



NEPROVALTER PROJECT

**Results of the survey on
consumption and use of organic
and quality products**

Final Symposium

Tarvisio

1-2 December 2005

METHODS

Interviews realized with questionnaires
to operators and responsables of
categories and sectors considered

CATEGORIES AND SECTORS CONSIDERED

**School
refectories**

Butcheries

**Restaurants
agri-tourism**

**Large-scale
retail**

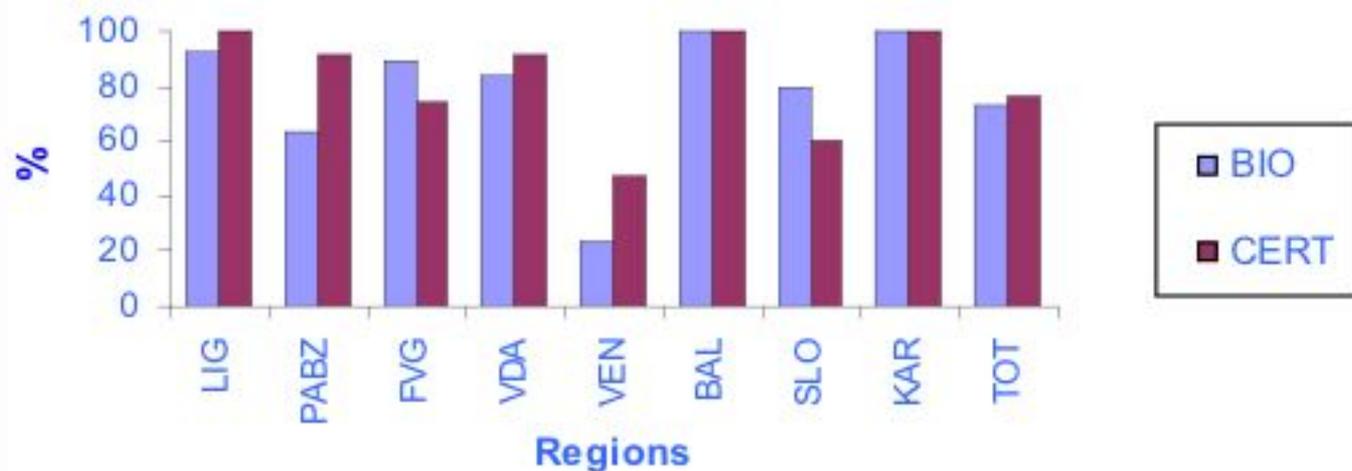
**Consumers
Tourists**

NUMBER OF INTERVIEWS REALIZED

Partners	Butcheries	Large-scale retail	School refectories	Consumers Tourists	Restaurants and agri-tourism
BAL	1	2	3	34	
FVG	38	4	8	91	101
KAR	3	3	5	10	
LIG	14	1	1	25	
PABZ	11	0	4	22	
SLO	5	1	5	19	
VDA	12	5	6	121	21
VEN	21	12	0	139	
TOT	105	28	27	461	122

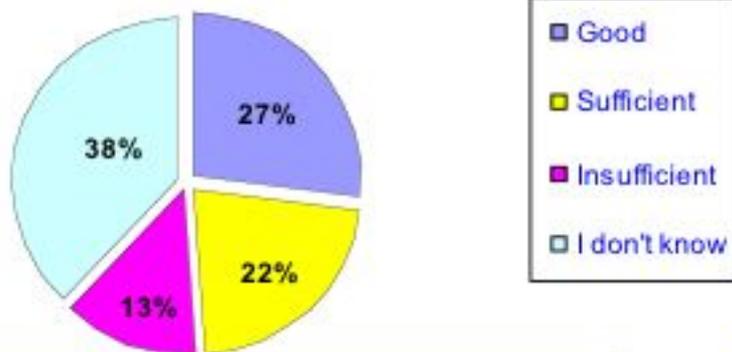
BUTCHERIES' MARKET SURVEY

Knowledge level about organic and quality certified products

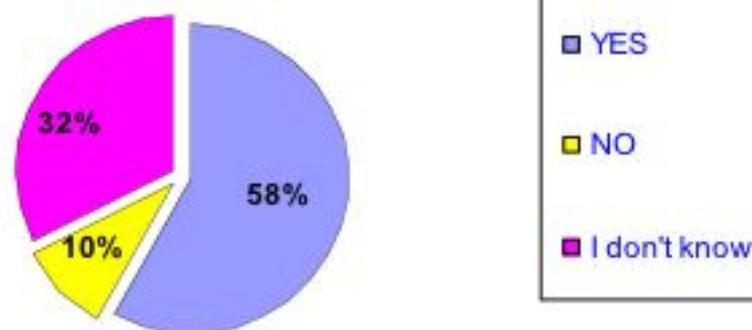


BUTCHERIES' MARKET SURVEY

Efficiency of the controls effected on BIO and CERT. productions

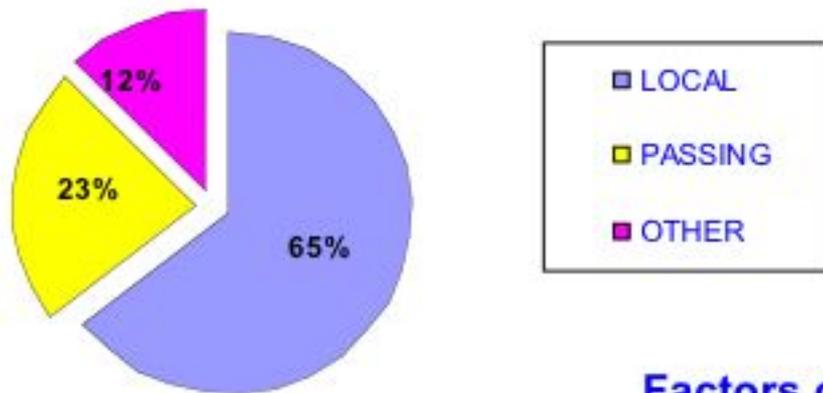


Has it been foreseen a control of every stage of the production and distribution process?

