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Organically and regionally produced food in Germany : a survey of concepts in Saxony, Bavaria and Thuringia

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Abstract

Summarising all recent studies about the development in the organic-food sector the "organic-boom" seemed to be no fashion trend, but a sign of a long lasting change of consumer demand. Among the consumers also a positive attitude exists towards regionally/locally produced food. This can be explained by the consumers' opinion that these products are more natural and with better taste than others. Maybe the consumers' concepts that "regional products are healthy" and "organic food is healthy" explain why "organically and regionally produced food" combines the consumers' desire to buy organic food and to know its origin.
The aim of this report is to analyse the concepts of organically and regionally produced food currently existing in Germany. In Germany, a number of projects concentrate on organically and regionally produced food, especially in some regions : Saxony, Bavaria and Thuringia.
With the implementation of the concepts, the relevant Ministries tried to support organic agriculture in communication and advertising, but there are various problems that are mostly identical to the different projects. Regional marketing concepts and advertising materials cannot put emphasis on the individual users' images. Therefore the number of users is small and the concepts are not widely accepted. Nevertheless, on condition that the knowledge of food origin gains in importance, the offering of specialities like organically and regionally produced food may support the individual image of the users in a growing competitive market.
Finally several theses are formulated evaluating the development of the markets for organic food and for regionally produced food as well as the impacts thereon caused by the growing globalisation of consumption patterns.

Keywords : organic food, regionally produced food

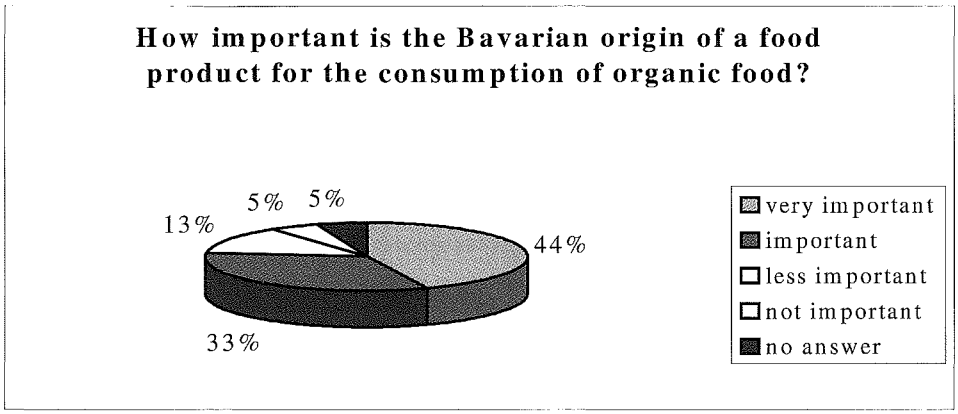
INTRODUCTION

A summary of all recent studies on the development in the organic-food sector shows clearly that the "organic-boom" is no fashion trend, but a sign of a long lasting change of consumer demand. Retailers like Rewe or Tengelmann decided to make organic-products a constant part of their product range. While the consumers demand for conventional produced food has not grown as fast as the offers, the prices for retailers, processors, and especially for producers have been decreasing for years on the German food market. Natural food shops, however, recorded increases in the turnover of organic-food during the last years. Survey results illustrate the positive image of organic food and the increasing demand for it, but there also exists an uncertainty when trying to recognise such products. One reason is the existence of too many organic-labels from different associations, regions and states.

At the same time several studies show the positive image of regionally produced food in different regions of Germany and other European countries. Among the consumers a positive attitude exists towards regionally/ locally produced food. This can be explained by the consumers' opinion, that these products are more natural and with better taste than others. The image of regional food strongly depends on the type of product, e.g. concerning beef, to know its origin is always connected with confidence. In Germany, as in other countries of the EC, it is increasingly recommended for single regions to develop regional marketing concepts (WIRTHGEN et al. 1998, p. 31).

BALLING (1999, pp. II-9) found out that the knowledge of origin of a food product is (very) important especially for the consumers of organic food. So 77% of the Bavarian consumers would prefer to buy regionally produced organic food (see figure 1).

Figure 1 : The importance of Bavarian origin of a food product for the consumption of organic food



Source : Umfrageinstitut Peinelt, München, 1998. In : BALLING 1999, p. II-10.

