



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



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Newsletter
dedicated to the
research project
EuroMARC

In this issue:

Editorial

EuroMARC in a few lines

Supply chains study:

The image of the mountain products in the eyes of the actors

LEADER:

Best practices for the development of the mountain products

Final conference:

Presentation of the recommendations and practical guideline

Editorial:

A good timing for the EuroMARC project to fit with the European policy change

According to the European agenda, the EuroMARC project could not have taken place at a better moment. A few months after it started, a Green Paper was announced on agricultural products quality policy. The launch of the Green Paper in October 2008 then revealed that the issue of mountain food products had gained ground since the question of possible European legislation to protect them was raised. That interest was confirmed in the Communication of the European Commission on agricultural products quality policy dated 25 May 2009. In this, the European Commission announces that it will “examine the feasibility of laying down specific optional reserved terms for ‘product of mountain farming’”. The Commission is therefore now studying the different options for possible mountain product protection, and the results of EuroMARC come just in time to feed into the process of reflection. The policy recommendation currently being prepared by the consortium should bring interesting information to Commission. The recommendations will also be useful to all decision-makers who **wish to have a better grasp** on the issue of the development of mountain products.

EuroMARC is not only about policy but will also result in practical advice, directly usable by the actors involved in the production or distribution of mountain food products.

Guidelines will be produced with that intention and translated into several languages so that they can reach as many professionals in the field as possible.

The EuroMARC consortium is also very satisfied to have started filling in the gap of knowledge on mountain foods, by bringing in interesting information on their consumption, retailing and on the possibilities of developing their supply chains, based on local initiatives or otherwise. Some preliminary results have been presented in previous issues of the EuroMARC newsletter, and some other information is unveiled in the next pages. Certainly, a lot of study is still to be done on the issue. However, we are confident that the project contributes to raising awareness of the potential of mountain products as a product category as such, and of the potential they represent for the development of mountain regions.

The final conference of the project, on 3 and 4 December in Maribor, Slovenia, will conclude 3 years of intensive research. The agenda promises enriching debates in which scientists, policy-makers and practitioners will have the occasion to exchange views and to try to find new ways of furthering the development of mountain products. The registration for the conference is open and we hope that many of you will be able to attend it.



FOOD QUALITY AND SAFETY



Project co-financed by the
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EUROMARC IN A FEW LINES

February 2007 to January 2010

10 teams from 6 countries (Austria, France, Norway, Romania, Scotland, Slovenia)

Objective: to assess the perceptions for and interest of European consumers and retailers of mountain food products in order to find ways of adding value to these products, thus contributing to the survival and management of mountain diversity (biological, rural, cultural and economic).

The work done:

- 1904 consumers have taken our questionnaire and 184 others participated in 21 “mountain products” focus groups
- 1765 mountain products have been observed in the European outlets
- 22 production chains were analysed thanks to 95 interviews for 4 types of products (water, fruit and vegetables, meat and fish products, milk and milk products).
- 638 retailers were interviewed or surveyed
- 10 local case studies have been analyzed
- 50 mountain stakeholders have been interviewed

Outputs resulting from the project:

- practical guidelines for development, promotion, and communication, towards all actors of the supply chains (from producers to retailers)
- recommendations relating to policies aiming to the development of mountain quality products, towards policy makers at local/regional, national and European level.

Presentation of the project results:

3-4 December 2009, Maribor, Slovenia

The image of mountain quality food products in the eyes of the supply chain actors



“Mountain products have special qualities, related to their origin and they have to be stressed on more in the promotion”



Part of EuroMARC was devoted to the analysis of Mountain Quality Food Products (MQFP) supply chains. To understand fully the relationships and interactions between stakeholders of a given supply chain, selected supply chains of products were studied in Austria, France, Norway, Romania, Scotland and Slovenia (see the table presenting the selected cases in newsletter 2). Interviews of actors involved in the production and retailing of the products were undertaken, focusing on their perceptions of MQFP, their marketing strategies, the problems they encounter and their expectations relating to MQFP and to the development of the supply chains. Specific questionnaires were prepared for each member of the supply chain: farmers, processors, retailers and caterers, and aimed at obtaining information on:

- the importance of mountain origin
- quality aspects of mountain products
- communication issues
- agreements and relationships between actors in the supply chain
- benefits and costs due to the mountain provenance
- specific bottlenecks regarding MQFPs
- the support strategies to overcome existing bottlenecks

The mountain origin of products and the qualities deriving from their origin

Firstly, it is interesting to note that the answers of supply chain actors are congruent with those of consumers: all are convinced that **mountain products have special qualities, related to their origin** and that it is important to promote these qualities to consumers. In particular, producers associate qualities of the products directly to the mountain origin, but there is little communication on this. An explanation could be that they think the origin is too obvious to need to be communicated more to downstream actors of the supply-chain.

