OPPORTUNITIES FOR AUTHENTIC FOOD MARKETING IN NINE REGIONS OF THE EU ATLANTIC AREA

COMMUNITY INITIATIVE PROGRAMME INTERREG III B
« ATLANTIC AREA » **RAFAEL PROJECT**

Report to the Interreg III B “Atlantic Area” Renaissance of Atlantic Food Authenticity and Economy Links (RAFAEL) Partnership

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Executive Summary

1. The overall aim of the *RAFAEL* project has been to "to enhance the identity and economy of the Atlantic Area by the concerted promotion of authentic food systems".

2. The overall aim of this review is to assess the opportunities for authentic food marketing in the Atlantic Area across a range of variables, as they affect each of the nine RAFAEL partner regions.

3. The methods used include a review of project material, a literature review and a questionnaire survey.

4. For the RAFAEL partners, 'authentic' food is identified as: *Local*, *People-focused, Sustainable*, *Distinctive, High quality, Healthy, Safe and Traceable*

5. While the overall EU market for organic food is expanding, there are considerable differences in organic sector development between northern, central and southern countries.

6. Authentic food marketing opportunities in southern regions arise not only from the current organic market potential but also from established patterns of production and the survival of traditional and artisan production and marketing.

7. In northern regions, environmental sustainability, animal welfare and traceability criteria are important to consumers; and productivist agriculture is associated with negative implications for traditional food links. New and innovative forms of authentic food marketing are more frequent in these regions.

8. Public sector food procurement (PSFP) is an opportunity for authentic food producers in the Atlantic area. Interest in the positive impact of quality food provision and the value added to sustainable rural development through public sector catering policies is growing. There is increasing emphasis on promoting health initiatives that encourage the consumption of fresh, local and organic produce.

9. Scope for local action on procurement is greater in regions where farming conditions and food cultures favour local or environmentally-sensitive consumption activities. The concept of sustainable public sector procurement is more developed in the northern regions of the RAFAEL partnership than in more southerly areas where the organic market and local regulatory mechanisms are at a relatively embryonic stage.

10. In the UK and France, there is a substantial basis from which to encourage further links between authentic food, environmental education and community health policies through growing support for local sourcing and sustainable public catering activities. Farming

conditions and food cultures are however favourable in Southern European countries, so there is also potential in these regions.

11. In countries with a more a developed marketing and processing sector, a much higher proportion of total organic operators are processors. A combination of policy, enterprise and infrastructural support is needed to increase processing capability, retain value-added and exploit the authentic food opportunities which have been identified in southern regions.

12. Although organic processing and product innovation in the northerly areas of the RAFAEL partnership offer expansion potential, inadequate processing infrastructure and the difficulties of sourcing organic/authentic ingredients are significant constraints on development.

13. The development of local supply chain opportunities can be achieved by linking them to tourism, conservation measures, health and public procurement.

14. Exporting can result in very long supply chains which make food products more expensive. Polycentric spatial development can overcome some aspects of food transportation from peripheral to core areas of the EU and back.

15. The extent of similarities and/or differences across the partner regions is likely to influence the degree to which a commonality of trading activities can be achieved between the partner regions of the Atlantic Area.

Recommendations:

16. The lessons learnt during the RAFAEL project need to be shared, and support for the authentic food sector needs to be continued.

17. The concept of authentic food requires further elaboration and development.

18. Authentic food production systems need public sector support.

19. EU public procurement policy needs to be integrated with wider sustainability policy.

20. Authentic food producers must communicate the benefits of the food they produce to consumers.

21. More practical guides for tourists to visit authentic food producers or to stay on a farm and learn more about how food is produced are needed. The eventual aim should be a pan-Atlantic Area guide, linking authentic food holidays to sustainable transport networks throughout the area by rail and by sea.

22. EU funded programmes should address the need for training and the need to involve young people in authentic food production, processing and marketing.

23. The importance of the RAFAEL project – its principles and methods – should be elaborated to address the emergent issues of: the global

food system's over-reliance on fossil fuels; food security; climate change.

24. A follow-up project should be undertaken to ensure that the findings and experience of RAFAEL are brought together

25. A number of toolkits have been produced as part of the RAFAEL project and a number of guides are still under development. These include toolkits on developing demonstration schoolmeals, creating a tourist guide, etc. The toolkits should be published in a usable format.

26. A selection of RAFAEL reports should be published so that they become available in the public domain.

27. A RAFAEL network should be continued and enhanced to maintain the links that have been forged in this project and to continue joint projects and trade development in authentic products.

28. Enterprise collaboration and partnership working has proven to be essential and should be encouraged in future EU projects.

29. An expansion of authentic food products with distinctive quality designations across the regions of the Atlantic Area should be undertaken.

30. Continued cooperation between producers, processors and suppliers from the north, centre and south of the Atlantic Area region should be maintained.

31. Setting up a trade network throughout the RAFAEL partnership area would help achieve the sustainable polycentric spatial development envisaged by the RAFAEL project.

RAFAEL is a partnership of organisations from EU countries with an Atlantic seaboard

1. Introduction – Interreg III B 'Atlantic Area' and the RAFAEL project

RAFAEL (Renaissance of Atlantic Food Authenticity and Economic Links) is an Interreg IIIB project, run by nine main partners from different regions of the Atlantic Area of Europe. There are public and private organisations among the partners and the regions involved are South West England, Wales and Northern Ireland (UK); Galicia, Zamora and Andalucía (Spain); Alentejo and Tras-Os-Montes e Alto Douro (Portugal); and Brittany (France). Devon County Council in Southwest England is the lead partner and coordinator of the project.

THE RAFAEL PARTNER ORGANISATIONS

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1.1 Interreg III

Interreg III is an EU "Community Initiative" whose aim is to encourage harmonious and balanced development across national borders. It is financed by the European Regional Development Fund (ERDF) and ran from 2000 until the end of 2006 (although funds can be drawn down until the end of 2008 for "committed projects").

Interreg III comprises 3 strands: A, B and C. *Strand B* covers transnational cooperation through the formation of partnerships in distinct European regions, and the EU is divided for this purpose into such regions as the Atlantic Area, the Mediterranean, the Baltic Sea, etc. Thus the RAFAEL partnership was formed by organisations in countries with an Atlantic seaboard.The general objectives of Interreg III are:

- To contribute to harmonious territorial integration throughout the European Community
- To encourage transnational, cross-border and interregional cooperation
- To encourage the mobilisation of key players by supporting collective projects involving partners from different countries

1.2 The Atlantic Area Programme

The Atlantic Area Programme brings together some 30 regions along Europe's Atlantic coast. The aim of the Programme is to reduce the effects of the peripheral nature of its member regions and to work together to promote their common strengths. The Atlantic Area has outstanding natural and historic assets, the majority of which are created and managed by food production systems involving micro SME's. The specific objectives of the *Interreg IIIB Atlantic Area* programme are:

- To promote the coherence and cohesiveness of the Atlantic Area
- To improve its economic competitiveness and efficiency so as to overcome its more peripheral location in comparison to the more central regions of the EU
- To seek sustainable development patterns through a strategy of integrated territorial development and the alignment of social, economic and environmental objectives, *whilst*
- Ensuring that the cultural, historical and environmental assets of this area are conserved and protected

Examples of the expected results from the programme are:

- New markets and products
- Better collaboration in the value chain
- Trained workforce and management on managerial and technical issues
- Good relations between companies and regional administrations
- Strengthened knowledge and experience in planning, food markets and rural development on regional level
- Regional cross-sector networks

Under *Priority D*, Interreg IIIB projects like RAFAEL have the following themes,

- Reinforcement and promotion of the Atlantic identity
- Promotion of the "Atlantic Area" heritage
- Encouragement of the contribution of culture to economic development
- Support for the creation and promotion of Atlantic tourist products
- Encouragement for the promotion of the Area through concerted economic promotion
- Help economic sectors prepare for the enlargement of the European Union
- Create and disseminate common communications tools to promote the dynamism of the Area and reinforce the identity of this interregional grouping

1.3 Transnationality

An exchange of experience is not sufficient for the Interreg III-B programme. There has to be a focus on creation of networks for actions such as:

- Joint promotion schemes
- Common transport services
- Common methodologies for common problems
- Shared strategic studies

In the Interreg programme, trans-nationality allows countries to co-operate on mutually beneficial projects and to tackle issues that go beyond national borders. It aims to produce models that are transferable across different countries, and to speed up the process of innovation through the sharing of expertise and development costs. Participating organisations should benefit through accessing new skills and ways of working, and increasing their connections to European networks and markets.

1.4 The aim of RAFAEL

The overall aim of the *RAFAEL* project has been to develop the identity of the Atlantic Area through food, for the benefit of inward investment strategies and SME's in this Interreg III B Atlantic Area. Partnership activities have been defined by the principal concept of the project: "to enhance the identity and economy of the Atlantic Area by the concerted promotion of authentic food systems".

Authentic food shopping – Ultracomida in Wales specialises in farm cheeses and artisan made delicatessen foods from Spain, France and Wales

The RAFAEL project

One of the objectives of Interreg IIIB is to improve the economic competitiveness and efficiency of the Atlantic Area, so as to overcome its more peripheral location in comparison to the more central (or core) regions of the EU. In line with this objective, The RAFAEL project addresses the impact of globalisation on Atlantic Area small and medium-sized enterprises (SME's) and the potential for sustainable polycentric spatial development[1] through enhancing and promoting cultural identity associated with authentic food systems. The project has been undertaken over a three-year period (2005-2007) and has been developed by the RAFAEL partnership, incorporating public and private sector organisations from nine Atlantic Area regions across four countries: France, Portugal, Spain and the United Kingdom.

The RAFAEL project has four main objectives:

- Objective 1: to create a sustainable network within and outside the Atlantic Area for promoting cultural identity and the authentic food produced within the region;
- Objective 2: to develop producer-led authentic food supply chains within the Atlantic Area;
- Objective 3: to enable effective learning and exchange between partners; and
- Objective 4: to contribute to the implementation of European Spatial Development Planning (ESDP) and EU policies related to agri-food issues.

Over the three year life of the project, these objectives have been addressed through the implementation of eight actions across the partner regions. The information and local evidence gathered during the period have made it possible to identify key factors affecting the ability of local actors to deliver project objectives.

1.5 Project review - opportunities for authentic food marketing

This report presents a review of the RAFAEL project and its associated partnership activities. The overall aim of the review is to assess the opportunities for authentic food marketing in the Atlantic Area across a range of variables, as they affect each of the nine partner regions: Côtes d'Armor (Brittany) in France; Andalucía, Galicia and Zamora (Castilla y León) in Spain; Alentejo and Trás os Montes e Alto Douro in Portugal; and Northern Ireland, South West England and Wales in the United Kingdom. Important variables for consideration in this context include:

- levels of development of sustainable production systems such as organic farming;
- local and direct marketing infrastructure;
- opportunities for the public procurement of authentic food;
- capacity for processing and adding value to local authentic production;

It also briefly addresses issues such as political commitment and export opportunities.