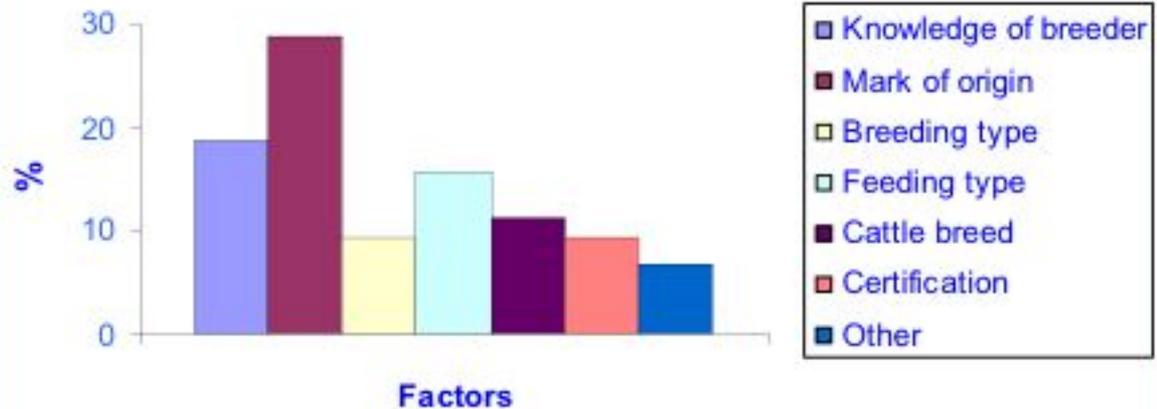


BUTCHERIES' MARKET SURVEY

Customer type

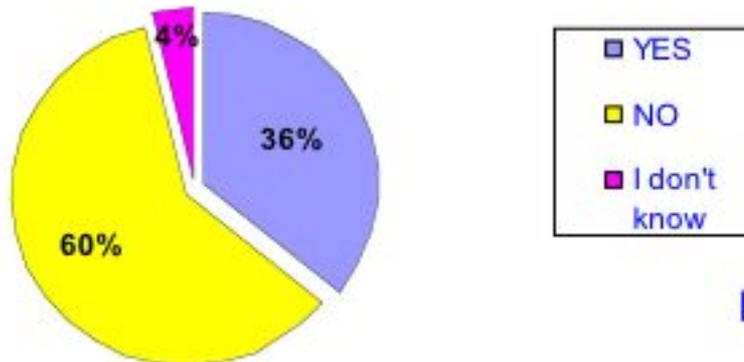


Factors conditioning the customer's choice

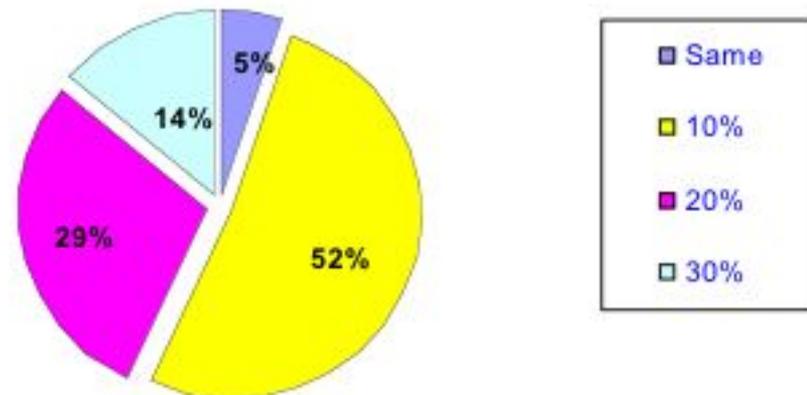


BUTCHERIES' MARKET SURVEY

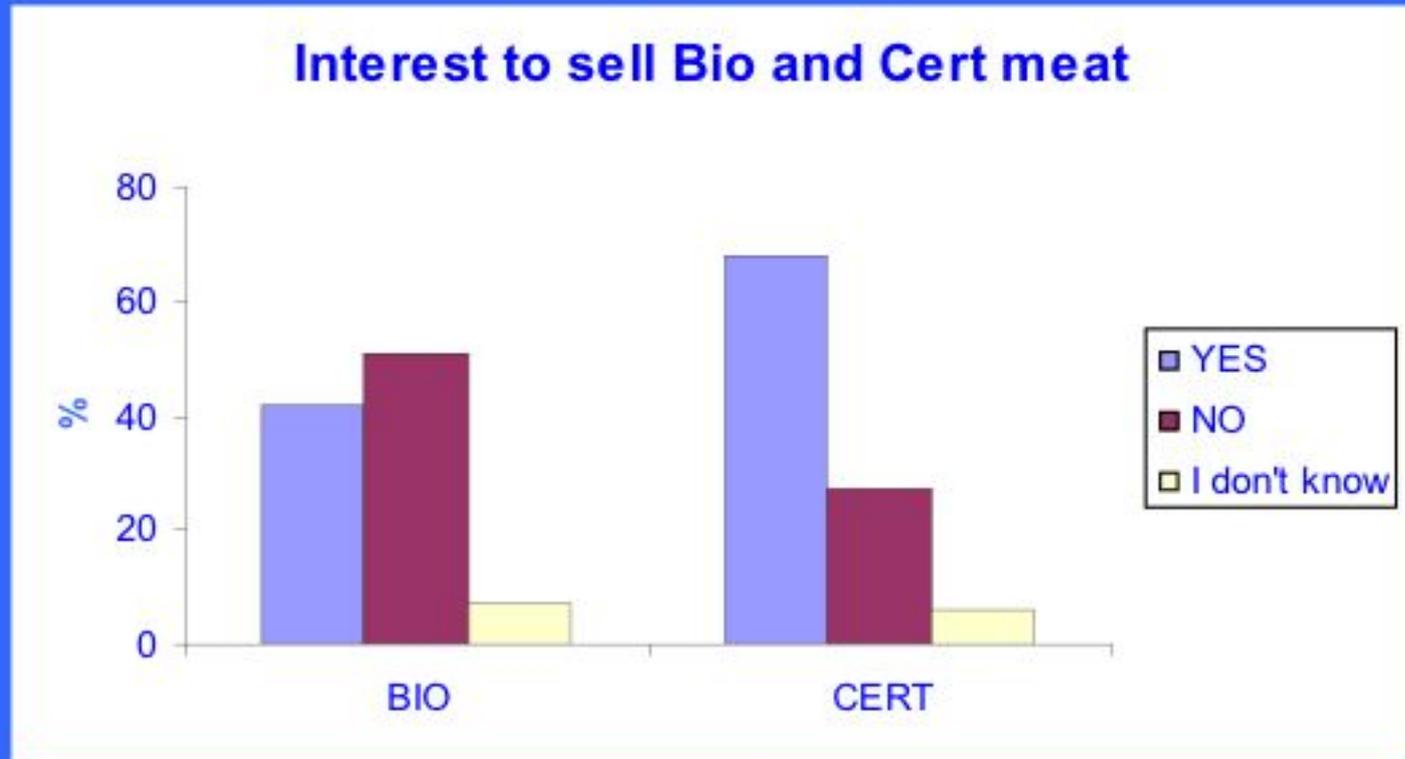
Availability of customers to pay an higher price for Bio or Cert beef



How much can be higher this price?

