FOCUS-BALKANS

5th Newsletter

November 2011

THE MARKET OF ORGANIC PRODUCTS AND TRADITIONAL FOOD IN THE WESTERN BALKANS COUNTRIES (WBC)

Results of qualitative studies in six WBCs

Authors:

Doc. Dominique Barjolle & Delphine Eynaudi, ETH Zürich
Martine Laniau, GEM,
Prof. Natasa Renko & Doc. Ruzica Butigan, University of Zagreb
Doc. Burkhard Schaer, ECOZEPT
Corinne Amblard, VetAgro Sup
Prof. Gorges Giraud, VetAgro Sup

TABLE OF CONTENT

1 Market and consumers' trends for organic products 2

1.1 Expert's survey: the Delphi method 2

1.2 Trends and development perspectives of the organic market in WBCs according to the experts from the region ..4

1.3 Conclusion and recommendations 9

2 Consumers' attitudes, expectations and behaviours towards traditional food 11

2.1 Objectives 11

2.2 Methodology 12

2.3 Main results 13

2.4 Conclusion and recommendations 18

3 Partners' impressions of the FOCUS-BALKANS project 19

1 Market and consumers' trends for organic products

1.1 Expert's survey: the Delphi method

→ *Why an expert's survey to understand the market and consumers' trends for organic products in WBC?*

The production of organic products is only at a starting phase of development in the Western Balkan countries and the market is still a niche market. The definition of "organic" is not yet clearly installed in the food market and in consumers' perception. For this reason, the research is not directed to the consumers. The research results about organic food consumption are given in a quantitative consumer survey and have been published separately in newsletter 4.

In WBCs, there is still a limited part of the population who consumes organic products. Only a few consumers buy organic products frequently. A typical consumer's profile of organic products is difficult to identify in all Western Balkan countries. For this reason, the objective of this part of the research was to better understand the consumer demand and expectations (both currently and in the future) through an expert's survey based on the Delphi method.

→ *What is the Delphi method?*

Illustration: The Pythia, the priestess of the oracle at ancient Delphi, Greece.

The Delphi method "*is based on a structured process for collecting and distilling knowledge from a group of experts, by means of a series of questionnaires, with controlled opinion feedback*" (Adler and Ziglio, 1996). This method has been mainly used to generate forecasts in different fields (the name of the method is a reference to the town of Delphi, famous in antique Greece for its oracle). The judgement of experts is considered as legitimate and useful in generating forecasts. The aim is to gather fragmentary information for the experts to elaborate prospective reflections in their fields of activity. The Delphi method has also been used as a tool to implement multi-stakeholder approaches for participative policy-making, for example in developing countries. The value of "collective intelligence" from civil society, academic and private sector participants of the Delphi have been recognized, especially in the context of rapid change.

The method is based on iterative inquiry of at least two and mostly three rounds. While the first round is often a set of open questions, the following rounds are more structured and qualitative and/or quantitative questions can be asked.

In particular, although anonymity of the participants is one of the main characteristics of the method, the confrontation of different points of view is probably the best way to understand the position of the organic market. The Delphi method will provide both ideas: evaluation of the current state (measures to enhance the development of the supply chain) and forecasting (trends of the market, consumers' expectations, etc.).

Another effect of the Delphi method is to launch an indirect communication between the interviewed experts as results are fed back into the expert panel after each round, allowing the experts to learn more about the opinion of their fellow experts. They can then reposition and review their own opinion in an interactive process.

→ *How has the Delphi method been implemented in this study?*

This method is very-well adapted to the general objectives of this research, oriented toward key stakeholders for this unknown and tentative market. It allows experts' points of view to be gathered and refined in relation to:

- the current situation of the organic market in each country and organisation of the supply chain,
- the forecasts regarding organic market development,
- the key success factors to develop the organic market.

- **1st round… To understand the general situation**

The first round of the Delphi method in the study of market and consumer trends for organic products in WBCs had the following objectives:

- to complete a description of the current situation of organic production, including history of the development and analysis of the current state of the organic market,
- to get the first analysis of the organic market development,
- to get an insight into consumers' motivations towards organic food,
- to get an insight into measures capable of enhancing the development of this market, through questions related to influence of organic production on disadvantaged areas and the key success factors of the organic supply chain.

