

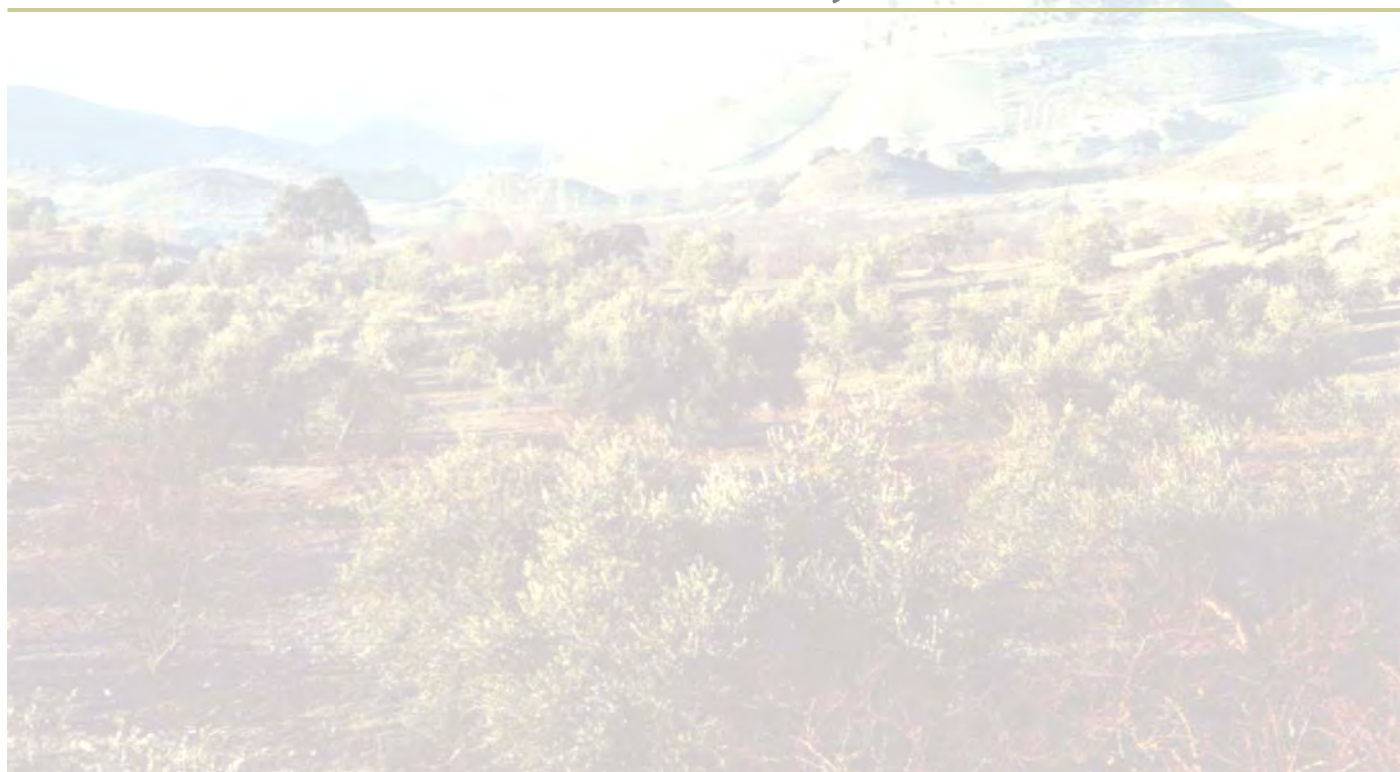


EuroMARC — Produits agroalimentaires de montagne en Europe, leurs consommateurs, distributions et démarches



# PROCEEDINGS OF THE PUBLIC MID-TERM SEMINAR OF THE EUROMARC PROJECT

## 6 NOVEMBER 2008, BRUSSELS



Project co-financed by the European Union 6<sup>th</sup> framework programme for Research and Technological Development



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## Programme of the seminar

08.45	<b>Registration</b>
9.00	<b>Opening session</b> Brief welcome and introduction, Marie Guitton, Euromontana General Project coordinator.
<b>Session 1: The image of mountain quality food products</b>	
9.30	<i>Between lack of knowledge and strong expectations: A consumer approach of mountain quality products</i> , Virginie Amilien, SIFO <i>The image of mountain quality food products along the supply chain</i> , Markus Schermer, UIBK <i>Panelist opinions</i> : EKPIZO – Athens; CNIEL, Bavarian State Ministry of Food, Agriculture and Forestry
10.30	Discussion with the audience
11.00	<b>Coffee-break</b>
<b>Session 2: Adding value to mountain quality food products</b>	
11.15	<i>Premia for differentiated products at the retail level: can the market put a value on the mountain attribute?</i> , Philip Leat, Cesar Revoredo-Giha, SAC <i>The influence of local initiatives on mountain product value-added chains</i> , Bernd Schue, ÖIR <i>Panelist opinions</i> : Országos Fogyasztóvédelmi Egyesület; Eco-innovation, COAG, FAO
12.15	Discussion with the audience
12.45	<b>Lunch</b>
<b>Session 3: Which policies to enhance the development of mountain quality food products?</b>	
14.00	<i>The mountain foods process: evaluation of the options offered by national and EU legislations and policies</i> . Robert Mac Morran, Martin Price, UHI <i>The evolution of labeling schemes</i> , Francis Fay, DG Agri <i>Panelist opinions</i> : Autonomous Province of Bolzano-Alto Adige, OFAG, CNIEL
15.00	Discussion with the audience
15.30	<b>Conclusions</b> , <i>EuroMARC work plan</i> , Georges Giraud, ENITA Clermont-Ferrand, EuroMARC Scientific coordinator; Closing by Martin Price, board member of Euromontana and partner in EuroMARC
16.00	<b>End of the day – closing</b>

## Results of the EuroMARC seminar

On 6 November, the EuroMARC seminar, organised within the offices of the Languedoc-Roussillon region in Brussels, brought together around fifty participants to exchange reflections on the first results of the research project on mountain quality food products. In addition to the 6 European experts invited by the consortium, the audience also participated and reacted to the presentations.

For the members of the consortium, the event had several positive aspects:

- It was an occasion to conduct a “check-up” of the work’s progress: after nearly two years spent working on the project, the seminar gave us the opportunity to realise what work had been accomplished and what work remains to be done!
- It was also an opportunity to put the pieces of the puzzle together: the EuroMARC project includes five study fields (consumption, distribution, supply chains, local initiatives, and policies). Since these aspects are treated separately in everyday research activities, the common presentations were an opportunity to link up all these aspects into a coherent whole.
- Finally, the seminar provided us with a chance to gather external opinions: the partners greatly appreciated these contributions that will enrich their future analyses.

The proceedings expose a summary of the presentations and discussions that took



## Session1: The image of mountain quality food products

*Chairing: Georges Giraud, ENITA*

*Presentations by Virginie Amilien, SIFO, and Markus Schermer, UIBK.*

*Guest experts: Noëlle Paolo, CNIEL; Richard Balling, Ministry of Agriculture of Bavaria*

The first session was the occasion to present the results of the consumer and supply chain research. The presentations focused on the analysis of the image of quality products according to consumers and the different actors of the supply chains. It is interesting to notice the similarities between the points of view of such different actors. Thus, the positive connotation of mountain, which evokes quality and a clean and preserved environment, is very frequent, and at the same time the hygienic quality of products appears crucial.

We can nevertheless observe differences in the perceptions of products according to the type of consumers interviewed. For instance, consumers in mountain regions consider mountain products as local products, whereas people in other areas tend to value more the mountain origin, thanks to the positive image of mountains. The research

on supply chains confirmed these results and allowed us to identify limits to the marketing of quality mountain products. It appears, in particular, that better communication on mountain quality products, in order to give them recognition as a specific category, would be appropriate. But first, better co-ordination between producers and supply chains actors is necessary.

**Noëlle Paolo** from the CNIEL confirmed the interest of consumers in mountain quality products: a study undertaken by the CNIEL on mountain milk produced similar results. She stressed the necessity to use carefully the expression “mountain quality product”, as the term “quality” suggests that inferior mountain products exist, and therefore undermines the mountain image. **Richard Balling**, from the ministry of Agriculture of the province of Bavaria, concurred with that

idea and proposed instead to talk about products “originating from mountain areas”.

The subsequent discussions raised several issues:

- The difficulty of defining what a mountain area is, a definition that would be necessary for the potential implementation of a logo or quality label
- The need to use appropriate terms, illustrated by the fact that in Scotland, “hills” is often used to refer to mountains.

- The need to define the potential criteria to be respected in the use of a logo or label.



Virginie Amilien, Markus Schermer.

Picture: Vanessa Klepandy

In conclusion, two development models emerged from the discussion: for local marketing, the “local product” aspect should be valorised; whilst the “mountain” aspect of the products seems to have a stronger potential among lowland consumers.

*“Mountain” evokes quality and a clean and preserved environment; at the same time the hygienic quality of products is crucial.*

## Session2

### Adding value to mountain quality food products

Moderation: Alexia Rouby, Euromontana

Presentations by Philip Leat, SAC, and Bernd Schuh, ÖIR

Guest experts: Frédéric Morand, Eco-Innovation; Livia Dömölki, Hungarian National Association for the Protection of Consumers

*Mountain quality food products are seldom sold at a higher price than products from lowland areas.*

During the second session, the consortium members working on the distribution and LEADER-like local initiative aspects tried to answer the question of how to generate added value for food products. **Philip Leat** first presented the initial results of the analysis of supply shelves of mountain products and similar products from other areas (see newsletter n° 1). These results show the price differences between the products identified by the researchers as mountain quality products and other products. The results show considerable differences according to the types of products and countries. Thus, for fruits, cooked meats, and water, the price difference was either not significant or negative for mountain products, i.e. sold at lower prices than products not originating from mountain areas. Mountain cheeses, on the contrary, are sold at a higher price, except in France, maybe because of the power of the distribution sector in that country and the high quality image of many French cheeses from non-mountain areas.

**Bernd Schuh** then presented the analysis framework of the local food initiatives. Although this aspect of the project is only sufficiently advanced to present preliminary

results, data from earlier ÖIR projects show the role that LEADER programmes can play compared to other development programmes: LEADER programmes can be the main element in rural development policies, or be a vector for new ideas, a niche programme, or a programme combining different initiatives at the local level.

As results for this part of the study are not yet sufficiently well developed, it is not possible to establish at the moment the extent to which LEADER programmes can support the creation or development of mountain quality food product supply chains.

**Livia Dömölki**, from the Hungarian National Association for the Protection of Consumers, underlined the benefit for consumers of being able to choose between a wide variety of products, rather than having to face a uniform market. **Frédéric Morand**, from Eco-Innovation, raised the issue of the margin that producers can benefit from. Indeed, a positive price difference between mountain products and other products does not automatically mean that producers benefit from higher revenues.

