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Local food" from the processors' and retailers' point of view: A case study of Western Austria

Abstract: *The production of "local food" has gained importance in the public discussion during the last few years as a result of increasing general interest in food safety, as well as environmental concerns regarding food production and transport. Often-cited arguments for purchasing local products relate to their special qualities, to protecting the environment and to the idea of supporting local farmers. But what about the perspectives of other market actors? For food processors and retailers, local products could offer a means of product differentiation and hence help increase their competitiveness on markets. This paper summarises the most significant statements of nine interviews with food processors and food retailers in Vorarlberg, the most western federal state of Austria.*

Keywords: *local agricultural products, processing, retail, Austria, survey*

Introduction

Austria's provincial governments are in charge of implementing agricultural policy measures in accordance with national directives and programmes, as well as international law. It is also their responsibility to pay for or co-finance the implemented measures. The governments have some leeway in defining their priorities; and one can state that they are confident of support for their policies by a strong majority of the electorate and are willing to put this confidence to the test. In general, agricultural policies exist to meet the expectations and objectives of the population to a higher degree than would be the case in the absence of such policies. Accordingly, these policies should bring about a situation which is preferable over a situation without them. In this context, evaluation has become a standard procedure accompanying the introduction of new policies or changes to existing ones.

In 2009 the agricultural support system in Vorarlberg (the most western federal state in Austria, where agriculture is characterised by a predominant share of grassland and mountain farming) was evaluated on behalf of the provincial government (see Ortner et. al., 2009). The project pursued the aim of suggesting changes to the existing agricultural policy system in order to enhance its effectiveness and efficiency. Within the overall concept, one chapter addressed the significance of local agricultural production for the regional economy, with a special focus on local food processors and retailers. In the following sections, the most significant outcomes of this study are presented.

The demand for locally produced food has increased during the last few years in Austria, not least because of a rising public interest in food safety and the environmental impacts of food production and transport. According to a consumer survey conducted by Agrarmarkt Austria in 2008 (Schantl, 2009), the regional origin of agricultural products determines the shopping decisions of consumers to a significant extent depending on the product (e.g. within the product group "milk and butter" the origin of products is an important purchasing criterion for 64% of the surveyed consumers). The focus on locally produced food has been given a lot of attention by the various actors within the food chain over the last decade. Hence, many studies were conducted but most of them concentrated on consumer attitudes. In contrast, the main objective of the present study was to identify attitudes, expectations, problems and perspectives regarding "locally produced agricultural products" from the point of view of processors and retailers. Conclusions could help to improve and intensify the vertical cooperation between agricultural producers, processors and retailers.

Methodology

Expert interviews were chosen in order to answer the above questions. According to Atteslander (1995, p. 173) experts are persons who have special experiences and knowledge with regard to the matter of interest. The survey followed the principles of a non-standardised questionnaire. According to Dorandt (2005, p. 66) typical characteristics of expert interviews are directness and non-standardisation. In other words the interviewees articulate their opinion, attitudes and knowledge openly without a detailed, predefined questionnaire.
The questionnaire was half-structured, i.e. the interviews followed a loose outline in order to assure that all topics were addressed during each interview. Minor adaptations to the questionnaire helped respond to the characteristics of individual enterprises. The conception of the questionnaire was based on the main marketing aspects: product, price, promotion and distribution. For the selection of relevant enterprises, the Economic Chamber of Vorarlberg was asked to provide an appropriate list with potential interview partners. From this list enterprises with relevance for the local economy (e.g. number of employees, sales volume) were pre-selected in a first step. The final selection of enterprises took also into account the most important agricultural product groups of Vorarlberg (e.g. dairy and beef). Finally, nine interviews with representatives of the following branches could be arranged.

