MARLO
"Sustainable Development of European Rural Areas through Cooperation in Marketing of Local and Organic Food Products"

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MARLO Needs Analysis

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Executive Summary

The aim of this document is to present the synthesis report of the identified needs of information and training in the area of marketing of local and organic products. The existing and missing experience of SMEs involved in production, marketing and sales were analysed, as well as preferred learning types, media, environment etc.

The Needs analysis document presenting in the form of synthesis report were developed into 2 steps:

1) The partners from Spain/Extremadura, Cyprus, Latvia and Lithuania according to the defined methodology analysed primary (already available) and secondary date (project partners developed tools) and presented Regional/Country reports (Annex);
2) From the project partners 'elaborated reports on the results of the needs analysis, produced synthesis report, presenting the situation in partner regions and drawing conclusions for transfer – development/adaptation of the training programme, materials and tools. The report is based on both quantitative and qualitative analysis.

During the surveying process there were established and strengthened the contacts with rural SMEs in the project partners' regions/ countries by reaching the target group (relevant organizations/ associations/ networks) in different ways.

The project partners were contacted local producers and tourism companies/ entrepreneurs with different background, experience, interest and willingness to take part and cooperate in Marlo project.

Contents

1. INTRODUCTION 4

2. PROFILE OF THE PROJECT PARTNERS' REGIONS 6

2.1 INTRODUCTION 6

2.2 REGION/ COUNTRY AND ITS MAIN CHARACTERISTICS 6

2.3 OVERALL SITUATION AND TRENDS IN PRODUCTION AND MARKETING OF LOCAL AND ORGANIC PRODUCTS 6

2.4 LOCAL AND ORGANIC PRODUCTS MOST DEMANDED BY CUSTOMERS IN REGIONS 8

2.5 PROMOTION OF LOCAL AND ORGANIC PRODUCTS THROUGH RURAL TOURISM SECTOR IN THE REGION 8

3. SURVEY 9

3.1 INTRODUCTION 9

3.2 PARTICIPANTS 10

3.3 ANALYSIS OF RESPONSES 10

3.3.1. Company information 10

3.3.2. Marketing experience 11

3.3.3. Training needs 14

CONCLUSIONS 16

ANNEX 17

1. INTRODUCTION

The MARLO Project aims to improve the competitiveness of rural small and medium enterprises by introducing a methodological training tool in marketing of local and organic food products, and to encourage sustainable development of rural areas.

In order to identify the needs for information and training in the area of marketing of local and organic products, there were developed 2 Tools as part of the Methodological Framework. These were the Survey and the Regional Report Template, as well as a Sample cover letter was proposed for the Survey.

The aim of this survey is:

- To find out whether the rural SMEs in partner regions/ countries make use of marketing,
- To compare SMEs from different EU countries on their understanding of marketing,
- To identify reasons why the target group does/does not use marketing,
- To evaluate the level of cooperation among the SMEs involved in growing/ manufacturing of local food products and those engaged in tourism activities,
- To identify, classify and compare marketing methods or tools that SMEs in different partner regions use and/ or would like to learn about,
- To identify companies with an interest in participation in the project and pilot training,
- To determine how any potential training should be delivered.

The target group of the survey was SMEs & organisations, which produce and/ or sell local/ organic food or are active in the tourism sector, independent of their legal status. There were stated, that at least 35% of respondents should be from one of these sectors in each country and 30 questionnaires per country should be collected.

At the Methodological framework were defined ways to find and contact the local producers:

1) by using already established contacts with rural SMEs in the project partners regions/ countries;
2) to establish new contacts of relevant organizations/ associations/ networks and ask for their advice and support for identification and contacts of the right people/ SME;
3) to make a web search: check national and local media/ social media to see who is active in production and promotion of local and organic food products and try to find best practices in your region/ country.

The representatives of target group who take part in the survey was offered the following benefits:

- become members of the network built by MARLO project;
- receive MARLO newsletters;
- they will be invited to participate in the free pilot training course.

In order to understand the context of the Marlo project and survey, a letter inviting to take part in the survey accompanied with the questionnaire – paper version or online survey link.