Maybe the consumers' concepts of "regional products are healthy" and "organic food is healthy" explain why "organically and regionally produced food" combines the consumers' desire to buy organic food and to know its origin. In Germany, a number of projects focus on organically and regionally produced food, especially in some regions : Saxony, Bavaria and Thuringia. The Ministry of Agriculture in Saxony created the concept *Öko-Punkt Sachsen* (organic-point of Saxony), the Ministry of Agriculture in Bavaria created the concept *Öko-Qualität garantiert aus Bayern* (guaranteed Bavarian organic quality), and the Ministry of Agriculture in Thuringia the concept *Thüringer Öko-Herz* (organic heart of Thuringia).

The aim of this survey is to analyse the concepts for *organically* and *regionally* produced food currently existing in Germany. The following report is based on literature review from the different projects.

1. ORGANIC AGRICULTURE IN GERMANY

1.1. Organic food market

Since the beginning 1980s, organic agriculture[1] has developed very quickly in Germany. In 1998, the turnover of the organic market was estimated to be between 3 and 4 Mio. German Mark, that means 1.2 to 1.5% of the whole turnover of the German food-market (BNN 1999. p. 17). For the most part, products are sold either through direct marketing (farm-gate sales and market stalls) or through natural food shops (estimated : together < 50% of the turnover). Supermarkets have gained importance as a marketing channel for organic food during the recent years (estimated : 20% of the turnover). Health food shops and special shops like bakeries and butchers account for 8% of the turnover each. Finally, bulk purchasers/gastronomy and dispatch services account for 2% of the turnover each.

1.2. Organisation of the organic movement in Germany

The "Association of Organic Farming Organisations in Germany" (AGOEL) is the umbrella organisation of organic producers and unites nine different organic organisations. Their names are Demeter, Bioland, Biokreis Ostbayern, Naturland, ANOG, ECO VIN, Gäa, Ökosiegel and Biopark. Each of these organisations has a label of its own. In the end of 1998, 7,231 AGOEL-farmers are cultivating almost 360.000 hectares according to organic guidelines of AGOEL and its organisations and according to ECC-regulation 2092/91, more than 416.500 hectares are certified according to ECC-regulation 2092/91. Altogether 1.8% of all German farmers cultivate respecting organic guidelines on altogether 2.4% of the entire agricultural surface (ZMP 1999, p. D).

1.3. Consumer attitude towards organic food

The consumer attitude towards organic food has been the object of a large number of studies[2]. Summarising the results, the reasons for the consumption of organic food are the association of organic food with healthy products and the distrust in regard of conventional agricultural techniques. As well in the perception of the consumers, organic food is covered with a positive image. The barriers to further consumption are : the higher price level in comparison with conventionally produced food, a lack of availability, as well as a lack of confidence and information. Despite this barriers, a growing demand for organic food can be notified.

2. THE KNOWLEDGE OF FOOD ORIGIN

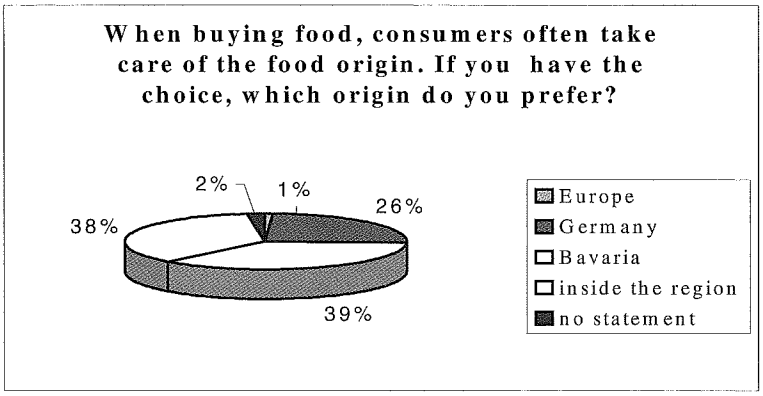
Scandals around food production like BSE and recently Dioxin, and the discussion concerning the use of new technologies in the food production process cause and intensify the consumers' reservation towards modern agricultural methods and food technologies. While these scandals reinforce the uncertainty of the consumers, their behaviour is increasingly influenced by the concept of "environmentally beneficial". With the growing uncertainty, the knowledge of food origin is becoming more and more important.

The results of several studies in Germany point out : in general, a local food is appreciated quite positively. HENSCHE et al. (1993, p. 127) indicate that almost one third of the interviewees in North Rhine-Westphalia would prefer regional food. According to HAMM et al. (1997, p. 34) the consumers' reasons to buy regional food are the association of better taste on the one hand side, and the assumption to maintain jobs in the region by consuming regional food on the other hand side.