Secondly, in long mountain supply chains, it seems that **mountain products** are often retailed **as local products**. The marketing discourses are only rarely based on the mountain qualities of the products. Moreover, retailers were seldom aware of the opportunity of promoting mountain products as a food category in their own right. Retailers tend to consider that the mountain origin should be promoted by other actors, for example in relation with tourism.

In conclusion, a *sine qua non* condition to take advantage of the potential that moun-



tain products represent is **to improve communication on the products to downstream partners**, so that the mountain origin and qualities are clearly presented.

Developing the supply chain

The research highlights that the **quantities of product available on the market could be increased with better coordination along the supply chain**. Several farmers said they were reluctant to produce higher volumes because they feared the demand would not be sufficient. In contrast, retailers asserted that they were afraid of increasing the promotion of products because the production would not

be able to respond to the demand created. This paradoxical situation could be solved with better communication between supply chain actors.

The research also pointed to an important aspect of the production of mountain quality products: for some products, keeping a small scale of production is very important for the final quality and authenticity of products. Producing larger volumes may then have negative impacts on quality. Therefore, the coordination of small-scale producers can be a better solution to reaching higher volumes than to increase the production volumes of single producers.

A better coordination between actors can lead to successful increase of production

LEADER

best practices for the development of mountain products

One objective of EuroMARC was to understand how LEADER-type local initiatives influence the implementation of local mountain food chains, and to what extent they can be a factor of success. 10 European initiatives were analyzed: 5 LEADER-like and 5 other, 2 in each country.

The food supply chains analyzed seemed to play an important role at the local level as they enhance social, economic and environmental sustainability. **The implementation of successful food chains had a very positive impact on the regional identity** and the local image, both for the inhabitants and for the people outside. It also seemed to have a very positive impact on the creation of new jobs and on the diversity of activities.

The Leader initiatives can enhance cooperation within food chains and seem to have a positive impact, no matter at what stage of the supply chain they are targeted. The three Leader types of actions "Animation", "Structuring" and "Consolidation" can further the cooperation between different actors at the local level, constitute a financial support, and optimise the organisational structures.

An example: the Bregenzerwald Käsestraße

With a high number of mountain farmers and a big concentration of dairies in the region of Bregenzerwald, producing especially chee-

ses, the region looked for solutions to help its producers to better add value and to sell their products. In 1995, an ambitious Leader project began aimed at the promotion and marketing of the cheeses produced in the region, and based around an ambitious cheese route of some 70 km. At the same time, the initiative stressed the necessity of developing innovative quality products. The project was to unify 22 communities along the cheese route.

The marketing concept of the "Käsestraße" in Bregenzerwald is based on the association of farmers, dairies, traders, restaurants, commercial enterprises, alpine huts, and club tourism in the entire region for the production, promotion and marketing of cheeses.

The creation of the cheese route has been a success and, at present, the association created around the route has some 200 members. The producers in the region have developed more than 30 types of cheese, famous at the national level, only with silage-free milk from the region and they market the different types of cheeses along the cheese route. The promotion of the products is made through many organised every week along the cheese route, and also by signboards affixed on all the shops, hotels, restaurants, ski lifts and craft enterprises of the

The Leader-like initiatives can act as Start Up Aid and Development Support .





route. The cheeses produced in the region and the creation of the route act as a tourism strategy for the region at the same time, selling not only the mountain cheeses but also the region.

The creation of the cheese route and the involvement of the majority of actors permitted not only the marketing of the cheese but

also the promotion of the region in Austria and abroad (internet website in German and English, promotion through national tourism organizations, etc) .

Final conference: presentation of the practical guidelines and policy recommendations at Maribor, 3-4 December

The main conclusions of the EuroMARC project will be disseminated through two strategic documents:

- **policy recommendations** for policy personnel of all levels (local/regional, national and European ones);
- **practical guidelines** for participants in mountain supply chains, related sectors and for extension services.

The first document aims at raising awareness among the political "mountain" stakeholders on the role that mountain food chains can play in the development of mountain areas, on how to better use existing policy and on the need for new policies. In addition to providing an overall picture of existing policies and of possible options to better identify and protect mountain food products, the document will include short summaries for each policy level regarding the solutions needed.

The practical guidelines provide advice for the improved development and valorisation

of mountain food products. Starting from identification of the weaknesses of the supply chains, the guidelines present measures that can be implemented to overcome in production, retailing and promotion. Examples of good practice are also presented to illustrate possible actions to develop mountain food products, including in relation to tourism.

Both documents will be presented and discussed at the project's final conference to be held on **3-4 December 2009 in Maribor, Slovenia**.

The Maribor conference will gather European specialists: political, scientific and production. Recent developments in quality food policy and the potential for developing mountain quality food products will be discussed.

Registration for the Maribor conference is currently open and can be made at

www.mountainproducts-europe.org

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