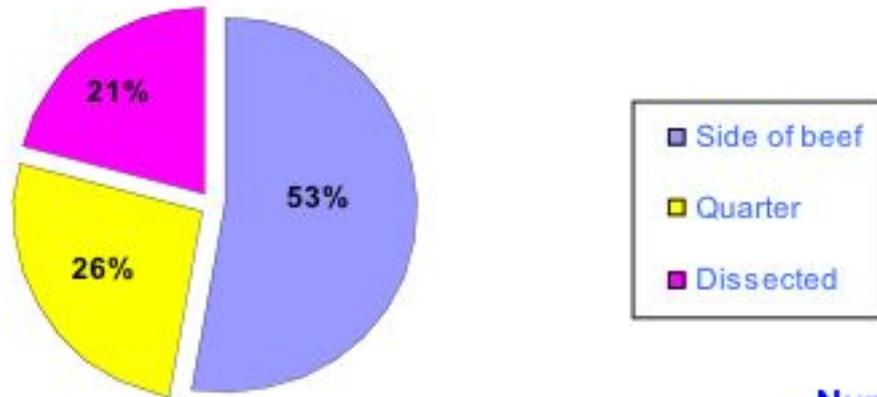


BUTCHERIES' MARKET SURVEY

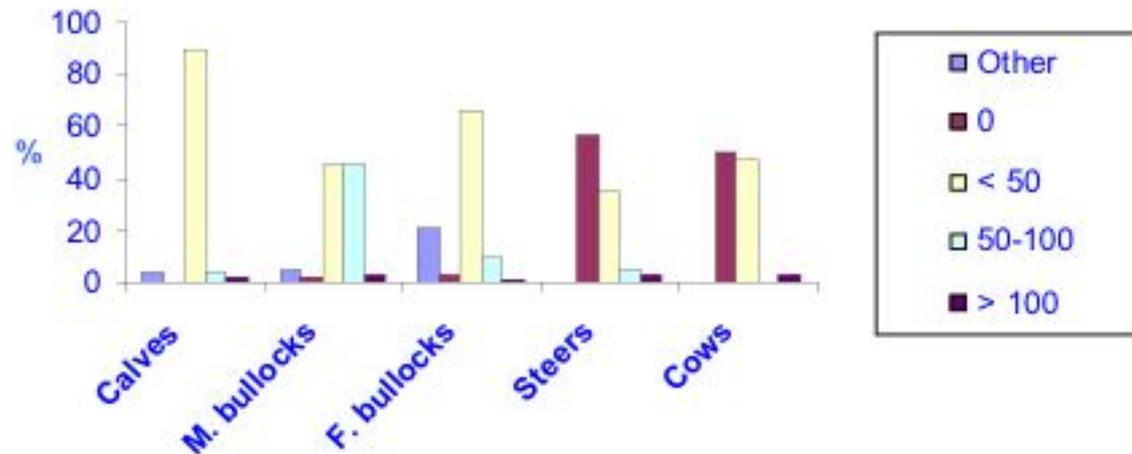


BUTCHERIES' MARKET SURVEY

Bought meat is in:

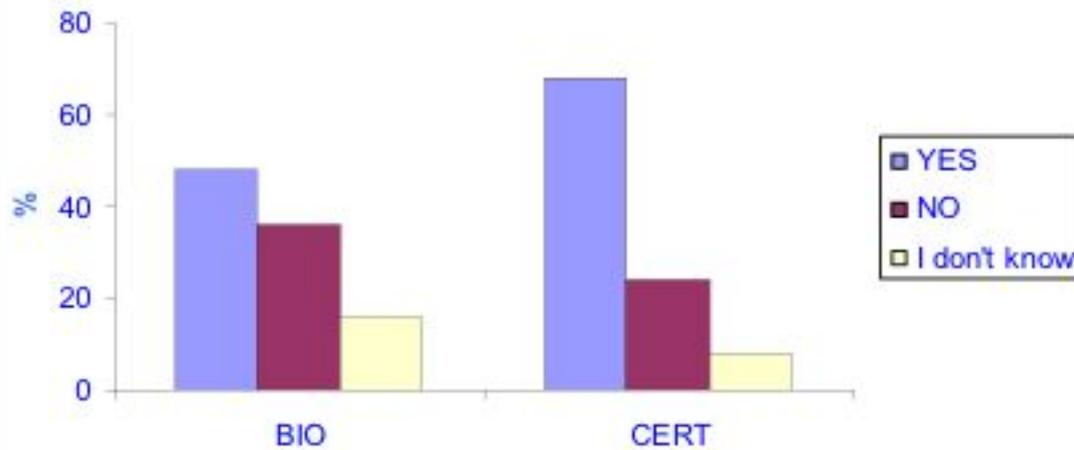


Number of slaughtered or bought from slaughterhouse cattle by year, shared for categories