- **2nd round… To go deeper into 6 main topics**

In the second round, the questionnaire was split into 6 different parts to deepen the following thematic:

- Government & Policy Impact
- Production
- Market
- Trends
- Supply chain
- Consumer behaviour

- **3rd round… to reformulate questions to get the most converging views**

In the third round, some of the questions were reformulated:

- to get more clear answers for questions with a high level of common disagreement. The questions were then reversed,
- to test again some of the questions from the second round with a low level of consensus,
- to get final feedback from the WBC experts regarding future expectations.

1.2 Trends and development perspectives of the organic market in WBCs according to the experts from the region

→ *At the production level*

- **Trends**

In all WBCs, the interest of producers to convert into organic farming is increasing, and consequently, organic production is expected to increase. All WB countries, even Slovenia where organic farming can be considered to be already well-developed, are interested in increasing the share of organic land. The smallest growth will probably be in Bosnia-Herzegovina.

According to the experts, the countries where it is easiest to convert to organic agriculture are Bosnia & Herzegovina, Macedonia and Serbia, compared with Slovenia, Croatia, or Montenegro. This view is based on difficulties for the former three countries in buying chemical inputs (esp. in Serbia during the period under sanction). The gap from a "traditional agricultural system" to an "organic farming system" is smaller than with high input agriculture. However, organic farming might still be hindered in the future by difficulties in obtaining organic inputs, esp. seeds.

- **Producer motivations for organic farming**

Subsidies and better prices or market situation are regarded as "good motivations" for farmers to convert their farm into organic farming. As in European countries, the profitability of organic farming is becoming mandatory (it was less the case in the beginning, when farmers were motivated by specific values). For some experts, it is even expected that organic farming will become more profitable than conventional farming in the future.

The "consumers contacts" also receives a high level of agreement. This observation is probably due to the modern trend regarding global concerns about climate change and carbon footprint. The experts are of the opinion that consumers and producers will get more involved in shorter distribution channels and direct sales.

Finally, experts are of the opinion that better integration in structured supply chains will increase the motivation of farmers to convert to organic farming.

→ *At the consumer level*

- **Trends and motivations**

In all WBCs, consumers' awareness of organic food will increase, and a high level of consensus (60 to 100 %) was reached regarding the consumption of organic products as being part of the common diet in the future.

Health was described as the main motivation to buy organic food in all WBCs, with all experts agreeing with this statement. On the other hand, a small number of experts consider that the environment will be one of the main motivations.

Other important motivations for consumption in WBCs are: traditional processing and small-scale agriculture, with slight differences among countries (less important in Croatia for example). This result reflects the Balkan consumers' attachment to traditional agriculture. To some extent, it also highlights the consumers' confusion between traditional products and organic products. Animal welfare seems to have rather less importance although this motivation exists.