- 2 Meat processors (beef, veal, pork, lamb)
- 2 Fruit processors (fruit juices)
- 2 Retailers
- 2 Milk processors (dairy, cheese)
- 1 Marketing organisation for local products in Vorarlberg

With one exception, all interviews were conducted face-to-face between 15th of July and 11th of August 2009, lasting 45 minutes on average.

Interview Results

The following presents the most significant outcomes of the interviews. It should be noted that due to the case study character the interview results do not necessarily reproduce the opinions and attitudes of the entire food processing and retail sector of Vorarlberg. Nevertheless, some interesting conclusions can be drawn and should be reconsidered by all actors within the production chain in order to improve cooperation amongst them.

"Local food – regional production"

At the beginning of each interview, the interviewees were asked to express their spontaneous associations concerning the term "local food." As expected, the responses showed a wide spectrum of connotations but most of them could be merged to fit the dimensions of Table 1. An interrelation between a product and its geographic origin was expressed by all respondents and can be seen as one major aspect of local food. However, the specified associations were quite different. Some put the term "local food" on a level with the federal state of Vorarlberg (administration) while others associated natural or historical borders (e.g. Montafon or Lake Constance, including the neighbouring regions in Germany and Switzerland). The variety of statements matches the results of numerous mostly consumer-focussed studies. For example, Hand and Martinez (2010) summarise regional aspects of agricultural products from the consumer's point of view as follows: "Some consumers think of local foods as those that come from within certain political boundaries, such as their county, metropolitan area, state, or region. Studies of consumer purchases indicate that the location of origin may be a natural geographic definition of "local" for some consumers and that consumers are willing to pay a premium for in-state products and products from within the consumers' county."

Another important dimension of local food comprises "food safety" as described by keywords like traceability or quality labelling. According to the interviewees, processors and retailers of local agricultural products know the origin of their product and can even exert influence on the local supplier in order to provide certain qualities or quantities. This results in guidelines or specifications of control mechanisms that help to provide confidence in local food. In this context a working communication between all actors in the value added chain is vital.

Table 1. Spontaneous associations of the interviewees concerning the term "local food"

Geographic origin	Food safety	Emotionality, Tradition	Quality of food	Environmental, economic, social aspects
Region	Traceability	Typical products	Authenticity of products	Processing, personnel
Origin	Confidence	Recipes	Customisation	Sustainability (agriculture, rural development…)
Location	Assured origin	Solidarity with agriculture	Fresh products	Short transport
	Quality labels	Product history	"Ländle" label	
		Personality	High quality	
		Humanity		
		Nature, valleys, mountains, Alps		
		Variety		
		Cultivated landscape		

Source: Own survey

Besides associations with geographic indications, statements expressing emotions or traditional behaviours also played an important role for the respondents. Presumably this dimension represents a means of differentiation for many processors, or of highlighting their products from the masses. Some interviewed processors and retailers had grown up on farms and still had emotional links to "their" local agriculture. Furthermore, it is believed that traditional varieties and production processes, or special recipes, are of high importance for regional agricultural products (e.g. the special variety "Riebel" corn).

Quality, and all of its characteristics, is another aspect of local food that was often addressed by the interviewees. However, the special requirements of individual processors or retailers in terms of quality depend to a large extent on the product group. Number one in this context is freshness, which was directly linked with short transport distances.

Because of the close interrelation with up and downstream industries but also with tourism, agriculture plays a crucial part within the economy of Vorarlberg for many respondents. In this context a more sustainable orientation of the economy is demanded, not least due to the environmental impact (e.g. short transport distances, less CO2-emissions). At the same time the increasing demand for regional products represent an interesting market with growing potentials.

Significance of regional agricultural products for processors and retailers

The objective of this question was on the one hand to identify motives for food processors and retailers to produce or sell regional products, and on the other to determine what share of total revenue is derived by these products. Given the different business structures of the interviewed enterprises, the answers differed accordingly and were thus quite heterogeneous.