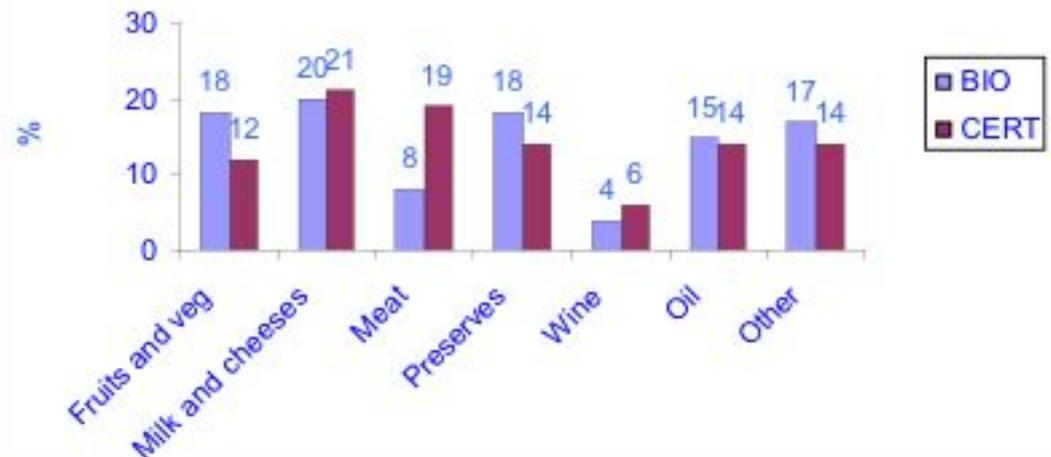


LARGE SCALE RETAIL MARKET SURVEY

Marketing of organic and certified products

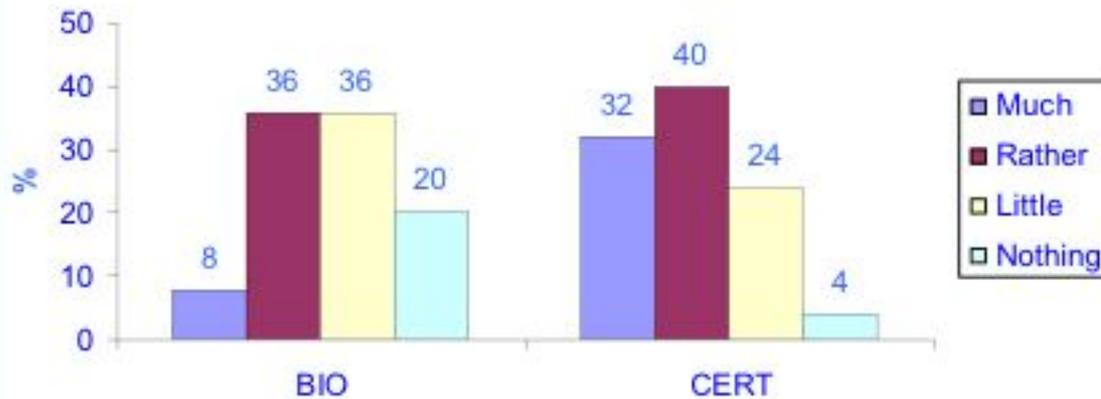


Which products?

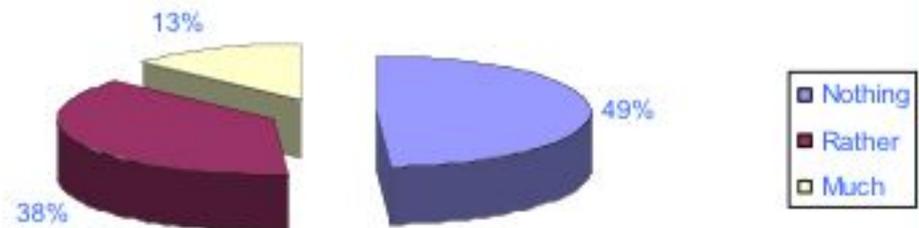


LARGE SCALE RETAIL MARKET SURVEY

Interest about distribution of organic and certified meat

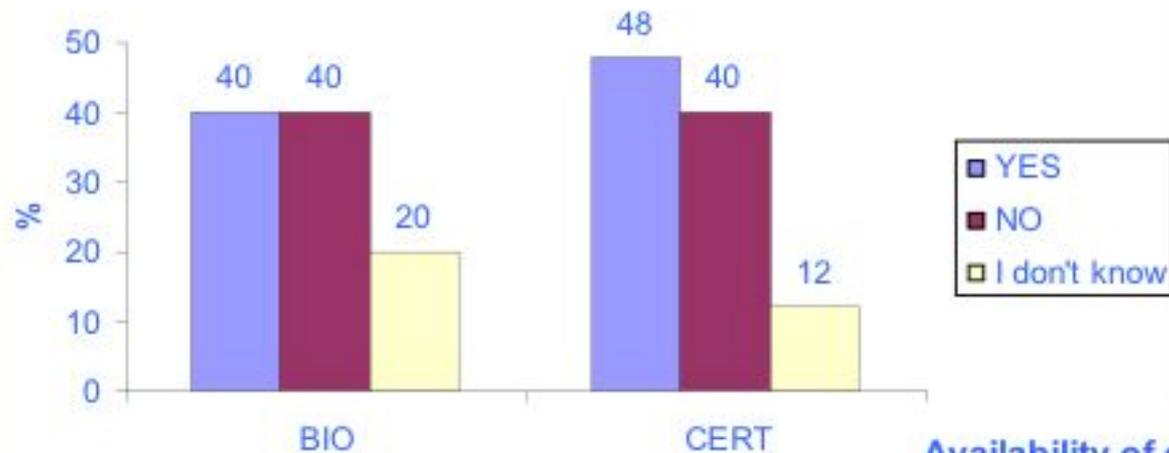


Interest about distribution of organic milk and dairy products



LARGE SCALE RETAIL MARKET SURVEY

Availability of customers to pay an higher price for the organic or certified meat

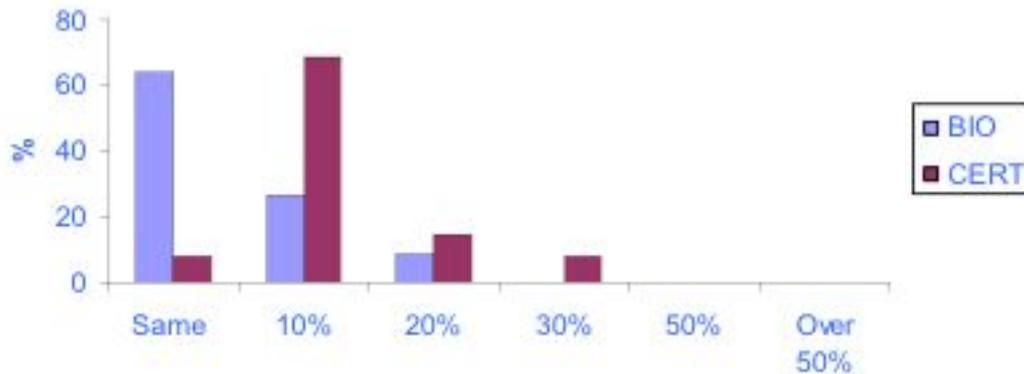


Availability of customers to pay an higher price for the organic milk and dairy products

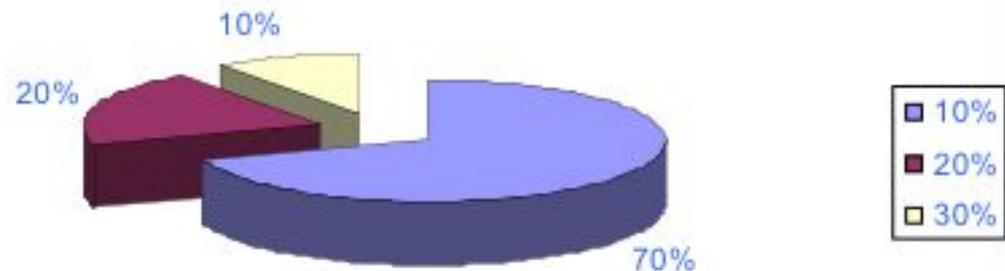


LARGE SCALE RETAIL MARKET SURVEY

How much can be higher this price for the Bio and Cert meat?