The ensuing debate focused on the reasons why mountain products are not all sold at

higher prices than the products originating from other areas. One reason put forward is that quality mountain products are sold locally and therefore bought by a rural population with lower incomes than the urban population. These products need therefore to be sold at attractive prices for local people. Moreover, participants remarked that since mountain products, up to now, have

an unclear image, consumers are not ready to pay higher prices for them. A stronger quality image and related promotion will first be necessary. Finally, the link between the products and their region of origin must not be undermined: a better mountain, territorial strategy, could bring added value to products.

## Session 3

# What policies would favour the development of mountain quality food products?

*Moderation: Virginie Amilien, SIFO*

*Presentations by Rob McMorran, Perth College, and Francis Fay, Deputy Head of Unit, Agricultural Product Quality Policy, DG Agriculture and Rural Development*

*Green paper on quality food products: product standards, farming requirements and quality schemes, available on [http://ec.europa.eu/agriculture/quality/policy/index\\_en.htm](http://ec.europa.eu/agriculture/quality/policy/index_en.htm)*

*Guest experts: Vesna Caminades, Brussels representation of the Province of Bolzano-Sud-Tyrol, Italie ; Christine Mueller, Federal Office for Agriculture (OFAG), Switzerland.*



Virginie Amilien, Francis Fay

Picture: Vanessa Klepandj

**Rob McMorran** presented the results of a survey conducted among persons involved in the preparation or implementation of rural development policies or in the labelling of products. The persons contacted worked at the local, regional, national or European levels (in the 6 countries). The results first showed that the understanding and legal definition of the terms “mountain” and “mountain product” greatly vary from one country to another. For instance, France has precise legal definitions for these terms, Romania only has a definition for the term “mountain”, and the other countries have no definition. The term “mountain product” is relatively well known and understood by the population in France and Austria, but not in Scotland. Moreover, the interviews conducted showed support at many levels in favour of a legal protection of mountain quality products. Even though the general tendency emerging seems to favour (by a narrow majority) such an initiative, some issues nevertheless need to be raised: the problem of the definition of mountain areas. Furthermore, some participants raised the issue of the relevance of a European label, since priority should rather be given to regional development support, and therefore proposed alternatives.

To further the discussion, **Francis Fay**, Deputy Head of the Products Quality Unit at DG Agri, presented the Green Paper on quality food products. The launch of the document on 15 October opened a period of general consultation on European policy towards quality products, which is the first phase of reflection and debates which should lead to a reform of that policy in 2010. In the Green Paper, the European Commission in particular addresses the issue of the potential need for new protection systems for some product categories.

**Vesna Caminades**, from the Brussels office of the South-Tyrol Italian region, shed light on an example of local policy towards products. In this province, emphasis is placed on the local aspect of products, which includes the idea of mountain since the province is very mountainous. She concluded by stressing the difficulties of the implementation of a label, difficulties that were further underlined by **Christine Mueller**, from OFAG. Indeed, since 2006, Switzerland has promulgated a law to distinguish and protect mountain products. The implementation of the law is still the subject of debate.

The subsequent discussions addressed the issue of a mountain label: is it the best tool for regional development, or should another

*Although the term « mountain product » is not understood in the same way in the different countries, there is an interest in developing a protection for it.*

kind of protection for the term mountain be favoured?

The issue of communication with consumers

was also addressed during the debate: the implementation of a quality sign or logo should go hand in hand with the promotion and significance of such an appellation.

## Conclusion

### What recommendations for a better protection of mountain products?

Because of current European policies, the debates of the seminar largely evolved around the issue of how to protect mountain products. Two possible strategies emerged from the debate:

- The local strategy, based on the acquaintance of the buyers with the territory. In this case, buyers know the origin of a product, and therefore know *de facto* that it originates from a mountain area.
- The long distance strategy, which requires an appeal to the imagination of the consumers and their perceptions of mountains. Because

of distance, consumers need to be reassured about the origin of the products. It seems that a label or official sign certifying the mountain origin of products could generate added value in this case.

These first tendencies will need to be confirmed by the analysis of the results before being included in practice guides and recommendations which will be prepared in 2009.

The final presentation of the results obtained will take place in early December 2009 in Maribor, Slovenia.

## Thanks to our sponsors:

At lunch time, the seminar participants had the chance to taste some examples of mountain quality food products offered by several producers. We would therefore like to thank:

- Zillertaler (Austria) for the Bergkäse and Almkäse cheeses;
- The apples and pears producers from Savoy (France);
- Mountain pork producers from France for the *saucisson* and dried sausages.



#### FOR FURTHER INFORMATION....

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## Opening session

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Presentation :

*Welcome and introduction*

**Marie Guitton**, Euromontana, EuroMARC overall project coordinator





## EuroMARC Seminar 06/11/2008



## Some historical data

- Mountain quality food products as a working theme for Euromontana for almost 10 years
  - Reflections led within Euromontana since 1999
    - 3 seminars and the second convention – DG Agri
  - 2002-2004: research project to characterise mountain quality food products (MQFP)
    - DG Research – 13 partners – 8 countries – 10 studied areas – 122 products studied
  - 2005: launch of the European charter of mountain quality food products
    - 69 signatories – 12 countries – 4 governments



Introduction Session – 06/11/2008

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## What is EuroMARC?

- Research project, FP6
- 2007-2010
- 10 teams, 6 countries



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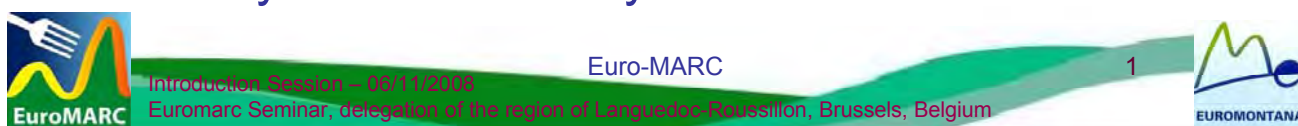
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## EuroMARC: General Objectives

- Measurement of European consumers' interest for mountain food products: verbal responses, actual attitudes, buying behaviour
- Assessment of share of added value along supply chain of mountain food products
- Strengthening rural development by implementation of original market-oriented strategy, enabling the maintenance of a living countryside and healthy environment



## Scientific objectives of EuroMARC

- To assess the interest, perception & expectations of European consumers for mountain food products
- To identify specific consumer segments sensitive to mountain food products, by means of cluster analysis
- To analyse the supply chains of mountain food products, with focus on bottle-necks and constraints, in order to emphasise the opportunities offered by distribution channels and consumer segments
- To identify factors for success or failure in local initiatives devoted to marketing of mountain food products



## Relevant research questions from EuroMARC

- Consumers and mountain: image vs knowledge
- Consumers and small scale producers in mountain area
- Mountain food products, marketing channels and promotion incl. tourism

Are mountain-quality food products attractive because they are from any mountain or from a specific local or far away place?

Possible overlapping between Mountain & Origin



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## EuroMARC: how to proceed?

- 2007-mid 2008: phase of research
  - Consumers study
  - Retailers study
  - Supply chain analysis
  - Local development analysis
  - Policy analysis
- Mid 2008 – 2009: preparation of guidelines and policy recommendation
- Today: presentation and discussion of the first results



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## Session 1

# The image of mountain quality food products

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### Présentations :

*Between lack of knowledge and strong expectations: A consumer approach of mountain quality products*

Virginie Amilien, SIFO

*The image of mountain quality food products along the supply chain*

Markus Schermer, UIBK



European Mountain Agrofood products, Retailing and Consumers

**Between lack of knowledge and strong expectations:  
A consumer approach of Mountain  
Quality Food Products –MQFP-**

**Virginie Amilien and Alexander Schjøll  
SIFO, Oslo  
-National Institute for Consumer Research-**



[www.mountainproducts-europe.com](http://www.mountainproducts-europe.com)

**Main objective of WP1**

To measure consumers' interest, perception and expectations towards quality food products coming from mountain areas in the 6 studied European countries.

## Methodological approaches

Data have been collected in Austria, France, Norway, Romania, Scotland and Slovenia through three different methods in each of the six countries:

- Focus groups
- Quantitative questionnaire (min. 300 per country)
- Conjoint analysis



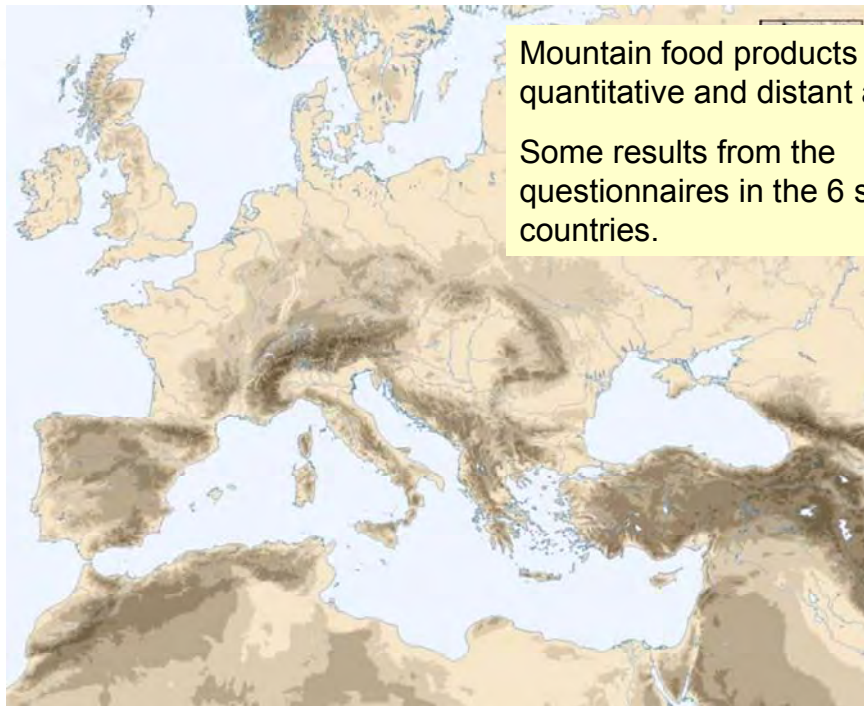
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## Quantitative approach



Mountain food products through a quantitative and distant approach.

Some results from the questionnaires in the 6 studied countries.



