



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



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Newsletter
dedicated to the
research project
EuroMARC

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FOOD QUALITY AND SAFETY



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Technological Development



THE DEVELOPMENT

OF MOUNTAIN QUALITY FOOD PRODUCTS: PRODUCTION, DISTRIBUTION, CONSUMPTION

After 3 years of research, EuroMARC came to an end, with its final conference on 3-4 December 2009 in Maribor, Slovenia.

As said in the first issue of this newsletter, very little information was already available and hardly any research had been done on mountain products before EuroMARC. The project opened the mountain products' Pandora's box. After three years of research, what can be concluded from our findings?

A first conclusion that stems from the observation of shelves in shops is that there are mountain food products on the shelves, showing there is a mountain products' market. This market is already partly exploited, and a specific market potential is through tourism.

A second finding however concerns the ambivalence of this market and the definition of mountain products: everyone (from consumers to retailers) has his own conception of what mountain products are, but there is yet no clear mountain product category as such in shops. Therefore, when a consumer buys a mountain product, he is moti-

vated by his own idea of what a mountain product should be. However, this idea may not correspond to what producers or retailers think a mountain product is and what they sell as a mountain product.

Many other things could be said, and we included them in the final documents of the project. The guidelines aim at providing advice on the production and marketing side. The policy recommendations tackle the issue of an official protection for mountain products, seen as a condition for a better development of this market, and of the need to implement better at all levels existing policies to support the development of mountain products .

The final conference presented the findings of the research and the documents produced. You will find in this newsletter a summary of the main points discussed. The guidelines and policy recommendations are available on the website of the project. We invite you to spread the news and to download the documents as much as you need.

The identity of mountain quality food products

Presentations available on www.mountainproducts-europe.org.

Speakers: *Virginie Amilien*, National Institute for Consumer Research, Norway
Bernd Schuh, Austrian Institute for Spatial Planning, Austria
Jim Turnbull, ADEPT Transylvania
Björn Rasmus, cooperative Bioalpin, Austria

The first session of the conference aimed at presenting the perception of consumers and supply chain on mountain food products.

Virginie Amilien (SIFO) introduced the session by presenting the interest, perception and expectation of European consumers towards products coming from mountain areas, according to the data collected in 6

countries (Austria, France, Norway, Romania, Scotland and Slovenia).

The results of consumer surveys stressed that **mountain quality food products are perceived as pure, traditional and quality foods**, although informants are aware of the industrial developments, pollution and use of chemical additives.

The respondents also underline the lack of a common definition/understanding of what is a mountain product and the fact that packaging and product promotion is not a guarantee of the real mountain origin.

EuroMARC did not identify any special category of consumers interested in mountain products: everyone can be a potential buyer in a certain situation and for a certain mountain product. However, consumers have some expectations vis-à-vis mountain products. In particular, mountain products should be:

- different from other usual products (from their taste/ quality)
- widely available: in specific distribution channels (market, speciality shops, in farm shops, etc) but also in supermarkets

Jim Turnbull from **ADEPT Transylvania** presented the initiative of the foundation. They created an umbrella brand for food products from a region in the lower Carpathians in Romania, especially home made jams. The Romanian association built its communica-

tion to consumers on the taste and the traditional means of production of jams in the region. The jams produced are natural, but not certified with an organic label. The speaker stressed the importance of telling the products' story to consumers so that they become aware of products' qualities.

Björn Rasmus, CEO from the Bioalpin cooperative, producing diverse organic mountain food products in the Tyrol region, of Austria, and managing the **Bio Vom Berg** brand, highlighted the fact that Austrian consumers generally support mountains and local products. The cooperative is also attached to the small-medium scale of production and to the fact that mountain products they sell are of good quality: with no GMO, and no addi-

tives, from a particular environment. Consumers can pay an extra price if they can be convinced on product quality: taste, ingredients, provenance and its story (marketing).



Bernd Schuh, Virginie Amilien, Jim Turnbull, Björn Rasmus

"Mountain" evokes quality, a clean and preserved environment, healthy products and link with the cultural identity of mountain communities.

What marketing strategies for mountain quality food products?

Presentations available on www.mountainproducts-europe.org.