In order to help evaluate the success of the RAFAEL project, an analysis and summary of key similarities and differences across the Atlantic area is necessary. A better understanding of the nature of existing opportunities across the partnership regions will also help to advance the development of RAFAEL objectives beyond the current programme.

[1] Polycentric spatial development was identified early in the project as a desirable objective in order to combat the increasing trend by which agricultural produce from peripheral regions is transported to the EU's dominant metropolitan areas packed, processed and otherwise commodified and then re-directed to markets throughout Europe.

1.6 Approach and methodology

This report collates and summarises evidence that has been produced by project actions undertaken in the Atlantic Area by the RAFAEL partnership. Primary and secondary research has been undertaken with a combination of literature review, comparative analysis and a final questionnaire survey (accompanied by informal, semi-structured interviews).

The questionnaire survey, undertaken in the closing stages of the project, was designed to harness any remaining issues of significance to RAFAEL partners which had not yet emerged from existing actions or other project contributions. Differences in the attitudes and expectations of individual partners were also addressed within the framework of the questionnaire.

The report is structured as follows. Following this brief outline of the scope and nature of the study, Section 2 describes and summarises the main factors affecting authentic food market development. An overall assessment of the principal opportunities for developing authentic food marketing across the range of farmed output in each of the partner regions is provided. The final section draws together all previous evidence from the Atlantic Area in a series of conclusions and recommendations in order to provide a framework for developing RAFAEL objectives beyond the current programme.

Additional information, including an example copy of the questionnaire which was circulated to all partners in the closing stages of the project, is provided in the Appendices.

RAFAEL Steering Group in session, September 2005

2. Factors affecting authentic food market development

2.1 Scope and sources of information

A number of major EU sources of background information are relevant to the activities and objectives of RAFAEL partnership. Research output from both the OMIaRD[2] and QLIF[3] projects provide useful EU-based evidence relating to market opportunities for both *organic* and (non-organic) *low input* foods. OMIaRD concentrates on the role of organic marketing initiatives in the context of rural development[4], whilst QLIF research is associated with the quality and safety of both organic and low input foods, including primary production, marketing and processing.[5] Similarly, the promotion of *quality* produce in the lagging regions of the EU has been highlighted in the findings of the RIPPLE[6] project [7]

2.1.1 The concept of authentic production

It is difficult to define 'authentic' as it can be used in many contexts. 'Authentic' food can be organic, fresh, local or seasonal, real or natural (yet alternative), safe, ethical, fair trade, free range, locally-sourced, regionally-distinctive, typical, traditional, artisanal, including origin-labelled foods[8] and those associated with local culture or heritage. All are relevant to a renaissance of authenticity in the RAFAEL context.[9]

All 9 RAFAEL partners defined 'authentic' according to the following principles: *Local*, *People-focused, Sustainable*, *Distinctive, High quality, Healthy, Safe and Traceable.*

2.1.2 The RAFAEL Charter

The partners produced a RAFAEL Charter (reproduced in Appendix 2). The Charter is an agreement of common understanding and commitment to the principles that define the concept of 'Authentic Atlantic Food'. One conclusion of a report produced by the Galician partnership[10] is that the Charter has been a useful tool to help communicate the principles of authentic food - helping to distinguish products that are sustainably produced even though they may not be certified as organic. The Charter gives smaller producers the opportunity to communicate to consumers the difference between their production methods and ethos compared to conventionally produced products[11]. Although the Charter helps in this way, there remains the problem that the concept and recognition of authentic or artisan production has no official recognition - which inhibits funding support for SME's.

One issue with the Charter highlighted by the report from the Galician partnership was the lack of consistency as the 'definitions' were interpreted in different ways by partners, however this flexibility was also positive as it allowed partners to involve a wide range of producers to suit the particular needs of their regional priorities. For example, regional partners had different criteria about the distance which goods could

[2] 'Organic Marketing Initiatives and Rural Development' (2001-2004): EU (FPV) Project QLK5-2000-01124 RTD.
[3] 'Quality Low Input Food' (2004-2009): EU (FPVI) Integrated Project No. 506358.
[4] (reported for example, in Sylvander & Kristenson, 2004)
[5] (see for example, Beck et al., 2006).
[6] 'Regional Images and the Promotion of Quality Products and Services in the Lagging Regions of the European Union': EU (FPIV) project, FAIR3-CT96-1827, Area 4.
[7] (see McDonnagh & Commins, 2000; Ilbery et al., 2001).
[8] The special characteristics of PGI and PDO foods are the focus of the EU DOLPHINS project 'Development of Origin-Labelled Products (OLPS): Humanity, Innovation and Sustainability', EU (FPV) QLK5-2000-00593 (1998-2002).
[9] (see for example, Tregear, 2001a & 2003; Cannon, 2005; Bessiere, 1998; de Roest & Menghi, 2000; DTZ Pieda, 1999; Wilson & Fearne, 2000; Groves, 2001).
[10] 'Guidelines for authentic food supply chain development' RAFAEL Project, December 2007
[11] See also, Alonso, N (2006); Frost and Daniel (2007)

travel to qualify for 'authentic' status, but the Charter allows for this flexibility. The case studies in this report from the Galician partnership reflect the fact that for many producers and businesses, producing authentic products in a way that respects the environment is a way of life.

2.1.3 Authentic and organic

Investigations of authentic food in the Atlantic Area are associated with a wide range of policy concerns and practical initiatives, including both theoretical and empirical studies. In the review of market studies undertaken by the RAFAEL partnership, organic production and consumption more or less dominated much of the evidence highlighted by partners in the southern European regions where the developing organic market is used as the principal exemplar for authentic food systems (OCW, 2006). In the more northerly regions, in recent years several authentic food studies have been conducted, in addition to organic research [12]

2.2 Level of development of sustainable production systems

At the heart of the RAFAEL Charter lie the key principles for sustainable food and farming, including the need to produce safe, healthy and nutritious foods whilst respecting and operating within the biological limits of natural resources and consistently high standards of environmental performance and animal health and welfare (DEFRA, 2002). The development of organic systems of agricultural production is therefore central to the market for authentic foods. While the overall EU market for organic food is expanding, there are considerable differences in organic sector development between northern, central and southern countries and this is also reflected within the RAFAEL partnership. Table 1 demonstrates the level of development in the 9 partner regions.

Table 1. Development of organic production in the RAFAEL partner regions

Country/region	Area under organic management (2006)	Holdings (2006)	% organic of UAA
Alentejo	139 449[13]	622[6]	7.2
Andalusia	537 269	6 195	11.9
Brittany	34 607	935	2.1
Galicia	9 623	396	1.3
Northern Ireland	9 127	240	0.9
South West England	125 003	1 282	6.7
Trás os Montes e Alto Douro	n/a	n/a	n/a
Wales	78 973	710	5.5
Zamora	12 639	234	0.2

Source: Lampkin et al, 2007

2.2.1 Spain and Portugal

Table 1 shows that of the 9 partner regions, Alentejo has the highest percentage of Usable Agricultural Area (UAA) managed organically.

[12] associated with the agro-food industry as a whole in relation to, for example, the effects of globalisation, food safety and environmental concerns, local food links and 'alternative' versus 'mainstream' systems of food provision.
[13] In 2005 not 2006

Firmino (2000; 2006) and Gonzálvez (2002) have highlighted the dynamic changes which have taken place in the organic sector over the past few years in Portugal and Spain. They suggest that interest in organic farming in both countries is a recent phenomenon. The percentage area under organic management for the whole of Portugal and Spain is 6.3% and 3.2% respectively.

National plans for organic agriculture have been produced in both countries – in Portugal for 2004-2007, and in Spain for 2007-2010 – and are expected to make a strong impact on the development of the domestic organic market (MADRP, 2004; MAPA 2006). Both plans provide detail on the organic sector and the potential market for organic food production.

According to IDRHA[14] data (IDRHA, 2005), Alentejo and Trás-os-Montes are the two main areas of organic agriculture in Portugal, where product potential and marketing opportunities focus on olive trees and the production of beef and sheep (Sudoeste Recursos, 2000; Cristovão et al., 2002). ADRAL further notes that barriers to increase organic supply are production and certification costs, lack of technical information available to producers, lack of motivation and lack of knowledge on legislation by producers (Questionnaire survey response).

Similarly, Andalucía is the most significant autonomous community in Spain in terms of both number of organic producers and area dedicated to organic production, with 11.9% of its agricultural area under organic management (Lampkin et al, 2007). Here, organic activity is in the process of considerable expansion and, as far as specialisation is concerned, important sectors include olive production in the provinces of Seville and Huelva, livestock farming in Cadiz and the production of strawberries and citrus fruits in Huelva (see Carrasco et al., 2003). According to Consejeria de Agricultura e Pesca (2002) the development of the organic farming sector has been largely influenced by prospects of subsidy rather than by market demand. They see this as a threat to the development of the organic sector. .

CAAE[15] identifies a number of weaknesses affecting the organic sector in Andalucía. These inlcude the fragmentation of organic production, lack of a marketing structure, lack of internal communication, lack of research, lack of knowledge amongst producers concerning organic farming standards and lack of investment capital for producers (Questionnaire survey response).

Domínguez et al. (2001), OBZ (2003) and Xunta de Galicia (2004) suggest that although in Galicia in North West Spain currently only 1.3% of land is under organic management, there are opportunities for organic and distinctive quality food production. This is supported with arguments that the significance of milk and beef is considerable and that there have been important recent incentives from the Galician administration and from the *Consello Regulador* or Regulatory Council of Galician Ecological Agriculture in organic food marketing and promotion.

Although Castilla y León[16] is not a strong organic producing area, with only 0.2% of UAA under organic management (MAPA, 2005), traditional farming systems and extensive livestock production in this relatively sparsely populated region have played an important socio-economic role for many years, and agriculture continues to be the most important sector of the local economy. Indigenous breeds and typical agro-ecosystems, such as the *dehesa* in Castilla y León and Andalucía and the *monte*

[14] Instituto de Desenvolvimento Rural e Hydráulica: Ministério de Agricultura, Desenvolvimento, Rural e Pescas (MADRP), Portugal.
[15] CAAE Association, a RAFAEL project partner, is a non-profit organization for the development of certified Organic farming and livestock production
[16] Zamora is in the Spanish province of Castilla y Leon

gallego in Galicia, continue to be highly appropriate to the development of organic livestock production and sustainable agriculture.[17]

Dehesa in Andalucía - Iberian Pigs

Dehesas are woodland pastures of cork and holm oak. The woodland is undergrazed with livestock. In the autumn Iberian pigs are fattened on the fallen acorns which gives jambon Iberico its distinctive flavour.