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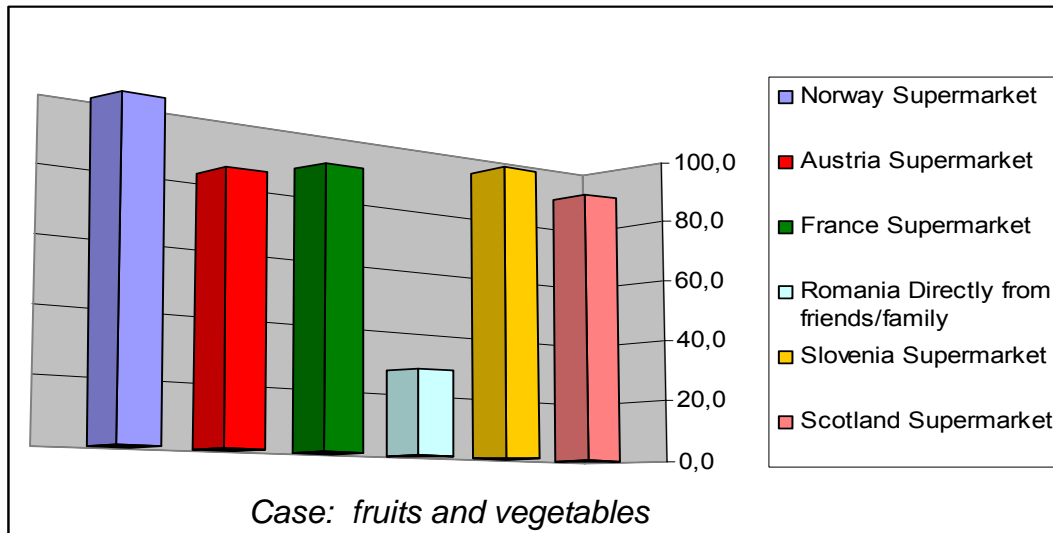
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## Every day food habits

Food is mostly bought at the supermarket.



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## Five most important attributes for respondents when buying everyday food

- Price/value for money
- Few additives
- Appearance
- Support to small scale production
- Local origin



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## From general food habits to mountain food products

- Dairy products
- Meat
- Water
- Some few fruits and vegetables
- Other



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## The two statements most of respondents agree most upon

- Mountain products are part of the cultural identity of local communities / connected to specific cultural areas
- Mountain products have to comply with industrial standards of hygiene



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## Where do respondents expect to buy MQFP?

- Directly from the producer
- Farmers' market and other markets
- Special shop (ex: butcher)
- From friends or family
- Regular grocery shops or supermarkets



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## When do respondents use MQFP?

- Tourism or visit at the production place
- Trying something new
- Every day use
- Week end use
- Dinner with family and friends



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# The preferred sticker for MQFP?

- Price: Low
- Label: Yes
- Origin: Local domestic
- Affect context: Photo of mountain



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## Qualitative approach



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# Mountain is a common good

Cultural knowledge, agriculture  
or/ and technology  
transform  
“natural” qualities  
into mountain food product qualities.



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# Mountain food is a part of the green world

- pure
- traditional
- local
- quality food



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## Different expectations in different situations

Eating, considering, expecting or perceiving MQFP is directly connected to a situated consumption:

one individual, consumer or “eater”, do not have the same opinion about, or expectation from, MQFP in different situations.



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## Consumers interest, perception and expectations ...

- Lack of knowledge
- Positive interest
- Lack of information



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## The image of mountain quality food products along the supply chain

Markus Schermer & Anja Matscher,  
University of Innsbruck – Austria

November 06, 2008



## Content

- Approach and supply chains

### Preliminary Results:

- Quality perception of mountain quality food products
- Promotion: suggestions on improvement and characteristics which should be promoted
- Bottlenecks
- Conclusion



## Approach

Example: The cheese supply chain „Bio vom Berg“



Over all 19 case studies from AT, N, FR, SL, UK,:

- 27 Farmers and agricultural delegates
- 21 Processors
- 39 Retailers, caterers

---

Σ 87 Interviews



## So far evaluated supply chains

	Fruit/Vegetable	Water	Dairy products	Meat
<b>Austria</b>		Montes Obladiser	Bio vom Berg Sennerei Zillertal Kaes.at	
<b>Scotland</b>				Balliefurth Farm Great Glen Game
<b>France</b>	Pommes et poires de Savoie Fraises des Monts Du Lyonnais	Laqueuille		
<b>Slovenia</b>			Mlekarna Planika Tolminc cheese Bovški cheese	Zgornjesavinjski želodec Mesnine Bohinja
<b>Norway</b>	Fjellmandel poteter from Oppdal Fjellmandel poteter From Vågå		Fenalår from Lofotlam Fenalår from Bjorli Fjellmat	





# Quality perception of mountain food products



## Are the case study products mountain food?

### Farmers:

- Case study products are **absolutely „mountain products“** (except Scottish farmers)
- Scottish farmers think quality is **due to handling** and not because of mountain

### Processors:

- Case study products are **absolutely „mountain products“** (except Scottish processors)

### Retailers:

- Retailers around the Alps (SL, AT, FR) perceive the case study products as **“mountain products”** unlike Scottish retailers
- Norwegian retailers value the **marketing** aspect
- For consumers the **local provenance** and the **quality** is more important than the **mountain origin** (N, UK)
- “Local products” are “short-travelled” and include often **“mountain food”**





## Influences of „mountain“ on quality

**No major differences** according to country or stakeholder group regarding to quality perception:

**Mountain:** high quality of input - high quality of output

- Extensive, small scale and **manual vs. intensive** mass production in lowlands
  - less use of pesticides
  - less polluted environment, pureness
  - less concentrate feed
  - silage-free and GMO-free production
- Forage/grass: high variety of herbs and grass species
- Pasturing: positive influence on the final product (meat and cheese)
- Climate: aroma for fruits
- Alpine conditions influence the ripening process (drying of meat)




## Quality aspects related to the „mountain“ provenance

Mountain conditions make the product unique:

- Nice taste
- Colour of the product
- Content e.g.:
  - high content of Omega fatty acids
  - without artificial additives
  - healthy ingredients (e.g. minerals), etc.
- Few do not regard quality as related to mountain provenance (UK, N)





# Suggestions for improvement of promotion



## Suggestions for improvement I

There is never enough marketing but ...

- ... critical if only **small quantities** produced (SL, AT) → **higher demand than supply**, only for short supply chains
- Stronger promotion of mqfps especially in **non mountain areas**
- Strengthening the consciousness of **children and younger people** regarding mqfp
- Better **organisation** of small producers/processors
- (Stronger) **cooperation** between **producers/processors** and actors of the **tourism** sector (SL)
- Stricter definition of **what is** a „mountain product“
- Clear distinction between **tradional small** processors and **industrial** processors of a mqfp



## Suggestions for improvement II

### Packaging:

- design of **packaging/labels** (pictures of the area of production)
- more **information** on mqfp on the packaging

### Improvements at the point of sale:

- organising **tastings** at the point of sale
- special trainings for the **salespersons**
- providing **promotion material** (folders, flyers) to retailers

### Stronger communication in the mass media needed:

- TV, radio, **lifestyle and health magazines**

### Other suggested means of communication were:

- installation of a **museum** about cheese
- offering **games** with prizes for solving riddles
- **certificates** for gastronomy
- **collective actions**: regional advertising campaign (UK)
- **unified marketing concept** for the alpine region (AT): only silage and GMO
- free dairy products



## Characteristics to be better promoted

**Combinations should be promoted, instead of single characteristics**

### Characteristics of production/processing

- natural environment within production takes place
- environmental friendly production, organic, GMO free
- traditional, small scale production, animal welfare

### Characteristics of the product

- contents (like Omega 3 fat acids)
- taste

### The (hi)story around the product

- authenticity and honesty
- scarcity and traditions

### Side effects of the consumption of mqfp (SL, AT):

- securing farmer's livelihood
- preservation of the landscape for tourists and local people
- preservation of local jobs





# Bottlenecks in the marketing of mountain products

- Mountain related bottlenecks
- Scale related bottlenecks



## Mountain related bottlenecks

### Farmers:

- **Costly** production
- Fluctuating, **seasonal** demand (tourism regions)
- High **transport costs** due to remoteness
- Difficult **management conditions** on mountain farms (manual work, expensive machinery)
- **Climate** related peculiarities in mountain areas (shorter vegetation period)

### Processors:

- Difficulties to comply with **hygiene regulations** (traditional processing plants)
- **Bad accessibility** of the processing plant
  - poor road conditions
  - remote location
  - higher transport costs

### Retailers:

**Limited** product range (no exotics)



## Scale related bottlenecks

### Farmers:

- **Limited production capacity** → Higher demand than possible supply (SL, AT)
- Constraints in **packaging and labelling**
- Farmers and food manufacturers have **no business training**
- No adequate **transport/distribution** system
- No collective **market organization** of small scale producers

### Processors:

- **Shortage** of raw material
- Traditional processing practices **laborious**
- Difficulties to find **appropriate machinery** for SME's (e.g. mineral water)
- **Lack of standards** leads to varying qualities and appearance
- To be listed in **retail chains**: high contributions, bar code
- Small scale businesses have **little negotiating power** (discounter)
- No small/independent retailers (concentration)

### Retailers:

- Mqfp are **too expensive** (esp. gastronomy)



Fluctuation in the **product quantities** (seasonality) and **qualities**

## Conclusions

- Mountain products are especially connected to **alpine countries**
- Mountain products have **unique characteristics** which should be promoted **specifically**
- Currently **little consciousness** that mountain products could be a **specific product category**
- Promotion should focus on **combinations** not single features
- Specific needs:
  - better coordination of **producers**
  - better coordination **along the SC**
  - better education in **marketing** for SME and direct marketers





Thank you for your attention

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[anja.matscher@uibk.ac.at](mailto:anja.matscher@uibk.ac.at)



## Session 2

# Adding value to mountain quality food products

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### Présentations :

*Premia for differentiated products at the retail level: can the market put a value on the mountain attribute?*

Philip Leat, SAC

*The influence of local initiatives on mountain product value-added chains*

Bernd Schue, ÖIR





## Premia for differentiated products at the retail level: can the market put a value on the mountain attribute?

Philip Leat, Cesar Revoredo-Giha, Chrysa Lamprinopoulou  
and Beata Kupiec-Tehan

Scottish Agricultural College – Edinburgh, UK

November 06, 2008



## Content

- Brief overview of the WP2 research
- Motivation for the presentation
- ‘Mountain’ as a differentiating attribute
  - Quality attributes and cues
  - Empirical approach
  - Results
- Conclusions and Discussion

## Brief overview of the WP2 research - 1

### Objectives of WP2 survey work

- To identify and analyse:
  - the market channels that are, and could be, used for mountain quality-food products
  - retailers' interest, perceptions and expectations of mountain quality-food products
  - the marketing attributes of mountain quality-food, and
  - factors inhibiting the marketing development of mountain quality-food products.
  
- To propose strategies to improve and expand the marketing of mountain quality-food products.



## Brief overview of the WP2 research - 2

- DL3 - contains a review of the marketing of mountain quality food products for each country in the project.
- 3 retailers' surveys have been carried out:
  - (1) shelves surveys, 90 per country (completed)
  - (2) face to face surveys, 20 per country (completed)
  - (3) postal surveys, 90 per country
- The shelves surveys were targeted at retailers who are actually selling mountain food products.
- The face to face and postal survey involved all food retailers.
- The structure of the DL8 document has been circulated, also summaries of the shelves surveys results for partners to write their country comments.
- Summaries of the postal questionnaire results are being generated and will be circulated in November.





Premia for differentiated products at the retail level:  
can the market put a value on the mountain attribute?



