



Strengthening European Food Chain Sustainability by Quality and Procurement Policy

Deliverable 3.3:

REPORT DETAILING THE SELECTION OF CASE STUDY REGIONS AND CASES FOR IMPACT ANALYSIS

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EXECUTIVE SUMMARY

This report presents the provisional selection of the 52 case studies for which the sustainability performance will be assessed in Work Packages 5-7: 30 cases of organic, PDO, PGI, TSG in WP5, 10 cases of public sector food procurement in WP6, and 12 cases of short food supply chains in WP7. This selection covers a large array of cases in different socio-economic and environmental contexts with varying governance mechanisms. Several criteria were considered for case study selection. Good access by project partners to the case and balance between countries and scheme types (e.g., organic vs PDO/PGI for WP5) applies to all Work Packages. Following the development of the methodological handbook, other WP-specific rationales were added to facilitate the implementation of the sustainability assessment. These rationales are presented in the relevant sections of this report.

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LIST OF ABBREVIATIONS AND ACRONYMS

LOC	Local/Short Chain PSFP
LORG	Local/Short Chain Organic PSFP
LOW	Lowest Prices PSFP
ORG	Organic PSFP
PDO	Protected Designation of Origin
PGI	Protected Geographical Indication
PSFP	Public Sector Food Procurement
SFSC	Short Food Supply Chain
TSG	Traditional Speciality Guaranteed

REPORT DETAILING THE SELECTION OF CASE STUDY REGIONS AND CASES FOR IMPACT ANALYSIS

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1. INTRODUCTION

Task 3.3 of the Strength2Food project consist in the selection of the 52 case studies for which the sustainability performance will be assessed in Work Packages (WPs) 5, 6 and 7. Based on the preliminary distribution of cases between countries and scheme types, this report details the selection of 30 cases of organic, PDO, PGI, TSG schemes (WP5), 10 cases of public sector food procurement (WP6), and 12 cases of short food supply chains (WP7). The project thus analyses a large array of cases in different socio-economic and environmental contexts with varying governance mechanisms.

Following the development of the methodological handbook, other WP-specific rationales were added to facilitate the implementation of the sustainability assessment. These rationales are explained in the following sections. Each section is dedicated to one WP.

The case study selection described in this deliverable is still provisional. As agreed in the Strength2Food interim project meeting in Dijon, FR (October 2016), partners will be allowed to change a case study if important difficulties arise over the first months of work on the case. Indeed, the implementation of the methodological handbook requires a minimal level of stakeholder cooperation among other things. Should changes arise from the list described in this deliverable, WP leaders will ensure that the overall balance between scheme types is preserved.

2. CASE STUDIES FOR WP5: FOOD QUALITY SCHEMES

WP 5 is focused on food quality schemes: organic farming, Protected Designation of Origin (PDO), Protected Geographical Indication (PGI) and Traditional Speciality Guaranteed (TSG). In addition to the distribution across countries and scheme types outlined in the Grant Agreement, the methodological work undertaken in task 3.2 uncovered another criteria to be considered: the availability of secondary data. Indeed, many food quality schemes are made of numerous businesses: thousands of farms and dozens or hundreds of collectors, processors and retailers. In these cases, collecting primary data through surveys of a representative sample of each supply chain level would require more resources than the three person-months budgeted for case studies. Therefore, the method for WP5 has been designed to rely mostly on secondary data – existing articles, reports, databases or other documents – coupled with a few interviews of key stakeholders to obtain a comprehensive list of the available secondary data. On a case by case and sustainability indicator by sustainability indicator basis, direct survey may be conducted to fill in important gaps.

An exception to this rule are food quality schemes or specific value chain levels in food quality schemes for which only a few businesses are involved. In that case, primary data collection through survey may be the most efficient way to obtain the variables necessary for sustainability assessment. However, to the extent possible, each case study should be rigorously selected in order to avoid this situation. Indeed, the assessment of only a few businesses may be more revealing of the specificities and constraints of these businesses than of the impact of governance and technical specifications of the food quality scheme studied.

The provisional cases selected for WP5 are summarized in table 1.