Original questionnaire was developed into English. Then by using *https://**docs**.google.com/* (email: LTOIMARLOproject@gmail.com) possibilities was created online questionnaire. In order to provide the correct, understandable and easy filling online version, the project partners were involved into the testing process, conducted by Farmers Parliament. The

project partners from Spain, Lithuania and Latvia translated questionnaire in their own languages. Cyprus questionnaire was translated, but collected most of the responses in face-to-face meetings and then used the English version of the online questionnaire

The following survey links in the Partners languages appeared:

EN - http://goo.gl/WIemXQ
LV - http://goo.gl/qyfVbK or http://ej.uz/Marlo_Survey_LV
CY – http://goo.gl/SUOHKb
LT – http://goo.gl/uw07ot
ES - http://goo.gl/po0kns

The survey was designed to be completed by the respondents themselves on a stand-alone basis. It attempted to capture some basic information regarding the use of marketing in European rural SMEs, as well as tourism companies and in cooperation of both sectors. Respondents were required to identify what marketing methods and tools they currently use, as well as what methods and tools they are interested in learning more about. Respondents were also asked to specify how they would like to engage in any potential training.

An open ended section was also included to allow respondents provide any additional feedback. The answers on the open questions were translated by relevant partners and a summary included in regional reports.

The online survey was used as the principal data collection method for the MARLO project.

On the basis of the Regional Report Template there were developed 4 countries reports – Cyprus, Spain, Lithuania and Latvia (in an Annex), which consist of the following structure:

1. Profile of the region (up to 5 pages)

Introduction

Region/country and its main characteristics

Overall situation and trends in production and marketing of local and organic products

Local and organic products most demanded by customers in the region

Promotion of local and organic products through tourism sector in the region

2. Survey

Introduction (How was the survey carried out? How did you approach the respondents? What was the response rate?)

Participants

Analysis of responses

3. Conclusions

Conclusions based upon the desk research and the field work conducted up to date

Needs Analysis document provide synthesis or analysis of aggregated results from the Regional reports, the generalizations and conclusions.

2. PROFILE OF THE PROJECT PARTNERS' REGIONS

2.1 Introduction

The following sections present the main geographical and economical characteristics of **Cyprus, Spain, Lithuania and Latvia**, the overall situation and trends in production and marketing of local and organic food products, which are most demanded in the region, as well as their promotion through tourism sector.

2.2 Region/ country and its main characteristics

All project countries are EU member states, with their own national languages.

Cyprus is the third largest island in the Mediterranean, after Sicily and Sardinia. Cyprus is divided into six administrative districts: Nicosia, Limassol, Pafos, Larnaka (in the government-controlled areas) and Famagusta and Kerynia (in the occupied areas). Cyprus has a subtropical climate – Mediterranean.

Spain, Extremadura is an autonomous western community. Its component provinces are Caceres and Badajoz. It is bordered by Portugal to the west. The climate of Extremadura is Mediterranean, except to the north, where it is continental, and to the west, where the influence of the Atlantic makes the climate milder.

Latvia and Lithuania geographically situated in the North of Europe – on the shores of the Baltic Sea. Latvia has population 2.025 million and Lithuania population of 3 million.

Farmers Parliament (LV) Regional Report was focused on the whole territory of the country as the organization members represent all regions of Latvia (Riga, Vidzeme, Kurzeme, Latgale and Zemgale regions).

Kauno regioninis inovacijų centras (LT) Regional Report covering Kaunas region, located at the central part of Lithuania with one-fifth of the total inhabitants of Lithuania (A quarter of the national population live in Vilnius Region).

National currency of Cyprus, Spain and Latvia is EUR, but Lithuania – Lithuanian Litas (Lt)

Cyprus has a service-based economy with some light manufacturing. The services sector, including tourism, contributes almost 80% to GDP and employs more than 70% of the labor force. Industry and construction account for approximately one-fifth of GDP and labor, while agriculture is responsible for 2.1% of GDP and 8.5% of the labor force. Potatoes and citrus are the principal export crops.

Key sectors of the Latvian rural areas economy are agriculture, forestry and logging, food processing and beverages which in 2012 comprised 8,1% of the total GDP value added and employed 81.9 thousand or 9.5% of total employment in the country.

2.3 Overall situation and trends in production and marketing of local and organic products

The geographic location and country specifics defines the production trends of local and organic products. The Mediterranean climate, hills, slopes and stony land are preconditions for citrus fruit, vegetables, berries, nuts production, also providing possibility to get more than one yield. However there are differences between Cyprus and Spain/ Extremadura local and organic food production: Cyprus production covers very wide range of different kind of products as the production based on many small size farmers however Spain/ Extremadura region has several very typical local products.

As northern countries Latvia and Lithuania has very similar local and organic products. However Lithuania is little bit more on south with longer vegetation season and crops more demanding the growing season as like as sunflower and souybeans.

There are local and organic products which are similar for all 4 countries as like as honey etc.

