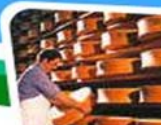




European Mountain Agrofood products, Retailing and Consumers



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

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

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- Approach and supply chains
- Preliminary Results:
- Quality perception of mountain quality food products
  - Promotion: suggestions on improvement and characteristics which should be promoted
  - Bottlenecks
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# 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 **traditional 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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