

# I - MAIN FINDINGS ABOUT SURVEYED PRODUCT CHARACTERISTICS

The 122 surveyed products include 12 fresh vegetables, 23 fresh animal products and 87 processed goods (including 34 varieties of cheese).

## A – GEOGRAPHICAL CONNECTION (WITH THE MOUNTAIN ENVIRONMENT)

The analysis of the 122 surveyed food products reveals a strong connection between products and the mountain environment. The latter impacts both on products as such and on production methods, and those interactions stem from very similar characteristics in the different mountain areas of Europe.

The study reveals that natural conditions in mountain areas bear an impact on 97 out of 122 products. Quoted effects namely include:

✓ in animal products: distinct taste, aroma, strong muscle build, better distribution of fat, firm texture, absence of parasites, reduced risk of disease, etc.

✓ in vegetal products: absence of viruses, nice colour, good taste, comparatively better texture and consistency, absence of pollution in organic products, etc.

In general, these quality features stem from the following quoted conditions: fresh air, quality pastures exempt from chemical fertilizers, industry-free area/region, altitude, flora diversity and richness, clean temperate water of high oxygen content, presence of a microclimate, type of soil, etc.

On the other hand, when it comes to delicatessen and bread (six surveyed products), natural conditions do not have any effect on products.

Furthermore, it was noted in some cases that natural conditions prevailing in the mountain environment can also be the source of low quality pastures and a lack of natural shelters resulting in slow animal growth.

Generally speaking, the direct impact of natural conditions prevailing in the mountain environment on process is negligible.

## B – TRADITIONAL / TYPICAL PRODUCT FEATURES

### 1/ Varieties and Breeds

Most animal breeds and vegetal varieties are traditional or typical of their respective areas.

- This aspect is particularly relevant in vegetal products. Indeed, variations between regions in the case of these products are considerable. Vegetal varieties are either cultivated or wild.

- In the case of animal breeds, different situations are in evidence: in some cases, animals are wild endemic (i.e. strictly local) species while in others they are local and typical and in others still they are not originally typical but are bred locally and have adjusted to the mountain environment. Finally, some herds include a mixture of endemic and other breeds.

- While pastry and confectionary is not typical, some of the ingredients used in manufacturing them are local and typical, which does bear an impact on distinctive food qualities.

## **2/ Production and Processing Traditions and Know-How**

There is a wealth of traditions and know-how relating to food production and processing in mountain areas.

A degree of homogeneity is discernible as far as production methods are concerned, especially when it comes to animal husbandry. Examples of specific traditional mountain farming features include: extensive rearing, feeding from comparatively large free-range pastures, preference for natural food, longstanding traditional know-how (pastoral systems, transhumance, etc.).

On the other hand, the vast majority of processing systems—while quite often considered traditional or even specific to individual areas—are more diverse when it comes to processing types and methods.

Traditional varieties and breeds, specific practices in production and process in mountain areas have an effect on the final features of the product.

## **C - IDENTIFICATION AND BRANDING OF SURVEYED PRODUCTS**

### **1/ Use of the Term “Mountain” and the image perceived by consumers**

There is a wide diversity of claims on products, but precious few that clearly communicate on their mountain dimension. The term “mountain” appears only on a few cheese labels. On the other hand, the identification of the specific area as mountainous is more often used than the term “mountain” itself and its generic image.

Positive claims appearing on labels vary greatly across the range of products: “farm product”, “traditional farm product”, “non-pasteurised milk”, “traditional product”, “natural”, “organic product”, “extra”, “typical”, “without preservatives”, “without artificial flavourings”, “without colourings”, geographical origin, nutritional information, or even the lack of any specific mention.

Mention of geographical origin (and where appropriate, of mountain origin) on products almost systematically impacts very significantly on consumers’ positive perception. This is true even in products whose raw materials are not wholly obtained in mountain areas.

### **2/ Types of Quality Designations**

#### **• Typology of Quality Designations**

There is a wide variety of existing types of identification in Europe. Such a wide diversity in fact, that clearly distinguishing between official schemes and brands—which, while private, enjoy the recognition and support of public authorities—has sometimes been a challenging task.

In addition, it should be emphasised that the 122 mountain products were initially selected on the basis of the following criteria:

- 1/ all products from individual surveyed areas enjoying protection under an official quality identification scheme were surveyed;
- 2/ as representative as possible a sample of products covered by private specifications developed within the framework of collective initiatives were included;
- 3/ finally, relevant examples of products sold under private brand names were incorporated.

So, the different types of identification schemes include 9 official denominations (four of which are Community-wide schemes) and 48 individual or collective private marks.