2.2.2 France and the UK

The percentage UAA under organic management for the whole of the UK is 3.6%. Wales and the South West of England have the highest proportion of UAA managed organically, 5.5% and 6.7% respectively.

In France, 1.9% of UAA is under organic management. The Provence-Alpes-Cote d'Azur and Languedoc-Roussillon have the highest proportion of UAA managed organically, 6.5% and 4.4% respectively. In Brittany, the percentage is 2.1% (Lampkin et al, 2007). Most of this land is used by dairy producers. (Observatoire Regional de la Production Biologique, 2007) The French organic farming sector is underdeveloped when compared to national consumption. Most organic products sold in France are imported from other European countries such as Germany and Italy. Organic farming associations are working to develop the sector but it is suggested that it is a long term process. Nevertheless, there is considerable potential for the development of local organic production.

In Côtes d'Armor, the RAFAEL funded organisation APPETIT also reports that lack of interest and low levels of demand, compounded by lack of government aid, lack of volume and consistent supply plus logistical problems such as poor transport infrastructure are barriers to further development of the organic sector. (Questionnaire survey response[18]).

In the UK, Organic Centre Wales (OCW) provides support to organic producer groups as the Centre believes this to be of great importance to the development of the

[17] See for example, Trujillo, 1999; Camacho Vallejo et al., 2000

[18] See http://www.rafael-eu.org/-Cotes-d-Armor-.html

organic sector in Wales. OCW states that further development of organic farming is very much linked to the organic market. Although currently there is more demand for organic produce than there is supply, conversion is hampered by high organic feed prices, lack of abattoirs and seasonally over-supplied markets, particularly for lamb (Questionnaire survey response). This is similar in other parts of the UK, such as South West England (Devon).

Organic farming is relatively underdeveloped in Northern Ireland and consequently organic supply chains are still developing for most products. During the technical exchange to Northern Ireland in 2006, RAFAEL partners learned that without a local market, food produced to RAFAEL Charter standards tended to follow all Northern Ireland agricultural produce into the commodity food chain where it is uniformly branded as 'British'. Opportunities for development of organic production depend on investment in basic technical training, advice and extension, development of producer groups, market intelligence and research.

2.2.3 Size of enterprises

Although this section has noted the overall differences in organic sector development between northern, central and southern countries especially in terms of land area converted to organic production and the degree of regional market penetration, this should not obscure the fact that there are significant organic businesses in the southern partner regions. CAAE in Andalucía - a not for profit organisation - is a major organic certifier, supplier and exporter, with a wide product range covering olive oil, olives, meat, preserves, spices, fruit and vegetables, nuts, dairy and eggs, bakery, honey, fish, wines and spirits, etc (Asociacion CAAE, 2006). As noted elsewhere in this report, the majority of organic processing enterprises in Spain are owned by a single family (Gonzálvez, 2007). These companies have the capacity and capability to develop inter-regional trade in authentic products.

2.3 Local marketing infrastructure and food supply chains

2.3.1 Introduction

Interest in locally-embedded food production structures is increasing, alongside novel, 'people-focused' approaches to provision such as community-supported agriculture (CSA), community food and farm projects, and 'grow your own' schemes.[19] Such initiatives are typified by the provision of both organic and non-organic local food for local consumption, and the creation of so-called 'alternative' food links through short, and more sustainable, food supply chains (SFSCs), improved local marketing infrastructure and a clearer role for direct marketing and local sourcing.

Types of Short Food Supply Chains

- 'Face to face' SFSC's, including farm shops, farmers' markets, roadside sales, 'pick your own', box schemes, home deliveries, mail order and e-commerce.
- 'Proximate' SFSC's, including farm shop groups, regional hallmarks, consumer cooperatives, community-supported agriculture, special events and fairs, thematic routes (food trails etc.), local shops, catering establishments and tourist enterprises, and dedicated retailers (speciality or whole food shops etc.).
- 'Extended' SFSC's, including the use of certification labels, production 'codes' (such as organic, regional, integrated, artisanal etc.) and reputation effects.

Source: *IMPACT project*[20]

[19] See for example, Share & Duignan, 2005
[20] The IMPACT project focuses on rural development in seven EU countries, including France, Ireland, Spain and the UK (van der Ploeg et al, 2002)[20]. Project results underline the existence of considerable diversity in the organisational structures of food

Case studies of direct marketing activities, demonstrate the variety of direct sales initiatives (Holloway et al., 2007; Hortenosa, 2008) . The following initiatives are identified:

- farm shop,
- farmers selling at farmers' markets,
- box delivery schemes,
- community-supported agriculture
- urban community garden selling to local households
- sales to schools and other public sector institutions
- sales to tourists
- sales to local shops, cafes and restaurants

In the Questionnaire survey, RAFAEL partners also identified:

- consumers associations and producer groups
- internet sales/ mail order

Research conducted as part of RAFAEL project (Action 4.2 report: 'Local and direct marketing') suggests that there is a broad range of local produce available in the different regions (although in some regions availability is scattered with little organic produce). However, the local market percentage of RAFAEL products generally does not exceed 1-2%, with Portugal and Devon being the exceptions. In these two regions authentic foods represent 10% and 45%, respectively of the available local food (CAAE, 2006a).

Increased demand for local produce has become associated with the search for authenticity in an increasingly globalised and homogenous environment. This reflects a reassertion of the more natural food processes displaced by industrial agriculture and standardisation and a reconnection with the social, cultural and environmental aspects of food production. As a recent commentator has put it, there "is a longing for what is regarded as peasant food, a rusticity that reflects not so much an admiration for a class that is now in the process of extinction in Europe[21], but rather a response to the transformation of *terroir* into factory and the desire to connect with a tradition of hearty authenticity" (Freedman, 200 p.17). He argues that,

"On the one hand, the uneasiness over where food comes from, coupled with a periodic shift towards simplicity, has led to a cuisine of *authenticity* in which quality, naturalness, seasonality and local ingredients are paramount and the style of preparation is designed to highlight the primary products". (Ibid, p 26 – 27. Italics in original)

Successive crises, such as BSE and Foot and Mouth Disease in 2001, have strengthened these themes in both the organic and conventional farm sectors especially in the more northerly regions of the Atlantic Area. Alternative food networks[22] and the re-localisation of food chains can play an important role in rural development. The authentic and innovative food marketing opportunities established by RAFAEL partners contribute to rural development and the sustainable agenda.

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supply chains and identify several categories of SFSCs according to different mechanisms for 'aligning' producer-consumer networks (as discussed in Renting et al., 2003).

[21] Freedman (Professor of History at Yale University) is expressing an Anglo-American viewpoint here. Elsewhere in Europe and certainly in France and among the Brittany RAFAEL partners there is political and community support for peasant farming. The Confederation Paysanne is a powerful force in French politics.

[22] Ilbery, 2001; Kneafsey et al., 2001; Stropes et al., 2002 provide some evidence of the role of these networks

2.3.2 Examples of local marketing from the current situation

Some commentators suggest that the different economic and socio-cultural characteristics in the rural areas of southern Europe have resulted in the relatively slow growth of domestic organic consumption in Portugal and Spain. (Firmino, 2000/6; Sanjuán et al., 2003; Urbano & Temprano, 2004). For example, although the local market proportion of RAFAEL products in Portugal is one of the highest in the Atlantic Area regions, local consumption and the local organic market is not yet well established. In Brittany, by comparison, RAFAEL produce is marketed through farm shops, farmers' markets, and school catering supply chains (public food procurement) and also through consumer groups (Questionnaire survey response). Consumer groups are currently not a common method of marketing in other RAFAEL regions, but could provide opportunities in the future.

Farmers' market, France 2007

2.3.3 Barriers to the development of SFSC's

Barriers to the development of shorter localised food supply chains are: the relatively small number and size of 'alternative' producers; bureaucratic constraints; shortage of key intermediaries in the food chain; and poor provision of key physical infrastructures[23]; limitations on niche marketing; the influence of large multiple retailers and the small number of 'alternative' chains are also important. (Kirwan et al, 2003).

[23] (Ilbery et al, 2004, summarised in OCW, 2006).

Studies conducted as part of the RAFAEL project show that the nine different regions all have their own problems related to development of the local market (OCW, 2006; CAAE 2006; CAAE 2006a) some examples are highlighted below.

Côtes d'Armor

In Brittany, the main problems with marketing RAFAEL products faced by APPETIT[24] are the limited range of products available, conflicts between producers and competition with established supply chains. Furthermore, lack of political support; agriculture and quality and safety policies not adapted to small farms are considered to be problems. According to APPETIT, wholesalers currently have little interest in RAFAEL produce. APPETIT suggests that cooperation between producers and growers will benefit the development of local supply chains (Questionnaire survey response).

Northern Ireland

The main challenges for developing local supply chains in Northern Ireland, as identified by CSA Regional Supplies Service [25]and Western Health & Social Care Trust[26], are lack of government aid, logistical problems and costs of produce (Questionnaire survey response).

Authentic Food in Hospital Catering – Western Health and Social Care Trust

[24] APPETIT is an association of food producers and actors who share common values concerning the environment and the importance of local action.

[25] The Central Services Agency is an integral part of the Health and Social Services in Northern Ireland, supporting the activities of Health Boards, Trusts and Agencies through a wide range of regional services; Regional Supplies Service has been recognised as a Centre of Procurement

[26] Western Health & Social Care Trust is the Northern Ireland RAFAEL partner and is interested in supply of local and authentic produce into its hospital catering

Portugal and Spain

In Portugal and Spain, fragmentation of production has had a negative impact on continuity of supply and local availability, whilst a range of local marketing and key infrastructural concerns including lack of co-ordination and poor trading structures has curtailed the expansion of the domestic market (OCW, 2006; Junta de Andalucía, 2002; MADRP, 2004; MAPA, 2006). Although there is evidence of a growing receptiveness to organic foods and an increased public understanding of organic production (Nexus, 2005), lack of consumer awareness and inadequate information has also resulted in problems of recognition (Soler et al., 2002).

A number of initiatives to develop local supply chains in both Spain and Portugal have been launched as part of the RAFAEL project (see http://www.rafael-eu.org). These include organisation of fairs, farmers' markets, setting up cooperatives (beekeepers organisation) organizing demonstration school meals, development of consumer groups, and developing links with tourism. These events have been successful in addressing a number of the issues noted earlier in this report, but the need to follow them up was stressed by a number of the partners in the interviews conducted as part of this project review.