Production of local and organic products

Cyprus: Many types of fruit are grown including *citrus fruit, apples, apricots, pears, figs, cherries, nectarines, plums, pomegranates, bananas, strawberries, grapes*. There is developed vegetable growing industry: *high quality red potatoes, carrots, peppers, tomatoes, celery, olives.* Cyprus is famous with nuts industry (*almonds, walnuts, pistachio, and hazelnut),* honey*, Carobs- healthy alternative to chocolate.* Cypriot farmers produce *pork, lamb, beef and chicken*, and a number of meat products are offered by local food processing companies. *Goat and cow farming are dominant* due to the production of the national *cheeses of halloumi, anari and feta, as well as yoghurt.*

Spain: The most demanded products by customers and visitors of Extremadura region are related with food products such as *olive oil, cherry, lamb*, *iberic ham, honey, paprika*, *cheese, creamy cheese, beef*, *wines*. For tourists Extremadura offer gastronomical products and meal is cooked using local, organic, natural and high-quality recognized ingredients.

Latvia: The traditional industries of organic farming are *grain* production and dairy farming, vegetable and fruit production. Home producers play increasing role in Latvian economy by processing agriculture products and offering a wide range of "niche" products such as *jams, jellies, dried vegetables, herbs, mixtures, bread and bakery products, canola oil, potato starch, malt, pasta, flour, flour products, vacuum-packed vegetables, sauerkraut, beer, juice, hemp stakes to products for children*, etc.

Lithuania: Producers grow all varieties of grain for food production: *wheat, spelt, oats, rye, buckwheat, barley, soybeans, oils crops, sunflower, flax, rape oils varieties are pressed in farms.* Organic livestock farming development in Lithuania has increased and processing of organic milk: *cheese, sour cream, milk, cheese curd, yougurt, and other production*. Organic beef has a potential to become the main export production in the near future.

Marketing of local and organic products

For marketing of local and organic products there are used different marketing tools. We can draw conclusion that on the state level of the Project partners countries there are institutions / organizations/ associations (public&private), which activities targeted for promotion of the local products using web portals, trademarks, social media in general. On the regional level the marketing is less developed, noticed more focus on direct sales and promotion tool - ‘word-of-mouth”.

Cyprus: The portal www.cyprusfoodndrinks.com promotes the traditional gastronomy and historically important agricultural products; it functions as a cost-effective on-line exhibition centre (Cyprus Research Institute& Cyprus Chamber of Commerce and Industry). A brochure-style map was published by the Ministry of Agriculture (http://enrd.ec.europa.eu/policy-in-action/communicating-rural-development/eafrd/information-tools/en/view-card-details_en.cfm?s=country&country=cy&action=detail&id=1852&v=1&a=2). - map of the country with the best of local food and drink in by promoting local gastronomy and tourism in rural areas.

Spain: The promotion of local and organic food products is poor in Extremadura. There are not advertisements, or good social media politics to promote food products from Extremadura on the Internet. Marketing is developed by word-of-mouth on the regional level. Traditionally there is popular and developed gastronomy tourism in the region.

Latvia: The organic products are promoted by Latvian Organic Producers Association with the sign http://www.lbla.lv/latvijas-ekoprodukts. Local products are promoted via internet (including social networks), through activities of different projects (brochures, presentations, markets). Very popular became farmers markets, sale on the fairs, town events, from the farm and other ways of direct sales.

Lithuania: growing tendency for direct sale: mobile markets with organic vegetables, fruits, meat, dairy products, honey, confectionary products. Usually small farmers don't use advertisement in Kaunas region, trying to establish internet sales by taking orders from customers and delivering product to the house.

Eco businesses, organizations and households can use www.ekovisiems.lt and www.ekopasaulis.com - the catalogues includes environmentally friendly products constantly producing and selling to businesses, organizations and households.

2.4 Local and organic products most demanded by customers in regions

The tendency shows that by increasing the financial situation of the customers' will grow demand for the healthy and locally grown organic products. The biggest barriers of the organic products are the price and limited choice.

Cyprus: Consumers are generally aware of organic products; the main reason to buy organics is health. The main barrier for consumers to buy organic products is price, the availability of products, and the limited choice. The recent economic crisis is the reason of many campaigns to support local producers, otherwise there was no strong trend of buying local products, and only the most traditional local food products were preferred over the imported ones.

Spain:

LATVIA: Consumers have interest for the Niche Products, healthy food and local product consumption (traceability).

LITHUANIA: Consumers food choices are defined according to product safety, quality; better taste and environmental protection.