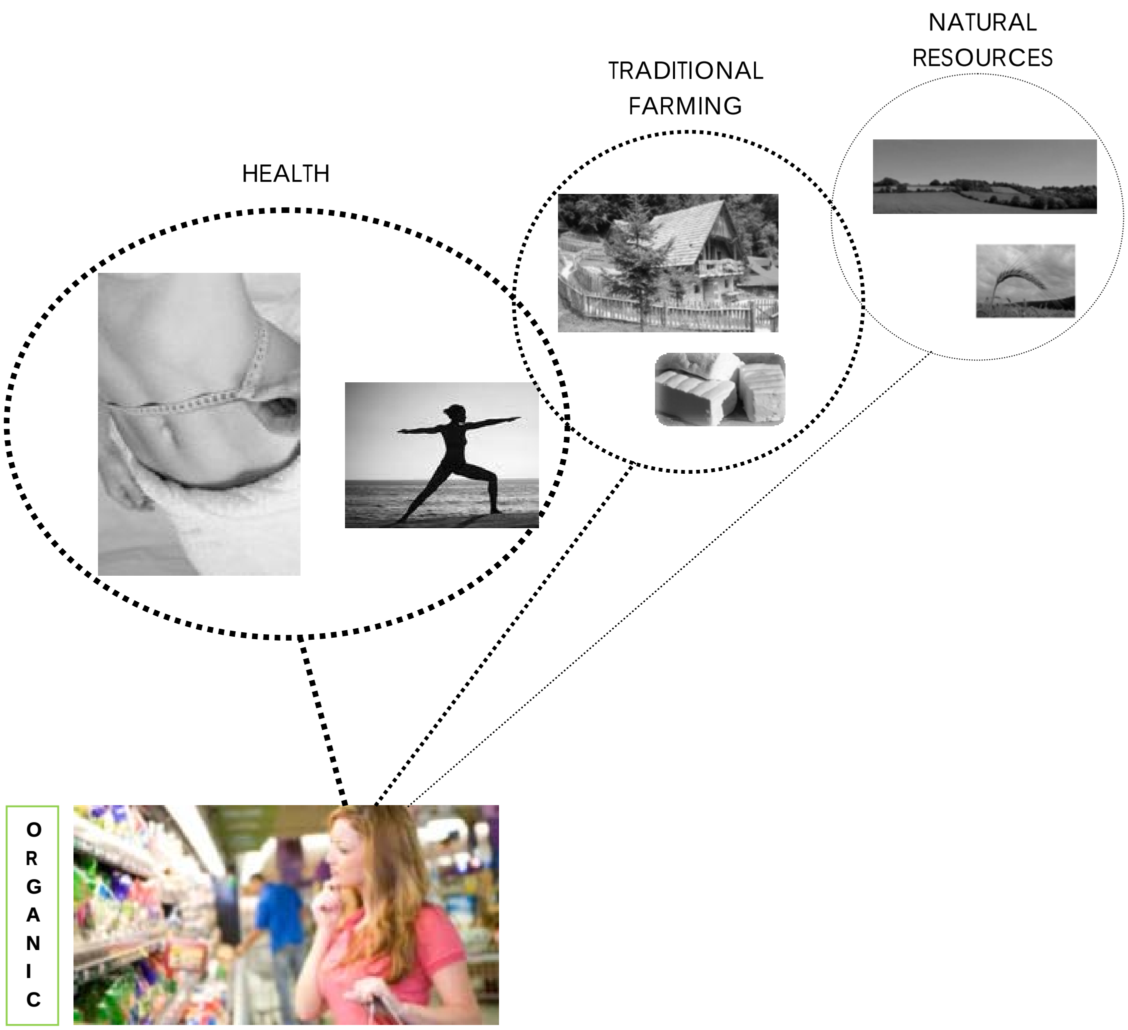

Figure 1 : Main motivations for consuming organic food

- **Who are the organic consumers?**

The majority of respondents agree with statements describing organic food consumers as urban (except in Montenegro), female (except in Serbia and BiH), with a high level of education (except in Montenegro). In some countries (Serbia, Croatia and to a lesser extent Macedonia), experts don't think that it is necessary to be well off to consume organic food.

Who consumes organic products in WBCs?	***Why?***
✓ Urban ✓ Female ✓ High level of education	✓ They are wealthy ✓ They want to be healthy ✓ They respect traditional values

Elderly people are not considered generally as a target group for organic food.

The majority of experts in all countries (except clearly in BiH) see high prices of organic food as a limitation for the future consumption of organic products. This can be interpreted in two ways:

1. Organic food is only for favoured classes of the population, who can afford expensive food.
2. Organic food could penetrate other categories of consumers, such as those having strong motivations. One of them is the category generally described as urban women with a rather high level of education. Their main motivation is then "health" rather than "respect for the environment", and to a lesser extent the protection of local agriculture and traditional processing.

→ *Market*

- **What kind of organic products?**

In all countries (except in BiH), the market for fruit and vegetables is seen as being the most valuable category of organic products in the future, and to a smaller extent, cereals.

Figure 2 : organic vegetables

Figure 3 : organic milk

In Slovenia and Macedonia, organic meat has potential to be a significant part of the organic market. In these two countries and also in Montenegro, being mountainous regions, milk is an interesting product to be developed.

In all countries, urban and touristic areas have a lot of potential and an important role for the development of the organic market. It seems that the organic sector could, in the near future, rely mainly on tourism and on the development of cities.

- **Local productions or imports**

In Slovenia, Croatia and Macedonia, the majority believes that imported organic products will dominate the market soon. Opinions are quite different in Bosnia, Serbia and Montenegro where only 40 to 50% of respondent agree with this statement.

→ *Supply chain*

According to experts of all WBCs, distribution channels will be diversified in the future (except in Bosnia).

Even if organic food stores are recognized as the historical distribution channel (with a 100% level of agreement for this item), experts assess that all other distribution channels will distribute organic food in WBCs in the near future, including both supermarkets and direct selling on-farm (with less importance in Serbia) or green markets (except for Croatia in this case). Modern ways of selling such as the Internet or even box schemes are also expected to be used as distribution channels for organic products HoReCa (hotels, restaurants and canteens) are not forgotten and they could be connected with expected sales in touristic areas.