Additionally local food is regarded more natural than conventional food. The individual attitude towards local products appears to be a complex phenomenon influenced by a various aspects. Food origin represents an added value, since it arouses the consumers' patriotic feelings (GUERRERO et al. 1998, p. 14). According to TROGNON (1998, p. 19) this added value may be a relation between regional identity and quality factors, synonymous of specific quality, even of high quality. Apart from that, according to WIRTHGEN et al. (1998) the consumers prefer regional food because of the image of the region or because of political reasons (supporting the region, ecological aspects).

In Bavaria, several consumer surveys were carried out concerning the importance of food origin and the preferences of different origins in the buying process. 77% of the interviewed Bavarians prefer food produced inside their own region (see figure 2) (BALLING 1997, pp. II-17). The importance of origin strongly depends on the type of the product, e. g. meat and eggs, as well as milk was preferred when produced in Bavaria.

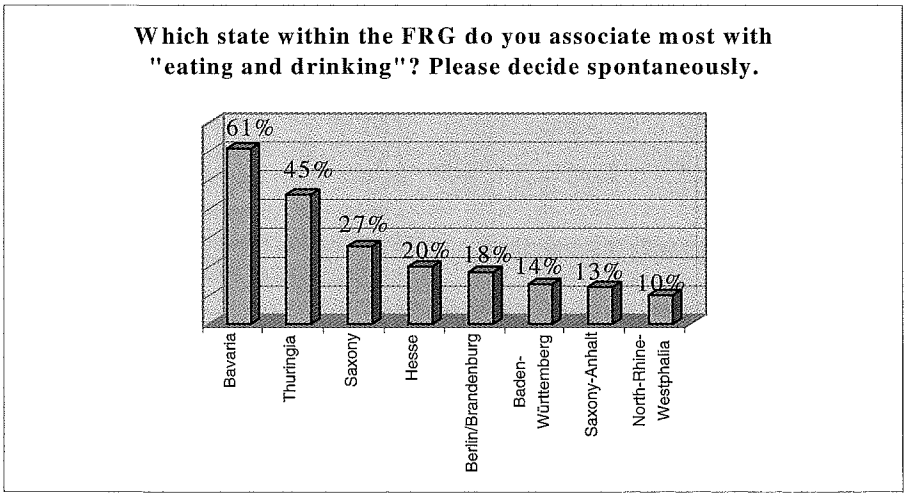
Figure 2 : Preferences of different origins in the buying process



Source : Umfrageinstitut Peinelt, München, 1998. In : BALLING 1997, p. II-17.

Regional specialities are offered in the different states of the Federal Republic of Germany. When asking consumers which states they associate with "eating and drinking" (see figure 3), more than 60% of the interviewed think of Bavaria, 45% of Thuringia and 27% think of Saxony (IM 1997, p. 1). That means that especially in Bavaria regional specialities play an important role, followed by Thuringia and Saxony. Therefore, these states seemed to be destined to initiate regional concepts.

Figure 3 : Associations of different states within the FRG when thinking of "eating and drinking"



Source : IM 1997, p. 1 (figures).

The consumers in the so-called "new lands" behave different from the consumers in the "old lands" of the Federal Republic of Germany. For 67% of the inhabitants of the new lands products of the relevant region play a significant role, while they are important for 37% of the interviewees in the old lands (IM 1997, pp. 4).

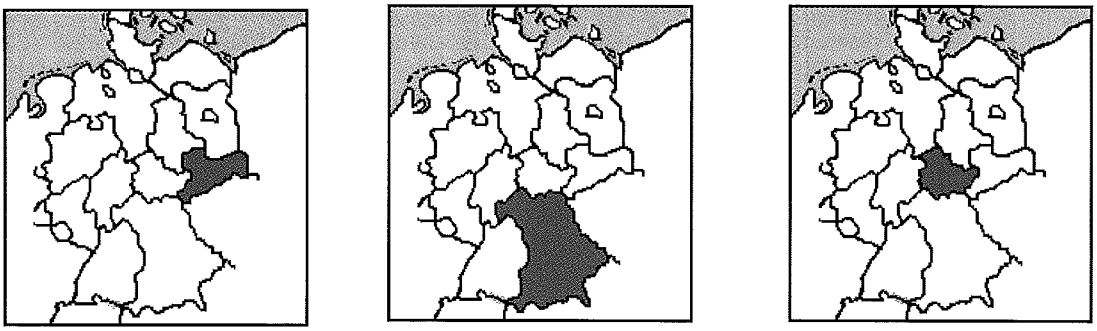
3. CONCEPTS FOR ORGANICALLY AND REGIONALLY PRODUCED FOOD IN SAXONY, BAVARIA AND THURINGIA