2.5 Promotion of local and organic products through rural tourism sector in the region

The tendency for promotion of local and organic products through rural tourism sector is growing. The farmers promote local products through food linked with folklore and cultural identity as well as introduce them with rural life and agricultural production. The project partners' countries introducing wide range of experience with fairs, markets and festivals on the state, regional and local events for the tourists and local inhabitants. The shops at the farms, tourism information centres, hotels, airports and other places offer very traditional local and niche products. The state organizations and private associations are trying to find the best marketing channels for promotion of local and organic products. Different countries experience brings additional value in Marlo project.

Cyprus: Traditional Cypriot dishes are linked to rituals, folklore, cultural identity and civilization, and this establishes them as part of the traditional culinary heritage. These customs can be used to promote local food products to tourists – as food is presented as a part of stories and live traditions, it gets a deeper meaning and can become part of memorable experiences: Wine Festival, Rose festival (village of Agros), annual exhibitions and festivals presenting and promoting local products to the local community and tourists. Environmental Information Center of Larnaca Mountainous Region hosts a small exhibition of local products at its premises and provides information about producers to the visitors; they

organise a festival promoting local products on 1st October, in a different village every year. In villages of Troodos region, a number of specialised centres (wine, coumandaria, zivania, etc.) have recently been established (some not operational yet) that will provide information to tourists and will have traditional products for sale. The challenge is to sustain the operation of these centres, thus new ways of promoting local products are being explored, e.g. the Wine centre includes a wine spa. Traditional food products (halloumi, olive oil, coumandaria, zivania, sweets), including some organic ones are promoted and sold to tourists in Cyprus airports.

Spain: Gastronomy tourism. For tourists Extremadura offer gastronomical products and meal is cooked using local, organic, natural and high-quality recognized ingredients.

Latvia: Local products for the tourists offer country tourism accommodations, hotels, places near touristic (nature and culture monuments). In Riga very famous is Central market, located near old city centre with unique architecture provides tourists possibility to get introduce with wide scale range of local products. There are available different exhibitions (e.g Riga food), town festivals, green markets, local product baskets. Country is famous with diverse and rich cultural and historical, national cuisine. The most common ingredients in Latvian recipes are produced locally, such as potatoes, wheat, barley, cabbage, onions, eggs and pork. Local producers also offer innovative niche products. The brand of the country is "Latvia. Best enjoyed slowly". Latvian Country Tourism Association this year organizing event "Open Days in the Farm", where inviting people from cities and town visit farms and get to introduce with farming. Some farms also combination the customs and traditions with the
Lithuania: Homesteads offering culinary heritage scattered individual regions, offering services related to the region's traditions (e.g. house "Pas tėvukus, which has certified all Samogitian culinary heritage dinner with all Samogitian dishes). Some restaurants in the Old town of Kaunas offering traditional culinary heritage dishes (e.g. Dishes are just a part of the Lithuanian culture in restaurant "Berneliu uzeiga") Lots of farmers try to sold their production during holidays, fairs, mobile markets, exhibitions.

The biggest shortage in the market - the culinary heritage, health and agro-tourism places. Agro-tourism service can be provided only in the houses, which are directly involved in agricultural production, not every farmer can find time to engage in the promotion of agricultural production. A solution is to start to work with family farmers union so that we can combine two different segments - small farmers and rural tourism, and to offer holidaymakers the arrival of the homestead acquainted with nearby farmers and try their agricultural production.

3. SURVEY

3.1 Introduction

The MARLO survey in Cyprus, Spain, Latvia and Lithuania was carried out by in February and March 2014.

The questionnaire reached the respondents online in the following ways:

1) via emails and Newsletters to the project partners already existing contact lists
2) by contacting organization and association working in the local and organic products production, and country tourism sector and using their contact lists
3) personal approach – calling and inviting to fill the questionnaire and then sending individual emails with the link to the survey.

The questionnaires were filled on paper versions and online.

In the survey totally there were involved 153 respondents:

Cyprus: 30
Spain: 32
Latvia: 25
Lithuania: 66

Alongside with the survey, introduction about the Marlo project, aims and activities were done in the project partners' countries.

3.2 Participants

The survey focused on SMEs and organisations that produce and/or sell local or organic food or are active in the tourism sector and are independent of their legal status was carried out.