Figure 4: organic offer in a conventional supermarket

Figure 5: direct selling on-farm

Figure 6: farmers market

Only discounters (shops offering very low prices) appear as poor stakeholders for selling organic food products.

→ *Public Policy impact*

All respondents highlighted the importance of government initiatives.

There are split opinions among experts in different countries regarding state incentives and political support for the organic sector. Experts in Bosnia-Herzegovina, Croatia and Montenegro expect State incentives to be inadequate in the future, whereas in Macedonia, Serbia and Slovenia, experts forecast the opposite. In Croatia, Macedonia and Serbia, they expect policy support to be higher in the future and in the other three WB countries: Bosnia-Herzegovina, Montenegro and Slovenia, experts don’t expect any improvement in support policies.

For all the experts, a national strategy for controlling and certifying organic production is needed. It is recognized that state and local governments could significantly improve the market by buying organic food for schools and hospitals.

The EU Agriculture Policy will give a push toward organic farming in WBCs.

1.3 Conclusion and recommendations

Organic agriculture in WBCs has promising perspectives. Natural resources of extraordinary richness, heterogeneity and quality are the first precondition of a prosperous agriculture in general, and for organic agriculture and wild collection (collection of natural products from the wild).

The market and consumption situation of organic products can be described as “patchy”. On the one hand, some elements are reminiscent of the early beginning of the organic sector in Western Europe, with direct selling, short supply chains and little and small-scale domestic processing. On the other hand, committed, strategic and highly-professional market actors are showing successful examples within WBC organic markets of marketing organic products and of efficient organisation of supply chains. Generally speaking, preconditions for further positive market development are fulfilled. The current heterogeneity illustrates the potential of the organic sector in WBCs, both at the production and consumption levels.

Some macroeconomic and transnational factors, like the economic crisis in Europe or the global financial crisis, might hinder the development of the organic sector as they limit access to financial resources and as they slow down the broadening of a “middle class” with sufficient purchasing power.

Apart from these factors, which are difficult to influence, the barriers to develop the market are rather typical for young markets: aggregation of critical volumes, constitution of critical production basins, producer organisation, professionalization, scaling up, information and communication to the consumers are the main fields where weaknesses exist today.

Policy measures can lower the impact of today’s barriers, and we know that similar action has brought about good success in other countries and regions. At various levels, in different WB countries, similar actions are already being taken or should be implemented.

Key factors for the development of the organic market	
Production level	➢ Motivation of the producers to convert their farms. Availability of market information (demand, supply, prices and export opportunities) is an important factor for the decision- making of the farmers to convert to organic farming. ➢ Teaching and training for organic farming ➢ Export opportunities, especially in Croatia, Serbia and Bosnia (less in Macedonia, Montenegro and Slovenia). ➢ New technologies. ➢ Risk venture capital. ➢ National Development Strategy has to be implemented with regional/local government support to organic agriculture as well. ➢ The Government should put special emphasis on the control system and certification of organic food.
Consumer level	➢ Education and information to consumers about organic agriculture and products.
Market	➢ Adequate marketing activities and clear labeling of organic products. ➢ State and local government can significantly improve the market by buying organic food and products for schools and hospital kitchens.
Supply chain	➢ Better organisation of the supply chain with: - Vertical cooperation - Transparency - Traceability - Quality management.

2 Consumers' attitudes, expectations and behaviours towards traditional food

2.1 Objectives

The Balkan countries have a strong heritage of culinary traditions; the consumption of traditional food is strongly connected with their cultural habits. In some Western Balkan countries, many products are already registered and protected in the legal frame of Geographical Indications (GI). However, the field of traditional food is much broader than the products, which are registered under a legal framework. A "consumer-driven" definition of traditional food has been proposed within the European project TRUEFOOD: "*A traditional food product is [...] a product frequently consumed or associated with specific celebrations and/or seasons, normally transmitted from one generation to another, made with care in a specific way according to the gastronomic heritage, with little or no processing/manipulation, that is distinguished and known because of its sensory properties and associated to a certain local area, region or country*" (Guerrero, 2009). It is also interesting to have an overview of Balkan consumers' perception toward traditional food because Balkan countries are a heterogeneous mix in terms of geography, culture, food and history. These different points may influence the nature and the consumption pathways of traditional food in each country.

Within the scope of the FOCUS-BALKANS project, the objective was to better understand consumers' attitudes, expectations and behaviour toward traditional food. Six Balkan countries have been selected for this project: Slovenia, Bosnia and Herzegovina, Serbia, Macedonia, Montenegro and Croatia. The study was coordinated by VetAgro Sup, France.