Speakers: Philip Leat, Scottish Agricultural College, Scotland
 Virginie Amilien, National Institute for Consumer Research, Norway
 Joze Tlaker, Association of Zgornjesavinjski želodec producers, Slovenia
 Georges Giraud, ENITA-Clermont Graduate School of Agronomy, France

The second session focused on the elements of the best strategies for marketing mountain food products.

Philip Leat first presented the results of EuroMARC on this question, raising the point that **better communication of product attributes is crucial for effective retail positioning by producers and retailers.** He mentioned the diversity of mountain products at the European level. Some are seen as speciality products and are sold at relatively higher prices than normal products, others are seen as local products for local consumers and therefore must have prices reflecting the local purchasing capacities, others are aimed at tourists etc. Consequently, there is not necessarily a price premium for mountain products.

The conclusion is that mountain products are promoted inadequately, with an 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 and per-

sonal communication vary greatly amongst countries, product groups and types of shops. The presentation concluded with the need for an individual approach when developing or intensifying the sale of mountain products.

Georges Giraud presented the integrated approach of selling the **Laqueuille spring mountain water** in France by a supermarket chain. The Laqueuille spring is located at 1200m. Laqueuille produces several types of bottles, for different types of consumers (from a private registered brand for more expensive products, to low cost products, with various sizes). The advantage of long distribution chains as supermarkets was stated to be such that larger quantity of products can be sold and the benefit to the region of production and transformation (local employment).

Joze Tlaker presented another type of marketing of mountain products, through the example of the **PDO zgornjesavinjski želodec**, a meat product, from the upper

« Not all mountain products received a premium and in some cases non-mountain products were more expensive ».



Presentation by Philip Leat

Savinja valley region in Slovenia. The production of zgorrnjesavinjski želodec is deeply rooted in the local history and culture and is a source of pride for the region. Although this type of želodec is more expensive than others, it benefits from its reputation and organisation of production. Promotion actions are also organised for selling these special meat products. Želodec is sold mainly through direct sale. Because of its huge success, it seldom reaches the shelves

of specialty shops; it may also be sold through public procurement for special events.



The PDO zgorrnjesavinjski želodec meat, a typical product from the Slovenian mountains

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

Presentations are available on www.mountainproducts-europe.org.

Speakers: Markus Schermer, University of Innsbruck, Austria
Davorin Koren, National Parc of Triglav, Slovenia
Fiona Young, Cairngorm's farmers market, Scotland

Throughout the project, the links between MQFP and tourism appeared to be quite important, as well as the respective potential of one for the development of the other.

Markus Schermer presented some examples from the project of how tourism activities are linked with the selling of mountain quality food products. The cases included the integration of mountain products in menus of local restaurants/hotels, and the sale of products by direct sale, in farm-restaurants and farms-shops. Activities focused on the production of mountain products are also a possibility for diversifying tourism opportunities offered by a region, with the organisation of seasonal culinary events, regional products trails, visits to farm or to enterprises, etc. Internet and regional tourist guides are useful tools for promotion.

Davorin Koren presented the approach of the **Triglav National Park** in Slovenia, which established a cheese trail. The initiative met difficulties at the beginning, with problems

of supply that could not satisfy the demand in term of quantity and of quality consistency. The interest of producers for being involved with tourism appeared to be a crucial element, and the Park had to select the producers who would work with the Park on the cheese trail. The project also underlined some results presented in the first session: people are generally interested in the mountain local history of the product but they also want to be sure of the compliance with hygiene standards and of the quality of product.

Fiona Young, organiser of the **Cairngorm's farmers market** in Scottish national park of the same name presented their initiative of creating places where farmers can meet consumers and tourists. These farmers market are a good opportunity to attract visitors for one day in the small towns where they are organised. Also Cairngorm's farmers markets provide tourism facilities with local mountain products that holiday makers can enjoy in their hotels.

How to promote mountain quality food products?

Presentations are available on www.mountainproducts-europe.org.

Speakers: Georges Giraud, Clermont Graduate School of Agronomy
Dumitru Rusu, Lactofarm Hamba, Romania,
Virginie Amilien, National Institute for Consumer Research, Norway

A general lack of communication on mountain quality food products to consumers and retailers has been observed. The question of using labels to better promote and to add

value to mountain products is then approached.