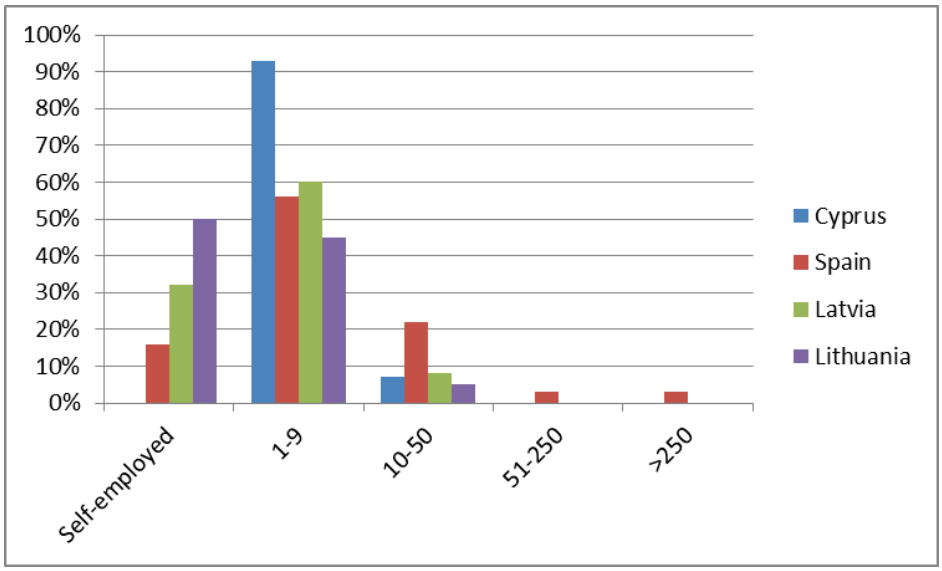
3.3 Analysis of responses

The analysis of collected questionnaires is presented below.

3.3.1. Company information

How many people does your company employ?

The respondents were covering different size of the companies. Majority of all country respondents were companies with 1-9 employees and self-employed (individual businessmen).

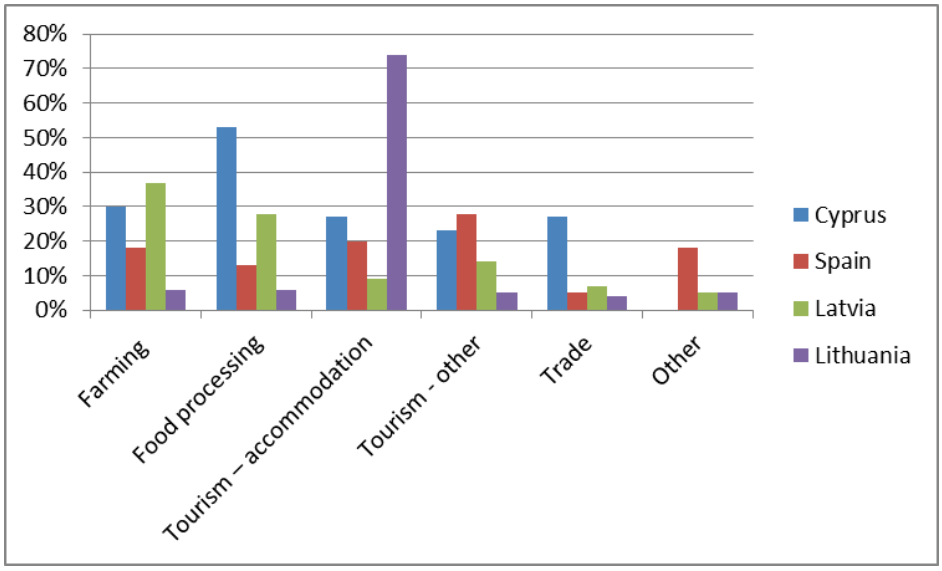


Picture 1. How many people does the company employ?

What sector(s) does your company work in?

The respondents were covering from all countries covering whole sectors.

The distribution of responses (%) is presented below:



Picture 2. Business sectors

The results showed also that the compny of the respondent not only involved in one sector but covering 2 and more sectors.

Local and organic products

How would you define a local food product?

The received definitions of local products can be summarised in the following categories, and in some cases the definitions included more than one of the following:

The most of the respondents consider a local food product as a high quality product, original from a specific place or grown in a determined territory.

- Products with very high quality, healthy, fresh, tasty, clean, bioactive (***features of the product***);
- Products grown or produced locally in the region or territory (***production location***);
- Bought directly from the producer in short distance - ***grown max 50 km away*** (***direct relationship with a grower or producer***);
- Products produced with local ingredients without additives and non-natural preservatives (***origin of ingredients and natural products***).