Five persons indicated that the processing or selling of local food resulted from the historical connection of their enterprises with the agricultural sector (e.g. historical background, tradition, origin from farms). Others stated that economic aspects are main reasons for the provision of locally produced agricultural products. In this context "regionality" is used as a strategy to distinguish local food from others. Especially in our globalised world of today, where economies are linked worldwide, consumers increasingly express a demand for regionally produced food. Furthermore, the majority of the interviewees remarked that in comparison to the other parts of Austria consumers in Vorarlberg behave more "patriotically" and have a strong preference for locally produced food.

Another reason for processors to use locally produced agricultural products is the possibility to exert a certain influence on suppliers in terms of quantities, quality characteristics or the date of delivery (e.g. special offers of traditional products). For two respondents, local food contributes to a sustainable economy in Vorarlberg. And, beyond preserving and creating jobs in the agricultural sector and its up- and downstream industries, some interviewees saw local food as a guarantor for maintaining the cultural landscape. Environmental benefits from the production and purchase of local produce were also mentioned (e.g. transport distances, CO_2 balance). The share of local products in terms of total revenue ranged from 10% to 60% in the participating enterprises, depending on the type of products processed or sold.

Acquisition of raw materials

The enterprises manage the acquisition of their raw materials quite differently (see Figure 1), depending predominantly on the kind of products processed or sold. With one exception, all enterprises acquire raw materials from Vorarlberg. One respondent was unable to give any specific indications concerning the resourcing market and estimated the share of local products at 20% to 25%. Taking into account the different shares of locally produced raw materials in the processed products raises an important question: What characteristics of a product (e.g. share of raw materials, value added) determine whether or not it can be declared as regionally produced food?

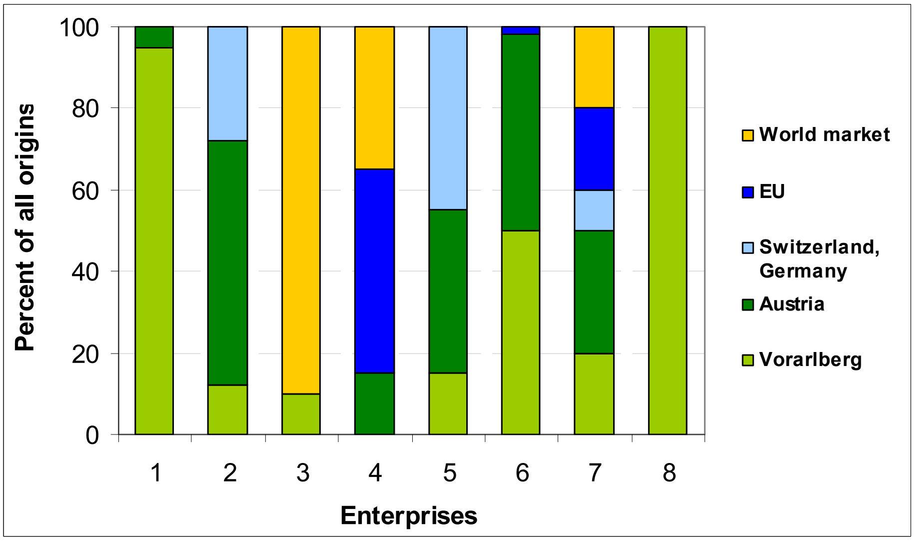

Figure 1: Acquisition of raw materials by the interviewed enterprises
Source: Own survey

Quality of local food

This question aims to assess whether processors and retailers associate special quality characteristics (e.g. guidelines, production requirements) with local produce. According to the different sectors of the participating enterprises the answers were quite heterogeneous. Basically all enterprises apply very high quality standards for all products and raw materials irrespective whether they are of regional origin or not. This applies not only for products but also for production processes. Such stringent demands result in high hygiene standards and quality management systems (IFS and ISO certification). In export-oriented enterprises the demand for high quality of regional products is rather less stringent than in enterprises with a focus on local markets. In most cases, enterprise-specific quality guidelines are applied for all products and raw materials independent of their origin.