The research aimed concretely at:

- Measuring the attitudes expressed by Balkan consumers towards traditional food products.
- Assessing the purchasing behaviour of WBC consumers for traditional food products.
- Identifying specific segments of consumers sensitive to traditional food products.

To reach these objectives, a qualitative and a quantitative survey were carried out in 2010/2011 in each Balkan country. The results permitted clusters of consumers sensitive in different ways to traditional food to be identified and characterized.

2.2 Methodology

Different methodologies have been used to measure consumers' attitudes, expectations and behaviours towards traditional food. After studying the legal framework for traditional food in the Balkans, a qualitative survey was carried out including two focus groups per country. This step was followed by a quantitative survey to measure associated trade-offs (conjoint analysis). 1200 consumers were interviewed about their perceptions of traditional food and their purchasing and consumption behaviours.

What is a focus group?

A focus group is a small group of people which is gathered to engage in controlled discussions and interviews to elicit opinions about particular products. It is a tool of qualitative marketing research.

Twelve focus groups were held (two per country). As an exploratory stage, generating new hypothesis and giving a first overview of what traditional food is for Balkan consumers, the focus groups helped to construct the quantitative study (next phase).

What is conjoint analysis?

Conjoint analysis is a method to measure consumers' trade-offs between attributes of a product.

In our study, the traditional products chosen and common to all countries were fresh cow cheeses. 1200 consumers were interviewed face-to-face. They ranked 11 profiles of fresh cow cheeses (cards) according to their preferences in the context of purchase and then answered a questionnaire. This method provided a detailed understanding of the importance of traditional food according to consumers in Balkan countries. It showed the trade-offs consumers are ready to make between attributes of a traditional product and the relative importance and attractiveness of these attributes. The additional questionnaire identified how the characteristics and attitudes of consumers were related to their preferences.

2.3 Main results

→ *Perception of traditional food*

Traditional food is a frequent topic of controversy among the Balkan population in general, confirmed by the focus groups discussions. Consumers do not have a precise view about whether a food is traditional. They perceive it as a large array of products and dishes. Spontaneous evocation of traditional food includes typical dishes and food products frequently consumed at home. Generally, basic reasons not to consider some products as traditional are the method of production (industrial), the product content (not known), the packaging and the date.

Several distinct concepts of traditional food were recognized and include the following:

- Traditional food as homemade food, the opposite of industrial products/dishes.
- Traditional food as food prepared and consumed by many generations.
- Traditional food as locally produced/grown food.
- Traditional food as food exclusively produced and consumed in the country.
- Traditional food as food bringing up emotions (food made in our childhood, food made in villages by our grandparents.
- Food consumed in a family and food connected with social events.

Participants were often more familiar with traditional 'dishes' than 'products'. Most perceptions of traditional food were positive. For example, traditional food was perceived to be natural, domestic, healthy, and tasty. Some negative perceptions about traditional food were related to their impact on health due to its possible fattiness and high calorific values (Figure 1).

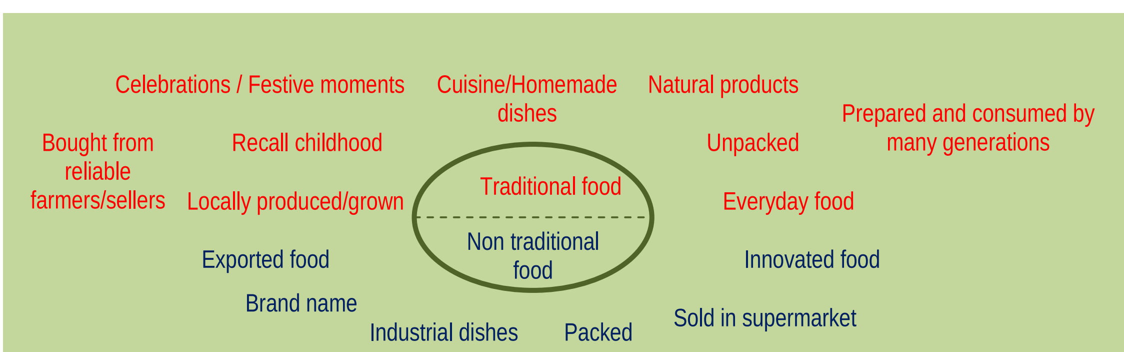

Figure 7 Perception of traditional food

→ *Perception of products with Geographical Indication (GI)*

We cannot speak about traditional food without mentioning products with geographical indication. Respondents were asked some questions about food with GI to measure their perceptions of these products. For the purpose of this survey, the definition of a GI was given to the interviewees as "*an official name or sign used on certain food products which corresponds to a specific geographical location or origin (e.g. a town, region or country) and may act as a certification that the food possesses certain qualities or enjoys a certain reputation, due to its local origin*".