In Germany, a number of projects focus on organically and regionally produced food, especially in the following regions : Saxony, Bavaria and Thuringia. All concepts are based on a label that makes it possible for the consumer to identify the kind of production : the organic production mode and the regional origin of a food product. One idea behind the creation of region-specific labels is the concept of image transfer. According to SCHLEYERBACH and ALVENSLEBEN (1998, pp. 78) the concept of image transfer describes the mutual transference and amplification of associations between products of different categories. As to organic and regional products, the associations referring to the region on the one hand and the positive image of organic food on the other hand were transferred to the product and communicated by the label. Providing the image-transfer has been successful, the knowledge of food origin in combination with organic production gains a key-position in the process of product perception.

The majority of food origin labels put emphasis on the origin aspects. According to TROGNON (1998, p. 23) a regional image includes aesthetic, geographical, cultural and technological dimensions. The image of a region is evoked and expressed by a territorial identity, a geographical name. "Bavaria" for example mostly evokes for Germans the images of high mountains, pure landscapes and traditional lifestyle. The visitors see this region as holiday area by remembering emotional holiday feelings, the inhabitant see the area as their native land.

In the following, the projects of organically and regionally produced food in Saxony, Bavaria and Thuringia will be described. Figure 4 shows the relevant states within the Federal Republic of Germany.

Figure 4 : The states Saxony, Bavaria and Thuringia within the FRG



Saxony Bavaria Thuringia

Source : http://userpage.chemie.fu-berlin.de/adressen/bl/bundeslaender.html.

	Saxony (East-Germany)	Bavaria (West-Germany)	Thuringia (East-Germany)
Organic Agriculture	▪ 1989 : 5 farmers on 17 hectares ▪ 1998 : 165 farmers on 12611 hectares ▪ 1.4% of the area under organic production ▪ average farm size : 76 hectares (Agriculture Ministry of Saxony 1999, pp 2).	▪ 1989 : 1196 farmers ▪ 1998 : 2815 farmers on 73041 hectares ▪ 2.2% of the area under organic production ▪ average farm size : 27 hectares Organic agriculture thus plays an important role in Bavaria. More than a third of the area cultivates organically in Germany can be found there (StMELF 1998, p. 6).	▪ 1990 : 20 farmers on 6200 hectares ▪ 1998 : 143 farmers on 15043 hectares ▪ 1.8% of the area under organic production ▪ average farm size : 105 hectares (Agriculture Ministry of Thuringia 1999, pp. 2).
Concept	***"Öko-Punkt Sachsen"*** ▪ Saxony was the first state of the Federal Republic of Germany, which created a concept of organically and regionally produced food. In 1994, the Ministry of Agriculture determined the conditions of the concept. ▪ The aim was to create a concept and a sign that counteract the consumers' uncertainty when buying organic and regional food. ▪ The created label (see figure 5) is a combination of organic-label and country of origin label : the "organic point of Saxony". ▪ The administration of the concept is organised by Gäa e. V., an organisation under the roof of AGOEL.	***"Öko-Qualität garantiert aus Bayern"*** ▪ In 1996, the Ministry of agriculture in co-operation with organisations of organic agriculture created the communication concept and the sign of "organic quality, of guaranteed Bavarian origin" (see figure 5). ▪ The aim of the concept is to guarantee high food quality in organic and regional production and processing. ▪ One of the motives was the insufficient development of the traditional marketing channels for organic food. Supermarkets as an additional marketing channel for organic food have gained more importance during the last years. But, their efforts to create their own brands have not been very successful, as little as the efforts of the different organisations of organic agriculture to gain of foothold in the supermarkets.	***"Thüringer Öko-Herz"*** ▪ The concept of the "organic heart" was implemented in 1995. ▪ The aim was to create a concept that would enable consumers to identify organically and regionally produced food. ▪ The concept is administrated and communicated by the so-called "*Förderverein Thüringer Ökoherz e. V.*", an association founded in 1991 to support organic agriculture in Thuringia. The label was created by this association as well (see figure 5). ▪ In 1995, the Ministry of Agriculture implemented the label as the official label for organic products of Thuringia.