For many interviewees local food has to be of high quality and should exceed the general quality standards of non-regional products. Depending on the product category, different Austrian quality labels and guidelines were mentioned (e.g. AMA, “Ländle” quality label). Higher quality standards of processed products may affect various fields of production and processing (e.g. animal husbandry, feeding, processing techniques). One example is the so-called “Alp pig” in Vorarlberg, which is fattened and fed with whey (by-product of cheese production) on alpine meadows during the summer season, with the meat sold exclusively in assorted shops.

It was mentioned that consumers who demand local produce do not only seek to purchase a product, like conventional milk or meat, but that they are seeking an additional benefit having special value to them – i.e. something that exceeds the fundamental benefit of food, which is essentially to satisfy one's hunger or thirst. Local products fulfil these special demands by ensuring short transport distances (environmental aspect), the traceability of the product's origin (food safety) and the support of local agriculture (social aspect), or even by communicating a unique, product-related story. The latter could refer to the manner of production (traditional recipes) but also to the story of an individual farmer. Especially for small enterprises the accentuation of additional benefits offers an opportunity to distinguish one's products from those of competitors on the markets.

"Regional" versus "organic" food

Organically produced food was associated with quality aspects by the interviewees. The comments on local and organic food are quite unanimous. It is believed that the buying motive "locally produced" is more important than "organically produced". The best alternative would be a combination of both. One interview partner stated that in comparison to local food, organic food is rather a niche product, as only a minor group of consumers regularly purchases the latter. Problems were mentioned concerning a constant availability of organic food in terms of quantity, quality and seasonality. Often foreign produce has to be used to fill the gap. This practice, described as "biotransit" by one interviewee, is opposed by the majority of surveyed enterprises.

Due to its small-structured character, agriculture in Vorarlberg is often perceived as nature oriented, environmentally friendly or close-to-organic production. The following statement reflects this opinion: "…in fact most farmers in Vorarlberg produce organically, they merely are not certified as such." This could explain the weaker awareness for organic products within the surveyed group.

Increases in the demand for organic products are predominantly seen in urban regions, especially in households with incomes above the average. It was also argued that not all products and production processes would fit in the organic scheme; and even worse, such products would undermine the authenticity of the organic idea, with non-perishable milk mentioned as an example. One interviewee cited an own study revealing that local production plays an important role for 80% of the consumers in Vorarlberg. But there are also differences between the various product categories. On the one hand bread and pastries are often purchased at local bakeries, which are embedded in the local economy. On the other hand retailers and supermarkets offer a wide range of yogurt from different producers, and consumer preference for locally produced yogurt is hardly a given. Furthermore, "variety seeking" – an intrinsic motivation to change brands within one product group – fosters changing purchasing practises.

Assortment of local food in Vorarlberg

Due to local climatic and topographic conditions, agricultural production in Vorarlberg is predominately based on milk and milk products. But what about other products? Is there a lack of locally produced agricultural product groups from the interviewees' point of view? The following section deals with this question.

Again, the answers were quite diverse depending on the product category. Because of the natural production conditions, the cultivation of cash crops plays only a minor role in agriculture in Vorarlberg. And the situation is similar for fruits, vegetables and potatoes. However, the surveyed persons did expect production potential for local farms, albeit with quantities remaining in a limited range.

The demand for meat from local production is not satisfied, with a production gap existing for pork in particular but also for poultry. This is not surprising given the grassland-dominated agriculture of Vorarlberg. But according to the interviewees there is also an additional potential for the production of regional beef. The interview partners furthermore reported poor carcass quality, which they said had been communicated to the farmers several times already but without the desired results (thus far). Hence, it can be concluded that both, quantitative as well as qualitative aspects in beef production represent potentials for farmers, and in turn also for the downstream processors and retailers. To a certain extent this applies also for small ruminants, like sheep and goats.