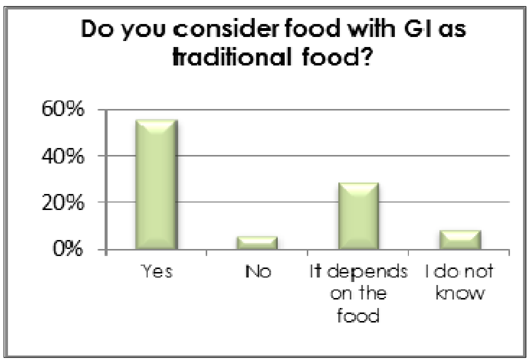

Figure 2 Perception of traditional food

One of the questions measured the perception of the food with GI as traditional food in respondents' mind. (Figure 2)

More than 55% of respondents associated food with GI and traditional food. For nearly 30%, it depended on the food, 10% had no idea and a minority did not consider food with GI as traditional food.

Another question on this subject was about the potential need to protect traditional food by geographical indication. All Balkan countries agreed in general that traditional food should be protected by GI (more than 80% of the respondents). This agreement was significantly more expressed in Montenegro and Macedonia with fewer consumers moderating their opinion by choosing the answer '*it depends on the food*'. The results also showed that there is a potential for food with GI, especially considering the results about preferences, where indication of the origin (mainly the region) was shown to be an important purchase criterion. According to consumers, it is important to protect food by GI, especially traditional food.

→ Consumers' preferences on a traditional product (the example of fresh cow cheese)

The two graphics below show the importance given to attributes by consumers in the context of purchase and their preferences between levels for each attribute:

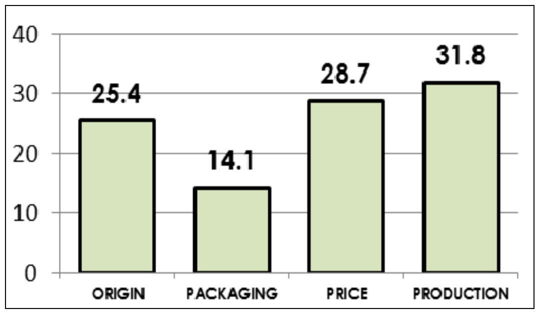

Figure 3: Attributes

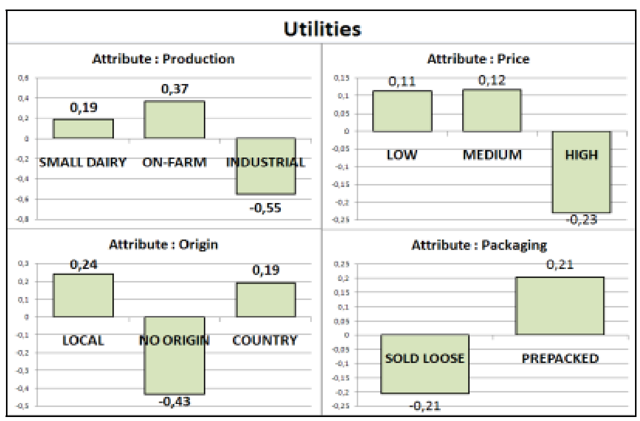

Figure 4: Partial utilities

The type/scale of production is the most important attribute as a purchase criterion, followed by the price and the geographical origin. Type of packaging seems not to be very relevant for consumers. Globally, there is a preference for small production of fresh cow cheese with a specific localization suggested by a locality or the country. Consumers would not buy fresh cow cheese with a high price and there is a slight preference for packed cheese instead of cheese sold loose.

Analysis at the aggregate level of Conjoint Analysis was not sufficient to comprehend consumers' behaviour clearly. Consumers were clustered to identify segments with different preferences, and groups of consumers having similarities in cognition and behaviour were analysed. The classification method applied was an Ascendant hierarchical classification (AHC). This highlighted 4 clusters of consumers with specific behaviours:

- A cluster more focused on local origin.
- A cluster more demanding on method of production (on farm and small dairy preferred).
- A cluster presenting strong rejection of high prices despite the quality of the product.
- A cluster preferring high prices and industrial processes.

