



GUIDELINES FOR THE DEVELOPMENT, PROMOTION AND COMMUNICATION OF MOUNTAIN FOODS



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FOOD QUALITY AND SAFETY

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Mountain Quality Food Products: an opportunity for the development of supply chains and areas

With this research project, Euromontana and its partners aimed to:

- test if the production of food products in mountain areas represents an opportunity for the actors in supply chains to bring added value to their products
- address consumers' expectations towards "mountain products"
- increase the attractiveness of mountain territories.

A first research project conducted between 2002 and 2004 (*Mountain Food Products*, see www.mountainproducts-europe.org for more details), concluded that **mountain quality products, compared to other products, had specific attributes which originate from their methods of production and/or from the raw material used.**

The project also confirmed that **farming, generating raw materials in mountain areas, can make an important contribution to mountain societies and contributes to the creation of more and better jobs in these areas**, encouraging skill development and social interaction. **This implies that raw materials should originate from and be processed in mountain areas, respecting product quality, tradition and traceability criteria.** The production and processing of raw materials in mountain areas can also be a response to the need to diversify the mountain rural economy.

Another important finding was that only 39 out of 122 products studied in mountain areas had a certification (PDO/PGI, organic label of national certification). The other producers had no opportunity to differentiate or to communicate their products in the market.



Following this research, the European Charter for Mountain Quality Food Products was drawn up. This document defines 5 principles to be fulfilled so that mountain food production has the greatest benefits for the local actors:

- 1/ The raw materials must be derived from a mountain region.
- 2/ The processing must be carried out in a mountain region.
- 3/ Production must take into account concerns relating to sustainable development.
- 4/ Production must attempt to maintain the biodiversity and heritage of mountain regions.
- 5/ Producers must be able to guarantee at all times the transparency of information to consumers.



With EuroMARC, consumers' perception of mountain quality food products (MQFP) was studied for the first time. In this sense, a distinction between mountain products and mountain quality products was made; mountain quality food products respect the principles of the charter (produced with mountain raw material, processed in mountain areas, with cultural and environmental concerns); mountain products do not necessarily respect these criteria, with some using only mountain images (terms or pictures) for their publicity. EuroMARC research shows that, at first, con-

sumers were not familiar with the concept of mountain quality foods. **However, once the concept was explained, they showed interest in these types of products.**

The category of mountain quality food products is large and can include any type of product respecting the conditions set out above, starting with products that only require packaging (such as water) and ending with products going through a (complex) transformation process.



Consumers answering the EuroMARC survey or participating in focus groups were positive towards mountain food products. For consumers, mountain products start with good raw materials from an area that is cleaner and less polluted than the lowlands. These raw materials are processed to obtain authentic products that taste good, and are sometimes connected with the culture of the originating area.

For European consumers in general (both from mountain and non-mountain areas, cities and rural areas) the following aspects should be noted:

- they have a common understanding of what mountain products are and associate these with **health** or **purity** and with **“special” products**, although they often cannot give specific examples. Consumers mentioned their trust or doubts about information on packages and the real mountain origin, and insisted on the importance of taste and quality. In all countries and for all product categories, the **taste and origin** of mountain quality

food products were most important for consumers.

- mountain quality products include more than food products and are closely related with the culture of mountain people. **They represent the combination of many dimensions: food, mountain areas, nature, local production, nostalgia. The specificity of a mountain product comes from the interaction of the different dimensions.** The **perception** of mountain quality food products by consumers and their expectations are directly connected to the situations in which these products are purchased and eaten. **This means**

that mountain products do not fit into one market segment: there are potential consumers for every type of mountain product. Some mountain products may be low-price products or luxury products; they can be sold as natural products or traditional products, etc. Mountain products can also compete in several segments at the same time (like specialty and healthy products, natural and local, etc).

Producers and retailers who are able to offer products which best satisfy consumers' expectations will very probably be more successful in marketing their products and in obtaining a higher price for them.



“Mountain products are different, linked to tradition, special flavor, not industrial production.”

(Consumer, France)

Country specificities regarding expectations of mountain products:

Some research results

Product characteristics

Mountain-related quality characteristics are product-specific: the quality of raw materials was considered as being especially important for the quality of mountain dairy products (studied especially in Austria and Slovenia).

Origin of mountain products

French and Austrian respondents generally have a stronger preference for local mountain products, rather than foreign products, compared to respondents from other countries. This may be because France and Austria each have a strong culinary identity. In Scotland, consumers tend to prefer local food, but when it comes to mountain quality products they will readily consider products from other countries.

Vocabulary:

Denomination of mountain products

Depending on the country of study, the word “mountain” in the national language has a different meaning and is closely associated with the local culture: “montagne”, “munte”, “berg”. In Scotland for example, Scots frequently call their mountains “highlands” or “hills” and “mountain” makes them think about foreign products, for example from the Alps. The presentation of Highland products as “mountain” can be strange for Scots, but they accept and agree with the term “Highlands”. The concept of mountain food must respond to local expectations: the name or the label of products should be associated with a mountain range or locality, the product's natural characteristics or its mode of production, depending on the interest of consumers .

The different **actors in the supply chain** have views of mountain quality products that are partially different from consumers. They have similar views on the quality criteria of the products but professional considerations lead to different perceptions of these products:

- **Farmers** stressed the fact that the mountain climate, the natural environment of production and the quality of the water and vegetation (and thus of fodder) are the key elements for the production of these high quality products.
- **Processors** mentioned the traditional nature of production (sometimes including hand-made production methods), the management and the small scale of production.

