna	Austria
Zdolsek	Silvester	Združenje izdelovalcev zgornjesavinjskega želodca	Slovenia
Zorman	Mitja	Faculty of Agriculture and Life Sciences-student	Slovenia

A propos d'EuroMARC

Qu'est-ce que EuroMARC? Le travail effectué

Le projet EuroMARC "European Mountain Agrofood products, retailing and consumers" - Produits alimentaires de montagne en Europe : Consommateurs, distribution et démarches locales (projet no. SSPE-CT-2006-044279) est un projet de recherché de 3 ans impliquant 10 partenaires de 6 pays, sous la coordination générale d'Euromontana et la coordination scientifique de l'ENITA Clermont-Ferrand.

Le projet de recherche a pour objectif l'étude des **perceptions et intérêt des consommateurs et des acteurs des filières vis-à-vis des produits de montagne** dans six pays européens (Autriche, Ecosse, France, Norvège, Roumanie, Slovénie) et a été lancé dans le contexte d'une politique sur la qualité des produits changeante. Des nouveaux développement (par exemple l'intérêt de clarifier les systèmes de certification de qualité pour les consommateurs européens et le besoin de fournir aux consommateurs davantage d'informations sur les produits disponibles sur le marché) amènent des défis et des opportunités à tous les acteurs du secteur agroalimentaire dans les zones de montagne, des producteurs aux consommateurs.

EuroMARC fournit une vision représentative des différentes perceptions des consommateurs pour les produits alimentaires de montagne de qualité, des pratiques de distribution ainsi qu'un panorama des politiques de soutien pour les produits de montagne.

Pour obtenir cette vision globale, les partenaires d'EuroMARC ont entrepris des recherches sous différentes approches:

- 1904 consommateurs ont répondu à un questionnaire et 184 autres ont participé à des groupes de discussion
- 1765 produits de montagne ont été observés sur les étalages dans 6 pays
- 638 distributeurs ont été interviewés (dont 514 grâce à un questionnaire écrit)
- Les filières de 4 types de produits ont été analysées (eaux, fruits et légumes, produits animaux, lait et produits laitiers)
- 10 cas d'initiatives régionales (de type LEADER ou non) de zones de montagne ont été comparés
- 50 personnes impliquées dans les instances politiques, des niveaux local à européen, ont participé à des entretiens

Les résultats

Des guides pratiques: leur objectif est de fournir des informations et des conseils pour un meilleur développement des produits de montagne de qualité, et pour augmenter le revenu des acteurs des filières. Ils sont orientés en direction :

- **Des acteurs des filières de produits de montagne** (agriculteurs, transformateurs, distributeurs);
- **Des entreprises et personnes travaillant dans des secteurs connexes**, tels que le secteur du tourisme;
- **Les services d'information et de conseil (publics ou privés).**

Des recommandations politiques: basées sur les résultats d'EuroMARC, une liste de recommandations à l'intention des **décideurs politiques** ont été préparées. Un résumé décline les recommandations pour chaque niveau politique: regional/local, national, européen.

Le guide pratique et les recommandations politiques ainsi que toute information relative au projet EuroMARC sont disponibles sur les pages dédiées au projet sur le site:

www.mountainproducts-europe.org



POUR PLUS D'INFORMATION...

Site internet: www.mountainproducts-europe.org

Ou contactez: Marie Guitton

Euromontana

2 Place du Champ de Mars

1050 Brussels

Belgium

Tel: +32-22-80-42-83

Email: mountainproducts-europe@euromontana.org

Préparation des proceedings: Ancuta Pasca, Marie Guitton, Euromontana