## Motivation

- The concept of a mountain quality-food product is a complex one, because it evokes different images for different consumers.
- The purpose of this paper is to explore whether the market puts a value on the 'mountain' attribute at the retailer level
- This is studied using prices from representative products from several European mountain ranges - Highlands, Alps, Massif Central, Norway.



## Quality attributes – 3 types

### Search attributes

- ascertained prior to a product's purchase (e.g. colour of meat, marbling, etc).

### Experience attributes

- cannot be determined prior to purchase, but can be ascertained during consumption (e.g. taste and texture).

### Credence attributes

- cannot be determined prior to purchase or during consumption (attributes which are believed to exist – e.g. the welfare conditions experienced during a lamb's life or whether a product's ingredients were actually produced in a mountain area).



## Categorisation of potential 'process' & 'product' quality attributes of organic meat from a mountain area

Process Attributes	Product attributes				
	Food Safety	Nutrition	Sensory	Functional	Image
Animal welfare (C)	Absence of Residues (C)	Fat content (S, E, C)	Appearance (S)	Product life (S and E)	Prestige Value (S, E, C)
Biotechnology (C)	Absence of artificial Hormones (C)	Energy content (C)	Taste (E)	Preparation Convenience (S and E)	
Organic production (C)	Absence of Additives (C)	Vitamins and minerals (C)	Texture (E)	Consumption Convenience (E)	Prestige value (S,E,C)
Traceability (C)	Absence of Toxins (C)		Tenderness (E)		
Feed and Feeding system (C)	Absence of Physical contaminants (E and C)		Juiciness (S and E)		
Mountain Production Environment (C)			Freshness and Taste (S and E)		Prestige value (S,E,C)
Treatment(s) in processing (C)			Smell (S and E)		

Note: S = Search attribute, E = Experience attribute, C = Credence attribute. The classification of the attributes into search, experience and credence is that of the authors.

Source: Developed from Northen (2000).



## Communication of Quality Attributes

- Consumers' perceptions of quality prior to purchase are based on **quality cues**:
  - stimuli which lead to the perception of certain quality attributes being present and which determine when, where and how a person responds (Kotler, 1980).
- **Intrinsic quality cues**
  - cannot be changed or manipulated without changing the physical characteristics of the product itself.
- **Extrinsic quality cues**
  - are related to the product but are not physically part of it.



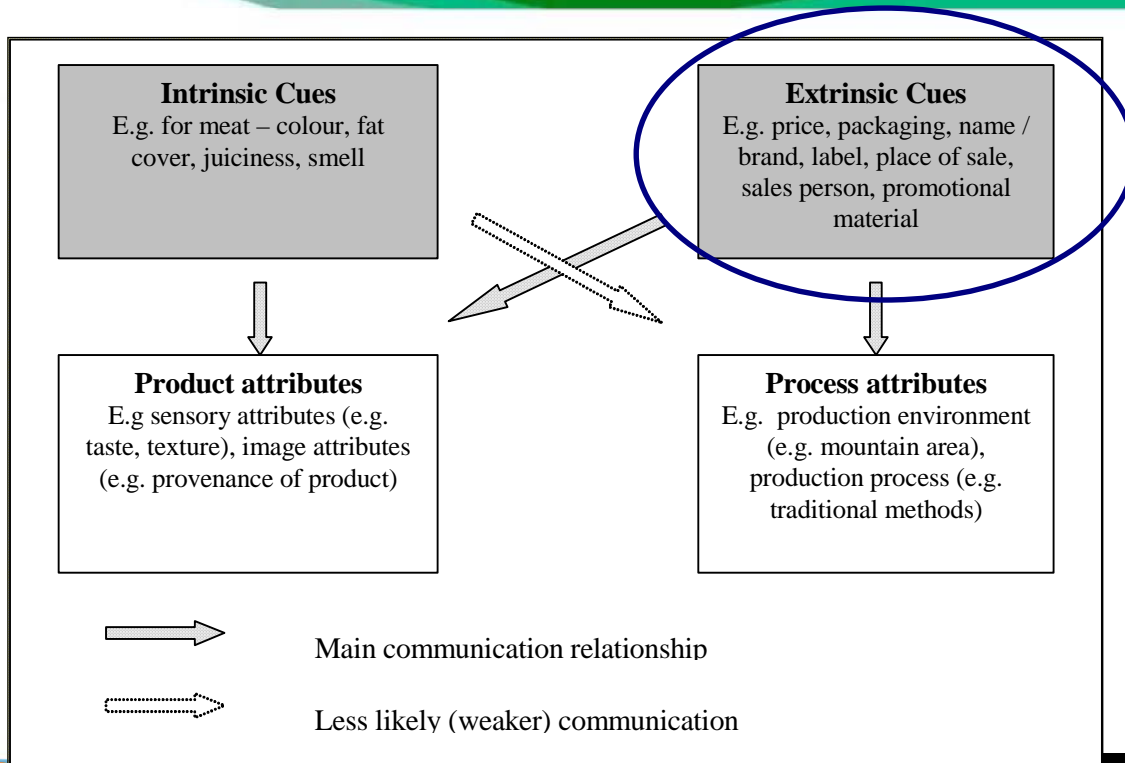
### Venison cues

- **Intrinsic, e.g.**
  - colour, leanness, fat cover, juiciness, type of cut, origin, etc.
- **Extrinsic, e.g.**
  - price, brand name, packaging, label information, point of sale information, presentation of product in sales outlet, reputation of outlet, activities of salesperson, other promotional activity, etc.

The influence of marketing



## Cues and attributes



## The shelves survey and its data

- What Mountain Quality Food Products are available – how are they marketed?
- 351 outlets, 564 shelves, 1765 products.
- 60% from mountain area shops, 40% elsewhere.
- 18 product categories – combined into 6 product groups: beverages, fruits, dairy, meat, meat products and other.
- Supermarkets, speciality shops, mini-markets and farmers' markets



## Empirical approach

- Based on information collected by shelves survey, hedonic price regressions were estimated for several products (apples, sausages, water and cheese) and countries (Austria, France, Norway, Scotland and Slovenia).
- The aim was to estimate whether the market is paying a premium for 'mountain' food quality products over the price paid for equivalent 'non-mountain' food products.



## Hedonic price regression

- The hedonic price method is a useful approach to study the price-quality relationship of a product.
- The method consists of a regression analysis of the price on the selected product characteristics. It has been widely used for both durable (e.g., automobiles) and non-durable goods (e.g. wine, cereals, foods).
- The implicit price of a characteristic is defined as the derivative of the price with respect to the product attribute.



## Results

	Austria	France	Norway	Scotland	Slovenia
Apples	--	<ul style="list-style-type: none"> <li>•No price difference between mountain and non-mountain products</li> <li>•Small non-specialised shops sell cheaper</li> </ul>	--	--	--
Sausages	--	<ul style="list-style-type: none"> <li>•Non-mountain product receives a premium</li> </ul>	<ul style="list-style-type: none"> <li>•No price difference between mountain and non-mountain products</li> </ul>	--	--
Water	<ul style="list-style-type: none"> <li>•Non-mountain product receives a premium.</li> <li>•Mountain shops are more expensive.</li> <li>•Non specialised shops sell at a cheaper price.</li> <li>•Flavoured water is more expensive.</li> </ul>	<ul style="list-style-type: none"> <li>•Non-mountain product receives a premium.</li> <li>•Specialised shops sell at a more expensive price.</li> </ul>	--	--	--
Cheese	<ul style="list-style-type: none"> <li>•Mountain product receives a premium.</li> </ul>	<ul style="list-style-type: none"> <li>•Non-mountain product receives a premium.</li> </ul>	<ul style="list-style-type: none"> <li>•Mountain product receives a premium.</li> </ul>	<ul style="list-style-type: none"> <li>•Supermarkets sell at a cheaper price.</li> <li>•Hard cheese shows prices below average, and blue cheese the opposite</li> </ul>	<ul style="list-style-type: none"> <li>•Mountain product receives a premium.</li> <li>•Prices in mountain area stores are cheaper.</li> <li>•Hard cheese is more expensive than the average and cream cheese is cheaper.</li> </ul>



## Conclusions and Discussion

- The theoretical framework on attributes and cues helps to reveal the nature of the “mountain” attribute in product marketing.
- The cues which convey the “mountain” attribute may in some instances be intrinsic (e.g. a distinctive taste or smell).
- In many instances the “mountain” attribute and its various aspects may need to be communicated by extrinsic cues (well-designed marketing effort) in the form of: labeling, packaging, a relatively high price, information from the sales person, etc.





## Discussion point

### Differentiation and the value of the 'mountain' attribute

Degree of Differentiation	Product provenance	Role of the 'mountain' attribute
<b>Homogeneous product (no differentiation)</b>	The product is produced in <b>both</b> mountain and non-mountain areas.	The attribute 'mountain' does not produce any discernible differentiation.
<b>Partially differentiated product</b>	The product is produced in <b>both</b> mountain and non-mountain areas.	<p>The attribute 'mountain' may differentiate the product, relative to the non-mountain substitute product, due to a special raw material, production environment, or production process.</p> <p>The 'mountain' attribute may create value, relative to the non-mountain product, and can be combined with other value creating attributes (e.g. Cairngorm Mountain Farmhouse Cheese).</p> <p>The 'mountain' attribute can be the basis of a quality label.</p>
<b>Totally differentiated product</b>	The product is <b>only</b> produced in mountain areas.	<p>With no direct substitute, the 'mountain' attribute may be enhanced with other value creating attributes (e.g. Cairngorm Mountain Heather Yoghurt) for differentiation from other mountain products.</p> <p>However, 'mountain' can still be the basis for a 'quality' label.</p>



## Conclusions - 1

- The analysis has sought to test whether the 'mountain' attribute carries or attracts a price premium relative to non-mountain products.
- A premium was only found in the case of cheese and only for Austria, France (though favouring non-mountain products), Norway and Slovenia
  - In Austria the premium was 1.125 €/Kg
  - In Norway, the premium was more substantial and equal to 23.1 €/Kg.(requires further investigation)
  - In Slovenia the premium was 2.5 €/Kg.



## Conclusions - 2

- Whilst the diversity of products creates challenges for the comparison, overall the results indicate that not all mountain products receive a premium, but in some cases the non-mountain products are more expensive.
- Thus, the existence of a premium appears to be very situation specific – depending on the product type, the mountain area (and possibly its association with food), the other value creating attributes embodied in the product, and the existence of substitutes.