“The composition of forage in mountain areas is different from that of the lowlands, e.g. due to the natural field management and the diversity of grasses and herbs.”

(Farmer, Austria)

- From the **retailers’** point of view, mountain quality food products are different from others especially because of their taste and nutritional values, their natural environment of production, their purity (GMO free), their authenticity and traditional mode of production. Selling these products in a shop can bring more than a financial margin: retailers get other benefits, such as offering additional categories of products and gaining additional categories of buyers (for ex-

ample interested in natural, green food, in the support of mountain development), capitalising on the mountain products image, etc.

These differences in perceptions reflect the complexity of the concept of quality, and imply that spaces of interaction and negotiation between actors in supply chains are important and should be created if they do not already exist. Differences in perceptions influence the quality of collaboration between actors, as they might not always communicate their different interests well. **The attributes valued in the supply chain have to be taken into account so that all actors find their interests satisfied.**

In Norway, the most popular reason for selling mountain products was that these are considered by retailers to be **“innovative quality products”**. Austrian retailers show a “strong personal interest in selling regional/local food” and are interested in **“diversifying their business and selling an innovative product”**. In other countries similar reasons occur, in addition to the will of retailers to **promote a region or a locality and to meet consumers’ interests.**



Consumers' expectations towards mountain products

On one hand, the possibilities for producing mountain quality food products depend on producers and on the specificities of mountain area; on the other hand, these products must satisfy consumers' expectations in order to find their place on the market.

Criteria that define the production and processing of mountain products are found where these two needs converge. The development opportunity of mountain quality food products lies within the **great potential represented by the positive image of mountain products in consumers' minds**: consumers are more and more interested in healthy products from mountain areas, as well as in "local" products.

More precisely, apart from the mountain origin, consumers expect mountain products to:

- respond to high (industrial) standards of hygiene,
- have a link to the cultural identity of local communities,
- be produced from raw mountain materials,
- be connected to specific cultural areas,
- support local employment, and
- be produced with traditional methods, by small-scale producers ensuring their authenticity.

The potential demand for pure, natural, special mountain products is high and could be further developed. However, some guarantees must be offered to consumers. Consumers want to be sure that, behind the promotion of



the products, there are some real qualities and that the mountain products actually come from a mountain area.

A key issue for the **development of mountain products** is their clear **identification by consumers**. The research undertaken in 2002-2004 highlighted that, of 122 mountain products studied, only 39 were included in official quality schemes. If a protection for mountain products is set up at the European level, it would bring a guarantee to consumers on the mountain origin of the products.

Protection for mountain products is currently being considered by the European Commission. Such protection already exists at the national level in France – for "mountain products" – and in Switzerland – for "mountain products" and for "mountain pasture products". The protection of mountain products and their certification would offer producers greater possibilities to market their products and to develop their businesses.

The advantage of certification for local development and business development – The example of the PDO Cheese “Tête de Moine” (Switzerland).



The mountainous region of Bellelay is well known in Switzerland and around Europe for its cheese called “Tête de moine”, produced there for some 800 years. This cheese is eaten as “rosettes” (very thin slices made with a special device - girolle) which develop its scented flavors. The cheese was registered as a PDO (Protected designation of origin) in May 2001. Since then, the certification scheme and its communication have led to increase of 32% in the production of “Tête de moine” from 1999 to 2008, linked to its commercialization. For the region, this generated 60% of added value for the whole process (milk production, processing, and distribution of cheese), equivalent to around 59 million Francs Suisse (about 39 million Euro), more than the added value generated by the entire regional tourism sector. Publicity for the product and its sales growth helped to reinforce the region’s identity, with positive consequences for the jobs available to people living in the area: 102 persons were employed in the processing sector between 2001 and 2006. The possibility of training/learning for young people has also increased, permitting continued agricultural activity on high-altitude pastures and, thus, the maintenance of these cultural landscapes.



www.tetedemoine.ch/en



Stressing the organisation of mountain supply chains

The supply chain includes all the actors involved in the production, processing and retailing of products: farmers, processors, wholesalers and retailers.

Two major obstacles to the development of mountain products are the **insufficient realisation of their potential by mountain stakeholders**, from producers to retailers, and the **lack of efficiency of some existing supply chains** in responding to consumers' interest. Structuring and strengthening the supply of mountain food products, as well as their promotion, is a priority for the success of products on the market.

The research highlights the need for improvements in the supply chain related to costs, the continuity of supplies, and market penetration. Actors within supply chains should work together to develop the potential of mountain foods and should also devise mechanisms to manage their collective actions. Greater collaboration and cooperation between producers is encouraged to secure access to key inputs, improve product volumes and ranges, assist with the development of distribution and promotion, and increase market influence.

Giving maximum attention to training measures

The successful organisation of supply chains depends on the development of **strong business, communication and marketing skills among the concerned actors**. Entrepreneurial spirit is essential for creating and implementing quality food initiatives. It often needs to be developed among actors, through training and the acquisition of specific competences. Training services must be aware of the specific needs of small actors and provide measures adapted both to the specific needs for skills and to each type of actor in supply chains. Training sectors should also raise the awareness of these actors about possibilities to benefit from existing programs of support to develop their businesses and products (through the CAP, Structural Funds, national and government funds), since the project highlighted that existing measures of support are not always well known by these actors.