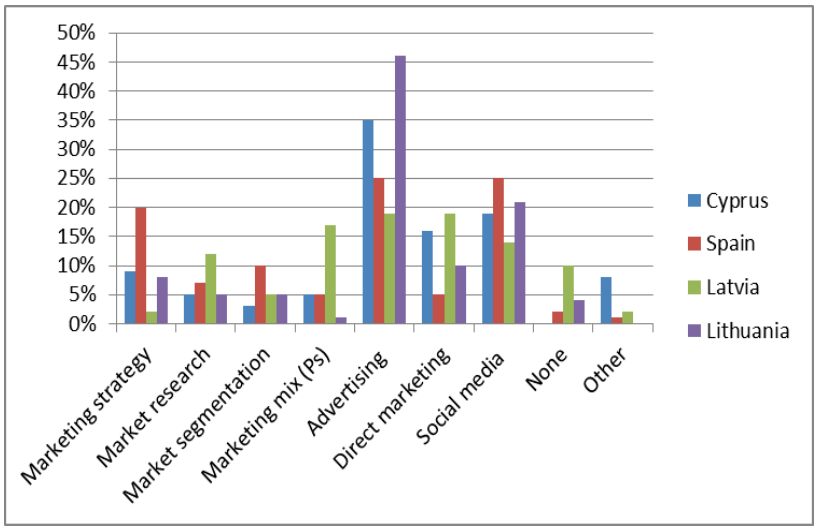
3.3.2. Marketing experience

What marketing methods and tools does your company utilise (use)?

Almost all respondents use advertising (brochures, website, e-mail campaigns), Social media (e.g. Facebook about half of them use direct marketing (e.g. through Farmers markets), marketing mix (Ps)); is in the third place by popularity from different marketing tools listed in the survey.
The least popular methods are tools are market segmentation and marketing research/strategy.

As “other” marketing tools, the respondents have mentioned experiences such as word of mouth, advertising through distribution companies and exhibitions.

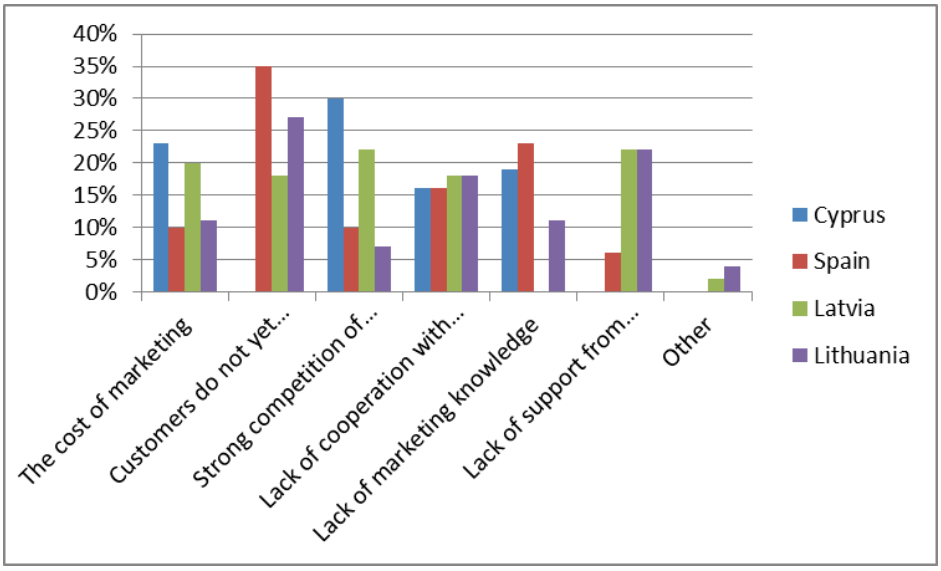
The answers distributed as follows (%):



Picture 3. Marketing Methods of the Company

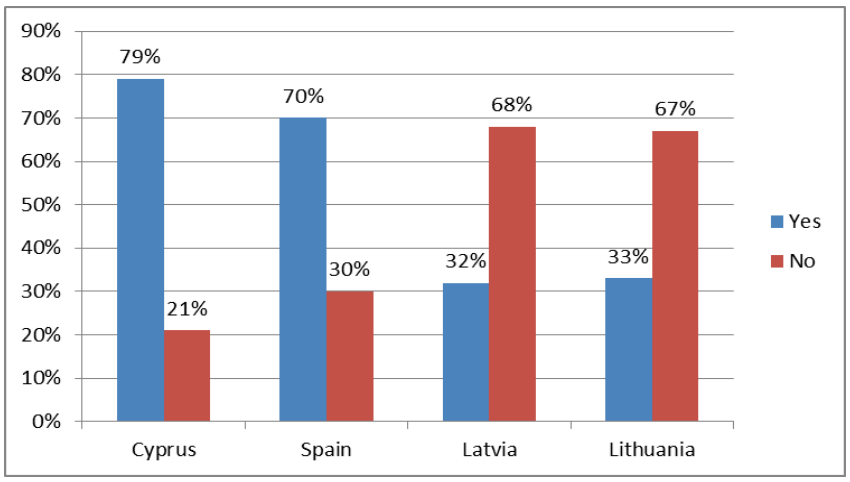
What obstacles do you experience in marketing local or organic products?