Thank you for your attention

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## The Influence of Local Initiatives on Mountain Product Value-added Chains

Bernd Schuh, ÖIR



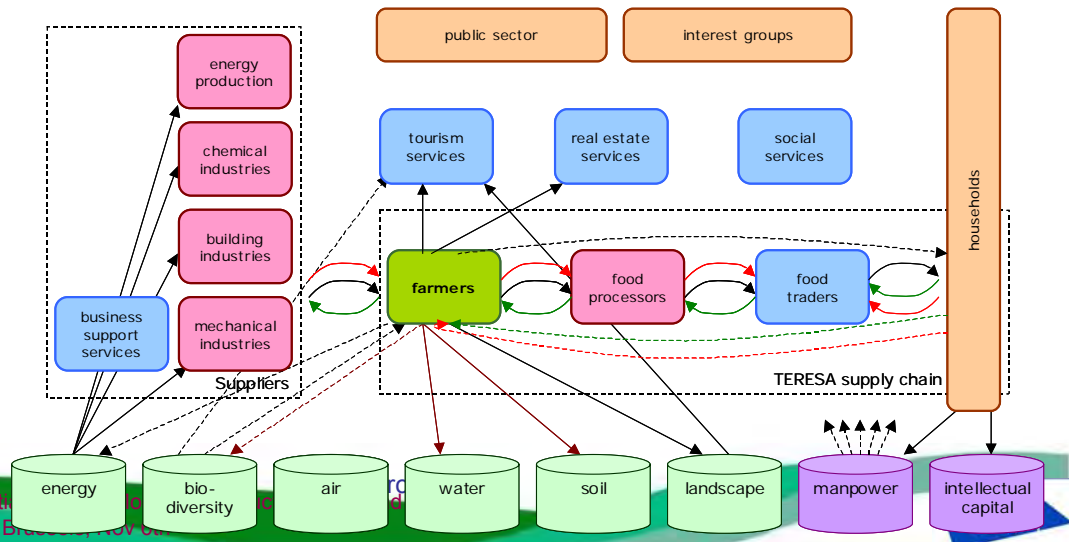
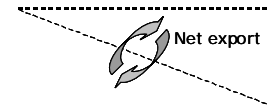
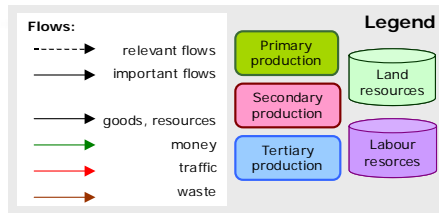
[www.mountainproducts-europe.com](http://www.mountainproducts-europe.com)

### Content:

- The vocabulary – agricultural value chains: how to capture them
- Are mountain products any different?
- Our approach in Euro-MARC
- The hypotheses
- Some preliminary findings

# Agricultural value chains – how to capture them:

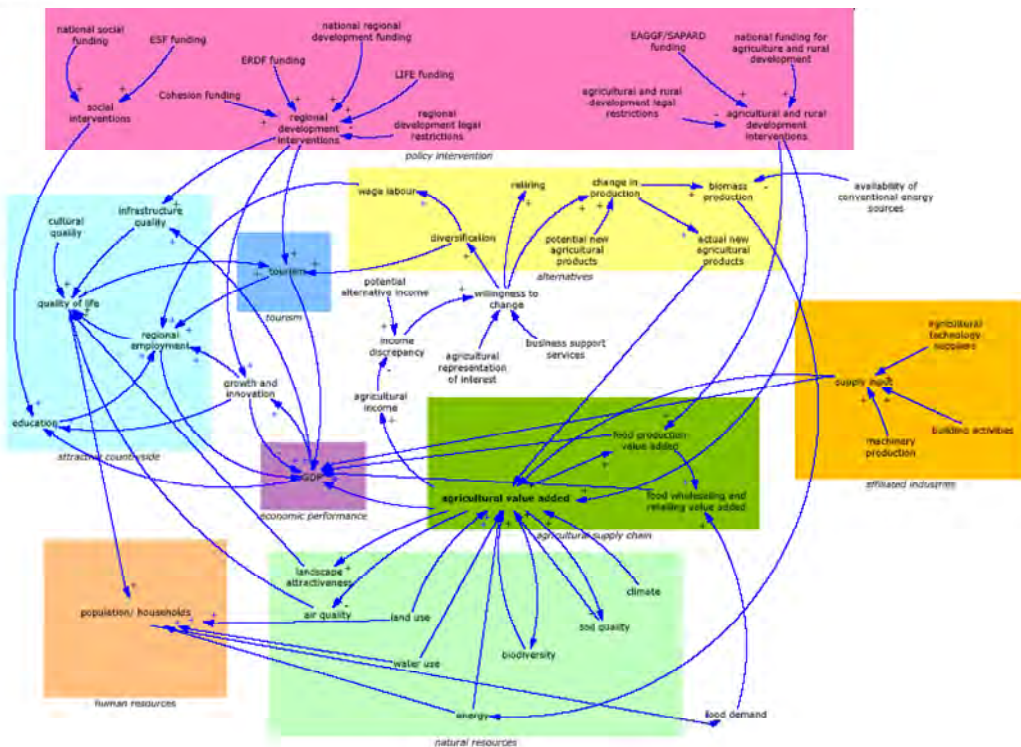
Example from – TERESA (types of interaction between environment, rural economy, society and agriculture in European regions) – 6th RD FWP



Local Initiatives for Sustainable Rural Development  
 Schuh – Brüssel, 10.11.2008

# Agricultural value chains – the complexity of interactions:

Example from – TERESA (types of interaction between environment, rural economy, society and agriculture in European regions) – 6th RD FWP



Local Initiatives for Sustainable Rural Development  
 Schuh – Brüssel, 10.11.2008

## Are Mountain Products any different?

### Mountain product value chains

- Relatively narrow range of possible products
- Geographical disadvantages (esp. Accessibility)
- ...leads to lower probability of a critical mass of entrepreneurial, innovative spirit

### Non-mountain product value chains

- Wider range of possible products
- Smaller physical barriers
- Higher probability of building critical masses of entrepreneurial, innovative spirit (see e.g. Volcano Land – Styria)



Local initiatives and Mountain product value-added chains  
Schuh – Brussels, Nov 6th

Euro-MARC

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## Our Approach in Euro-MARC

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

- In order to do so the main aim within this WP will be to test whether and how far LEADER/ LEADER like measures – as mainstreamed principle of rural development programmes of the EU, provides a basis for supporting (in the first place) the supply side of local food chains in mountain areas.
- WP-4 will therefore consist of an analysis of territorial local initiatives (inside and outside the LEADER programme) oriented towards marketing of mountain food products



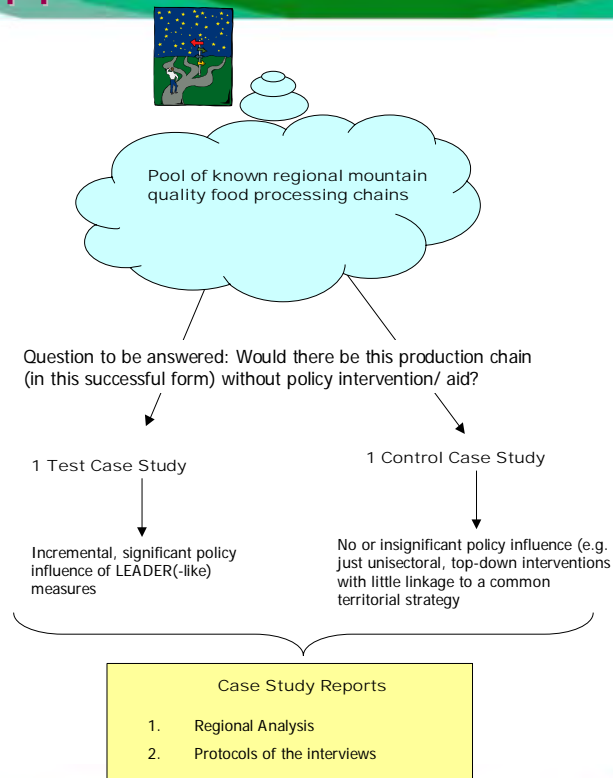
Local initiatives and Mountain product value-added chains  
Schuh – Brussels, Nov 6th

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# Our Approach in Euro-MARC II



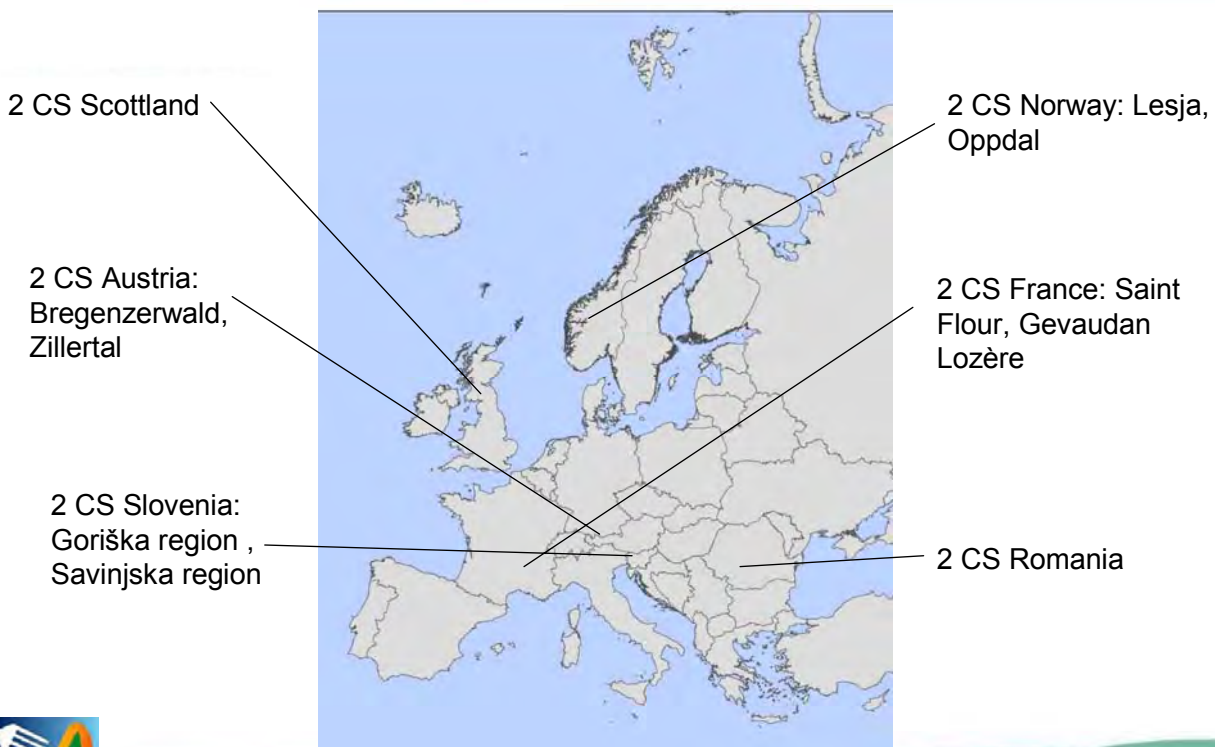
Local initiatives and Mountain product value-added chains  
Schuh – Brussels, Nov 6th

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## The Case Studies:



Local initiatives and Mountain product value-added chains  
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## What is a LEADER-like measure (LEADER principles)

**Seven operational principles** and one programmatic principle, which are commonly epitomized as the “**LEADER approach**” or “**LEADER method**”:

- The area-based approach
  - The bottom-up approach
  - The local partnership
  - The multi-sectoral, integrative approach
  - Innovation
  - Territorial cooperation
  - Networking
- and
- Decentralised management and financing



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## What are those measures supposed to effect - hypotheses

LEADER has ...