Table 1: Case studies selected for WP5

Country	Partner	Sector	Organic	PDO	PGI	TSG	Counterpart (optional)
Croatia	ZAG	Meat			Baranjski kulen (Baranja sausage)		
Croatia	ZAG	Fruit/Vegetable	Ekstra djevičansko maslinovo ulje CRES (olive oil)				
France	INRA-D	Dairy		Comté cheese			
France	INRA-D	Cereal/Bakery	Wheat flour, Aiserey mill				
France	ECOZEPT	Seafood/Fish			Anchois de Collioure (anchovies)		
France	ECOZEPT	Seafood/Fish				La Moule de bouchot (mussels)	
Germany	ECOZEPT	Meat	Chiemgauer Naturfleisch (Fresh and processed organic meat from beef, pork and poultry from Chiemgau area)				
Germany	ECOZEPT	Dairy	Schrozberger (organic dairy products from cow's milk by Schrozberger cooperative)				
Greece	AUTH	Fruit/Vegetable		Mila Zagoras Piliou (Zagora apple)			
Greece	AUTH	Fruit/Vegetable			Milo Kastorias (Kastoria apple)		
Hungary	ECO-SEN	Meat			Gyulai kolbász (Gyulai sausage)		
Hungary	ECO-SEN	Fruit/Vegetable		Kalocsai fűszerpaprika őrlemény (Kalocsai paprika powder)			
Italy	UNIPR	Dairy		Parmigiano Reggiano cheese			
Italy	UNIPR	Fruit/Vegetable	<i>Organic to be determined</i> (either an apple from Trentino or the local production of tomatoes)				
Netherlands	WU	Dairy		Noord-Hollandse Gouda cheese			Dutch yellow cheese made from cow's milk
Netherlands	WU	Fruit/Vegetable		Oppeerdoezer Ronde potatoes			Fresh potatoes
Norway	HiOA	Seafood/Fish			Tørfisk fra Lofoten (Stockfish from Lofoten)		
Norway	HiOA	Seafood/Fish			Rakfisk fra Valdres (Fermented fish from Valdres)		

Country	Partner	Sector	Organic	PDO	PGI	TSG	Counterpart (optional)
Poland	SGGW	Cereal/Bakery	“Bio Babalscy” – organic pasta				
Poland	SGGW	Fruit/Vegetable		Kaszubska Strawberry or Grojec Apples (<i>final decision to be made</i>)			
Serbia	BEL	Dairy		Homolje cheese (<i>certification ongoing</i>)			Regular cheese
Serbia	BEL	Fruit/Vegetable	Ariđe raspberries				Frozen raspberries
Spain	CREDA	Meat			Sobrasada of Mallorca (raw, cured sausage from Mallorca)		Sobrasada
Spain	CREDA	Meat			Ternasco de Aragón (Lamb) or Vedella de los Pirineus (beef)		Cordero (Lamb), or Temera (beef)
Thailand	KU	Cereal/Bakery			Khao Hom Mali Thung Kula Rong-Hai (fragrant rice from Thung Kula Rong-Hai area)		Rice
Thailand	KU	Coffee/tea			KaĦae Doi Chaang (Doi Chaang coffee)		Arabica coffee
United Kingdom	IMPMENT	Dairy			Exmoor blue cheese		
United Kingdom	IMPMENT	Seafood/Fish		Fal oysters			
Vietnam	UEHCM	Seafood/Fish		Phú Quốc Fish Sauce (Extract of fish)			
Vietnam	UEHCM	Coffee/tea			Buôn Ma Thuột (Coffee beans)		

3. CASE STUDIES FOR WP6: PUBLIC SECTOR FOOD PROCUREMENT

WP6 is devoted to determine how different Public Sector Food Procurement (PSFP) strategies may impact on nutrition, food supply chains organisation and sustainability, as well as local economies. To evaluate PSFP impacts, WP6 is focused on the specific case of school meals, where the nutritional consequences of PSFPs have significant long-term impact.

According to the Description of Work, WP6 case studies will represent a mix of Lowest Prices (LOW), Local/Short Chain (LOC), Organic (ORG) and Local/Short Chain Organic (LORG) procurement models. Within the pairs of cases conducted in each country, one case will represent a LOW model (which will act as the counterpart for the paired analysis), and the second case will represent either LOC, ORG or LORG model. Our research so far finds that in Croatia, Serbia and Greece procurement is dominated by LOW models. The only alternative model, which exists in a very tiny way, is LOC. Therefore, the first proposal for the WP6 case study choice is presented in Table 2.

Table 2: Case study schemes for WP6

Country	Partner	Sourcing model	
		CASE 1	CASE 2
Croatia	ZAG	LOW (relatively)	LOC (garden schools)
Serbia	BEL	LOW	LOC
Greece	AUTH	LOW (municipal)	LOC (charity foundation)
Italy	UNIPR	LOW (relatively)	Either ORG or LORG
Scotland	UNED	LOW (relatively)	Either ORG or LORG

4. CASE STUDIES FOR WP7: SHORT FOOD SUPPLY CHAINS

WP7 aims at providing a better insight into the social, environmental and economic impacts of short food supply chains (SFSC) on rural territories. Its objective is also to identify factors which support or deter the development of SFSC.

SFSC are defined as food systems with close producer – consumer relations, with some variation in the extent of intermediation. To account for this diversity, three types of SFSC will be investigated:

- Cases where producers have direct contact with consumers, without any intermediary: “face to face” (e.g., on-farm direct sales, community-supported agriculture, etc.);
- Cases with one intermediary: “proximate” (e.g., box schemes, farm to institution delivery, etc.);
- Cases with more than one intermediary (e.g., processed fish sold to local consumers from a local shop).

A balanced coverage of different chain types across 12 case studies in six European countries will be provided following a systematic characterisation grid: 3 types of SFSC, in 6 forms and variants, considering both fresh and processed products. Indeed, there is likely significant difference between fresh and processed food regarding impacts along the three dimensions of economic, social and environmental sustainability.