Beekeeping - Andalucia Technical Exchange, October 2006

2.3.4 Lessons from RAFAEL direct marketing case studies

The RAFAEL case studies collected by the Galician partnership demonstrate the benefits that come from the wide range of direct selling methods. The case studies cover the range of methods that businesses can adopt to sell their goods directly, including farm shop, mail order, on-line, home selling, direct to schools (other than by the public procurement process), local shops, restaurants, markets etc. These methods enable producers to receive a better price for their goods due to the removal of intermediaries and increased 'ownership' of products and opportunities for adding value. It allows producers to control all aspects of their business - from production to processing to selling. The case studies show the benefits a business can gain by adding value through processing on the farm and maintaining quality instead of enlarging the farm or producing more intensively. There are a wide range of benefits that come from direct selling - social (contact with consumers, confidence, traceability etc.) economical (fewer intermediaries etc.) environmental and ethical (traceability, animal welfare etc.).

2.3.5 Opportunities to develop SFSCs

Producer groups

Co-operation between producers is seen as an important means by which routes to market for individual produce can be improved. (CAAE, 2006a; CAAE, 2006)

CAAE (2006) stresses that to establish these groups it is necessary to continuously and intensively work with producers, to promote the benefits of creating local supply chains and producer groups, to provide marketing advice to producers, and to facilitate contacts between producers (CAAE, 2006).

A number of the RAFAEL partner case studies reviewed in the Galician report promote the benefits of working as producer groups to develop and promote local food. The producer groups highlighted in the case studies comprise cooperatives, producers, agricultural companies, and agricultural stakeholders. The purpose of the group took a number of forms:

- To identify the phases of production and to ensure traceability
- To consolidate the local products supply chain
- To improve the selling of products and to save money by reducing intermediaries
- To increase the value of local products
- To offer consumers the best quality 'authentic' products.

The report proposes that public authorities should ensure that training courses are provided for producer groups and that there should be talks in schools and with consumer associations. It argues that producer collaboration is very important to ensure business productivity.

Catering and tourism

Hotel and catering outlets and sustainable tourism enterprises are increasingly interested in local sourcing (based on origin, cultural identity, gastronomy, ‘green-ness’ etc.) (Bessiere, 1998). Furthermore, there are also considerable opportunities for sustainable public sector procurement. This issue is discussed separately in the next section.

ADRAL outlines two methods of marketing RAFAEL produce in the Alentejo, Portugal: “Rota dos Sabores” and “Rota dos Vinhos do Alentejo” which could be used in other regions. These projects integrate marketing local and traditional products with agri-tourism. They both consist of routes which tourists can follow to visit producers of authentic products, learn about traditional production methods, learn about the history of traditional products and buy them (OCW, 2006). Organic Centre Wales have published booklets such as their 'Local and Organic' which have been very effective in educating consumers and providing them with information on where to buy local organic produce. In the UK, farmers' markets have also contributed greatly to the development of the local market[27]. CAAE, APPETIT and Hortanosa have also set up producers' cooperatives. In Brittany consumers' associations (such as '*Voisins de Paniers*'[28]) have played an important role in the development of the local market.

2.3.6 Summary

According to Renting et al. (2003), SFSCs are most developed in Mediterranean countries (citing France, Italy and Spain as examples), where direct selling activities and regional quality production centre on long-established cultural and gastronomic traditions and the survival of traditional marketing structures and distribution networks. He suggests that new and innovative forms of marketing such as vegetable box schemes, farm shops and farmers' markets appear most often in the more northerly countries where 'modern' definitions of quality tend to emphasize environmental sustainability, animal welfare or traceability criteria; and where the relative strength of the productivist model of agriculture has had negative implications for traditional food links.

Furthermore, authentic food marketing opportunities in France and the Portuguese and Spanish regions arise not only from the potential of the emerging organic market but also from existing patterns of production and the survival of traditional marketing activities. As CAAE note, the development of producer groups has an important role here. (CAAE 2006)

The Action 4.2 report: 'Local and direct marketing' (CAAE, 2006a) suggests that local marketing generally is still at an initial phase. The report suggests that "consumers are currently attracted by low prices, easy access and convenience,(and) the development of local sourcing will be influenced by the evolution of consumer attitudes and behaviour. However, it is clear that interest in local produce is growing alongside the increasing number of initiatives, such as consumer associations, and other activities designed to promote the marketing and consumption of quality local foods".

2.4 Public procurement of authentic food

2.4.1 Introduction

In terms of food re-localisation, public sector food procurement (PSFP) is a valuable opportunity for authentic food producers in the Atlantic Area. Interest in the positive impact of quality food provision and maintenance of value added to sustainable rural development through public sector catering policies is growing and there is increasing emphasis on promoting health initiatives that encourage the consumption of fresh local and organic produce.

In the UK, where PSFP is valued at £1.8 billion a year, encouraging public bodies to purchase a greater proportion of their food requirements from local or regional food sectors and to consider what is meant by 'best value' (as opposed to lowest price) already has a high level of government support.

A number of RAFAEL partners have run experiments to include local and organic produce in public sector food procurement. Northern Ireland has developed a toolkit

[27] See also Kirwan (2004)
[28] See also Gilg & Battershill (1998) and Persillet & Sylvander, 2003

for including local and organic produce in the public sector, mainly hospitals. This has resulted in local organic ice-cream and local fruit and vegetables to be used in hospitals. In Wales, a number of policies have been put in place to develop local (authentic) public sector supply chains. As part of the RAFAEL project, Organic Centre Wales has organized demonstration school meals, conferences, taste testings and has prodcued an Organic Trade Directory and is working with a number of local authorities. Also in Wales, a number of organic producers are currently supplying the public sector with organic produce.[29] In South West England, the RAFAEL project has been used to get more authentic food into Devon's schools. This has involved 'meet the buyer' events, school food policies, farm visits and curriculum activities.

In the Spanish and Portuguese region a lot of awareness raising activities have been undertaken which will influence public procurement decisions and raise the profile of the benefits of authentic food. Currently, public procurement of local authentic food is not well-established in Portugal or Spain and there appears to be a shortage of evidence on procurement activities in general. In Spain, the Diputación de Zamora has used the RAFAEL Project to develop demonstration school meals and while central buying policies have obstructed introduction of large quantities of local and organic food, a first awareness was created.

In Brittany, a wide range of activities were developed as part of the RAFAEL Project. These include awareness raising amongst school cooks, pupils, parents and politicians. Organic food and healthy eating has been promoted trough DVD's and videos. Currently the distribution of healthy local and organic school meals is carried through suppliers and Biopôle ('hub' platform)

The RAFAEL partnership can learn from France, Italy and Denmark where fairly well-developed local food economies already prioritise local and organic food in sustainable public procurement practices[30]. This has been achieved largely through increased levels of local and regional procurement activity and the adoption of organic purchasing policies, leading to a significant increase in the number of local or regional producers participating in the procurement process, *Manger Bio*, for example, has provided organic meals to schools and other institutions across southern France since 1993.[31]

[29] For example Trioni www.trioni.com

[30] See (Morgan & Morley, 2002)
[31] http://www.manger-bio.fr/index_fichiers/mangerbio2.htm

Technical Exchange participants sample school meals in Cotes d'Armor, Brittany May 2007

2.4.2 Barriers

Within the organic sector, there are particular problems supplying the public sector when supply is fragmented and there are no large national organic enterprises. From the survey undertaken for this project, it is clear that the price of organic produce is also sometimes perceived as a problem by local authorities.

In the UK, foods with high local availability and a low percentage of public sector expenditure, such as fresh vegetables and dairy products, have been identified as providing particular growth potential (Glasu, 2007; WPIT, 2004). However, specifying service criteria and developing tendering procedures in such a way as to support local and regional food producers is important in terms of raising the barriers to participation in sustainable procurement activities. Although the promotion of organic and local foods in public catering is increasing in Brittany, Northern Ireland and in other UK regions, an overall lack of information concerning local requirements, the development of tendering opportunities procedures for small-scale local food enterprises and the legal criteria for the adoption of local-only policies has been reported (OCW, 2006). In the current survey, APPETIT in Côtes d'Armor stated that in addition to the issues mentioned, low prices paid for produce and low volumes needed, lack of nutritional knowledge amongst cooks and lack of professionalism of producers (labels, quality) are problems. They add that some cooks are afraid to work with local products because of perceived "poor hygiene standards" (Questionnaire survey).

2.4.3 Opportunities

Regional Supplies Service[32], in Northern Ireland, a recognised Centre of Procurement Expertise within the Health Sector, has established a structure and a strategy for including more local authentic produce into the public sector. They have been pro-active in explaining tendering procedures to farmers and suppliers and have succeeded in including a number of local products. Initiatives, developed as part of the RAFAEL project have demonstrated that availability of information on quantities required by the public sector and adapting menus according to availability of local produce can create opportunities (Questionnaire survey).

Introducing organic food in public sector food procurement can meet many public policy goals as organic food delivers on a range of public benefits and is legally defined. To quote from the OCW Organic Trade Directory, "From a best value perspective, organic food delivers on a range of public benefits, is legally defined, and is widely available. Organic regulation provides a legal basis for contract specification and overcomes the issue of Single Market rules in public procurement. Although organic food is often associated with a premium price consumer market, opportunities exist to reduce costs through short food supply chains and bulk purchasing**.** Buyers can investigate whether organic food can be sourced affordably as part of a supply mix. " (OCW, 2007)

Organic Centre Wales also stresses the importance of facilitators. They say: "Those in charge of public procurement, for example, local councils cannot develop supply chains if they favour some producers / suppliers - it breaks EU competition and tendering rules. An independent organisation can fulfil this vital role" (Questionnaire survey).

Enterprise collaboration and partnership working has proven to be essential and is exemplified by the work of the South West Local Food Partnership (Hughes & Griffiths, 2003) and the Cornwall Food Programme in England (detailed in Roep & Wiskerke, eds., 2006), and by the Powys Public Procurement Partnership and the Pembrokeshire Organic Group in Wales (Pitts et al., 2002: summarised in Carey, 2002; Blackwell-Jones, 2004). Local trade directories and 'where to buy guides' may also facilitate the food procurement process and thus impact positively on the local economy and sustainable rural development.[33]

Examples of creative and innovative thinking in procurement are presented in a diversity of publications from the UK regions of the RAFAEL partnership. A collection of case studies from Wales[34] relates to the findings of 'Food for Thought', a comprehensive set of guidelines designed to facilitate an improved understanding of procedures and to foster sustainable procurement practices (WPIT, 2004). For South West England, examples of best practice, primarily in the case of school meals, are reported in Hughes and Griffiths (2003) alongside recommendations for future provision. With reference to the UK, the SUS-CHAIN catalogue of sustainable supply chains is dedicated to activities that focus on the feasibility and benefits of sustainable food supply initiatives including those associated with a greater emphasis on PSFP (Kirwan et al., 2003).