#### • Distribution of Quality Designations

The following distribution of designations emerged from the quantitative analysis performed on the 122 products:

1/ *Official designations*: 39 products (including 6 beverages) are protected by 9 different official designations:

- ✓ EU level: 14 P.D.O.s, 4 P.G.I.s, 2 T.S.G. and 4 O.F. (Organic Farming) products (nevertheless, organic products from the Province of Trento were excluded from this analysis because there were simply too many);
- ✓ National level: 15 designations (strong representation of “traditional products” in Italy);
- ✓ Thirty-one products are currently seeking protection under national or community designations.

2/ *Private brands*: 48 private brands, representing a total of 60 products;

Many brands (some 29) are product-specific; the remainder (19) are “umbrella” brands covering a wide range of products.

⇒ Identification is totally absent in the case of 21 (mostly Romanian and Polish) food products. Also in evidence are unpacked products as well as products targeting specific local markets.

Therefore, in all products except beverages, we note that:

- ✓ there is a predominance of collective or individual brands;
- ✓ while few official community designations exist, there is a comparatively stronger representation of PDOs. However, there is substantial variation across survey areas and products. For example, official EU designations are quite widely used for cheese products while private brands are comparatively more strongly represented among meat products. These two types of identifications are equally distributed among vegetal products and beverages.

## D – GEOGRAPHICAL ORIGIN OF RAW MATERIALS AND PRODUCTS

### 1/ **Raw Material Production Locus**

#### • Animal products

About 3/4 of all surveyed raw materials of animal origin are wholly obtained in mountain areas, and substantially all of them do when livestock reared “partly in mountain areas” is incorporated. The latter category identifies products obtained from animals belonging to herds either subjected to transhumance or parked in pastureland not entirely situated in mountain areas. However, more than 90 % of animals spend their entire life in mountain areas. Lastly, the raw materials of only three meat products are not wholly obtained in mountain areas.

In addition, while trout farms are all situated in mountain areas, other fish or shellfish farms are not systemically located in mountain areas.

#### • Vegetal products

Eighty-five percent of surveyed fresh and processed vegetal products are produced in mountain areas.

#### • Other products

In most cases, the origin of the raw materials of beverages is mixed. Cereals used for delicatessen predominantly come from lowlands and as for honey—where particular and traditional transhumance paths are specified—, it does not exclusively originate in mountain areas.

### **2/ Location of Processing Units**

Out of 87 food products, 57 (i.e. 65%) are entirely processed within individual mountain areas, while only three are totally produced outside mountains.

⇒ A definite predominance of mountain area processing for cheese, meat and vegetable products is discernible: almost 85% of cheese processing industries operate exclusively from mountain areas and almost all animal products are wholly produced in units located in mountain areas.

⇒ Conversely, processing of delicatessen, bread, sweets and alcohol, tends to be either mixed (both within and outside mountain areas) or completely external.

### **3/ Location of Supply Chain (Production and Processing)**

- Forty-nine processed and 23 unprocessed products (representing 59% of all surveyed products) are wholly obtained and/or processed exclusively in mountain areas;

- Eight out of 122 products (i.e. 6% of the sample) are obtained or processed completely outside mountain areas;

- Seventeen products are processed in multiple units, some of which are located outside mountain areas.

- Finally, 38 products are manufactured from raw materials obtained in multiple farms, not all of which are located in mountain areas, or are meat products obtained from animals not wholly bred in mountain areas (i.e. not spending their entire life in mountain areas or staying there only part of the year). Transhumance is considered among a multiplicity of factors.

## **E – ECONOMIC ASPECTS**

Production of unprocessed goods mostly takes place in small units situated in mountain areas.

Geographical market specialisation and product value added vary considerably, primarily according to market organisation as well as marketing and commercial strategies developed for individual products. The full range of different organisational formats and product chain lengths is in evidence.

## **F – CONSUMER SURVEYS ON MOUNTAIN PRODUCTS**

The project made no specific provision for conducting a Europe-wide consumer survey. Still, an attempt was made to identify existing national or European surveys by contacting consumer organisations in Europe via BEUC (the European Bureau of Consumer Unions) but to no avail: no such survey seems to exist. A short questionnaire was subsequently circulated to BEUC members, but with little success (possibly because of both the indirect nature of contacts with these organisations and the fact that no reminder was sent). The few returns contained valuable information, however. Answers from Austria, Belgium and Hungary indicated a need to clarify the meaning of the term “mountain” used in association with food products and a willingness to investigate the matter further so as to reduce the amount of misleading information circulated to consumers.