One critique relates to the fact that many farmers adhere to traditional production patterns (milk production) independent from market developments. In this context keywords like "dourness" or a "lack of flexibility" within local agriculture were expressed by the interviewed persons to describe the current situation. In addition, the respondents mentioned that especially older farmers were missing entrepreneurial thinking. In other words, more market orientation is demanded and also a willingness to change production patterns (e.g. meat instead of milk). But also co-operations between farmers (horizontal cooperation) on the one hand and between farmers and processors/retailers (vertical cooperation) on the other should be reconsidered and intensified.

Distribution

The interviewed enterprises adhere to quite different distribution strategies. For larger, internationally orientated enterprises importers and wholesalers were most important. However, small-scale enterprises rely predominantly on retailers, though wholesale and direct marketing are also important distribution channels for supplying the gastronomy sector in particular.

Export-focused enterprises market their products primarily in EU countries (almost 75%). Because of its geographical vicinity, Germany has an extraordinary position. Smaller enterprises are instead focussed on regional markets in Vorarlberg (up to 60% of total sales) but also on other areas of Austria. In such enterprises the export rate remains below 10%.

Communication and promotion of local food

It is essential for the sale of local products that consumers recognise and distinguish them from other products at the point of sale (POS). The enterprises use different means of communication and promotion in order to improve the recognition of their product on the shelves. Which measures are taken in detail by the interviewed processors and retailers in order to promote and differentiate their local products is described below.

According to the answers, a variety of communication tools are used by the enterprises in order to provide information on local products. Often the product itself is used to transport the message, e.g. with special package designs. The use of individual labels, characters, captions or pictures suggests the regional origin of the products at the POS. Moreover, newspaper advertisements, direct mailings or brochures are sometimes used to provide information on regional products. In recent times the use of the internet has gained importance for spreading information, as has the use of market research in order to respond to consumer trends and market developments. Other mentioned promotional activities included tastings, exhibitions and event sponsoring.

Negative comments were heard in regard to the mass of various labels that have emerged of late. It is believed that consumers become increasingly confused and finally lose their confidence in the authenticity of labels. Depending on their appearance, labels are selectively perceived by consumers and do not always contribute to achieving the desired results.

Pricing of local produce

This question attempted to clarify whether the interviewed enterprises pursue different price strategies for local and non-local produce, and what the main reasons might be for producers and retailers pursuing a particular price policy. Despite the wide spectrum of answers, it was agreed that local products are generally located in a higher price segment. A common argument was that the higher raw material prices for local products require higher product prices to be passed on to consumers. Proportional surcharges within the production chain contribute to an additional increase of the absolute product prices (e.g. profit margins). In addition, the higher demand for quality raw materials, special production processes and recipes were mentioned as justification for higher prices.

One interview partner argued that the marketing of local products only makes sense in the premium price level because suppliers of local products are not able to compete with the prices of global competitors. But there were also other opinions. One respondent stated that regional products should be marketed at an above-average price, but not in the premium price segment, because regional food should attract the majority of consumers and not only the small group of financially strong consumers. Another interviewee believed that because of the relatively high share of direct-marketed local food the prices for such products are often below the price levels of similar products sold in retail. Offering regional products in the lower budget segment was criticised by another survey respondent. This individual argued that low prices are often associated with lower quality in the view of consumers, and this would contradict all former efforts to promote a high quality image for local products. To summarise: higher costs for raw materials and special processing techniques or recipes justify higher prices for local food.