Table 1: Characteristics of the 4 clusters

Cluster 1 (8% - 216 resp.)	**Cluster 2 (30% - 364 resp.)**	**Cluster 3 (20% - 238 resp.)**	**Cluster 4 (32% - 382 resp.)**
Local origin	**Rejection of industrial level**	**Rejection of high prices**	**High prices & industrial production**
- Less festive consumption - Less consumption as a child	- Fewer purchases at supermarkets - More home-production (family, friends) - Less requiring about hygiene conditions for small scale production	- More purchases at markets. - Less home-production (friends, family) - Price is more often quoted as a barrier of consumption - Fewer people having finished faculty	- Fewer main cooks - Fewer purchases at farms, friends, families but more at supermarkets - More requiring about hygiene conditions
Under-represented: - Macedonia	*Under-represented:* - Macedonia *Over-represented:* - Croatia, Slovenia	*Under-represented:* - Macedonia, Croatia *Over-represented:* - Montenegro, BiH, Serbia	*Under-represented:* - BiH, Slovenia, Croatia *Over-represented:* - Macedonia (41%)

Cluster 1 constitutes a segment of consumers for whom geographical origin of fresh cow cheese is a main concern. They clearly prefer local fresh cow cheese and do not like this product when no origin is specified at all. After having taken into account the origin of the product, their attention goes to the method of production. They still prefer on-farm production and reject industrial production (however, this rejection toward industrial products is not as strongly stressed as seen on average in the total sample). Price and packaging have little importance and no specific behaviour appears considering these attributes. In this cluster, Macedonia is underrepresented. This segment is characterized by the fact that there are slightly more consumers declaring that they never consume fresh cow cheese with the family on festive occasions and more consumers declaring that they did not consume it when they were a child or cannot remember it. Households from cluster 1 are slightly larger than the global sample average.

Cluster 2 constitutes a segment of consumers who place the method of production as their main concern for fresh cow cheese purchase, clearly preferring on-farm production, also liking fresh cow cheese from small dairies and rejecting it when produced industrially. By decreasing importance in decision-making, we find far behind is geographical origin, then price and finally packaging. In this cluster, Croatia and Slovenia are significantly overrepresented whereas Macedonia is strongly underrepresented. Respondents are less keen than average on supermarkets for purchasing fresh cow cheese, and are more in favour of friends, family, on-farm or own production. There are proportionally fewer respondents thinking that food with GI is traditional. Moreover, the need for higher hygiene is slightly less of a consideration than average, whereas the country of origin is slightly more important for them.

In the third cluster, the main concern of consumers is the price of fresh cow cheese. We find a linear relation for this attribute, with strong rejection of high prices, weak acceptance of medium prices and clear preference for low prices. All other criteria seem not to have any weight in decision-making for these consumers. In this cluster, Montenegro, BiH and Serbia are overrepresented whereas Macedonia and Croatia are underrepresented. Consumers from cluster 3 buy their fresh cow cheese more often at open markets than the tendency for all consumers. This suggests that fresh cow cheese is more affordable at open markets. They are more often the main cooks of their household. They or their family/friends circle more rarely make their own fresh cow cheeses and they received home-made cow cheeses from friends or family more rarely than average. High price is more often given as the reason for reluctance to increase consumption and a lower percentage than average has finished faculty. There is slightly higher agreement on the statement linking taste of food with the region of origin. Households are a bit smaller.

Consumers of **cluster 4** gave main importance to two attributes, which are the price and the method of production. They strangely favor fresh cow cheese when sold at a high price (rejection of low prices) but also when sold industrially (rejection of on-farm production). The third attribute considered is origin and finally packaging, which is more important here than in others clusters. In this cluster, Macedonia is overrepresented whereas BiH, Slovenia and Croatia are underrepresented. Consumers of cluster 4 are less often ‘main shoppers’ with regards to the average. Consumption as a child and during festive occasions is more important. They prefer industrial fresh cow cheese with a high price. This is coherent with the fact that they buy less frequently at farms or from friends and family. They have a lower desire to consume fresh cow cheese compared with other clusters. The income for this cluster was also studied because of their willingness to pay for higher prices and the cluster also had a higher than average proportion of refusals. They consider more often GI food as traditional and give significantly more importance to hygiene considerations (stricter about the market/farmer and more confident toward their own production) than average. However, although still high, they are less concerned than average about the geographical origin of food. Maybe they buy industrial fresh cow cheese to meet their requirements on hygiene and so are willing to pay more for this attribute.