- addressed and fostered **local identities**, the sense of belonging, and feelings of allegiance, and turned them into drivers for local development;
- **strengthened the capacities of local people** and their representatives to articulate their needs and to get access to adequate resources to achieve their aims;
- provided an **organisational framework** to plan, implement, monitor and evaluate territorial development concepts at local level;
- unbound new options and dynamics for local development by putting the emphasis on the **linkages between different sectors**, as well as between private, public and civic activities;
- fostered **social interaction and organisational ties** between different actors, contributing to a more balanced representation of interests at local level;
- prompted local actors to **create positive images and strategic visions** based on endogenous resources and values, thus improving the competitiveness of their area in the context of a globalised economy;
- contributed to **building up local governance structures** capable to cope with complex tasks and to assume responsible roles with regard to sustainable development.

(Source: Lukesch, Schuh: The Legacy of LEADER – Final Conference of the LEADER Observatory Network 2007)



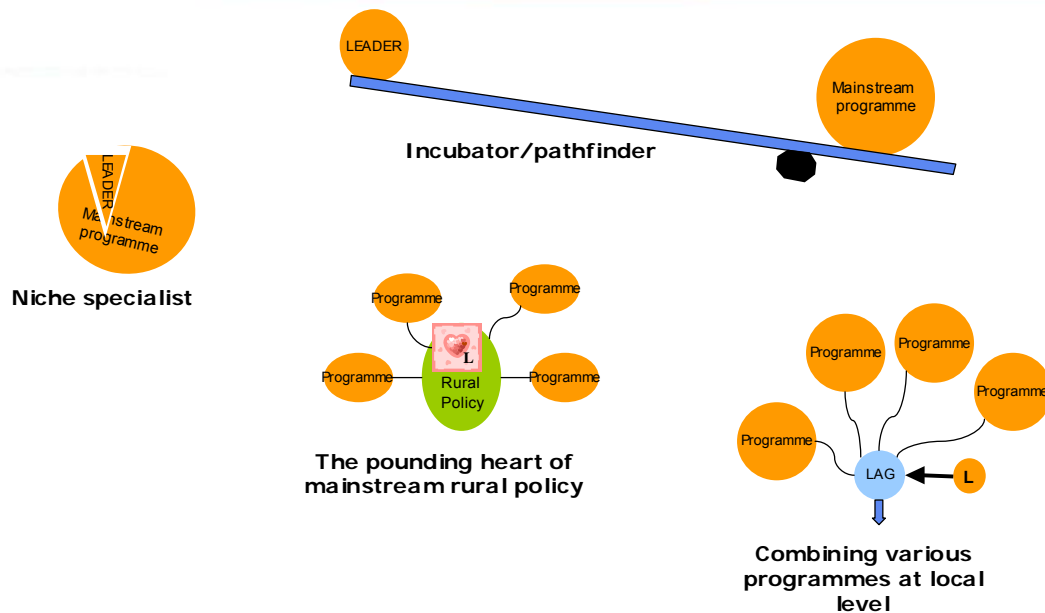
Euro-MARC  
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## ... but LEADER played quite different roles:



... therefore not always the same outcome and effect on the regional scale.



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## Some preliminary findings:

- LEADER/ LEADER like measures certainly supported value chains – in different roles: seed money, initiator, bridging function between sectors
- BUT...**
- LEADER is not everything → without critical mass of entrepreneurs, innovative thinkers and some risk – no development in regional setting of rural areas (incl. Mountain areas is possible)
  - Thus mountain product value chains rely on people in place capable and willing to carry on this development.
  - Policy support can not replace the disadvantages of mountain areas – accessibility, lack of services, brain drain, demographic change, but may offer remedies to symptoms.



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Local initiatives and Mountain product value-added chains  
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## Session 3

# Which policies to enhance the development of mountain quality food products?

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### Presentations :

*The mountain foods process: evaluation of the options offered by national and EU legislations and policies.*

**Robert Mac Morran, Martin Price, UHI**

*The evolution of labeling schemes*

**Francis Fay, DG Agri, European Commission**



## The Mountain Foods Process: Evaluation of the options offered by National and EU Legislation and Policies

Euro-MARC WP5: Rob Mc Morran and Martin Price  
Centre for Mountain Studies, UHI - Perth College



1. Multi-scale policy review - key constraints & opportunities for mountain foods
2. Review policies relevant to the promotion & labelling of mountain quality-foods
3. Identify synergies & discrepancies between policies
4. Recommendations



The Mountain Foods Process: Evaluation of the options offered by National and EU Legislation and Policy.  
Rob Mc Morran and Martin Price, Brussels, 6<sup>th</sup> November, 2008



# Mountain and Labelling Policy Reviews

- Phone interviews
  - Mountain policy (30)
  - Labelling policy (20)
  
- National / EU:
  - Government / NGOs / Researchers / Regional agencies



## Use of Terminology at the policy level

Country	Level of definition and understanding of.....		
	The term 'mountain' in national policy	The term 'mountain foods' in national policy	The term 'mountain foods' among the general populace
Norway	No criteria/definition	Not used/defined	Understood as a general term; not in common usage
Slovenia	No national criteria (LFA)	Not used/defined in policy	Used as a term but not in common usage
Scotland	No national criterion (LFA) <i>'Agriculture not occurring in mountains'</i>	Not used/defined in policy	Not used or well understood
France	Defined: LFA system and national policy (Mountain Law)	Mountain Food can use French Mountain Label from Mountain Law	Relatively well known. Consumers not always clear on meaning of labels
Romania	Defined using LFA system and national policy	Not used/defined in policy	Reasonably well-known, perhaps not in frequent usage
Austria	Defined using LFA system	Not used/defined in policy	Relatively well known



# Terminology – Key Points

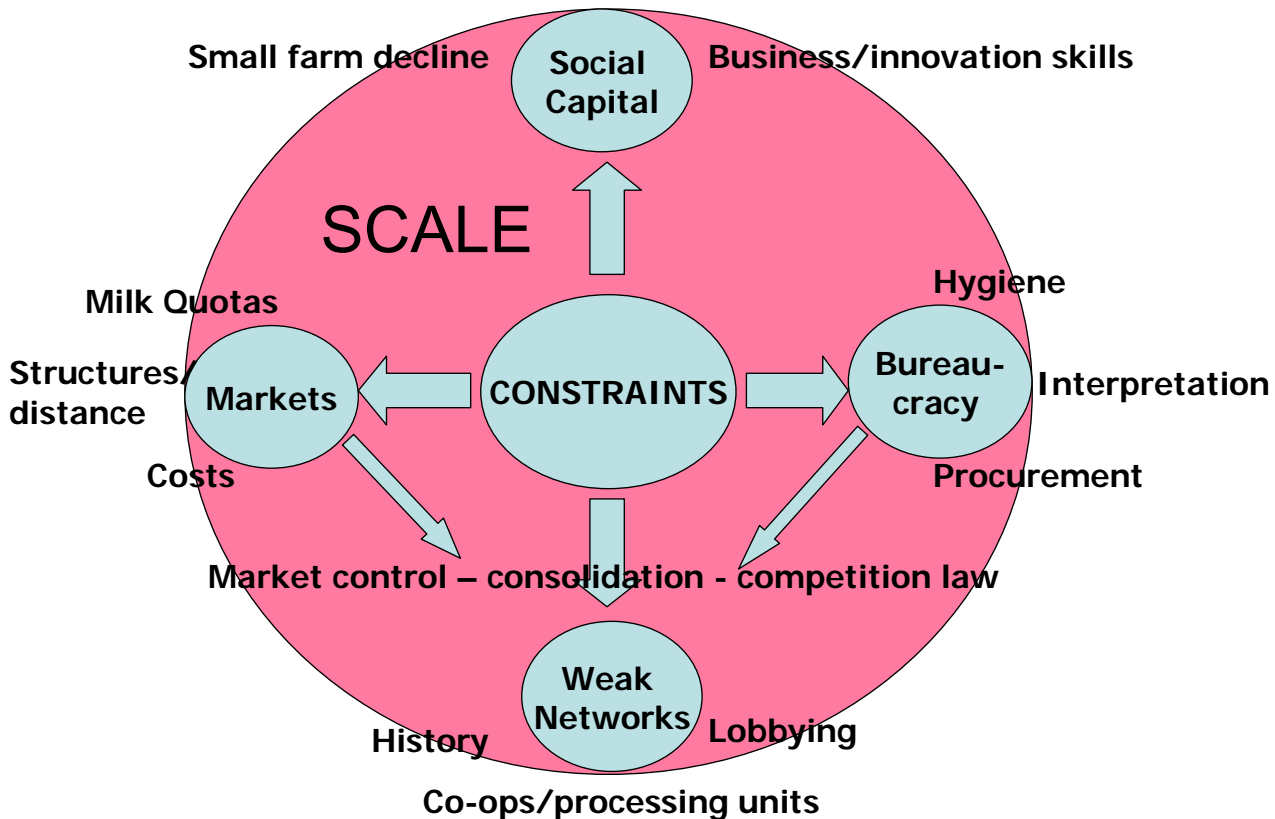
- Other terms – speciality, farm, traditional, regional (foods) – preferred by some
- Norwegian / Scottish respondents:
  - Support all disadvantaged farmers!
  - ‘Mountain Foods’ inappropriate
- 60% support (EU) definition of mountain regions / foods
- EU less supportive – support **national** initiatives