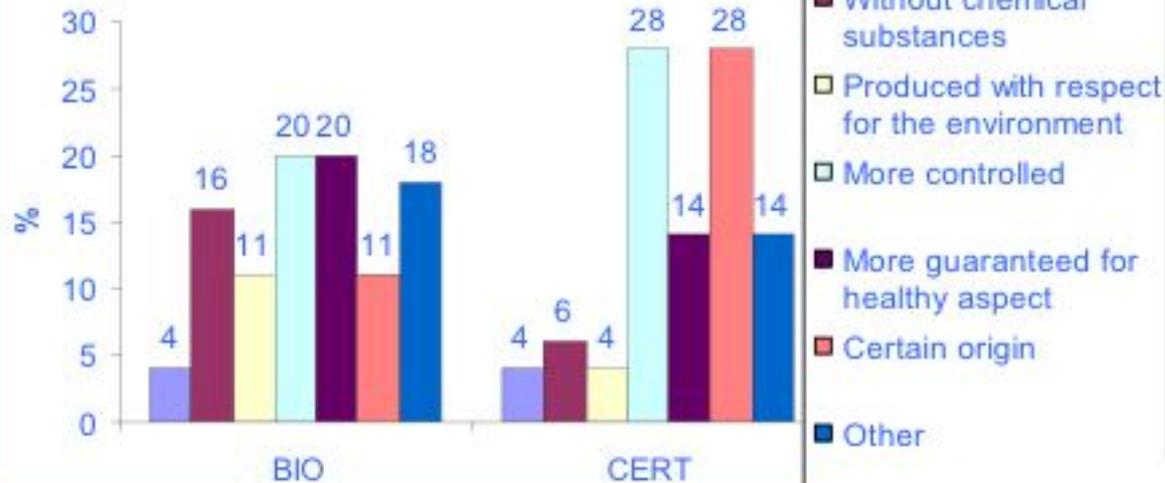


How much can be higher this price for the organic milk and dairy products?

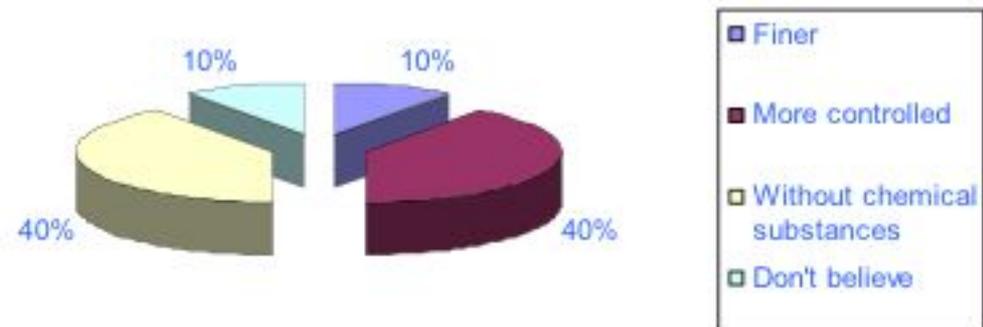


LARGE SCALE RETAIL MARKET SURVEY

Why should customer pay an higher price for bio and cert. meat?

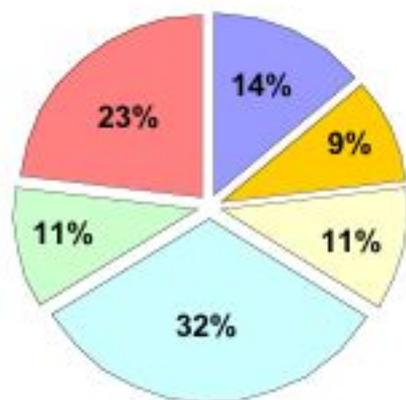


Why should customer pay an higher price for the organic milk and dairy products?



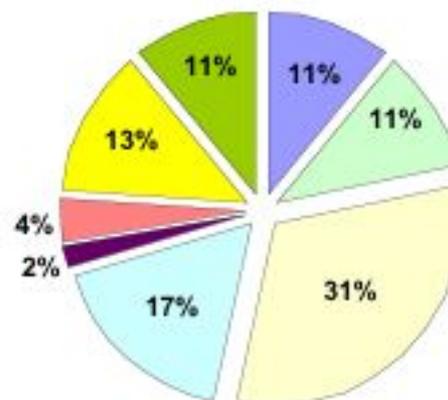
LARGE SCALE RETAIL MARKET SURVEY

Strengthness for introduction in large-scale retail trade of Org. and Cert. meat



- Healthiness image
- Certain origin
- Produced with respect for men and nature
- More controls on the whole productive process
- Superior quality
- Other

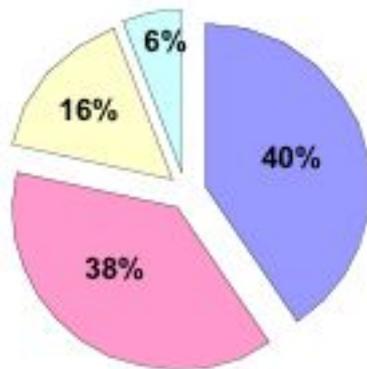
Weakness factors



- Lack of interest
- Mistrust about controls
- Higher sale price
- Quality not recognised
- Difficulty of finding and distribution
- Difficulty of management at firm level
- Lack of continuity in product supplying
- Other

LARGE SCALE RETAIL MARKET SURVEY

Promotion strategies to buy organic and certified meat



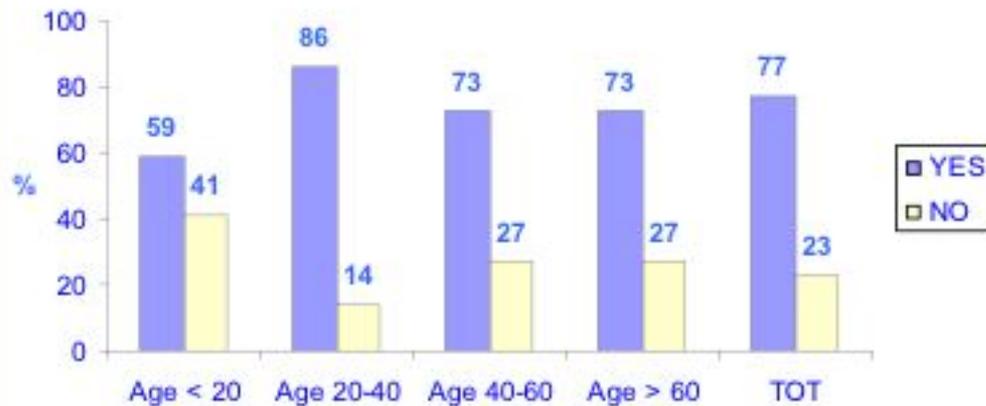
- Informative material in the selling point
- Publicity on papers and television
- Promoter presenting the product in the selling point
- Other