Figure 5 : The labels of Saxony, Bavaria and Thuringia

	Saxony (East-Germany)	Bavaria (West-Germany)	Thuringia (East-Germany)
Conditions	1. The user of the sign must produce according the EEC guidelines 2092/91 for organic production. Once a year independent controlling- and certification bodies must control the user. 2. Production and processing according to the basic guidelines of AGOEL. 3. The ingredients of organic food must be of organic origin to 95% and produced in Saxony to 75%.	1. See Saxony. 2. See Saxony. 3. The ingredients of organic food must be of organic origin to 95% and produced in Bavaria to 80%. 4. Processing according to EEC-regulation 1836/93 (voluntary participation in common systems for environmental-management and -controlling).	1. See Saxony. 2. See Saxony. 3. The ingredients of organic food must be of organic origin to 95% and produced in Thuringia to 75%.
Users	At the moment 42 enterprises of different sectors use the label, for example farmers, dairies, mills and bakeries.	At the moment 40 enterprises of different sectors use the label, for example farmers, dairies, mills and bakeries.	At the moment 21 enterprises of different sectors use the label, for example farmers, dairies, mills and bakeries.

	Saxony (East-Germany)	Bavaria (West-Germany)	Thuringia (East-Germany)
Fees	a) Farm production : 240 DM b) Processing and selling : Fees per year depend on the turnover : up to0.5 Mio DM ⇨ 480 DM from 0.5 to 1 Mio DM ⇨ 1200 DM from 1 to 2 Mio DM ⇨ 2400 DM from 2 to 6 Mio DM ⇨ 7200 DM more than 6 Mio DM ⇨ 9000 DM (Ministry of Saxony 1998, p.4.)	There are no fees to pay, but the users had to pay the administration costs (Ministry of Bavaria 1998, p. 13).	a) Farm production from 0 ha to 49 ha ⇨ 100 DM from 50 ha t 100 ha ⇨ 200 DM from 101 ha to 1000 ha ⇨ 300 DM more than 1000 ha ⇨ 400 DM b) Processing and selling : Fees per year depend on the turnover : up to 0.25 Mio DM ⇨ 250 DM between 0.25 to 0.5 Mio DM ⇨ 500 DM between 0.5 to 1 Mio DM ⇨ 1000 DM more than 1 Mio DM ⇨ 1500 DM c) Farmers with possibilities for farm-gate sales : 100 DM (Ministry of Thuringia 1995, p. 11).

	Saxony (East-Germany)	Bavaria (West-Germany)	Thuringia (East-Germany)
Problems	With the implementation of the concept, the Ministries initiated the support of organic agriculture in communication and advertising. There are various problems that are mostly identical to the different projects : ▪ In particular in the first phase of implementation the availability of the labelled products had to be guaranteed in the whole state. Organisation problems like insufficient quantities and qualities of regional organic food are critical points. ▪ In regard of nation-wide activities of retailers, the use of regional labels cause organisation and communication problems. According to SCHAER (1999, pp. 304) state-labels for example are competitive to their own labels and brands. ▪ Regional marketing concepts and advertising material cannot put emphasis on the individual users' images. Therefore the number of users is small and the concepts are not widely accepted.		

4. DISCUSSION

4.1 Organically and regionally produced food

The present survey can only give a short impression of the structure and the organisation of marketing concepts for organically and regionally produced food existing in Germany at the moment.

The aim of all concepts is to create a basis of confidence to counteract the consumers' uncertainty in regard of food origin and production processes. Regional labels for organic food can be a response to the consumers' demand to know the origin in combination with the ecological production process of a food product. Consumers of organic food in particular seem to prefer food produced in the relevant region.

Nevertheless, the concepts can be discussed critically. The market volumes of organic food and of regional food seem to be very limited. The assortments of big retailers in Germany contain only a small range of organic food and in most of the cases only few regional products.