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



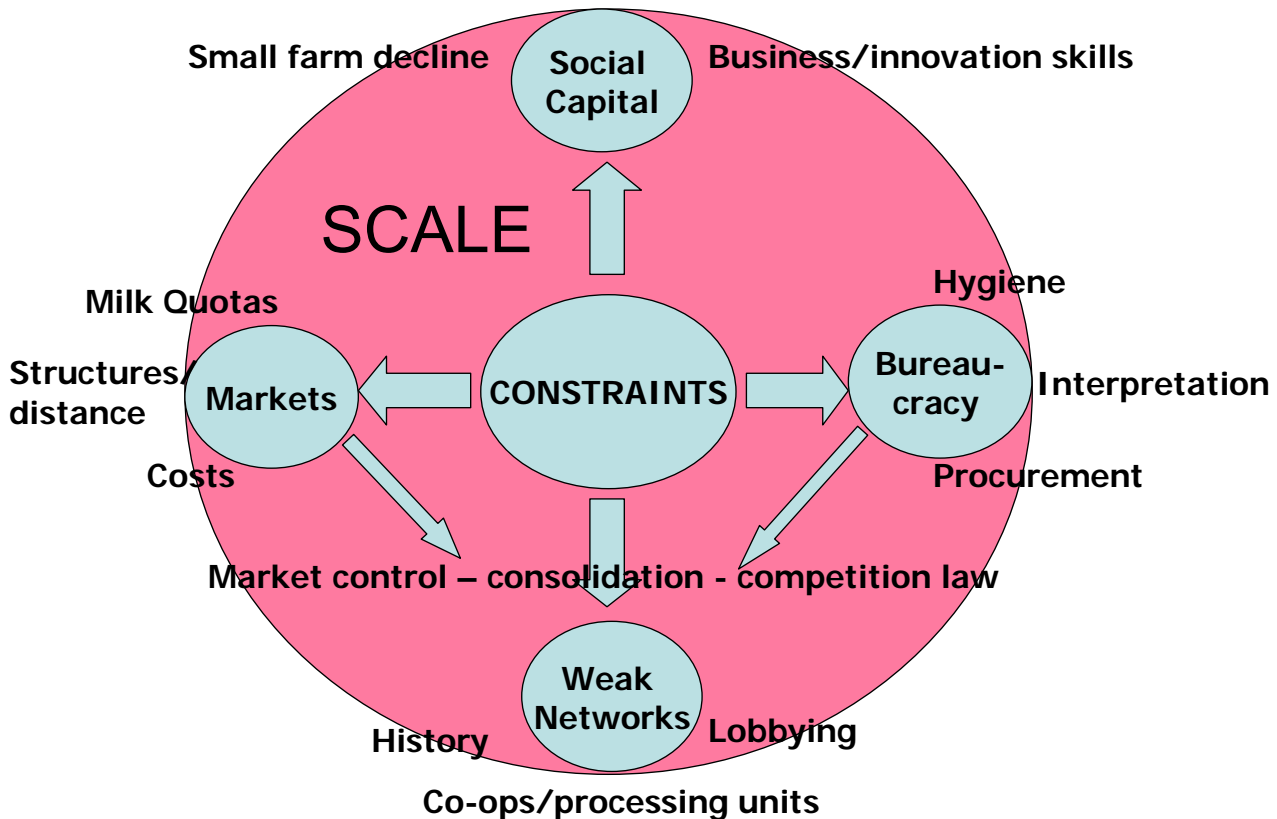
## MOUNTAIN FOODS PROCESS - POLICY



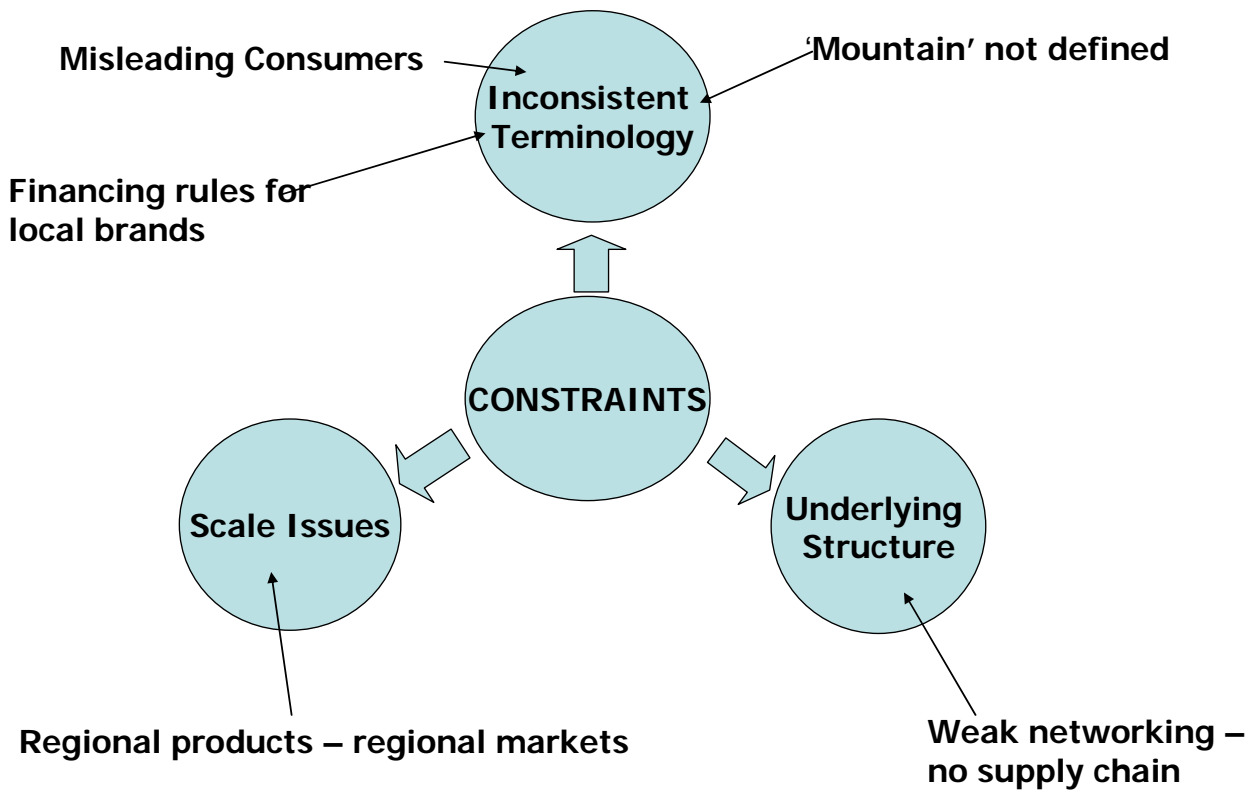
# MOUNTAIN FOODS PROCESS - POLICY



# MOUNTAIN FOODS PROCESS - POLICY



## Non-EU Schemes - CONSTRAINTS



## Non-EU Schemes - OPPORTUNITIES

- Marketing standards – reserved terms
- EU Labelling Strategy (70-80%)
  - Clarify use of regional names
  - Define key terms (criteria)
- Regional development – Food networks
  - Lead regional products



## An EU Mountain Quality Food Label ?

### Why an EU Label?

- Generic constraints – high benefits
- Consumer-producer link at EU level – high-profile
- Milk quota gap
- Clarify terminology – align non-EU Schemes
- Mountain Foods Charter
  
- 50-60% supportive (Round 1)
- 60%+ supportive (Round 2)



## An EU Mountain label – CONSTRAINTS

- Scottish / Norwegian / EU respondents less supportive
  - -most **effective** and **efficient** way?
- Why Mountains? – Not defined outside LFA
- ‘**Confusion Hypothesis**’
- EU labels = international marketing tools: unsuited to regional marketing?
- **HNV Scheme** – conflict or complementary?





## Possible Levels of Action for EU Mountain Food Labelling

1. **EU Regulated Mountain Products Scheme (criteria?)**  
PDO/PGI – beyond origin? – stocking densities? – organic?
2. **NGO-led / private collaborative EU Mountain Quality Scheme & label; centrally monitored or self-regulating?**
3. **Define key terms in EU Marketing Standards (optional reserved terms); “Mountain Product”**
4. **EU Strategy for Non-EU labelling schemes (definitions; criteria)**



## Possible Levels of Action for EU Mountain Food Labelling

- **OR** – EU High Nature Value (HNV) label (extensive agriculture)
- **OR** development of a holistic EU ‘sustainable foods’ labelling system (e.g. ‘Gut So’ in Austria)





## WP5 Conclusions and Recommendations

1. MQFL – Difficult at EU Level - Labelling alone insufficient; -  
-integrate policy & recognise benefits
2. EU-wide food labelling strategy and national strategies  
– major potential
3. Member State policy interpretation / implementation  
guidelines
4. Regional development: high-quality regional lead products /  
networks
5. Integrate regional agriculture / food in sustainable regional  
initiatives (e.g. biosphere reserves, organic regions,  
national parks)



Respond to the Green Paper!  
THANK YOU !





## **Evolution of labelling schemes**

***Green Paper on agricultural product quality:  
farming requirements, product standards, and quality schemes***

***EuroMARC seminar  
Brussels  
6 November 2008***



## **Evolution of labelling schemes**

***Green Paper on agricultural product quality:  
farming requirements, product standards, and quality schemes***

***EuroMARC seminar  
Brussels  
6 November 2008***



## Quality is a strength of EU agriculture

- Farmers need to respond to:
  - Globalisation
  - Consumer demand
- EU Farmers compete on quality
  - Baseline production requirements and marketing standards
  - Higher value-added farming attributes

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## EU intends to improve its quality policy to help farmers:

- provide products with the qualities that consumers want;
- guarantee these qualities, and
- effectively communicate these qualities to their buyers and to consumers

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## Policy development: consultation

- Step by step approach
- 2008: Consultation of all those involved in the food chain from the farmers to the consumers, the traders to the retailers (**Green Paper**)
- May 2009: Strategic policy orientations also open for consultation (Communication)
- 2010: Legislative proposals to adapt the EU quality policy

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## Green Paper: 3 parts

- I. Production requirements and marketing standards
- II. EU quality schemes:
  - PDO/PGI, TSG
  - Organic farming
  - Outermost regions
  - Other...?
- III. Food quality certification schemes



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# I. Farming requirements and marketing standards

- Farming:
  - How to make better known EU farming requirements?
  - EU label?
- Products:
  - Simplification of marketing standards
  - Use of reserved terms:
    - 'farmhouse', 'mountain' ?*
  - Retail sale of 'unaesthetic' product?

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# II. EU quality schemes

- PDO-PGI: major policy review
- TSG: 20 registrations in 15 years
- Outermost regions: impact and development of scheme
- Organic farming: functioning of the EU market
- What else is needed?
  - Mountain? High nature value? Ecolabel?*



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### III. Certification schemes

- Private and national/regional
- Build on conference 2007
- Issues:
  - Consumer confidence
  - Farmer burdens of multiple certification
  - Functioning of single market
- Guidelines?

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### Case for a labelling scheme

- What is the problem?
- How best to address the problem?
  - Public / Private scheme; national / regional/ EU level*
- Simplicity and clarity for participants
  - Costs and benefits for farmers and consumers*
- Control burdens:
  - Certification structure:
    - Competent authority; control body; accreditation authority*
  - Labelling mechanism in marketing standard:
    - CMO control*

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## Future developments

- Reminder: consultation on the Green Paper  
**15.10.2008 — 31.12.2008 only**
- Stakeholder responses: on-line
- Summary report *planned* March 2009
- Czech Presidency Quality Conference  
*planned* March-April 2009
- ‘Communication’ (strategic orientations):  
May 2009

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**Thank you for your attention!**

**Francis FAY**  
Deputy Head of Unit  
DG Agriculture and Rural Development

**Quality:** [http://www.ec.europa.eu/agriculture/quality/index\\_en.htm](http://www.ec.europa.eu/agriculture/quality/index_en.htm)

**Green Paper:** [http://www.ec.europa.eu/agriculture/quality/policy/index\\_en.htm](http://www.ec.europa.eu/agriculture/quality/policy/index_en.htm)

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## Concluding session

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Presentation :

*EuroMARC work plan*

Georges Giraud, ENITA Clermont-Ferrand





# EUROMARC

## Perspectives & Workplan

G. Giraud  
ENITA Clermont



[www.mountainproducts-europe.com](http://www.mountainproducts-europe.com)

### Initial Work Plan

month	2007												2008												2009											
	F	M	A	M	J	J	A	S	O	N	D	J	F	M	A	M	J	J	A	S	O	N	D	J	F	M	A	M	J	J	A	S	O	N	D	J
WP-1	Survey of consumers' perception of mountain quality-food products																																			
WP-2													Survey of retailing of mountain quality-food products																							
WP-3													Survey of food supply chain actors' strategy towards mountain quality-food products																							
WP-4													Local initiatives case studies oriented towards mountain quality-food products																							
WP-5													Mountain policy: rural development, quality food, labelling, regional policy																							
WP-6	Integrating framework												cross-tabulated analysis and modelling																							
WP-7																									Guidelines for marketing and promotion											
WP-8	Publication and dissemination to the stakeholders, integration of their feedback																																			
WP-9	Coordination																																			

- Data collection almost achieved, time to harvest
- Implementation of diverse protocols, unequal but congruent
- Slight delay of data formatting for integration into same WP



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## Consumers and mountain: image vs knowledge

- **RQ1:** What do consumers comprehend as mountains and/or as mountain areas?
- **RQ2:** What do consumers comprehend as mountain products?
- **RQ3:** Which general symbolic values do consumers connect with mountain products?
- **RQ4:** What level/range of knowledge do different consumer groups have about the production of
  - mountain products produced by small scale farmers
  - products marketed by adopting images of mountains?