The ability and know-how to ensure the development and packaging of high-quality products, to market these products, to negotiate, and to communicate successfully with other businesses are very important for success. These competences can be achieved through **marketing and business training** that must be adapted to the scale of the enterprise and should be accessible to all concerned. The involvement of marketing professionals is very important for the success of the training.



Fostering communication inside supply chains

Appropriate and efficient supply chain arrangements are essential for successful marketing and to obtain high returns from products.

A well-organised supply chain is characterised by good collaboration between its members and with external partners. This implies trust, the exchange of good information, and knowledge of the market. **Good communication between supply chain actors requires exchanging information about their expectations and fears, about the production and marketing possibilities as well as about the product and its attributes;** it contributes to reducing environmental uncertainty (e.g. securing a stable and higher inflow of orders) and can sometimes improve the continuity of supply and develop demand.

Different actors have different and specific concerns related to their activity, depending on their place in the supply chain. Partners may not be aware of the problems of other partners because of communication is lacking. For example, producers are often reluctant to increase production of mountain products as they fear that consumer demand might be insufficient. At the same time, retailers often are not interested in products produced from small-scale producers because the quantities delivered are too low. Better communication between supply chain participants can lead to better estimation by producers (of final demand) and by retailers (of the potential increase of supply). This could lead finally to an increase of the volume of mountain foods produced and retailed, especially if accompanied by support for their promotion.

Producers may be constrained by the availability of raw material, the physical capacity of their farm, or the production process. They must communicate such constraints to retailers so that they are aware of these realities. This will allow them, for example, to adequately organize the commercialization and promotion of the product as a seasonal one (like some cheeses, or lamb meat at Easter) or to develop working relationships with other producers in order to ensure the distribution of products to consumers.

Effective communication is needed concerning:

- attributes of products (e.g. taste, ingredients,) and production processes (e.g. traditional methods of production)
- potential volumes and seasonality of production
- potential demand volumes
- the expectations of consumers towards mountain products as perceived by retailers, leading to appropriate packaging and promotion possibilities

Encouraging partnerships

Larger markets can also be reached by small/medium mountain actors through the coordination of several partners on the same level in the production chain. This seems to be an effective strategy: association of producers can then sell higher quantities of product of constant quality. This common strategy may be better than the expansion of single actors, which can affect product authenticity.

Local partnerships between producers/processors, and cooperation between the public and private sectors, are critical for developing the production and marketing of mountain products of consistent quality. Policy support is available for bottom-up measures (like LEADER measures and Structural Funds, as well as cooperation for development of new products – within the CAP) and can be accessed through local partnerships. These can support and facilitate action groups by enabling networking and linking food supply chains to other sectors such as tourism. Such cooperation also plays a large part in developing distribution systems and promotion, especially with the public sector (e.g. public procurement).

Establishing horizontal cooperation helps enterprises to tackle some production and promotion problems and obtain better access to advisory services, to further develop their common interests. Eventually, they can carry out larger scale marketing and sell their products through the distribution systems of larger retailers. Associated producers and processors also gain multiplier effects in the field of marketing, while staying independent – as together they can negotiate with bigger retailers, assure larger quantities of products and more reliable distribution. The research identified examples of successful collaboration between small companies/farms, which otherwise would have been in competition but who gain by

working together, such as in the example below.

The Oppdal almond potatoes cooperative (Norway)

A co-operative society was created in 1999 by 27 farmers in the municipality of Oppdal, producing and selling almond mountain potatoes, which are grown only at altitudes above 400m. The objectives of creating the society included:

- better collaboration in finding solutions to common production problems
- jointly marketing potatoes under a common label
- increased demand for almond potatoes
- giving the members the best price for their products.

Producers sort and package potatoes on their own farms and sell locally, but also use the services of a company (which is a member of the cooperative) to sort and package potatoes at a larger scale. In this way, they reach a scale large enough to work with the distributor “Gartnerhallen” and access the national grocery sector.

The co-operative has become a PGI union which, since May 2006, has sold its products under a PGI label : “Mountain Almond Potato from Oppdal”, individually on farm (in competition with each other) but also together through the cooperative.

In addition to attaining their objectives, successes of the cooperative include:

- better access to consultancy and research advice (all members can use the services of an advisory organisation)
- common purchase of materials for packaging and marketing, lowering the price of these materials
- access to support offered by the national authorities (Leader-like measures), particularly environment and product innovation measures.

The production of mountain foods must **respond to quality criteria and be able to innovate** in term of marketing, in line with consumers' expectations. Product quality and presentation need to be continually improved. This requires better cooperation, both horizontally and vertically, between actors. Best practices include:

- ⇒ **Collective purchasing of inputs** - the negotiation power of a group is stronger than that of individuals. While farmers often create cooperatives, processors can also group together to buy raw materials. For instance, small-scale producers of mineral water can jointly buy larger quantities of plastic or glass bottles water at a good price.
- ⇒ **Offering higher volumes and larger product ranges** - groups of producers can overcome retailers' concerns about adequacy and consistency of supplies.
- ⇒ **Improving production qualities and innovating continually** (for instance regarding product packaging, presentation and marketing strategies) - in conformity with consumers' interests and expectations. For producers and processors, coordination with retailers is very important to obtain continuous information on consumers' expectations.
- ⇒ **Looking for new markets** - the distribution of products is particularly important for producers in remote rural areas, served by poor road/communication networks. When producers seek access to large retail chains, initial enquiries, contacts to potential buyers and deliveries to stores or depots can be facilitated by collective action: the distribution costs are shared (less time spent by producers individually to prospect new markets, to contact potential buyers, to negotiate and then to deliver their products), as are the initial investments



needed in order to propose a consistent offer to distributors.