[32] A RAFAEL project partners
[33] See for example: OCW, 2005; South West Local Food Partnership, 2003.

[34] Welsh Procurement Initiative (2005) Food for Thought - A new approach to public sector food procurement: Case Studies. Welsh Assembly Government and the Welsh Local Government Association, Cardiff, Wales.

2.4.4 RAFAEL partners' experience of public procurement

The majority of the RAFAEL partners have been working with school meals. All of these partners found that for the activities to be successful a range of awareness-raising activities need to be carried out at the same time as the supply chain development activities. It is vital that the whole school community is involved including key personnel, school food policy, sourcing local food, involving the whole school community, events, farm visits, training events etc.

With regard to the development of the public sector contracts, case studies highlight the importance of researching the market, engaging with SME's and producer co-operatives, increasing the amount of organic produce and hosting meet the buyer events. New European Regulations concerning hygiene and food safety are due to come into force. This will impact on smaller businesses if the current exemptions for smaller businesses no longer apply as it will be impossible for them to sell to the public sector. There is a need to encourage the public sector to do more to inform SME's about the opportunities to supply the public sector and for assistance to be provided.

2.4.5 Conclusion

There is considerable scope for local action on procurement, although it is influenced more positively in regions where farming conditions and food cultures naturally favour local or environmentally-sensitive consumption activities; others have to work considerably harder to move towards more sustainable systems.

Currently it seems that public sector procurement in the sustainable context is stronger in the northern regions of the RAFAEL partnership, rather than in more southerly areas where the organic market and local regulatory mechanisms are still at a relatively embryonic stage. In the UK and France, there already appears to be a substantial basis from which to encourage the further development of links between authentic food, environmental education and community health policies through growing support for local sourcing and sustainable public catering activities. However, as farming conditions and food cultures are favourable in Southern European countries, there is a huge potential.

2.5 Capacity for processing and adding value to local authentic production

It is suggested that the increasing consumer demand for convenience and processed foods from organic and low input agricultural systems is of considerable significance to organic processing potential in the RAFAEL context.

One important conclusion of the market studies report produced on behalf of the RAFAEL partnership during 2005/2006 was that food processing data, including specific information concerning local capacity and potential from the authentic perspective, appears to be particularly difficult to both locate and identify across the Atlantic Area, not necessarily because such information is absent from regional research, but because relevant findings tend to be spread across a diversity of studies (OCW, 2006). Over the past ten years, however, processing activities and new product development in the organic or sustainable context have been considered in a number of important pan-European investigations such as the RIPPLE, SUPPLIERS[35] project. They provide invaluable regional case studies (including from Wales and N. Ireland) of best practice in food processing and marketing.[36]

[35] See Footnotes 3, 4, 5.
[36] (see Parrott et al. 1997; McDonagh & Commins, 2000; Walkley et al., 2004 and related studies).

More recently, the ongoing QLIF project[3] dedicates an entire sub-project to 'minimum' and low input food processing strategies that guarantee food quality and safety. A related paper presented at the 3rd QLIF Congress early in 2007 highlights the main challenges for the future: "*to develop regulations with the right balance between authenticity, health orientation and convenience to maintain the confidence of consumers and credibility of products in the use of minimum and careful processing strategies permitted under organic farming standards*":" (Kretzschmar et al., 2007).

The Soil Association[37] (2007) notes "*in 2005, there were 182,000 registered organic operators in the EU-25, of which 87% were producers. Organic producers far outnumber organic processors in most of the new EU member states, such as the Czech Republic, Cyprus, Latvia, Lithuania, Hungary, Poland, Slovenia and Slovakia*." They suggest that in countries with a more developed market and processing sector a much higher proportion of the total organic operators are processors. The table below demonstrates the number of processors in the 9 partner regions. In percentage terms, the UK and France have more processors per producer than Portugal and Spain.

Country/region	No of organic processors (2006)	Total organic operators	% processors of total
Portugal	82	1 660	4.9%
Spain	1 942	18 318	10.6%
France	5 802	17 611	32.9%
UK	1 933	6 485	29.8%

Source: Eurostat

The DEFRA UK regional breakdown of organic producers, growers and processors shows that there are over 2,400 processors and/or importers of organic products in the UK as a whole and that 5.2% of these (125) are located in Wales, compared with 9.4% in Scotland and just 2.2% in Northern Ireland (DEFRA, 2007).[38] .In the second Welsh Organic Action plan the development of organic marketing and processing opportunities is given particular priority (AFP, 2004). Key constraints to the increased utilisation of organic produce include difficulties associated with local sourcing and inadequate processing capacity (OCW, 2006a).

Traditionally, the French organic food processing sector consists of small and medium-sized artisanal enterprises, producing one to two speciality products for local sale although large agri-food companies are also investing in the organic sector and, by the end of 2005, the number of organic processors amounted to 5,000, representing an increase of 2.5% over the previous year. (Reynaud et al., 2001/6; Agence Bio, 2006). Massot (2005) suggests that in Brittany, there is a significant lack of food processing operations although it is suggested that considerable potential exists in Côtes d'Armor for collective activities in relation to vegetable products, milk and meat.

In Portugal, in 2000, Cristovao (2002) suggested that a lack of correlation between cultivated organic area and the volume of processing resulted in a poor range of processed products. While between 1999 and 2005 the number of organic processors in Portugal has increased from 17 to 82, an increase of 482% (Eurostat) even now a low proportion (4.9%) of the total organic operators is a processor. The Alentejo does however produce a number of high quality processed organic products, such as olive oil and meat, but the capacity for processing needs addressing. ADRAL notes in relation to this "Investments for setting up processing plants are high and few grants are available. Furthermore, there are a lot of laws related to processing which can

[37] A RAFAEL partners in Devon, South West England
[38] Processors and/or importers include abattoirs, bakers, storers and wholesalers.

hinder further development." They add: "It would be important to provide HACCP courses to producers interested to add value to their produce" (Questionnaire survey).

Farm-made washed rind goat's cheese, Alentejo 2005

In Spain, opportunities exist for marketing a much broader range of organic and/or authentic processed foods but unfortunately the major part of national organic production finds its way on to external markets, mainly as raw materials. Consumers in Spain are buying more processed foodstuffs, creating significant potential for new product innovation in response to the growth of domestic organic consumption.

In some Spanish regions there is a lack of local processing capability and also limited development of processing standards in the organic context. Recent processing trends in Spain are nevertheless positive. Latest MAPA statistics indicate that organic processing activity has been growing at a rate of between 5-10% in Spain over the past five years, such that the number of organic processors reached 1,942 by 2006, compared to approximately 900 in 2001 (MAPA, 2006a). The majority of these are engaged in pre-processing (for example, oil mills and canning/peeling factories) but a small number produce organic bread and other cereals, wine, juices, canned fruit and vegetables, soya products, bread spreads and baby food (Gonzálvez, 2007). Approximately 18% of all processors are located in the region of Andalucía, the major organic producing area in Spain, whereas Galicia and Castilla y León[39] account for just 3% and 4% respectively.[40] Notably, the number of registered processors in Castilla y León is high in proportionate terms (relative to organic producer numbers) reflecting a more organised sector and indicating that the province of Zamora may be especially suited to participation in RAFAEL activities.

[39] Zamora, a partner region of the RAFAEL projects, is in the Spanish province of Castilla-y-Leon.
[40] The autonomous region of Cataluña accounts for one-fifth of all organic processors (20%), reflecting the highest level of regional processing capacity in Spain.

Furthermore, it should be noted that the majority of organic processing enterprises in Spain are owned by a single family (Gonzálvez, 2007), again reflecting the importance and potential of small scale traditional agricultural production and food processing methods which can be adapted to modern organic systems of quality management.

A combination of policy, enterprise and infrastructural support is needed, as well as research to increase processing capability, retain value-added and exploit the authentic food opportunities which have been identified in these southern regions. Similarly, although organic processing and product innovation in the northerly areas of the RAFAEL partnership offer real expansion potential, it is evident from recent studies conducted in the UK[41] that inadequate processing infrastructure and the difficulties of sourcing organic/authentic ingredients continue to act as significant constraints on development.

Cheese making – Andalucía, October 2006

2.6 Political and policy commitment

In the RAFAEL project, the extent of local political commitment to project aims and objectives varied, and also changed over time. Some partner areas, for example in the UK, had government commitment enshrined in existing organic action plans. Organic action plans provide a framework for policy and reflect a degree of commitment to organic/authentic at the national level. As the project developed the interest of local politicians grew, and at each technical exchange there was a good level of political representation and involvement.

[41] See for example, Barclay and Cleeton, 2005, with reference to the Scottish case

In some partner areas, notably Côtes d'Armor, RAFAEL was part of a political strategy led by the local authority to promote a sustainable alternative to agricultural methods which are environmentally damaging – in the case of Côtes d'Armor this particularly relates to nitrate pollution of ground water supplies resulting from intensive pig production.

In Zamora, the final RAFAEL conference in the town was planned from the outset to coincide with the Ecocultura Trade Fair. This was an opportunity for the local authorities to promote what is the only fair of its kind in Castilla y Leon and a developing attraction to business, trade and visitors[42].

In Northern Ireland, the success of the project in achieving a degree of public procurement of authentic food and the associated publicity resulted in considerable political recognition which was very evident at the Northern Ireland RAFAEL conference in September, 2007 [43].

Political involvement such as this provides an opportunity for organisations to influence policy.

Policy concerns relating to food and food systems are wide-ranging and include health and food safety standards; the rural economy and community development; planning and Local Agenda 21; tourism and environmental issues; and, more generally, sustainable consumption and the quality of life. The technical exchange to Andalucía in 2006 had the theme of organic livestock farming in National (Natural) Parks and emphasised the importance of traditional farming methods for the survival of the dehesa ecosystems[44] [45]. Similarly, recent policy debates about the role of hill farming in Wales have emphasised the public goods delivered by agriculture alongside food production. For example, Midmore and Moore-Collyer argue that,

"The activity of upland farming also makes an environmental contribution to society more generally, providing habitats for rare and threatened plant and animal life, and is increasingly understood to be important in buffering the impacts of climate. In the future, as essential energy and material supplied become scarcer, the role of the uplands as a source of water and renewable resources may become even more important." (Midmore and Moore-Collyer, 2005, p.6).