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## Consumers and small scale producers in mountain area

- **RQ5:** How do consumers differentiate between mountain products produced by small scale farmers and (mass) products marketed through adopting images of mountains?
- **RQ6:** What are the congruencies, what are the discrepancies between (small scale) producers and consumers concerning their perception of and values linked to mountain products?
- **RQ7:** What are possible strategies to improve the communication between (small scale) producers and existing and potential consumers of mountain products?
- **RQ8:** What are possible strategies to increase consumers' comprehension of the processing pattern concerning the production of mountain products?



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## Mountain food products, marketing channels and promotion incl. tourism

- **RQ9:** What are the optimal ways to take benefits from the tourism-related (rural or ski-resort) opportunities of consumers' experience of mountain-quality food products?
- **RQ10:** What are the distinguishing features and implications of the marketing environments – incl. urban, rural and mountain locations - within which mountain food products are marketed?
- **RQ11:** Which marketing channels are most effective, within these marketing environments, with respect to markets performance and wider economic, environmental, social and cultural benefits?
- **RQ12:** What strategies can be promoted by rural development agencies and organisations to support and disseminate good practice with respect to the marketing of mountain foods?



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## Issues raised from first results analysis

- Mountain food products seen by consumers:
  - Dairy: At, Fr, Slo
  - Meat: No, Sco
  - Spring water: Fr
- Mountain quality food products / consumers :
  - Low responses for MQFP, higher for MFP
  - No response MQFP/MFP: +38% No, Sc, x4 At, Fr
- Direct sale, farmer's market & self-production
- Lack of familiarity & knowledge MQFP



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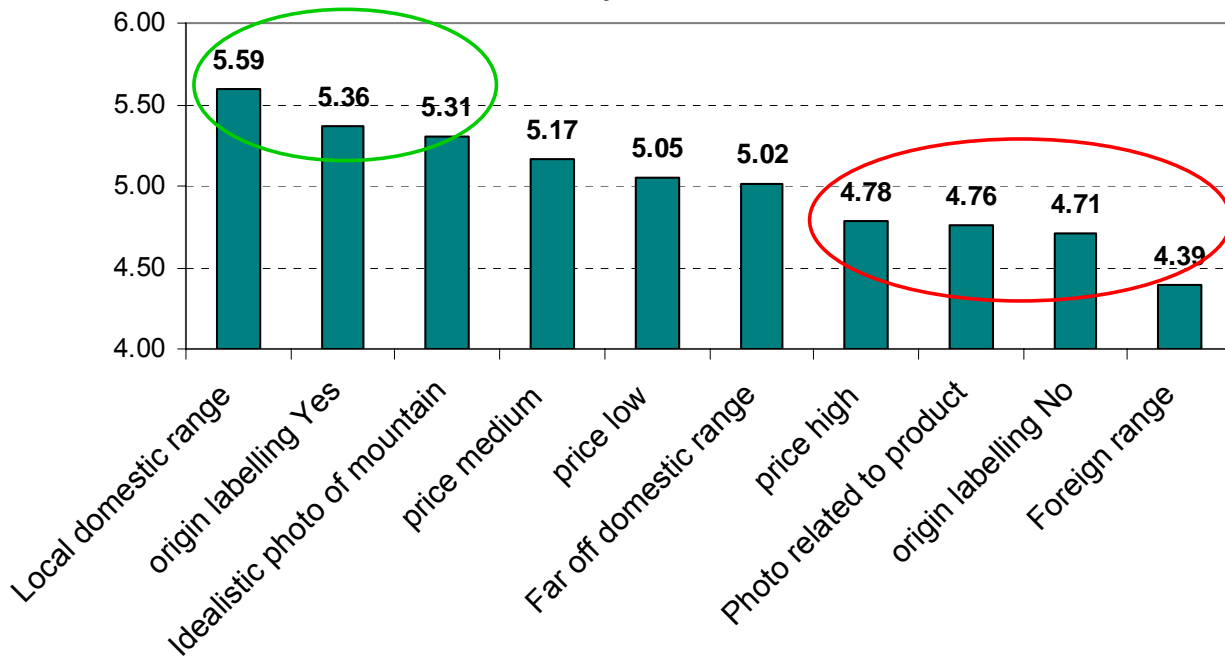
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## Main expected vs rejected mountain attribute

means ranks of attribute\*modality in all Euromarc countries N=1870



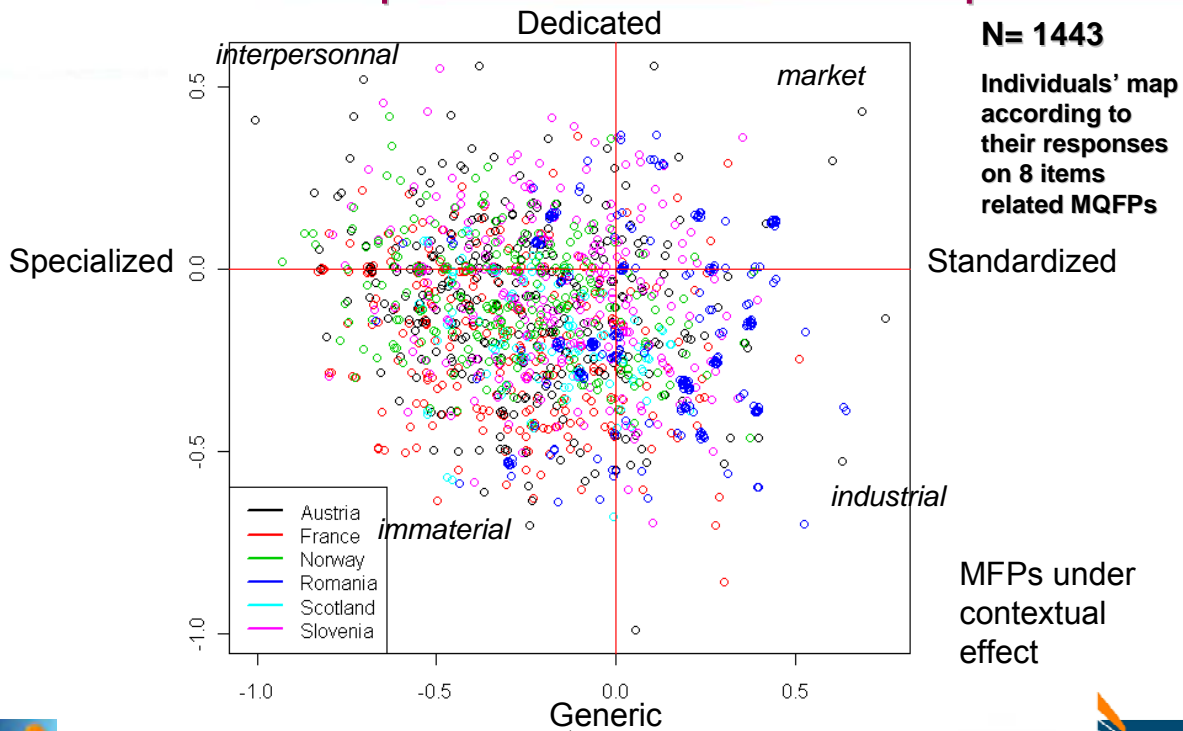
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## MFQP mainly perceived through immaterial and interpersonal relationships



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## First results from retailers, supply chains & local initiatives

### Strengths & weaknesses

- Intrinsic attributes better perceived than extrinsic ones
- None price premium for MQFPs / retailers' brand strategy
- Mountain origin is not *per se* leading to better quality
- Local provenance & quality more than mountain origin
- PDO & PGI coverage limiting factor
- Positive side effects of MQFPs consumption

### Opportunities

- Agri-tourism & tourism as positive contextual effect
- Higher demand than supply
- Networking & local collaboration & initiatives, a key issue
- Policy shift towards products not production



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## Workplan

### Forthcoming activities

- Integrating framework, cross-tabulated & deeper analysis, and modelling
- Guidelines for marketing and promotion of mountain quality-food products
- Publication, dissemination to stakeholders, integration of their feedback

### Dissemination & publications

- Good practice example for production of traditional quality food? Conference Institute of Agricultural Economics, Belgrade, Dec 07, UM FK
- Consumers and their perception of mountain quality food – using the example of two mountain food products from Austria, German JAL of Agricultural Economics, UIBK, 2008
- The role of consumers within localized agrofood systems in Mountain area, Oct 2008, IV° SYAL congress, ENITAC
- Consumers' perceptions of mountain quality food products in Norway & Slovenia, EAAE congress, Aug 08, Ghent, SIFO, UM FK
- Spatial marketing for MFP, INRA-SFER-CIRAD, Paris, Dec 08, ENITA-C, ISARA-L
- Consumers' perception of the concept of mountain food products, Conference Institute of Agricultural Economics, Belgrade, Dec 07, UM FK SIFO



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## Liste of invited experts, speakers and chairmen

NAME	ORGANISME
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### Invited experts

Balling Richard	Ministry of Agriculture of Bavaria, Germany
Caminades Vesna	Autonomous Province of Bolzen, Italy
Christine Mueller	OFAG, Switzerland
Frédéric Morand	Eco-innovation, Belgium
Livia Dömölki	OFE, Hungary
Noëlle Paolo	CNIEL, France

### Speakers and chairmen

Francis Fay	DG Agri, European Commission
Alexia Rouby	Euromontana
Bernd Schuh	ÖIR
Georges Giraud	ENITAC
Marie Guitton	Euromontana
Markus Schermer	UIBK
Martin Price	Perth College
Philip Leat	SAC
Rob McMorran	Perth College
Virginie Amilien	SIFO

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With the help of : Ilias Papageorgiu, Frank Gaskell, Martin Price, Philip Leat