- ⇒ **Increasing product promotion** - this includes working with food/enterprise development agencies and retailers, to raise awareness of their products among both retailers and consumers. Issues to be promoted may include the location of production or specific features of the products.
- ⇒ **Increasing market influence and bargaining power with large-scale buyers**, through a very thorough approach to product supply and maintenance of quality.
- ⇒ **Improving research and innovation, e.g. on how to maximize consumer appeal**

Tips for training services:

Extension services should promote the opportunities that collective actions can offer to participating members as a means to improve their efficiency. Different modes of cooperation and collective actions should be considered, including contracts for the acquisition of raw materials and the creation of cooperatives of farmers.

Marketing strategies for mountain quality food products

Marketing environments in which mountain foods are sold

A detailed study of outlets was carried out in order to define where mountain foods are sold. A total of 1765 products were observed in over 350 outlets (in both mountain and non mountain areas) across six countries: Austria, France, Norway, Romania, Scotland, and Slovenia. This study showed that:

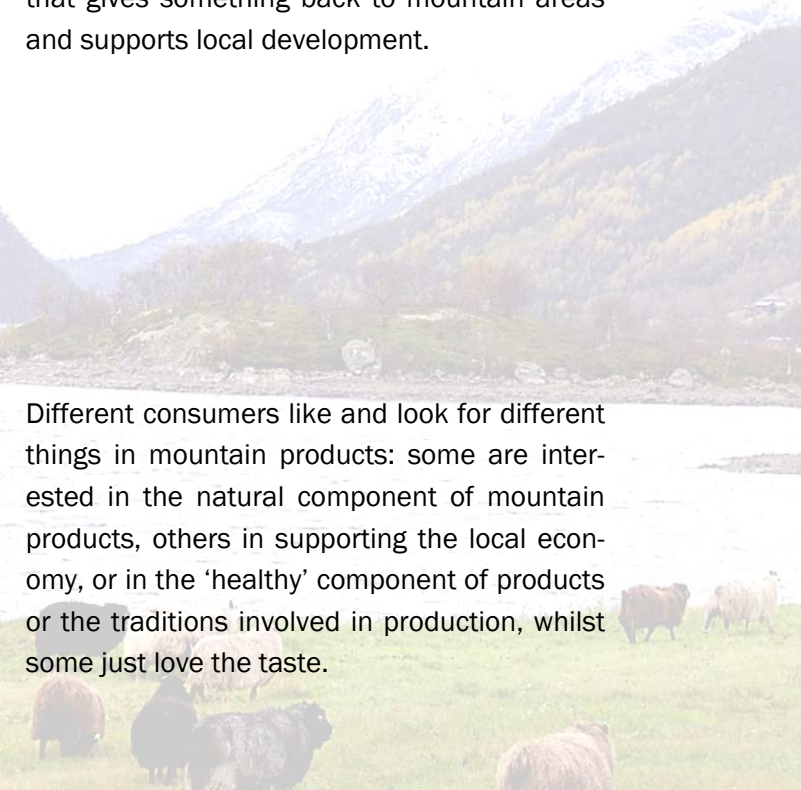
- a wide range of outlets sell mountain quality food products: supermarkets and hypermarkets, specialty shops, mini-markets, farmers' markets and farmers' shops, and internet websites.
- a great diversity of mountain products was encountered; cheese was most common, followed by mineral water and meat products.
- prices varied tremendously: mountain quality products are not always more expensive. (See specific section on page 12).

Targeting a market for mountain products

All interviewed consumers are potentially interested in mountain food products and most have already bought some. **There is no specific target market for mountain products**: they can be sold locally in the mountain areas and also beyond (e.g. tourists, for export); some mountain products clearly aim at a luxury/speciality market whilst others are for everyday consumption.



Retailers generally consider mountain products positively: they think that consumers regard them favourably and are likely to buy. They consider some of these products innovative and of very good quality. Retailers can also have a personal interest in certain mountain products, for instance to promote food that gives something back to mountain areas and supports local development.



Different consumers like and look for different things in mountain products: some are interested in the natural component of mountain products, others in supporting the local economy, or in the 'healthy' component of products or the traditions involved in production, whilst some just love the taste.

“We make distinction between the customers, sensitive to prices, the consumers, paying more attention to taste and quality and citizens who support local economy.”

(Retailer, France)

However, when asked where they expect to buy mountain quality food products, consumers gave the following order:

- directly from producers,
- in farmers’ markets,
- in other markets,
- in specialised shops.

Targeting such retailing places is important to reach consumers attracted by specialised products.

Mountain product versus local product

Consumers and producers often mix the concept of mountain products with that of local products. Mountain products have a dual identity:

- in mountain areas, mountain products are considered and sold as local products. Local people and tourists are the two different categories of buyers, with different expectations for these products. For local people, they are everyday products and must be affordable; for tourists, they are special products associated with the region they visit and for which they could pay more. For tourists, the links between local/mountain food and local people – (and their traditions) – are critical, and must be highlighted.
- in non-mountain areas, mountain products are considered as special products reflecting the image of mountain areas. Precise



No market is closed to mountain products. On the contrary, mountain products should be easy to

find everywhere, in all types of retailing outlet, if they are to maximise their market potential.