Interest to insert organic and certified meat coming from our own Region

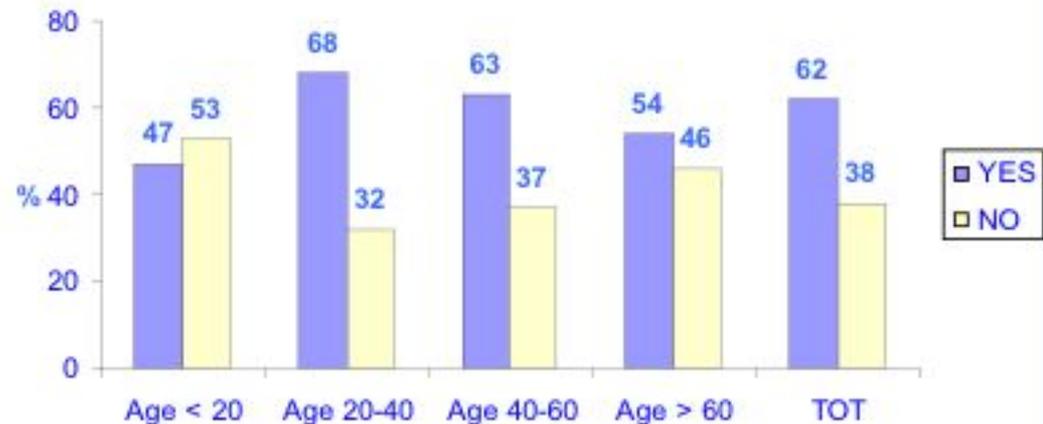


TOURISTS AND CONSUMERS SURVEY

Knowledge about Bio products

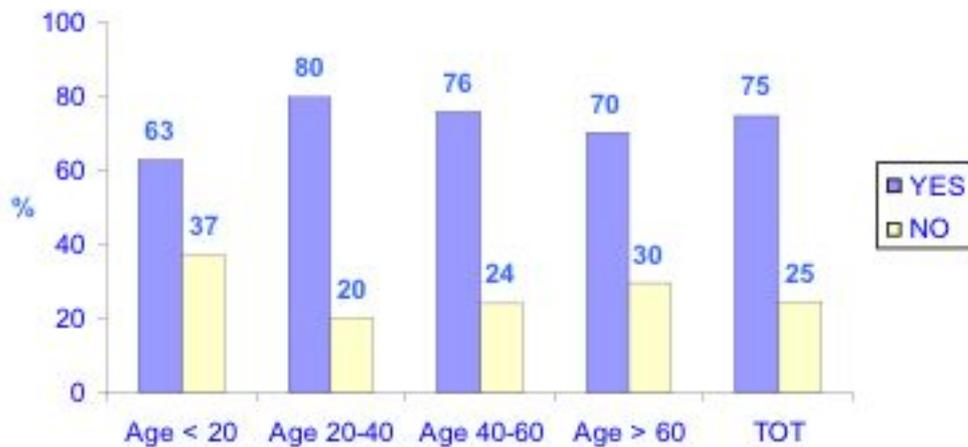


Knowledge about Certified products

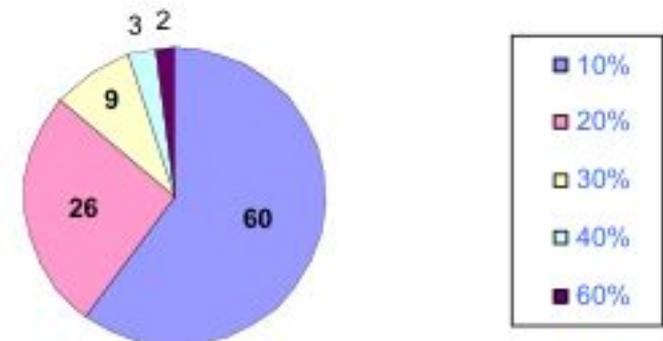


TOURISTS AND CONSUMERS SURVEY

Availability to pay an higher price



How much can be higher this price?



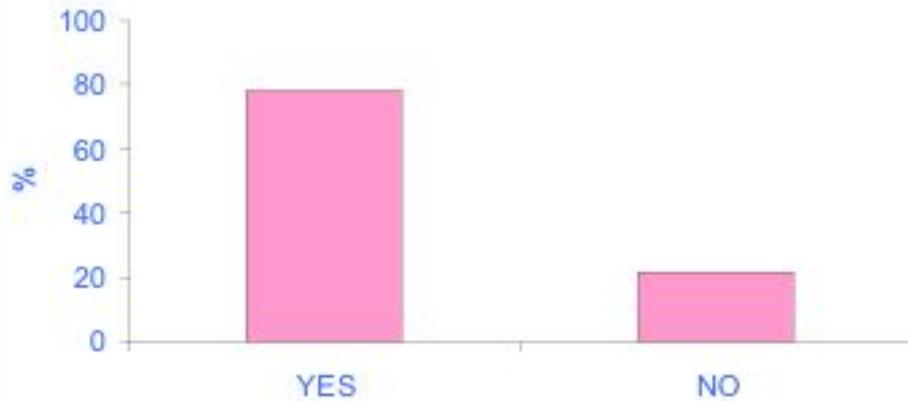
TOURISTS AND CONSUMERS SURVEY

Why should customer pay an higher price for bio and cert. products?