Georges Giraud introduced the session with conclusions from EuroMARC. A mountain label could be a tool to protect real mountain products, and a promotion tool to enable quick identification by consumers and retailers of mountain. But in order for a label to be efficient, definition and eligibility criteria must suit mountain producers and processors and be accessible in terms of investment costs and administrative procedures. It must also suit consumers' expectations, and be promoted to consumers and actors in the supply chains.

Questionnaires research during the research project revealed that consumers are highly favourable to a mountain label, as they want more information on the origin and on the qualities of products. Retailers are generally favourable, although they are not all in favour of the same type of label (mountain products or mountain quality products, specific mountain range, etc.). Retailers want not only a label: having

strong promotional campaigns and explanation of the terms is necessary.

Dumitru Rusu from **Lactofarm Hamba**, Romania presented a mountain enterprise selling meat products at the regional/inter-regional level in Romania. The compliance of these mountain meat products with hygiene standards, their quality raw materials and the absence of additive, as well as the capacity of the enterprise to innovate in its processes and recipes, led the enterprise to obtain a national label for healthy products.

Virginie Amilien presented the Norwegian enterprise "**Björli Mountain products**" which created a strong quality brand in the production of a specific product, cured leg of mutton. The raw material and the production mode of their "Fenalår" are criteria to obtain several labels, and thanks to which they can added-value to their production and distinguish their products from their competitors.

An official protection for « mountain products » is not enough in itself, it requires also some communication towards consumers and the supply chains

What policies to support mountain products production?

Presentations are available on www.mountainproducts-europe.org

Speakers: Philip Leat, Scottish Agricultural College, Scotland ,
Rob Mc Morran, UHI Millennium Institute, Scotland,
Bernd Schuh, Austrian Institute for Spatial Planning,
Ancuta Pasca, Euromontana,
Vincent Cordonnier, European Commission, DG Agriculture and rural development
Jacques Henchoz, Federal Office for Agriculture, Switzerland

The EuroMARC project brought some interesting conclusions on the policies that best support the development of mountain quality products. They were presented in this session, as well as information on the evolution of quality policy in European Union and on the recent creation of a mountain label in Switzerland.

Rob Mc Morran stressed that the production of mountain foods is submitted to a lot of constraints but there are also opportunities that should be exploited. For some mountain products, existing certification schemes (PDO, PGI, Organic, etc) do not meet their needs and mountain producers face difficulties to promote their products. At the same time, a few initiatives have been identified in Europe: at the national level in France and in Switzerland, as well as at the regional or local level. But generally, consumers can be misled as there is no definition of mountain products.

Bernd Schuh was responsible for the analysis of case studies on mountain/local food

initiatives. He tried to identify the factors of failure and success of such initiatives. Firstly he stressed the existing similarities between mountain food supply chains and food supply chains in remote rural areas over Europe. Successful regional mountain food supply chains enhance economic, social and environmental sustainability. In the EuroMARC case studies, food production strengthened both regional identity and the local image, contributed to the creation of more and more diverse jobs. Leader initiatives can function as Start up aid, as well as Development Support for food supply chains, strengthening the cooperation between different actors/firms, enabling financing investments for being more successful and optimizing organizational structures. There is a need for policies that strengthen the entrepreneurial spirit and initiative behaviour among farmers and food processor, people being a key element for the development of any initiative.

Jacques Henchoz, founder of the mountain label in Switzerland presented the creation

of this new quality scheme (created by a law published in January 2009). To avoid abuses and misleading uses of the “mountain” and “alpine pasture” terms, to guarantee the origin of products to consumers and to give producers the possibility to differentiate the market, definitions were established. They include the conditions producers must fulfil to be allowed to use the terms.

Vincent Cordonnier from the General Directorate for Agriculture and Rural Development presented the European context of the policy of agricultural quality products, and its recent evolution with the Communication of the European Commission published in May 2009 on this topic. This document mentions the possibility of establishing a European mountain reserved term. The next step is an impact study on the need and the feasibility of setting up a mountain reserved term, to take place in the first semester 2010. On the basis of this evaluation, in the second semester of 2010 the European Commission will make legislative proposals to the European Council and to the Parliament or deliver guidelines to actors and Member States.