Specific promotion events, with mountain products gathered on a group of shelves in outlets can help raise the attention of consumers.

information about the origin of products is recommended: for example, association with a mountain location permits consumers to associate the food with the region of origin (relating to the place of consumers’ holiday). The quality characteristics of the product, the purity of the production environment, and the association between the region of origin and products all contribute to the product’s identity.

While local products can be sold through direct marketing channels, distribution through standard retail chains requires horizontal and vertical cooperation as well as the coordination of supply chain actors.



The example of the “Zgornjesavinjski želođec” meats in Slovenia is illustrative of the potential the local markets represent for the selling of mountain products, both for tourist and local inhabitants.

Zgornjesavinjski želođec is a quality dry meat product originating from a small area in Slovene Alpine region called Upper Savinja valley. It has been produced here for more than 100 years. Drying is traditionally carried out in wooden lofts suitably oriented to the wind, maturing several months at a certain temperature, with application of a particular know-how and attention.

Producers of this unique dry meat product are associated in *Producers association of Zgornjesavinjski želođec* with more than 50 members and within this association they applied for national geographical indication (PGI), although the costs of certification are too high for many farmers.

Zgornjesavinjski želođec is mainly sold directly on farms or on local markets. According to stakeholders involved in the production, “the best way to taste and buy it is to visit the farms directly”. Today 41 tourism farms and restaurants dispersed in the valley particularly promote *Zgornjesavinjski želođec* in their menus. Its price

is higher than the average of similar

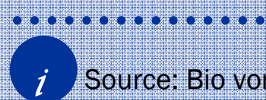
low land and mountain products due to the high quality and demanding traditional production process. The promotion of *Zgornjesavinjski želođec* is mainly undertaken by the *Producers association* with the help of some local municipalities. Today producers encounter difficulties in addressing new markets. Firstly because the available supply is lower than the demand. Secondly the quality of the product is still heterogeneous and varies from producer to producer, mainly depending on climate.



Selling local products in the supermarket

The Austrian organic cooperative Bioalpin provides an example of successful marketing through a regional supermarket chain for producers who can produce organic products in the mountain area (those who do not produce under a biological label can not benefit).

The cooperative is located in the mountain province of Tyrol and includes organic farmers, dairies and butchers, operating as an umbrella organisation for single farm enterprises and primary cooperatives. It has developed a producer-owned brand called Bio vom Berg (Organics from the mountains) which is used to market a full range of organic products, almost exclusively with a family-owned supermarket chain which is dominant in the region. Coordination of the supply chain involves packaging, labelling, logistics and the negotiation of prices and terms of sale. The horizontal coordination of farmers and dairies allows specialisation among the members, without losing the broad product range. The close cooperation with the supermarket allows a mutual win-win situation, as the producer brand enhances consumer trust.



i Source: Bio vom Berg www.bioalpin.at



Asking the right price for mountain quality products

Production in mountain areas is per se more expensive than in non-mountain areas. Both producers and processors mentioned, in particular, costs of transport and distribution. To cover the costs, one might expect mountain products to be sold at a higher price than their counterparts from the lowlands; i.e., with a price premium.

To compare the prices of mountain food products with similar types of products not coming from mountains, a study of shelves in shops was undertaken. A price premium was observed for some countries, and some products, which suggests that the perception of quality and uniqueness seems to be important factor in setting prices. **However, as the study revealed great variation in prices, no general conclusion on the price of mountain products can be given.** There is no evidence that mountain products are gen-

erally more expensive than other similar products: the price depends on the quality, on the product's distribution, the nature of competing products (degree of similarity, branding, quality, etc.), and on the place where it is marketed (e.g. if local customers have a moderate income or can afford more expensive products).

Consumers have a positive opinion of mountain food products and some would be ready to pay an extra price, assuming the product is of a relatively high quality. Today, this has to be put into perspective, since the consumer study was carried before the current economic crisis. Consumers' opinion could have changed and they could be more oriented towards low-cost products. Consumers must, however, be convinced that products have a real mountain origin, are of good quality, and support the economy of mountain areas.

Making seasonality and small scale of production into assets for marketing mountain quality food products

Retailers consider both seasonality and small-scale production to be constraints in the retailing of mountain products. Though they would like to sell mountain products all year, seasonal availability is a constraint with respect to the demand from consumers. However, **seasonality can be :**

- **overcome, where possible, by product processing, organisation of supply chains as well as process and product innovation,** so that products are available on the market all year long
- turned into a strength by:
 - ⇒ **explaining to consumers that it is a guarantee of the product's quality.** For example, it can be explained that the taste of some summer cheeses is particularly good due to the quality of the summer pasture (with many flowers and herbs).

⇒ exploiting it in the marketing process, presenting **mountain products as complementary to non-mountain food products** (e. g. mountain fruits that arrive on the market at the end of the fruit season in the lowlands).

On the production side, **small scale** can be presented as a strength deriving from the producer's personal engagement, guaranteeing the authenticity of the products, the link with cultural identity, the methods of production, and labour-intensive practices. Constraints of small scale could be overcome by the organisation of producers jointly selling products to retailers, and retailers buying from different producers.

Products must appropriately promoted, to explain these specific features to consumers.