SCHOOL REFECTORIES SURVEY

Use of Bio products for the preparation of the meals

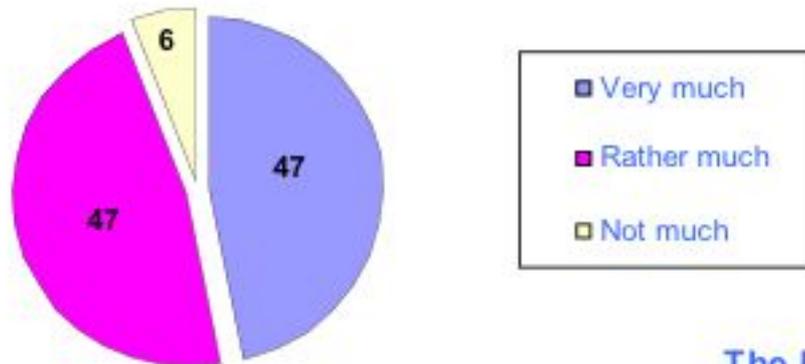


The interest of users about Bio products



SCHOOL REFECTORIES SURVEY

The importance about the local origin of the Bio products

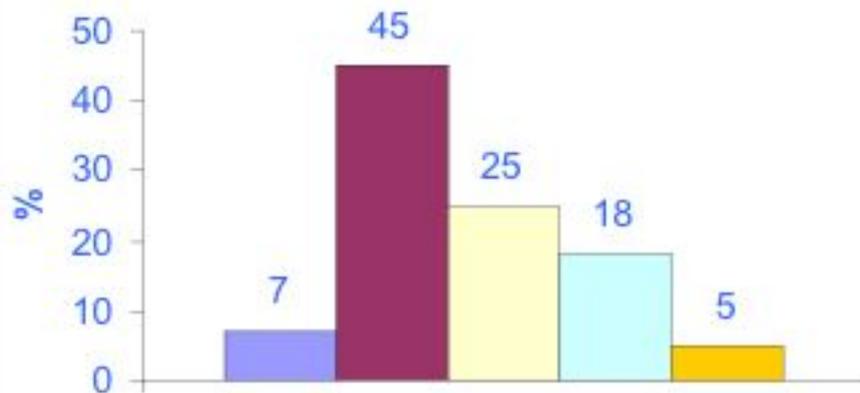


The logistic problems for the introduction of Bio products



SCHOOL REFECTORIES SURVEY

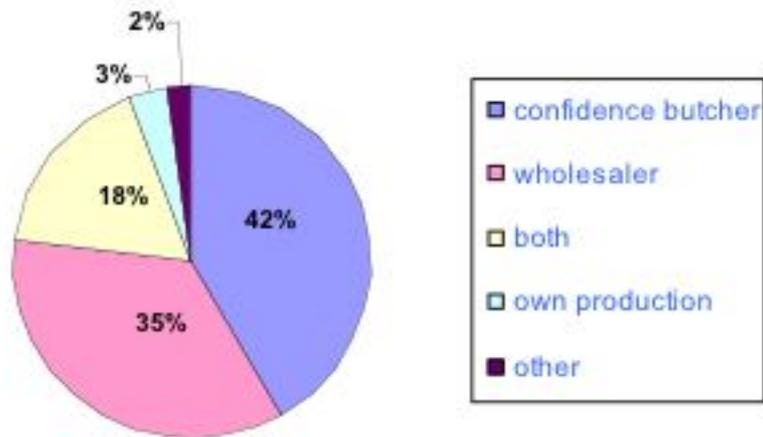
Necessary actions to sensitize parents and child about consumption of Bio products



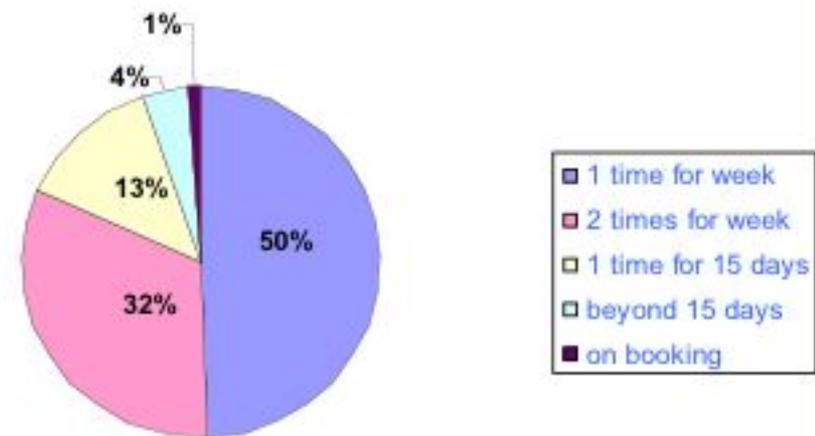
- Advertising on papers and television
- Alimentary education in the schools
- Public meeting to discuss the nourishment
- Promotional marketing campaigns
- Other

RESTAURANTS and AGRI-TOURISM SURVEY

Who is the supplier of the meat?