Problems to be solved in the future

Many responses indicated a need for creating increased awareness for local products within society at large. As in other Austrian regions, a loss of identification with the agricultural sector among the general population of Vorarlberg was perceived. Along with this development comes the belief that knowledge about, and awareness for, the integration of agriculture in society and the economy as a whole has been lost (regional raw materials – regional processing – regional sales – creation of jobs and the preservation of family farms – maintaining cultivated landscape – tourism). The mentioned positive external effects of agriculture (e.g. maintaining the landscape, generating jobs in up and downstream industries) are insufficiently perceived by large segments of consumers and meanwhile play only a marginal role in their buying decisions. Various activities (e.g. open day on farms) could be used to intensify the contact between the agricultural and non-agricultural population, to communicate the important role of agriculture within the local economy and, ultimately, to sensitise consumers on the importance of local food.

As previously mentioned, some interviewees complained about narrow-minded behaviour within many agricultural enterprises. Greater openness to new developments would help establish new co-operations between agriculture, the processing sector and retailers. Such co-operation often fails due to the existence of mutual mistrust between the different actors in the production chain.

Influenced by the alpine landscape, favoured agricultural areas in Vorarlberg are scarce and thus competition is high – not only within the agricultural sector but also between agriculture and non-agricultural stakeholders. Regions like the Rhein Valley experienced an economic boom during the last decades and provided plenty of alternative, off-farm jobs. Both developments have contributed to an accelerating drop-out rate of agricultural farms and many interviewees expect a revival of agriculture in peripheral mountainous regions. This would imply additional problems in terms of logistics for farmers and processors alike (e.g. daily milk collection by dairy plants). Two comments suggested improving the promotion of Vorarlberg's agricultural products in Austria and abroad, and that the positive image of these products should be better highlighted by all actors.

The lack of a common definition of "local food" was identified as a major problem. After all, what exactly is meant by local, or regional, produce? Certainly, the term has a different meaning to different people. Most people associate local food with the origin of the raw materials, for others the location where the product is processed or where value is added determines the character of local food. In this context the last two explanations become problematic, since products that are principally untypical for a region could be marketed as regional food (e.g. Pineapple compote). Ultimately, this only contributes to decreased consumer confidence in locally produced food. In general, it would be important to provide better information on the topic of local food, including differentiating product characteristics, production techniques and the origin of raw materials. Representatives of food retailers admitted that the limited quantities and only temporary availability of products from certain local regions are often the key reasons for offering products of non-local origin.

Expectations for the future

The following section discusses several expectations expressed by the interviewees concerning the development of local food in general and co-operations between the actors within the production chain. Some of these statements overlap with points already touched upon in previous sections.

Farmers should reconsider their opinion towards new developments on markets and in production techniques. A more market-oriented farm management and decision making process is needed in order to create an atmosphere that is conducive to seizing new opportunities, instead of maintaining a narrow-minded "milk barrel thinking" that is based on doubts. In a further step, the cooperation between agricultural producers on the one side and processors and food retailers on the other should be intensified by broadening the product range and providing a better supply of raw materials. Closer co-operation also enables better coordination towards balancing the supply and demand of regional food. For example, the question "Which products are demanded at what time?" could be answered more easily. Identified supply gaps, e.g. for organic cereals or berries, could offer interesting alternatives for farmers in Vorarlberg. This also implies a certain willingness to adapt to new structures of co-operation among all involved actors.

Quality is one important feature of local food. A clearer and more detailed specification of quality criteria ensures a common understanding of all actors within the production chain (e.g. common quality criteria for cattle carcasses or the protein content of barley). In general, communication between farmers, processors and retailers should be intensified not only to improve co-operation within the production chain but also to reduce traditional mistrust. Unfortunately, prejudices and mistrust are still widespread and are often responsible for a failure of a closer horizontal or vertical co-operation. Due to the better level of education among the next generation, a more entrepreneurial thinking is expected by the majority of the interviewees.

Some wishes pertain to the behaviour of consumers and deal with the following question: “What are the principal consequences of purchasing local food?” This means that consumers should become aware of the interrelation between local food and economic, social and environmental aspects. In various surveys, consumers have expressed a willingness to buy local food even at higher prices. However, most interviewees in the present survey doubted that this willingness was sincere, explaining that original intensions and follow-on actions are in reality two different matters altogether. However, most of the interviewees did wish that consumers would make more patriotic buying decision in the future.