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42 For media coverage of the final RAFAEL conference in Zamora, see "Expertos europeaos admiten que la produccion ecologica se enfrenta al cambio climatico" *La Opinion – El Correa de Zamora* 12 October 2007 p. 6; The Parliament – Regional Review – Europe's Regions and Cities Review – 'RAFAEL – Promoting authentic food along the Atlantic fringe of Europe' Issue 6 October 2007
and
http://www.laopiniondezamora.es/secciones/seccion.jsp?pRef=2040_2_0__Zamora (11th October) ; http://www.laopiniondezamora.es/secciones/noticia.jsp?pRef=2040_2_232397__Zamora-Jesus-Concepcion-coordinador-proyecto-Rafael-provincia-productos-ecologicos-Zamora-buenos-pero-primero-promover-consumo-local (11th October);

43 See, http://www.northernireland.gov.uk/news/news-dard/news-dard-september-2007/news-dard-190907-gildernew-encourages-use.htm

44 Natural Parks (Parques Naturales) are administered in Andalucía by the Environment Department, Junta de Andalucía's Consejeria de Medio Ambiente.

45 In Andalucía, there are 90 protected areas including 30 Natural Parks. Nine Natural parks are situated in the three provinces involved in the RAFAEL Project - Cádiz, Huelva and Sevilla - and cover a total of 678.921 hectares. These areas were given protection as 'Natural Parks' in the 1980s. Dehesas are woodland pastures of cork and holm oak. Bark is stripped every 9 years for cork, while holm oak is traditionally pruned once in four years with the prunings used for charcoal. The woodland is undergrazed with livestock. In the autumn Iberian pigs are fattened on the fallen acorns which gives jambon Iberico its distinctive flavour.

Food Action Plans

Working with the support of local authorities, organisations can develop and support 'Local Food Action Plans'. These provide a policy framework for local food and can stimulate further development of local supply chains. An example is given below of an existing Local Food Action Plan.

A Local Food Action Plan:

Improve the Regulatory Framework

- Taking advantage of CAP reform and the Treaty commitment to sustainable development, create a regulatory framework in the EU which fosters rather than frustrates the growth of local food economies
- Create a clearer, more supportive regulatory framework to encourage re-localisation at all stages of the food chain from farm to fork
- Ensure that local food systems are protected globally by making WTO rules more compatible with nutrition, environmental protection and animal welfare
- Ensure hygiene and health & safety regulations are appropriate to business size and supportive of local consumption

Educate the public about local food

- Promote consumer education on the benefits of local food and the need to "eat less, move more"
- Raise awareness of the diet-related problems of foods of low nutritional value

Stimulate demand for local food

- Public procurement, especially in schools and hospitals, should use local or organic food whenever possible
- Persuade supermarkets to do more to stock local food and make it more readily available

Develop the supply of local food

- Develop a supply chain infrastructure to support the local food sector by creating a network of small abattoirs, processing facilities and dairies in each region.
- Use public procurement to encourage small producers to "act big" by working in concert

Facilitate healthy foodchoices

- Tax foods and drinks of low nutritional value
- Require fast food firms to provide better nutritional information on their products
- Restrict TV adverts for foods and drinks of low nutritional value
- Ban/reduce the sale of foods and drinks of low nutritional value in schools and facilitate access to water
- Use a *Healthy Schools Network* to disseminate good practice

Sources: (as per Morgan and Morley, 2002: p.67).*Adapted from Lucas (2002); Nestle (2002) and The Soil Association (2000)*

A favourable policy environment for the effective development of local supply chain opportunities can be achieved by relating it to diversification (e.g. tourism), conservation, health and public procurement issues. The role of traditional or regionally-distinctive foods can be of invaluable local economic benefit, particularly in rural areas. In Brittany, for example, commitment to local food culture is already strong and, aside from procurement potential, presents considerable opportunities for promoting authentic produce in the tourism catering sector. In South West England, the potential for branding produce which originates within designated Protected Areas is highlighted as an exemplar of best practice. In Spain, links with the preservation of local culture and traditions, and the protection of the environment furnish similar tourism potential, especially in the context of land abandonment and increasing rural depopulation.

Across the Atlantic Area as a whole, commitment to policies designed to emphasise a more inclusive role for authentic foods in rural tourism and conservation might be encouraged, together with an improved regulatory environment in order to facilitate such links.

Northern Ireland Minister for Agriculture and Rural Development, Michele Gildernew, with Bernie Grimes Northern Ireland RAFAEL project leader and members of the Western Health and Social Care Trust. RAFAEL Northern Ireland Conference, Greenmount College. 19th September 2007

Welsh Minister for Planning, Environment and Rural Affairs, Carwyn Jones, signing the RAFAEL Charter, with David Frost Wales RAFAEL project Leader. Royal Welsh Show, Builth Wells, July 2006

2.7 Infrastructure for inter-regional trade and exports

There are significant questions concerning the role of export marketing, and the way in which this relates to the local and sustainability criteria of authentic foods. Exporting can result in very long supply chains which make the products more expensive to the consumer. Polycentric spatial development can, however, overcome some aspects of food transportation from peripheral to core areas of the EU and back.

One action to achieve polycentric development (and counteract the periphery-core tendency) in the RAFAEL project focussed on the establishment of inter-regional trade links. It was intended that the information obtained from this action would feed into the ongoing development of producer-led trans-regional supply chain pilots. A trade directory, with contact details of producers, is available from the following website www.organic.aber.ac.uk/tradedirectory. An infrastructure for exporting is still at an initial phase and a first step is being developed in the latest edition of the OCW Organic Trade Directory which includes details of the RAFAEL partners and contacts for sourcing authentic produce in each of the RAFAEL partner regions (OCW, 2007 forthcoming)

There are lessons to be learned from existing sustainable trading such as Alimenterra.

"AlimenTerra is a new network of European organisations committed to developing practical and co-operative actions leading to the creation of a truly sustainable European food system. Participating organisations come from France, Italy, the Netherlands, Spain and the UK and cover the chain from farmers' unions and development organisations to NGOs, local food initiatives and organic support bodies." http://www.alimenterra.org/

Trade links have been developed as part of the project and a producer network has been established through the programme of technical exchange.[46] In addition, RAFAEL attended numerous trade fairs including Biofach, Sapor Bio and Biocordoba. International trade fairs offer opportunities for traders to meet and to explore possibilities for inter-regional trade.

Ecocultura Trade Fair, Zamora, October 2007

[46] For more information on the individual technical exchanges please see Appendix 5

3. Summary

The previous sections have demonstrated that the EU market for authentic/ organic food is expanding. It must however be noted that there are considerable differences in organic sector development between northern, central and southern countries and this is also reflected within the RAFAEL partnership.

3.1 Lessons learned

RAFAEL reports have addressed a wide range of issues related to the development of local supply chains, and the technical exchanges have provided the partners and a number of producers from each region with the opportunities to compare practices in their country with those in other regions. For an overview all reports produced as part of the RAFAEL Project please see the References section.

The extent of similarities and/or differences across the partner regions (as identified in the previous sections) is likely to influence the degree to which a commonality of trading activities can be achieved.

The findings from the interviews undertaken as part of this project review, suggest that, in some regions, partners define authentic food mainly as that which is produced organically. This is an important consideration as it may have implications for the coherence with which future Atlantic Area or regional partnerships are able to lobby for enterprise and other relevant policy support.

The interviews also demonstrate that all RAFAEL partners learned a great deal throughout the three year project and through the range of different activities.

During the project period, the majority of the partners had not yet been involved in public procurement. However, during the technical exchange in Northern Ireland, many became aware of the potential to supply authentic produce into the public sector. A number of demonstration school meals and other activities were subsequently organized in a number of partner regions to enhance the volume of authentic produce going into the public sector.

Similarly, after the technical exchange in Andalucía the potential for sales of local authentic produce associated with agri-tourism, was explored by several partners by setting up tourism trails (Alentejo) and Organic Food Trails (Wales), etc.

Toolkits created towards the end of the project by some of the partners will help to ensure that future work can continue to develop local supply chains by building on lessons that have already been learned.

3.2 Challenges and solutions

3.2.1 Supply

The main challenges in developing the production and marketing of authentic food identified by this review are logistical. In some regions of the Atlantic Area fragmentation of the sector is also a barrier. To overcome logistical problems and fragmentation, and to increase supply, many respondents suggest grouping producers to work together to organise transport and to share costs. (Re) Educating consumers about the seasonality of produce can relieve some of the supply problems although there are other options. North-south trade, for example, offers considerable potential and could help meet the supply gaps for fresh produce in northern regions and re-establish some lost traditional markets, for example for small, light lambs in Spain and Portugal that could be met from Wales in particular, but also from Northern Ireland and Devon. Brittany has also been a traditional supplier of onions, early potatoes and carrots, winter cauliflower (broccoli), artichokes and mistletoe to the UK partner regions. Many other traditional inter-regional marketing traditions need to be investigated as these have declined as commodity trading between agri-business and the multiple retail sector has become dominant.

Lack of processing capacity is seen as a major issue by the Southern European RAFAEL partners. Lack of public sector support is a problem reported in the Alentejo, Galicia and Northern Ireland.

3.2.2 Demand

Lack of demand is identified as a major issue by respondents in The Alentejo, Andalucía and Brittany. Some RAFAEL partners also commented that the demand side needs to be flexible and needs to understand producers. They suggest that the communication and education of consumers on regional products and seasonality can have a positive influence on the demand for organic and authentic produce. Education on the health and nutritional aspects of these products might in some cases convince consumers to pay a higher price.

Price can also affect demand, but this depends to some extent on the type of market outlet.

Booklets, such as 'Local and Organic' and 'Organic, what is it all about', published by Organic Centre Wales, and other examples, such as trade fairs like Ecocultura[47] in Zamora - help to promote authentic and organic produce.

Lack of local consumer interest and demand is a challenge in the Spanish regions of Andalucía, Galicia and Zamora where availability of locally marketed organic produce is restricted. Not all (large) retailers stock organic produce and most of the produce is exported. Authentic food marketing opportunities in these Spanish regions and also in Portugal and France arise from established patterns. The marketing of PGI and PDO products provides best practice examples for the marketing of organic and authentic produce.