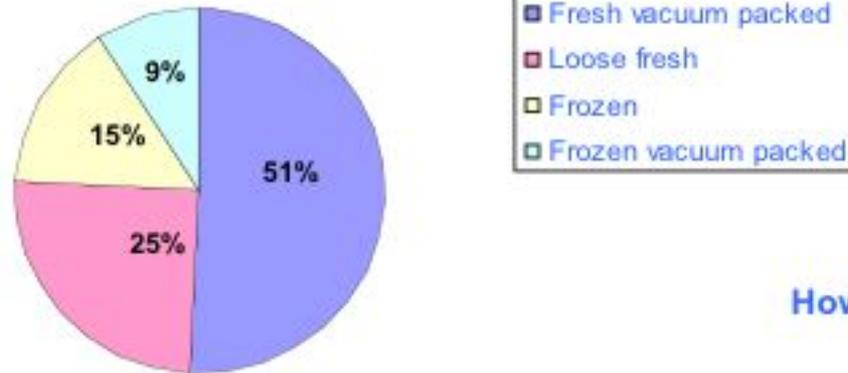


The buy frequency



RESTAURANTS and AGRI-TOURISM SURVEY

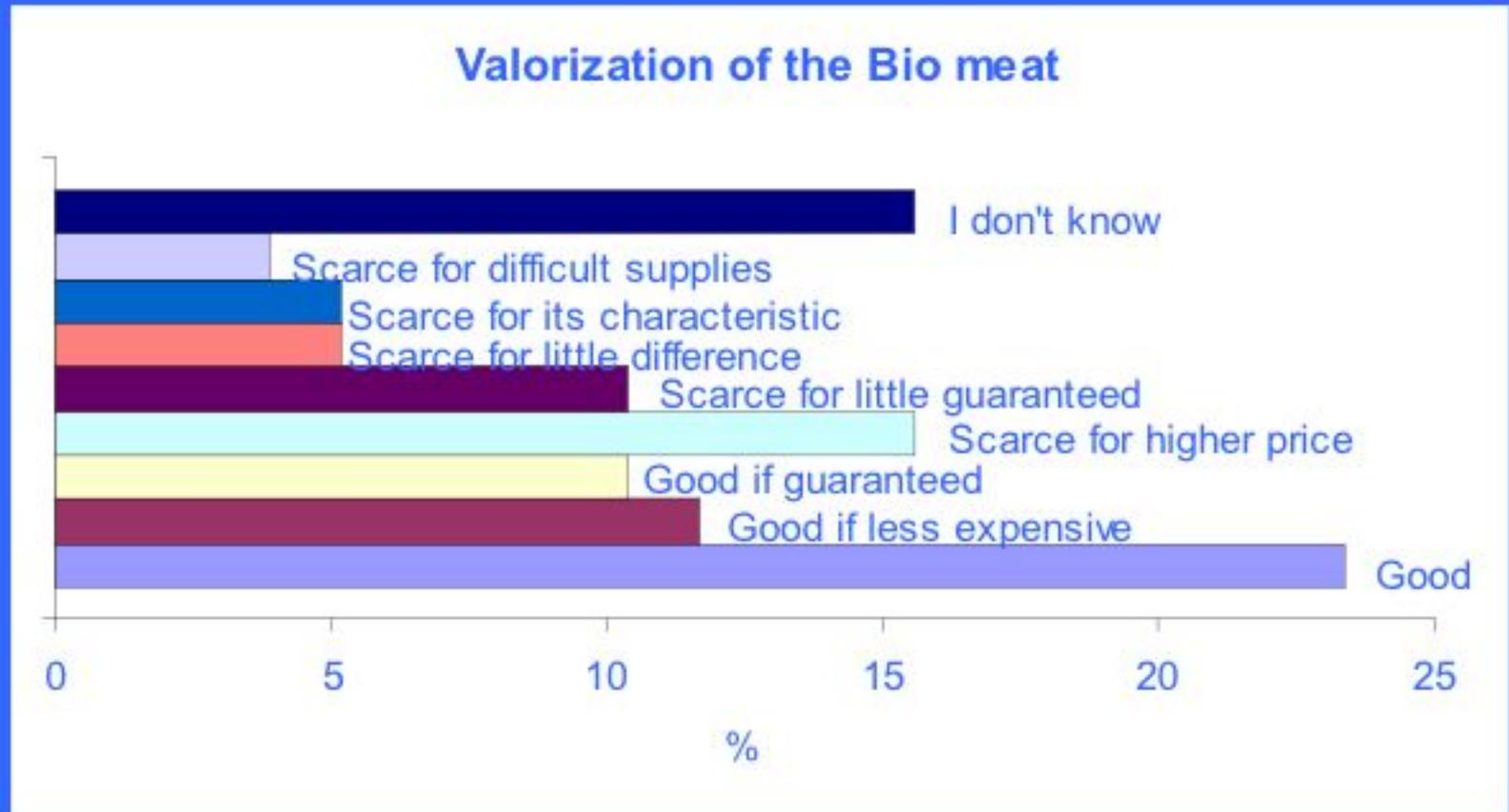
Buying form



How much can be higher the price for Bio and Cert meat?

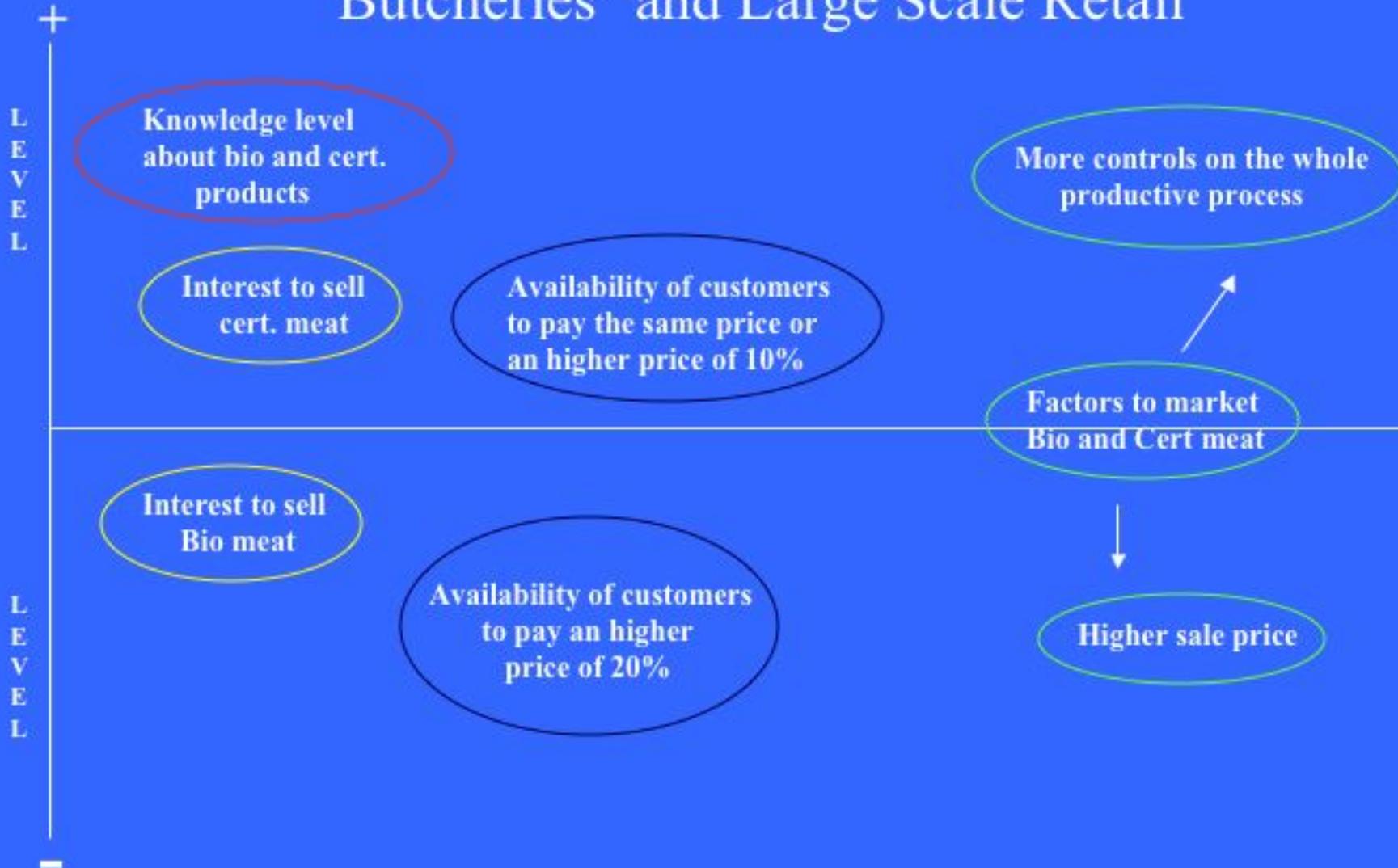


RESTAURANTS and AGRI-TOURISM SURVEY



CONCLUSION

Butcheries' and Large Scale Retail



CONCLUSION

Tourists and Consumers



CONCLUSION

School refectories, Restaurants and Agri-tourism