Better promotion of mountain products

The observation of products offered for sale in retail outlets reveals that **the promotion of mountain quality products is not sufficiently developed or adequately done:**

- many products have no packaging or any other form of promotion,
- packaging seldom displays the region or environment of origin, or the products' qualities. When a reference to mountains is found, it is generally by using the word "mountain" (or a relative term) and a mountain image. The qualities of products that derive from the mountain origin are hardly ever mentioned.

- with the exception of some strong brands, the promotion of mountain products is generally limited to product packaging and labeling (where they exist). There is seldom additional promotional activity (posters, leaflets, someone to provide information).

In all countries studied (though to a lesser extent in Romania, where the products studied were very well advertised to consumers), actors in the supply chain often stated that the promotion of the products could be improved by adequate **advertising**.

Highlighting the mountain origin

The mountain origin has to be easily recognizable for consumers, so they can clearly identify the product as a mountain product, with quality criteria.

The mountain origin can be displayed by:

- a label on the product stating that it comes from a mountain area (name of the product, plus "mountain product" mentioned)
- using a name referring to a mountain range (e.g. Cairngorm cheese, water from Canigou mountain, Carpathian ham...)
- displaying a picture or image of an actual or an idealized mountain.

There is potential to develop markets for mountain products as such, as shown by the answers of consumers and retailers. However, the mountain origin and its benefits in terms of the qualities of products have to be clearly displayed, especially on the product. Informative posters can also be used when products are sold loose.





In particular, communication about products should confirm their authenticity, their natural conditions of production, the purity of the environment, the extensive methods of production, and the support that production offers to mountain people. Consumers regard these as important characteristics for differentiating and purchasing mountain products, and it is the authenticity and the quality of the products which permit them to gain a premium price.

“The term mountain in the name of the product is important. Other details are important like the green packaging and indicating that it is a small scale production...”

(Retailer, France)

“Mountain” is a good “story” which can be told to consumers; everything that can make the product different or special, as the origin, the farm, the farmer and so on is positive for marketing.

(Multiple retailer, Norway)

Stressing positive characteristics of mountain products

In addition to characteristics linked to production conditions, the promotion of **quality and uniqueness of the products** are important to sell mountain quality food products with a premium.

- the taste and sensory appeal of product,
- the quality of the raw materials/ ingredients should be stressed in direct relation to the quality of the final product
- the purity of the products

Different characteristics that deserve good promotion were highlighted:

Formal protection for mountain foods?

A European quality label or a reserved term, specified on the product's package, could be a guarantee given to consumers about the origin and the qualities of the product. This could also be a good solution in term of visibility and of promotion of mountain quality products as a range of products. Such a protection is currently being considered by the European Commission.

However, labelling is not enough: retailers stressed the need to promote the label. If a label or a reserved term is created at the European level, it must be promoted by professional and regional actors so that consumers are aware of its existence.

“At the moment, the development of national ‘mountain labels’, either state or private, supported by such legislation (like the French or Swiss ones) offers an opportunity to clearly differentiate market products, thereby increasing their access to markets. “

(National stakeholders EuroMARC).



Using various communication means for mountain products

Advertising the mountain origin on the product itself

The first means to communicate the mountain qualities of a product is on its packaging. Many mountain products are sold without packaging. This is not necessarily a problem in itself, but can limit how a product is communicated to consumers. The packaging should communicate the product origin, the methods of production and its qualities. A nicely designed package will be more attractive for and recognised by consumers.

Posters and leaflets

When products are sold with no packaging, **informative posters** could accompany the products: this provides more information to consumers without requiring producers to make costly investments in packaging.

Leaflets can also be used, either in shops or in locations visited by tourists.

Communication about the product by retailers/ direct contact

Personal communication by retailers of the qualities of mountain products could be further reinforced, as this is an effective method of promoting mountain products. Personal communication

For example, the milk carton of the dairy “Zillertal Sennerei” in Tyrol (Austria).

The name of the product is “Zillertaler Bergmilch” (mountain milk from the Zillertal). As written on the package “freshly milked at more than 1.000 m above sea level - containing a high number of valuable Omega-3-fatty acids”.



tion mostly occurs in farm shops, at market stalls and in specialist retailers, where consumers expect more information to be provided on the products.

The person in contact with consumers should give explanations on the provenance and conditions of production of the product, and its intrinsic characteristics.