[47] The fourth Ecocultura Trade Fair was held in Zamora (Spain) on the 12th, 13th and 14th of October 2007. This is the only trade fair of its kind to be held in Castilla y León and it has become a reference point for cross border meetings of manufacturers and distributors of organic products from Spain and Portugal. In 2007 there were exhibitors of a wide range of products including wine, oil, horticulture, vegetables, rice, fish, beekeeping, bread, dairy produce, conserves, meat and sausage, chocolate, cakes, as well as textiles, cosmetics, aromatic plants, natural building materials and renewable energy. Many of the RAFAEL regions were represented by producers who have been involved in the project. In addition there was a 'RAFAEL' stand showcasing typical products from the regions and providing further information on the project.
More information at www.ecocultura.org

4. Conclusions and Recommendations

1. The lessons learnt during the RAFAEL project need to be shared, and support for the authentic food sector needs to be continued. The range and diversity of projects undertaken by RAFAEL partners is an illustration of the positive effect of a publically funded project. It demonstrates how people, organisations and European regions may be brought together. Without the Interreg IIIB programme the Atlantic Area RAFAEL partners and their associates would not have come together. The RAFAEL experience is that the production and marketing of authentic products brings a wealth of benefits to rural communities and the sustainable development of the region. Project activities have had a positive impact on authentic food businesses and have helped to fuel a renaissance of consumer interest in authentic food.

2. Although increasingly understood, the concept of authentic food requires further elaboration and development. For example adding value to authentic food production may not only increase farm income but can also factor the value of the countryside and social capital into food.

3. Authentic food production systems need public sector support. RAFAEL authentic producers are often sustaining cherished landscapes and ecosystems by their production methods. They are delivering social and environmental benefits not paid for by the market. For example, RAFAEL producers in Andalucía have spoken of how the value from their *Jambon Iberico* is returned to enrich and sustain their Dehesa – a threatened and distinctive habitat.

4. EU public procurement policy needs to be integrated with wider sustainability policy. A focus on price cuts across other policy objectives such as environmental protection, diet and health and rural development. A fuller argument to support this recommendation is presented in the introduction to the RAFAEL funded Organic Trade Directory (OCW, 2008) www.organic.aber.ac.uk/tradedirectory

5. Authentic food producers must communicate the benefits of the food they produce to consumers. RAFAEL partners have promoted the benefits of authentic food through education programmes, education materials, 'taste and see' experiences and events, demonstration meals, new menus in schools and hospitals, discussions and visits, media articles and research. This work should be continued and supported.

6. More practical guides for tourists to visit authentic food producers or to stay on a farm and learn more about how food is produced are needed. The eventual aim should be a pan-Atlantic Area guide, linking authentic food holidays to sustainable transport networks throughout the area by rail and by sea. Well planned and implemented agri-tourism can benefit authentic food producers and provide opportunities for new short food supply chains without the potential damaging cultural and environmental effects that has too often been the experience of commercial tourism.

7. EU funded programmes should address the need for training and the need to involve young people in authentic food production, processing and marketing. Traditional farming and artisan food production skills can be lost in a generation, and the demographics of the agriculture sector highlight this vulnerability. The RAFAEL partners have started many educative actions aimed at schools and young people. These innovations need to be maintained and developed.

8. The importance of the RAFAEL project – its principles and methods – should be elaborated to address the emergent issues of the global food system's over-reliance on fossil fuels, food security and climate change. The RAFAEL approach can contribute to and support the development of localised, low carbon, resilient, authentic food systems.

9. A follow-up project should be undertaken to ensure that the findings and experience of RAFAEL are brought together and that these are translated into usable formats (e.g. toolkits) for future projects. A comprehensive list of ongoing food projects and local networks, details of marketing opportunities and advice on how to establish direct marketing and related activities is available from the project.

10. Opportunities and barriers for developing shorter localised food supply chains have been examined in a number of EU studies, including the RAFAEL project and have important lessons for future projects. It is important to publish a number of RAFAEL reports so that they become available in the public domain. Rafael has published a number of reports which can be downloaded from the RAFAEL website (www.rafael-eu.com

11. A RAFAEL network should be maintained and further developed to maintain the links that have been forged in this project and to continue joint projects and trade development in authentic products.

12. Enterprise collaboration and partnership working has proven to be essential and should be encouraged in any future EU projects

13. An expansion of authentic food products with distinctive quality designations across the regions of the Atlantic Area should be undertaken. To achieve this aim the main barriers (such as an expansion of processing facilities) need to be addressed. A combination of policy, enterprise and infrastructural support will be needed, as well as further research and development, in order to increase processing capability, retain value-added and exploit authentic food opportunities

14. Continued cooperation between producers, processors and suppliers from the north and south of the Atlantic Area region should be maintained. A trade network throughout the RAFAEL partnership area would help achieve the sustainable polycentric spatial development envisaged by the RAFAEL project.

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4.1.1 Website sources

1) Links to national/regional agri-food departments

France:	http://agriculture.gouv.fr
Portugal:	http://www.dgadr.min-agricultura.pt
Spain:	http://www.mapa.es
Andalucía:	http://www.juntadeandalucia.es/agriculturaypesca
Galicia:	http://www.xunta.es/galicia2004
Zamora:	http://www.jcyl.es/
UK:	http://www.defra.gov.uk
N. Ireland:	http://www.dardni.gov.uk
Wales:	http://www.countryside.wales.gov.uk/

2) Links to EU projects:

IMPACT:	http://www.rural-impact.net/
QLIF:	http://www.qlif.org
RIPPLE:	http://europa.eu.int/comm/research/agro/fair/en/uk1827.html
SUPPLIERS:	http://suppliers.econ.upatras.gr/start.html
SUS-CHAIN:	http://www.sus-chain.org
DOLPHINS:	http://www.origin-food.org

3) Websites containing information on local food, availability and support as identified in the questionnaire survey by partners.

http://www.organic.aber.ac.uk
http://www.aof.revues.org
http://www.localfoodworks.org
http://www.organic-europe.net
http://www.manger-bio.fr
http://panierbio.tregor.net
http://www.inao.gouv.fr/
http://www.sustainweb.org
http://www.northdevonfood.com
http://www.sourceproduceco.uk
http://www.therubycountry.com
http://www.blackdownhillsfoods.co.uk
http://www.sddfd.co.uk
http://www.lovetheflavour.co.uk
http://www.vinazangarron.com
http://www.harinashmc.com
http://canales.nortecastilla.es/comerciales/alimentosyvinosdecyl/27.html
http://www.granxafamiliar.ccom
http://www.coviga.org
http://www.verinbiocoop.com
http://www.coopertivaxoaninha.org
http://www.arbore.org
http://www.agroalimentariadoeume.org
http://www.civam-bretagne.org
http://alimenterra.org

1. Appendix 1. Final questionnaire

1. Background

1a) Respondent details

- Name
- Partner region
- Country
- Organisation

1b) Authentic ?

- Please briefly comment on how 'authentic' is defined in your region.

2. RAFAEL Supply Chains

Please describe the most common supply chains for RAFAEL products in your region.

3. **Please use the tables on the following pages and list major problems, solutions, initiatives, policies and best practices along the supply chain**.

- *In cases where no such products are produced in the region, please indicate: 'NO RAFAEL PRODUCE' (eg. olive oil products in northern European regions)*

- *In cases where RAFAEL products are produced in the region but information is not readily available, please indicate: 'LACK OF INFORMATION'.*

3a) RAFAEL Fresh Fruit & Vegetables

	Producer	Cooperative / Marketing Agent /	Wholesaler	Retailer
Problems				
Solutions/ initiatives				
Examples of best practice				

3b) RAFAEL Meat products

	Producer	Cooperative / Marketing Agent /	Wholesaler	Retailer
Problems				
Solutions/ initiatives				
Examples of best practice				

3c) RAFAEL Dairy products

	Producer	Cooperative / Marketing Agent /	Wholesaler	Retailer
Problems				
Solutions/				

Initiatives				
Examples of best practice				

3c)RAFAEL Processed products

	Producer	Cooperative / Marketing Agent /	Wholesaler	Retailer
Problems				
Solutions/ initiatives				
Examples of best practice				

3d) RAFAEL Cereal products

	Producer	Cooperative / Marketing Agent /	Wholesaler	Retailer
Problems				
Solutions/ initiatives				
Examples of best practice				

3e) RAFAEL Olive oil products

	Producer	Cooperative / Marketing Agent /	Wholesaler	Retailer
Problems				
Solutions/ initiatives				
Examples of best practice				

3f) RAFAEL Wine, cider and other drinks

	Producer	Cooperative / Marketing Agent /	Wholesaler	Retailer
Problems				
Solutions/ initiatives				
Examples of best practice				

4a) What are the main challenges facing the supply side?

Please rank the challenges from 1 (least) to 5 (most) important

Challenges	Score	Observations and possible solutions
Lack of government aid		
Low production levels		
Lack of quality products		
Lack of consistent supply / volume		
Lack of interest / demand		
Logistical problems e.g poor transport infrastructure		
Others		

4b) *What are the main challenges facing the demand side?*

Please rank the challenges from 1 (least) to 5 (most) important

Challenges	Score	Observations and possible solutions
Price		
Lack of marketing		
Lack of quality products		
Lack of consistent supply		
Lack of consumer interest / demand		
Poor marketing e.g. packaging, presentation		
Others		

5) Improvements made / lessons learned -
Please identify improvements made or lessons learned about developing authentic supply chains as a result of the RAFAEL project

Description / Example	*Outcome*

6) Relevant links

Please identify local or regional websites containing interesting information for other RAFAEL partners;

- websites of any local or regional organisations encountered during the RAFAEL project which are also working to establish 'authentic' supply chains.

2. Appendix 2: Charter for the Renaissance of Atlantic Food Authenticity and Economic Links (RAFAEL)

Authentic Atlantic Food

The concept of 'food' covered by this project includes every kind of raw and processed food from the wide climatic diversity of the Atlantic Area. Foods included range from fresh fruit and vegetables to meat, dairy, bread, seafood preserves and beekeeping products. The project focuses on land based production systems and includes all parts of the food chain from production, processing, marketing, retailing and consumption.

Signatories to this Charter work to develop authentic food systems, with the following characteristics:

'Local' – Food that is grown and processed close to where it is consumed.

'People-focused' – With a full recognition of the role of the producer, the processor and the consumer in producing high quality, healthy food. Full acceptance of the principles of ethical and fair trade.

'Sustainable' –Food produced and processed to deliver integrated economic, health, social and environmental benefits, wherever possible to certified organic standards and from land management that is sensitive to heritage and conservation.

'Distinctive' – Food that is linked to the identity of the area and its natural, cultural and historic assets, both coastal and inland including local recipes and flavours and a sense of ownership by local communities. With support for artisan methods of production and processing that add to cultural heritage.

'High quality' – Food that is appealing, rich in taste and flavour with maximum nutritional value, produced and processed to the highest standards including good animal welfare and organic where possible.

'Healthy' – Food that is fresh and nutritious offering a wide range of produce to make up a balanced diet for consumers.

'Safe' – Food produced and processed to the highest food safety standards

'Traceable' - Food that can be traced along the food chain from production through to consumption and traded between like-minded groups who share similar principles. Food trusted because of its transparent and authentic quality.