2.4 Conclusion and recommendations

In conclusion, this survey on consumers' attitudes, expectations and behaviours towards traditional food is innovative in the Balkans and highlights some interesting results. Generally, Balkan consumers express a positive attitude towards traditional food. If we try to explain consumers' behaviour towards traditional food, we can say that there are different types of consumers giving more or less importance to components considered as traditional. Thus, the future supply of traditional foods should target different segments of consumers:

- Those who favour local origin.
- Those who favour small or on-farm production.
- Those who seek affordable prices.
- Those who are more confident in industrial products.

The study also gave interesting results regarding consumer interest to protect traditional food by a geographical indication. Geographical indication is widespread in European countries, especially for traditional food. In Balkan countries, there is a long tradition of protecting geographical indications but only Slovenia already has many products registered as PDO (Protected Designation of Origin) and PGI (Protected Geographical Indication). These labels are less well-known by consumers and not used by producers, except in Slovenia. However, there is a strong potential for this regulation on geographical indication. The research demonstrates that geographical indication is a purchase criterion for traditional food. Results show that traditional food is often associated with a specific place, especially a locality or a region of a country. Protecting traditional food by a label will increase the confidence of consumers, especially when we see that consumers do not have a strong confidence in hygiene practices of on-farm and small producers/processors. A label involves stricter specification on hygiene rules, production, etc. and will make the product more attractive for consumers. Those labels guarantee that the particular product is produced and processed and packed in its region of provenance (PGI) or region of origin (PDO). Of course, the price is also an important purchase criterion and a protection of the geographical indication must not significantly increase the cost of the product. This consideration is important to increase the popularity of traditional food outside the region of origin or the country because, generally, traditional food is consumed less outside its region of origin. When the image of the region of origin is strong, and a label of protection may help to reinforce it, the geographical indication might work as a brand name, minimizing the cognitive effort of consumers during their decision-making process. Protecting traditional food with such labels can enable producers to become known and to differentiate their products on the market, which would be interesting particularly, but not exclusively, for small-scale producers. With knowledge on consumers' preferences towards attributes of traditional products, there are marketing opportunities by putting emphasis on preferred characteristics.

This study put emphasis on the need to protect the Balkans culinary heritage as much as possible, for tourists but also, and especially, for the domestic populations. The protection of traditional products could also be interesting for countries entering the EU.

3 Partners’ impressions of the FOCUS-BALKANS project

Doc. Ružica Butigan, University of Zagreb, Faculty of Economics and Business

From day one, I was excited to be part of the Focus-Balkans project. Having such an opportunity to work with neighbouring countries, being part of a great learning team, and looking at research concepts from different angles were all positive aspects and experiences.

The personal and professional benefits I gained from the FP7 programme are invaluable. The workshops and meetings were most engaging and allowed me to acquire and apply scientific experiences. The programme also widened the lens of my perspective by helping me to move beyond the micro-focus on marketing, to develop a global view on food consumer science. The Focus-Balkans project, as a world-class learning opportunity, also prepared me for my job.

The training, communication and other skills I gained were extremely beneficial, and came at a time when I was finishing my PhD programme. The different methodology courses taught me how to understand and interpret reports. Going through the programme, I would learn something, and apply my new knowledge immediately on my return back to Croatia. The results of the project were thus tangible and instantaneous. In addition to the quality of training I received, one of the most valuable parts of the project was to exchange with people who entered the project with a wide variety of practical life and business experiences. I now have a network of friends and colleagues that I can consult and receive an honest opinion – whatever the issue – at a moment's notice.

My colleagues were productive and successful individuals. I probably learned as much from them and their business experiences as I did in my classes. It is so much comforting to know that, even though the project has come to an end, I can still pick up the phone and call those people who have had such an impact on my life.

Corinne Amblard, VetAgro Sup, France

As the leader of the study on “Consumers’ attitudes, expectations and behaviours towards traditional food”, I can say that this project was rich considering the quality of the research and the scientific part but also in the great human exchanges in which I have been integrated. I observed that Balkan countries have a strong heritage of culinary tradition which is, in my point of view, important to preserve. There was a real pleasure for consumers to speak about their traditional food and I thank all Balkan partners for the work they have done in this study. The specificity of each Balkan country has been taken into account in the study which led to complex but interesting results.

Personally, I found this project complete, it includes a theoretical description, cases studies, networking building and a training programme. I hope the network that has been built between the people from the consortium will continue and maybe in the future work together again.

http://www.focus-balkans.org