Buffet of Slovenian products

Ancuta Pasca from Euromontana closed this session with the presentation of the policy recommendations that have been made on the basis of the research project. The policy recommendations target political stakeholders at all levels of governance (European, national and regional/local ones). They aim at raising awareness among policy-makers and technical staff with responsibilities in mountain policy on the potential of mountain products for mountain regions' development. The recommendations also provide practical advice on measures that can be implemented at each level of governance so that consumers can identify better mountain products in retail shops, and supply chains can reach a better level of organisation, at the stage of production, marketing and communication. A first recommendation is the need for a protection framework at European level for mountain quality products and of the definition of clear criteria to be allowed to use the term “mountain”. The next recommendations concern the fostering of production, processing, distribution and marketing of mountain quality food products.

Round table discussion — Mountain food products and policy instruments

Chairman: Olivier Beucheurie, ISARA-Lyon, France .

Panel: Vincent Cordonnier, Agricultural Product Quality Policy Unit, DG Agriculture and Rural Development, European Commission

Mira Kos-Skubic, State secretary, Slovene Ministry of Agriculture Forestry and Food

Alenka Lipuscek-Miklavcic, director of Planika dairy, Slovenia

Livia Dömölki, Consumer's association of Hungary (OFE), member of BEUC (European Consumers' Organisation)

Jean Gault, SARD-M coordinator, FAO

The round table discussion aimed at discussing the policy instruments available for mountain products and what improvements were necessary. The State Secretary of the Slovene Ministry of Agriculture, Forestry and Food and Vincent Cordonnier, from the European Commission, recalled that several tools exist to support small-scale producers, such as the ones for the on-farm selling of products. The need to implement them at member-state level was underlined.

The existence of quality schemes (PDO/PGI, organic schemes) was also mentioned as tools that can be used by mountain farmers. However, specific tools for mountain producers are seen as interesting possible options for producers according to the director of

Planika Dairy, as well as by Livia Dömölki who said that Hungarian consumers, although their country is not very mountainous, are still interested in genuine mountain products. She underlined the link with tourism in this respect. Jean Gault, from FAO, precised that mountain products are not only a European question but that the need to promote them is also discussed at global level. This raised the question of the communication of a possible mountain reserved term. In the current state, the analysis made by the European Commission on a reserved term does not propose a solution for communicating the term. This issue would have to be dealt with in a second stage, if a protection for mountain products is established.

A few concluding words

Presentations are available on www.mountainproducts-europe.org.

Speakers: George Giraud, ENITA-Clermont Graduate School of Agronomy, France

The EuroMARC project has been a first approach on mountain products. However, some questions remained unanswered or have been raised throughout the work done during the project.

The question of small-scale of production has been discussed several time, appearing to be either an asset (for the quality of production) or a drawback (from retailers' point of view). Specific solutions to support small-scale producers must be further developed.

The "local" origin of products is also a pending issue: just like the word "mountain", it is associated to various meanings. The "local" character of a product can also be part of

the "mountain" character of a product. It is then useful to communicate using local names.

A further point that deserves to be further studied is the overlap and discrepancy between consumers expectations towards mountain food products (dream of untainted mountains, low prices...) and the economic needs of the supply chains (need of productivity, every day employment...).

The EuroMARC project has brought some first answers on what mountain product are and on how they are perceived. But it also raised numerous questions that deserve to be further studied.

Where to find the guidelines and the policy recommendations?



The guidelines are available in four languages: French, English, German, Slovene, and the policy recommendations in French, English, German. Both documents, as well as all the presentations of the conference, the newsletters of the project and the summary results of the project can be

downloaded from the website www.mountainproducts-europe.org.

The dissemination of the documents is free of charge, but an acknowledgement referring to the project must be included when extracts or quotations are used.

Thanks to our sponsors

During the conference coffee breaks and at lunch time, the participants had the chance to taste examples of mountain quality food products offered by producers. We would therefore like to thank:

- Association of Zgornjesavinjski želodec producers in Upper Slovenia;
- Lactofarm Hamba, Sibiu in Romania.



Romanian products from the LactoFarm Hamba entreprise, Sibiu

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