Signatories to this Charter will work to achieve the following results:
Increase in the use of authentic food systems as marketing tools for the Atlantic Area
Increase in the awareness of the benefits delivered by the Atlantic Area authentic food systems, and the connections with the Area's cultural identity and assets
Increase in the availability and promotion of authentic food in the Atlantic Area
Increase in the competitiveness of Atlantic Area SME's

All signatories will share learning with others

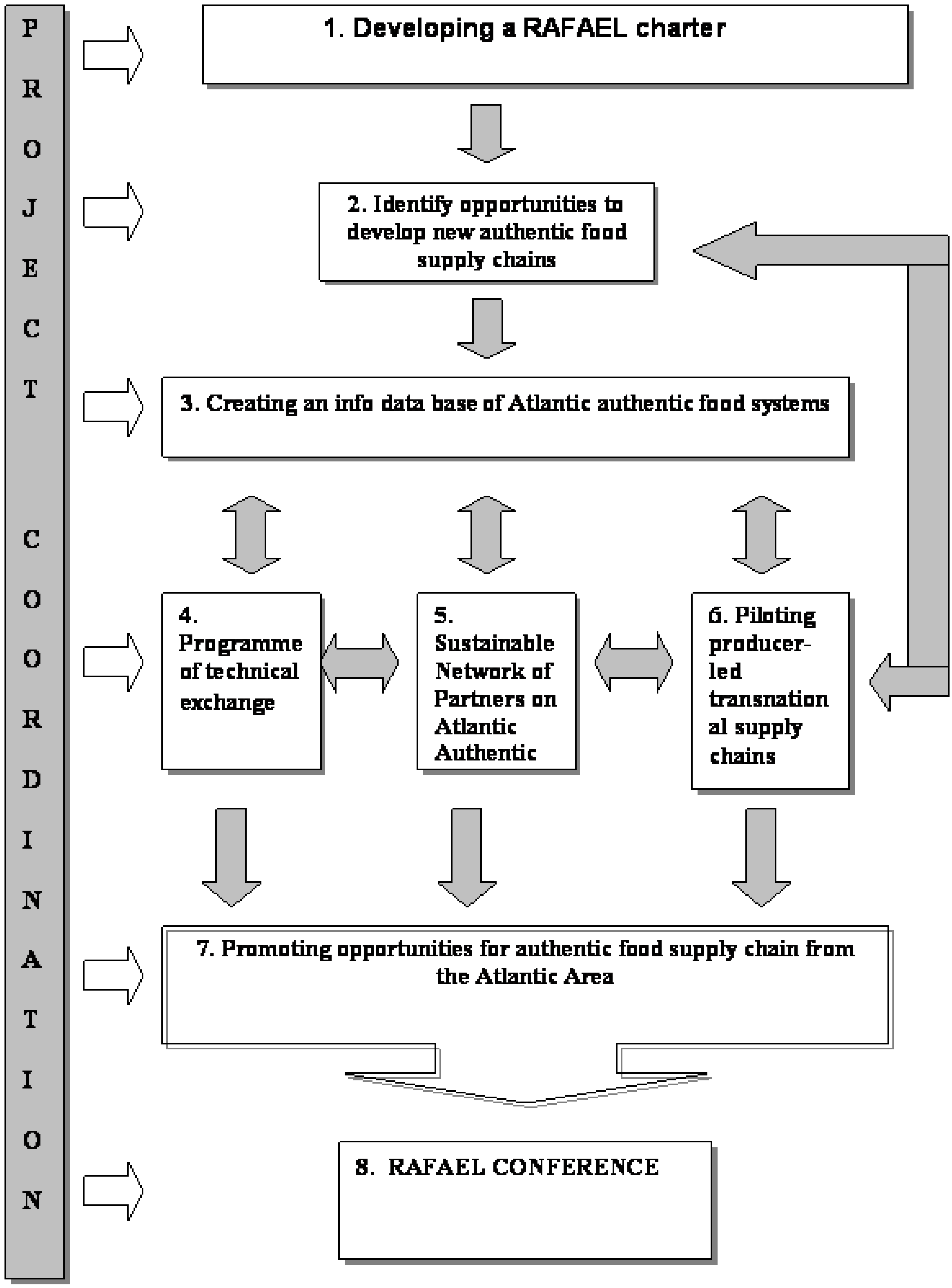
3. Appendix 3: potential product areas for supply chain development in each partner regions

REGION	Fruit and vegetables	Meat and dairy produce	Other produce	Other processed produce
FRANCE				
Brittany	apples beans	pork, beef, lamb meat products (particularly pork) poultry cheese, yoghurt, butter, milk, cream	seafood (scallops)	cider brandy fruit preserves
PORTUGAL				
Alentejo	grapes, olives cherries prunes apples chestnuts	pork, beef, lamb meat products (hams, *chouriço, morcela*)[48] cheese		wine olive oil honey
Trás-os-Montes/Alto Douro	grapes, olives almonds nuts apples potatoes	beef, lamb meat products (sausage, ham) sheep/goat's cheese	mushrooms	wine olive oil honey fruit preserves
SPAIN				
Andalucía	grapes, olives strawberries citrus fruits almonds	meat products (*salchichones, chorizo*, hams)[49]	Seafood	wine virgin olive oil fruit preserves vegetable preserves honey
Galicia	grapes chestnuts apples potatoes	pork, beef cheese	Herbs	wine cider honey bakery products
Zamora	grapes potatoes cereals nuts	pork, beef, lamb meat products cheese	seafood herbs	wine honey bakery products
UK				
Northern Ireland	apples potatoes	speciality dairy products	fish	honey fruit juice bakery products
South West England	apples	beef cheese, cream ice cream	fish seafood	cider apple juice confectionery
Wales	soft fruits potatoes leeks root crops	beef, lamb *saltmarsh* lamb meat products cheese yoghurt	seafood (cockles, *laverbread*)	fruit preserves honey bakery products confectionery bottled water

Source: Organic Centre Wales (2006) A Summary of Existing Market Studies. RAFAEL project (Action 2.1). Coverage is based broadly on the information supplied by RAFAEL partners. It is not intended to be all-inclusive and products do not appear in any particular order of preference or potential.

[48] *Chouriço* and *morcela* are types of traditional Portuguese sausage.
[49] *Salchichones* and *chorizo* are types of traditional Spanish sausage.

4. Appendix 4. Allocation of RAFAEL project actions



5. Appendix 5. Technical exchanges

Exchanging Skills and Knowledge Between 'Authentic' European Food Producers

The RAFAEL project promotes 'authentic' food in nine regions across Europe's Atlantic Arc.

'Authentic' is defined as food which characterises the area it comes from. It is unique in texture, taste and colour and reflects the commitment and passion of the people who produce and process it.

At a local level, partners of the RAFAEL project work to increase the availability and consumption of authentic food in their area. They do this through creating food directories and hosting food events, helping schools, hospitals and the hospitality trade to source authentic produce and encouraging producers to work together to develop farmers markets and box schemes.

At a pan European level, the RAFAEL project organises exchanges between producers in different regions to facilitate the sharing of skills, knowledge, and expertise and to create good opportunities for inter-regional trade.

Now the current programme of exchanges is complete, we are able to summarise how these have helped producers to increase their profitability and strengthen their commitment to producing high quality, sustainable, traceable and distinctive food.

Exchange One: Alentejo, Portugal, Sept 2005.

Alentejo is southern inland area of Portugal where a dry landscape supports the growth of olives, seeds, cereals and grapes.

Traditional products from the region include olive oil, wine and sausages. Because of the strong links these goods have with the area's landscape, many have been granted 'Protected Designation of Origin Status'. This gives the products a unique identity which has created a market for them across Europe and the rest of the world. By visiting a range of producers in the area, participants on the exchange were able to learn about the importance of linking produce with its origin, and the marketing advantages this can bring.

The exchange also demonstrated how Alentejo had developed its successful agri-tourism sector. By encouraging tourists to experience local produce, stay on farms and learn how food in the area has evolved, it now offers an interesting alternative to coastal holidays on the Algarve. Exchange participants therefore were able to learn how producers have diversified through offering accommodation and attractions for tourists alongside their traditional food production activity.

Exhange Two: Northern Ireland, May 2006

This exchange focused on supplying to the public sector. Through meeting both procurement officers for the public sector and producers supplying to public bodies, participants were given a good grounding in the public sector procurement. They learnt about how contracts are tendered and what fulfilling a contract entailed in terms of pricing, standards and deliveries.

Through meeting a local group of farmers, participants also learned the importance of producers working together within a region in order to share skills, experience and resources and to promote their products. This led to a general consensus at the Exchange that the establishment of producer groups are an important step towards the formation of co-operatives.

Exchange 3: Andalusia, Spain, September 2006

Based in the National Park of Sierra de Huelva, this exchange sought to give participants an understanding of the vast diversity of organic producers operating in and around protected areas.

In an area where Mediterranean woodland predominates, participants on the exchange visited a range from producers who use the natural landscape to produce sustainable, unique and high quality products. These included a small bee keeper who uses pollen from nearby heather and eucalyptus to create superior honey, an Iberian pig farmer who rears his stock in an acorn orchard to produce a unique flavour in the meat and a goat's cheese maker who uses traditional ancestral methods to make a scarce and unequalled cheese.

The exchange demonstrated how similarities in food production could be drawn between Sierra de Huelva and other protected landscapes and why quality regional artisan products are important to the sustainable development of the regions. It also showed how adding value to goods is important to ensure a fair price is received and how local people can take pride in the food from their area.

Technical Exchange Four, Côtes D'Armor (France), May 2007

This exchange was aimed at dairy, meat and horticultural producers, who wanted to learn more about direct selling methods and focused on box schemes, local distribution networks and school meals.

Through examining the success of a box scheme set up by the RAFAEL partners in the Côtes D'Armor, the exchange examined how to set up a scheme, what the barriers are to a successful scheme what opportunities there are in distribution networks.

The exchange also gave participants the opportunity to learn more about the supply of produce to local schools, learning from local examples as well as through discussions with producers in other RAFAEL regions.

Conclusions

Over 100 authentic businesses and food stakeholders from the project's 9 regions took part in the program of technical exchanges, who have benefited from seeing first hand examples of how producers in the four exchange regions have created 'authentic', unique and high quality food that reflects the characteristics of the area it comes from. Crucially, participants learned how producers used this to differentiate their products from 'mass market' goods.

Coupled with this, participants also gained knowledge about the advantages of setting up networks and co-operatives within regions and learned about the processes involved in public food procurement.

It is hoped the knowledge, skills and experiences gained on these exchanges will equip producers in RAFAEL regions with new ideas for products and different ways of working which will increase their profitability and give them the competitive edge needed to make their authentic products successful.