The biggest obstacle in marketing local/ organic products seems to be strong competition of imported products and **customers do not understand the value** of the local and organic products, the cost of marketing, lack of **cooperation** with other local companies (and lack of **marketing knowledge**.



Picture 4. Obstacles in Marketing Local or Organic Products

Cooperating with tourism companies/ entrepreneurs in marketing local/ organic products



Picture 5. Cooperation with tourism companies/entrepreneurs

The survey shows that the local producers have very good cooperation with tourism companies/entrepreneurs in Cyprus and Spain, but in figures really opposite – low cooperation in Latvia and Lithuania.

As MARLO Is trying to encourage cooperation there are shown the similarities/ differences in perceived benefits and obstacles of cooperation, from the perspective of producers and tourism sector.

The ways of cooperation include:

- demonstration and tasting events;
- two-way recommendations (when producer and tourism company recommend each other to their clients);
- marketing or selling products to hotels and restaurants;
- cooperation with travel agents and tour operators;
- marketing or distribution of products through tourist shops.

The perceived benefits of such cooperation are:

- access to new customers;
- additional marketing at no extra cost;
- increased promotion and sales;
- possibility to earn additional income from new activity (demonstration or tasting);
- support to each other's businesses;

In what way do you cooperate?

The ways of cooperation include:

- Include in the route of visit of organic farm or home-producers;
- Information, generating of ideas;
- Common events, product promotion;
- Purchase local products and offer for sale in my company.

What are the benefits of cooperation?

The respondents have listed the following benefits of cooperation with local producers:

- Improvement of the services;
- Increase of income and slow recognition in the market;
- Improved image and variety of local products;
- Wider range of products' offer, depending on the tourist interests

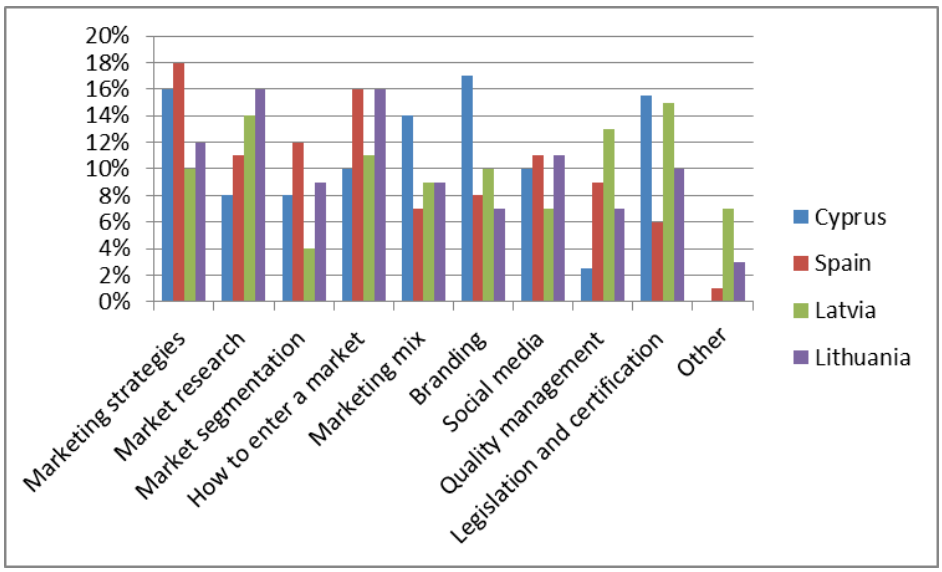
What are the problems or obstacles?