4.2 The organic food sector

The increase in organic agriculture in Germany has not been as impressive as in the neighbour countries, Austria and Switzerland. In Austria for example, nearly 9% of the area is under organic production and nearly 8% of the farmers are working according to organic guidelines (ZENNER and ZIEHLBERG 1998, p. 1). The obstacles to the development in Germany may be seen in different sectors, for example the insufficient market channels for organic food. The organisation within the organic movement is inadequate to guarantee high quantities of equal qualities of raw material, necessary for processors and big retailers. Additionally, for the last years, government policy has strongly supported the producers of organic food, but not the development of marketing channels and processing facilities. Over a long period of time, the implementation of a common organic label was demanded (HAMM 1999, p. 1). It was demonstrated that the consumers' uncertainty in the recognition of organic food is one of the strongest obstacles to the development of the organic food market.

It can be hoped that the organic food sector in Germany will receive a push from the new common organic label that was discussed more than 10 years by the different organisations within the organic movement (see figure 6). At the beginning of 1999, the common organic label *Öko-Prüfzeichen* (OEPZ) was presented in public. AGOEL and CMA (association for agricultural marketing in Germany) create it. In the last years, it was not possible to advertise nation-wide for organic food neither in television nor in newspapers because an identification symbol for organic food was lacking. With the introduction of the OEPZ, better advertising will become possible[3].

Figure 6 : The new common label for organic products in Germany

Source : http://www.soel.de/infos/internat/deutschland/d1999.htm.

4.3 Strategies for further development of the organic food sector

Concerning the development of the organic food sector, two strategies are possible : a national and a regional scale. The further nation-wide development of organic agriculture strongly depends on the consumers' behaviour. In order to facilitate the access to organic products for more consumers, they should be available in common food shops like supermarkets. Product range, quality and convenience characters of organic food have to be as good as those of conventional food. The price level should be closer to conventional food than it has been in the past.

The further development of health food shops, market stalls and farm-gate sales can be influenced negatively by the further distribution of organic food in supermarkets. Special services, e. g. a product range of organic food out of the region, may be a possibility in the competitive market. On condition that the knowledge of food origin gains in importance, by offering a range of regional products traditional marketing channels can

compete with big retailers. Retailers as well can see regional food as a market segment, although a small one. The offering of regional specialities may support their individual image in a growing competitive market, too.

4.4 Thesis about a further development of organic and regional concepts

Summarising the results of the survey of concepts of organically and regionally produced food in Germany, nine theses need to be discussed

Consumer behaviour :

1. With further scandals in food production processes, the knowledge of food origin becomes more and more important.
2. Growing distrust in modern production and processing technologies influences the demand for organic food.
3. Concepts of organically and regionally produced food meet the consumers demand for organic food on the one hand and the knowledge of origin on the other hand.

Users of organic and regional concepts :

4. In most of the cases, nation-wide retailers do not have advantages by using regional labels because of their nation-wide activities and because of the private label and branding strategies.
5. Due to growing competition, to improve a personal image becomes increasingly important. The offering of specialities like organic and regional food may support the individual image in a growing competitive market, even if at the moment this market segment is small.
6. Organic and regional concepts seem to be interesting for traditional marketing channels in the organic food sector like health food shops, market stalls or farm gate sales. Those special offerings may be a possibility to compete with common retailers.

The common organic label in Germany :

7. The use of the new common organic label (OEPZ) not only on a nation-wide scale but also in the different regional concepts can be a possibility to combine advertising efforts. Provided that the different states agree on one and the same label common advertising could be realised for the other regional concepts, too.

European dimension

8. Tendencies of regionalism can be discussed as contrary to a growing European Union. Nevertheless, the initiating of regional concepts does make sense in regard of the consumers' demand of knowing of the food origin. The integration of regional concepts into a growing European Union, for example as "Region in Europe", might be pointed out.
9. Against the background of further globalisation of the whole food market, an EEC-wide organic label is being discussed. Nevertheless, the sense of an EEC-wide label has to be discussed very critically. For the identification of organic food, the control-code on the organic food product should be sufficient.

NOTES

(1) Organic plant production is legally protected under EEC-Regulation No. 2092/91. In the past, organic animal production had to be carried out according to the guidelines of IFOAM (international federation of organic agriculture movements), in Germany according to the guidelines of AGOEL. Since July 1999, organic animal production is legally protected under the EEC regulation 1804/99 as well.

(2) Examples : ALTMANN and ALVENSLEBEN 1986, pp. 91 ; BAADE 1988, pp. 210 ; PLÖGER et al. 1993, pp. 43 ; PRUMMER 1994, pp. 207; FRICKE 1996, pp. 188.

(3) Further details of conditions, fees, control procedures etc. are not clear at the moment.

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