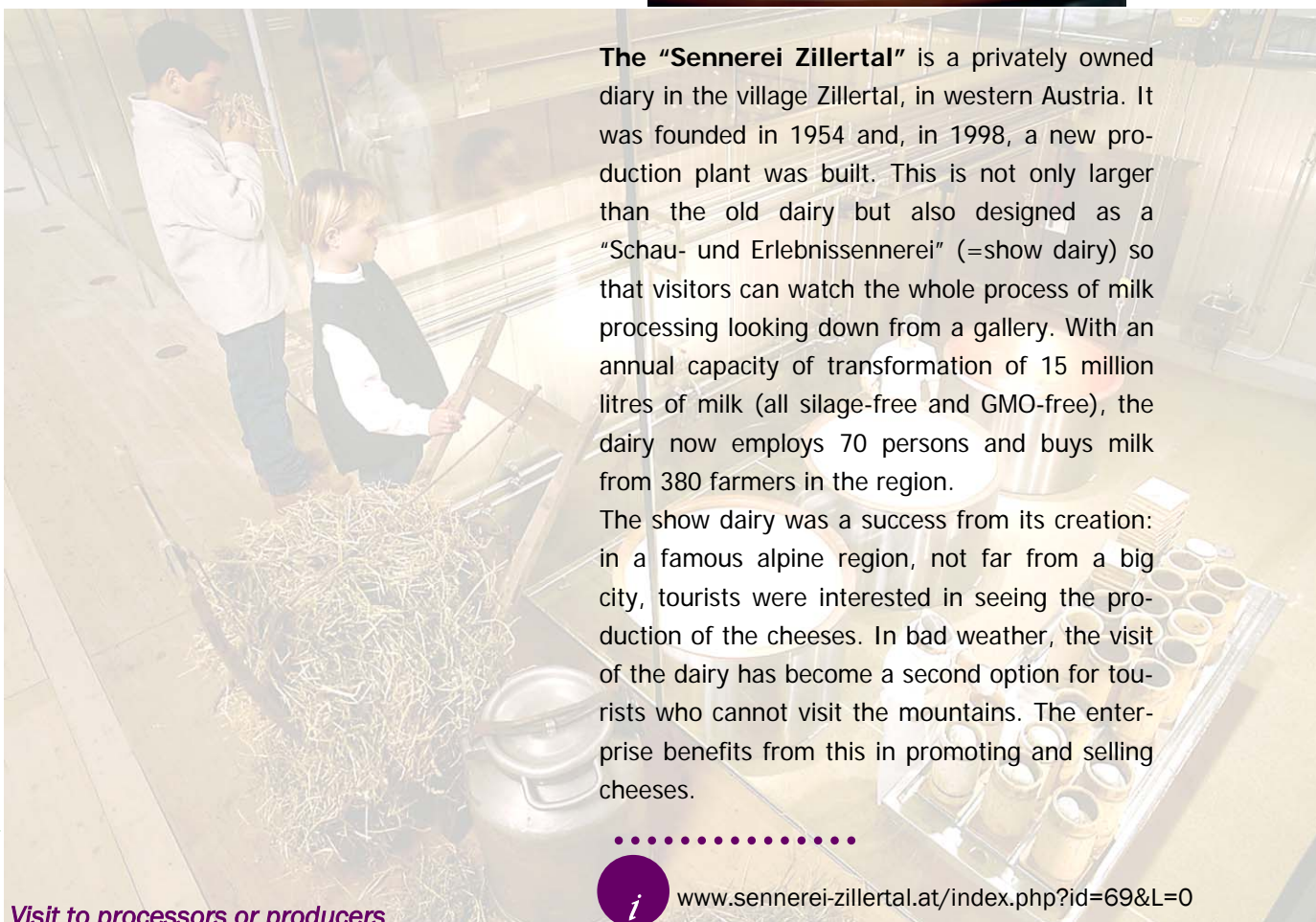
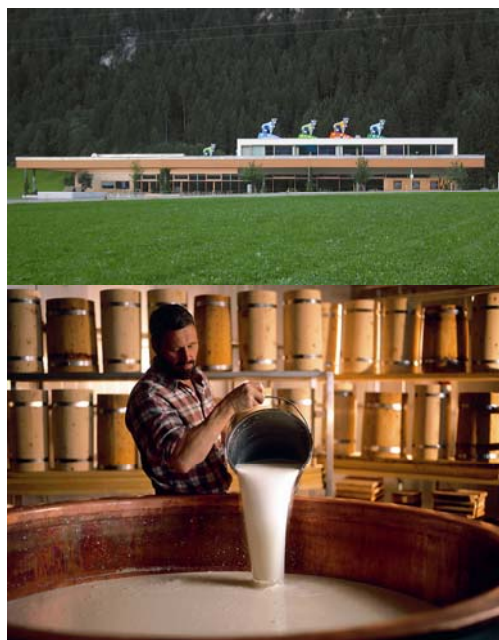
Even though product qualities may be obvious for producers and sometimes for retailers, they should be advertised: consumers may not know that these products are special. Producers and retailers must convince them that this is so!

Visits to farms or places where mountain quality products are processed can be good opportunities to promote products and their qualities.

Offering to try the products

A good way to convince a consumer that a product is worth buying is to make her or him try it!

Presentations of mountain products, tasting or seasonal events organized around products are all good opportunities to promote mountain products, especially outside the region of production.



The “Sennerei Zillertal” is a privately owned dairy in the village Zillertal, in western Austria. It was founded in 1954 and, in 1998, a new production plant was built. This is not only larger than the old dairy but also designed as a “Schau- und Erlebnissennerei” (=show dairy) so that visitors can watch the whole process of milk processing looking down from a gallery. With an annual capacity of transformation of 15 million litres of milk (all silage-free and GMO-free), the dairy now employs 70 persons and buys milk from 380 farmers in the region.

The show dairy was a success from its creation: in a famous alpine region, not far from a big city, tourists were interested in seeing the production of the cheeses. In bad weather, the visit of the dairy has become a second option for tourists who cannot visit the mountains. The enterprise benefits from this in promoting and selling cheeses.

.....
i www.sennerei-zillertal.at/index.php?id=69&L=0

Visit to processors or producers



Mutual benefits for mountain quality products and tourism



Tens of millions of Europeans spend their holidays every year in mountain areas. In addition to mass tourism (for example with winter sports), “smaller-scale” tourism has developed in recent years and can be very beneficial to all mountain

areas. Production and promotion in mountain areas, especially in the context of climate change, can offer a good opportunity for diversification for all tourism resorts. Such connections between tourism and other economic sectors must be developed in order to offer attractive opportunities to tourists.