A contribution to the clarification of the term “local food” is expected from politicians. This especially pertains to questions related to the origin and share of raw materials in processed foods, and to the location of processing (i.e. where value is added). Is a sausage local food if the sausage is produced in Vorarlberg but the raw material (pork) originates from outside the region or even from abroad? In addition, the interviewees addressed the topic of food control and traceability. One person posed the question: “What about the traceability of local food today and in the future?” Other expectations pertained to financial support for regional marketing initiatives, but also to the improvement of communication structures between actors in the production chain.

The majority of those interviewed expected the demand for local food to increase in the future. One reason could be the rising number of food scandals, as a loss of consumer confidence in various different product groups implies an increasing demand for food safety. In addition, new consumer awareness for environmental and social concerns would also make a strong argument for an increase in demand for local food.

Respondents also predicted two important developments within food retail: On the one hand the low-budget sector (discount) is expected to gain market shares, but this development is expected to be accompanied by increasing demand for high-priced premium products as well. Thus, strategies targeting segments between these two extreme positions were viewed negatively, since these segments will experience a drop in demand. One logical conclusion from these predictions is that local foods should be placed on premium markets, not least because their higher production costs and lower supply quantities make local producers less competitive on discount markets.

In conclusion, the production of regional products and specialities provides an interesting strategy for maintaining or increasing sales volume, not only for farmers but also for downstream processors and retailers. The production and marketing of regional products requires the co-operation of different market actors. Hence, local products may represent an important element within rural development strategies.

Summary

The results of nine expert interviews in the most western Austrian federal state, Vorarlberg, revealed a lack of common understanding of the term "local products," although most interviewees did associate it with a form of "geographic specification." Specifically, the connotations were quite different among the interviews. Some associated political borders (e.g. states, federal states, provinces) with local products, while others had smaller entities or natural landscapes in mind (like the Lake Constance region or the Montafon Valley).

Another important aspect deals with the labelling of local products at the points of sale, as labelling is seen as a means of allowing consumers to differentiate local products from others. The interviewees agreed that despite the existence of various labels, local products are not as visible in the stores as they should be. Moreover, the large variety of labels sometimes confuses and overburdens consumers whilst shopping. Some respondents criticised a lack of flexibility within the agricultural sector. Furthermore, the interviewees identified seasonality as one significant barrier to expanding local products, as local agricultural producers are rarely able to meet the processors' and the retailers' quantitative demand throughout the year (e.g. the availability of fruits and vegetables in winter). On the other hand limited availability is also seen as a special attribute of a product that can be used to highlight its exclusive character (e.g. "Alp pig" meat). Based on the statements of the interview partners, local products are generally positioned in the high price segment. This often results from the acquisition of raw materials for local products, since the required raw materials are more expensive than those of bulk commodities. The majority of respondents believed that local products will gain even more importance in the future.

The production of regional food and specialities provides an interesting strategy for maintaining or increasing market competitiveness, not only for farmers but also for downstream processors and retailers. Whereas many consumer surveys reveal enthusiastic support for locally produced food, consumer behaviour at the point of sale often does not match the survey results. There are various reasons for this discrepancy, but most frequently consumers do not perceive the benefits from buying local products. Hence, raising awareness for local food among all involved groups (producers, processors, retailers and consumers) could help foster the idea of relying on local produce. Towards this end, it would be important to clearly communicate the implications for the regional economy and society, to include arriving at a more common understanding of the term "local production" and providing a clearer delineation of what qualifies as locally produced food. In addition, the survey confirms that the production and marketing of regional products requires co-operation among the different market actors. Taking all arguments into consideration, local products may indeed represent an important element within rural development strategies, especially for regions with a high share of less-favoured areas and small-structured agriculture.

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