The following problems and obstacles for cooperation were discussed:

- *Poor quality of roads, infrastructure, communications;*
- *Complicated registration process for organic farming.*
- *High quality standards of the farm in order to be open for visitors.*
- *There is no option to purchase the required amount of production in time;*
- *Due to limited storage facilities and small organic farms are unable to maintain the high quality raw material for a longer period of time;*
- *Not always we can get in time enough required product;*
- *It's hard to get all the necessary documents (such as for meat or milk)*
- *The cost of their products is higher because of pricy ingredients and traditional production methods (no mass production),*
- *Other companies/ partners try to copy their products,*
- *As a small business they cannot accommodate all visitors,*
- *Tourism companies sometimes ask for commission (for bringing clients) that is too high*
- *Other local businesses do not cooperate, just try to copy, then produce poor product and give the original quality produce a bad name,*
- *Limited space to organise demonstrations,*
- *Lack of personal involvement.*

3.3.3. Training needs

Would you like to learn more about:



Picture 6. Training Needs

The training needs varies through the countries. The most inportant training needs are on the following topics:

- ***Marketing strategies***
- ***How to enter into the market***
- ***Marketing research***
- ***Legislation and certification***

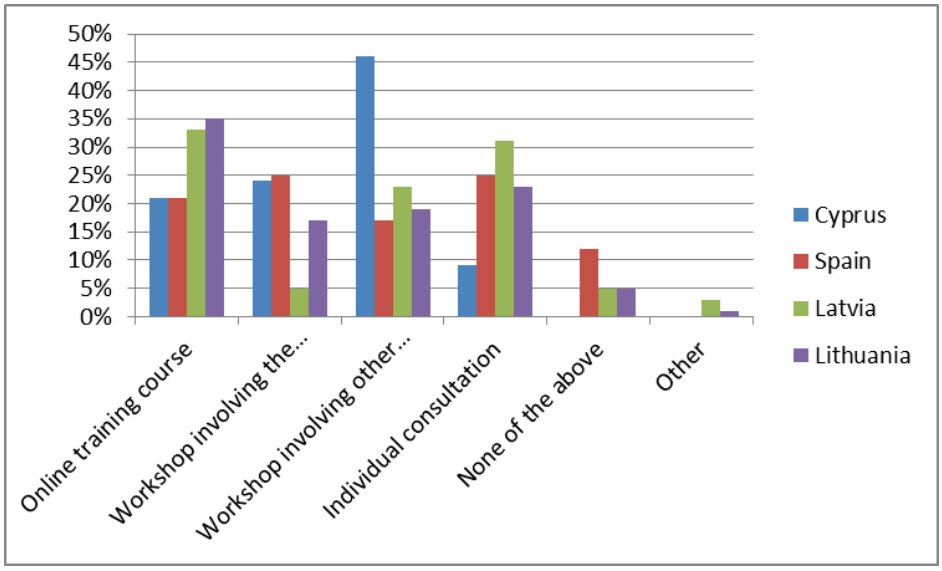
Then follows **branding and social media.**

Which of the following would help your company consider learning more about marketing of local and organic products?

The respondents were mostly interested in the following tools of the marketing (arranged in the sequency of the priority):

- **Online training material**
- **Case studies**
- Engaging with fellow participants
- Best practice **tools/ checklists**
- **Problem based learning** seemed less important to them.

How would you like training to be delivered?



Picture 7. Training forms

The most infortant training forms are the following:

- **Online training material**
- **Workshop involving other companies' employees**
- **Individual consulattions**

4. CONCLUSIONS

The desk research and the field work conducted have shown that both conventional and organic producers in Cyprus, Spain Latvia and Lithuania could benefit from MARLO project.

There is already some cooperation among producers and tourism sector, as it leads to mutual benefits. The biggest obstacles in marketing local/ organic products seems to be *strong competition of imported products, lack of support from national, regional or local authorities; lack of cooperation with other local companies and lack of marketing knowledge, cost of marketing*. In Spain/Extremadura the local market is overcrowded with local and organic products.

Rural companies in Cyprus involved in farming, food processing/ manufacturing, tourism and trade seem to be ***interested in learning more about marketing (especially branding, marketing strategies and marketing mix) and would like to participate in training provided as multi-company workshops, in-company workshops or online course***.

In Spain is the most common way to promote the enterprises, products and services in this region. The most used marketing methods and tools focused on advertising and social media. The preferred way of training of Spanish respondents could be included ***market researches and marketing mix, because they know who and where to sell out***.

Rural companies in Latvia involved in farming, food processing or manufacturing, tourism and trade seem to be interested in learning more about about ***legislation and certification , marketing strategies, marketing research and quality management***. The most suitable training delivery forms are ***online training material, access to case studies, best practice tools and checklists.***

In Lithuania farmers and tourism companies expressed their wish to learn more about ***entering to the market and market research, marketing to promote their product.*** The best way for trainings they think is ***online trainings and individual consultations.*** As a possibility for their growing could be their cooperation with other local companies.

Most participants of the survey in all countries were interested to learn more about MARLO, thus we can expect interest and participation in the pilot course on marketing local and organic products that will be offered in project countries in about a year.

5. ANNEXES: COUNTRY REPORTS