Production of quality products also has direct effects on the local economy of the region, social life, the tourist economy and the identity of local inhabitants. Our research highlighted a strong interaction between tourism and promotion of products:

- products with a positive image for their renowned qualities have a positive impact on the image and the promotion of the region of origin
- and vice versa, regions that have a strong identity, could use it for promoting quality products produced within it

Therefore, the promotion of one benefits the other. This argument is already used in some regions (see example below) and should be recognised by local/regional authorities to obtain their support for the production and promotion of mountain quality products.

“Retailing mountain almond potatoes from Oppdal is a way to give the municipality an identity.”

(Retailer, Norway)



Skye and Lochalsh Food Link is a Community Interest Company embracing an area including the Cuillin Mountains on the Isle of Skye and part of the North West Highlands of Scotland.

The members are: fishermen, farmers, smallholders, crofters, scallop divers, processors, confectioners, bakers, retailers, hoteliers, restaurateurs, and local food supporters.



The group aims to:

- Create links between producers, food outlets and consumers
- Develop links between food and tourism
- Provide a local food distribution service
- Stimulate local food production and new businesses
- Promote the economic, environmental, social and health benefits of local food
- Improve access to fresh, healthy and affordable food.



Activities include: a food and drink directory of local producers, a food festival to develop food tourism, a booklet of places to eat, local food symbols for local food businesses, a project to assist a sustainable local food economy, food awards, and an excellent website. A particular success has been the project Food Link Van which collects food from 26 producers, twice a week, and distributes it 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.



www.taste-local.co.uk/

How to promote mountain quality food products through tourism?

There are many opportunities for the mountain food sector in linkages between agriculture and tourism, both at the farm level through direct sale and through networking between agricultural and tourism businesses. A number of respondents pointed out that tourists are a high-paying target market and therefore represent a great opportunity for selling high-quality products with high added value.

Mountain quality food products are a way to bring dynamism into regions through effective communication and innovative ways of promoting the mountain areas.

Various opportunities exist to link tourism and food production in mountain areas. Tourists and local inhabitants can be easily involved in events around products and are likely to taste and buy:



- on-farm tourism, with diversification on-farm, offering tourist accommodation and/or tourism activities (visits of the farm and participation in the main stages of activities, educational actions for children, visits to the surroundings, etc).
- tasting of products (on-farm, in processing units, in shops)
- participation of tourists in the main stages of production (e.g. picking fruit or vegetables)
- cooperation with restaurants (producers can sell their products to local restaurants and hotels so that these can offer local dishes or menus)
- regional recipes/books, made in collaboration with a local chef, proposing both traditional recipes and innovative ways of using mountain quality food products
- creation by owners of restaurants/hotels of networks for promoting and selling local products (local labels of food and accommodation)
- mountain producers' markets
- local festivals/events
- twinning of producers - inviting producers from different mountain regions to present their local products. The project highlighted an interesting example of producers from Norway participating in a very big event in Berlin, where they presented their products and region. The aim was not to just to sell their products in the event but to make a maximum number of people discover them and then to invite them eat them in Norway.
- mountain product routes - offer an opportunity to capitalise on the high quality of the environments and to develop a price premium on products to compensate for higher production costs in mountain areas, as in the example presented hereafter:

The Bregenzerwald Käsestraße – Cheese route – (Austria).



KäseStrasse
Bregenzerwald

The region of Bregenzerwald in Austria is a successful example of selling mountain products at the farm level and organising a regional tourism strategy around these products.

With a high number of mountain farmers and dairies, the region looked for solutions to help producers to better add value to their products. In 1995, an ambitious Leader project began, aimed at creating a cheese route. At the same time, the initiative was oriented to creating innovative and quality product. The project embraced 22 municipalities along a route 70 km long.

The marketing concept of the **Käsestraße** (cheese route) is based on the association of farmers, dairies, alpine huts, restaurants, commercial enterprises, and club tourism in the entire region for the promotion of cheeses.

Currently, the association created around the route has 200 members. Producers in the region produce more than 30 types of cheese and market them in the shops along the cheese route. Promotion is ensured through the organisation of many events along the cheese route, as well as by signboards on all shops, hotels, restaurants, ski lifts and craft enterprises on the route.

The promotion of cheeses along the Käsestraße acts as a tourism strategy: the region is "sold" together with mountain cheeses, in Austria and abroad, thanks to an active advertising of the products (internet website in German and English, promotion through national tourism organizations, etc).



www.kaesestrasse.at/

In all cases, it is important that the name of the mountain products is clearly stated: consumers will buy again, but only if they know what it was!

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The EuroMARC project “European Mountain Agrofood products, retailing and consumers” is a three-year research project, involving 10 partners from six countries under the overall coordination of Euromontana and the scientific coordination of ENITA Clermont-Ferrand.

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

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

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

50 policy makers from local to the European level were interviewed

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

This booklet synthesises the results of EuroMARC, with the objective of giving advice and hints to further develop the production of mountain quality food and to increase the financial return from their marketing for all actors of mountain supply chains.

These guidelines are written with the aim of assisting:

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

The second official output of the EuroMARC project includes **political recommendations for policy-makers** at European, country and local/regional levels.



www.mountainproducts-europe.org;

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