Each partner in WP7 has suggested at least two cases to be studied with either no, one or more than one intermediary (see Table 3). The cases will also cover either one or more fresh products or one or more processed foods. Based on the overview of cases in Table 3 the next step will be to select cases with specific products that will be compared across types of chains and countries (see Table 4). To favour cross-analysis of case studies, as far as possible, case study conductors will seek to select at least one product which would be the same in all countries. To the extent possible, the selection of case studies will also take into account the ‘hybridity’ of SFSC and the fact that actors may engage in several types of channels simultaneously.

Table 3: List of cases for WP7

<i>Country</i>	<i>Cases</i>	<i>Products</i>	<i>Comments</i>
<i>Poland</i>	<p>1. Korycin Cheese producer group – all types of SFSC represented</p> <p>2. Food marketplace in Warsaw BIOBAZAR – mainly one intermediary or direct sales by farmers (but also other types of SFSC represented)</p> <p><u>Additional or alternative:</u></p> <p>3. Local marketplace supplied by “local” farmers (no intermediaries, farmers use their stands)</p> <p>4. Trout – Producer Association</p>	<p>Korycin Cheese (PGI)</p> <p>Various products: organic apples, vegetables (e.g. potatoes, onions, carrots), dairy and meat products</p> <p>Apples, vegetables (e.g. potatoes, onions, carrots)</p> <p>Trout fresh and smoked</p>	<p>12 producers in one small territory</p> <p>Strength: large number of consumers, rich offer of products;</p> <p>Weakness: suppliers (farmers) dispersed in a large area</p> <p>Traditional type, small scale farmers, concentration in relatively small area, relatively easy to survey;</p> <p>Weakness: losing importance, in many cases poorer quality</p> <p>About 160 producers in the association, however dispersed in several regions of the country</p>
<i>France</i>	<p>1. “Locavorium”. A local shop, near Montpellier, opened in September 2015.</p> <p>The store offers a sales area of 300m² with all categories of food products. The products come from farmers who are partners of the</p>		<p>The project is based both on:</p> <ul style="list-style-type: none"> • the number of intermediaries: delivery through maximum one intermediary between farmer and consumer

<i>Country</i>	<i>Cases</i>	<i>Products</i>	<i>Comments</i>
	shop, but who do not own the shop (contrary to typical farmers' shops). 75% of the sales value are returned to the farmers		• the concept of proximity: the majority of products come from within a radius of less than 50 km away from the shop and the maximum distance allowed is 150 km
	2. Fish Brenne	Fish	
	3. Central market in Dijon - farmers sell their own products (no intermediary)	Beef, pork, vegetable, dairy products, poultry, honey, bread, etc.	It is a traditional market in a medium sized town which is composed of several forms of commercialisation (not only short supply chain). We will focus strictly on short supply chain (farmers who sell their own products). The choice of produce is open and adaptable
	4. Farmers market in the Drome (village of Hauterive) (no intermediary)	Poultry, apple, bread, vegetables, cheese	Local farmers' initiative in a rural area
	5. Uniterres (Burgundy Franche Comté region) (one/two intermediaries: association and social grocery store)	Vegetables, fruit and eggs	It is a very special case study because it takes place in a social grocery store (a form of food aid). It involves people in precarious situations on the one hand (the recipient) and weakened local farmer on the other. It involves also

<i>Country</i>	<i>Cases</i>	<i>Products</i>	<i>Comments</i>
			people who work in grocery store and an association from the solidarity and social economy field. This initiative is supported by public and private funds
<i>Hungary</i>	1. Freshwater fish (one or more intermediary) 2. Honey (face to face/one intermediary)	Fish Honey	
<i>UK</i>	1. Creel Fish Club - a fish box scheme (internet purchase and collection through a local distribution point). This initiative is part of Northumberland Seafood, and is based in the North-East region (Northumberland). It is an example of ‘proximate’ system with one intermediary involved. More info at: www.creelfishclub.co.uk 2. Northumbrian Quality Meats – a farm business founded in 2000 with the aim of producing and supplying the finest quality meats available. Monkridge Hill Farm (750 acres of mainly high hill land, managed on traditional, extensive-basis) is located in the North-East region (Northumberland), in the UK. Different sales channels are used, including direct sales to consumers (on-farm sales, sales at farmers’ markets), sales to local restaurants and through the local butcher (one intermediary involved), home delivery to consumers (not clear on the number of intermediaries involved). More info at:	Fish and shellfish (multiple species); processed products (Crab Claws, Dressed Crab). Meat products (beef, sheep meat, pigmeat); processed products (sausages and burgers)	The Creel Fish Club is a fish box scheme to promote quality, fresh, locally sourced, seasonal and sustainable fish and seafood. The idea behind Creel Fish Club is to take the strain off overfished stocks, introduce customers to new types of fish and seafood and help support the inshore fishing fleet. Synergies with Task 2.4 (hybrid forums) and Task 9.4 (pilot on fish SFSC). Meat from Northumbrian Quality Meats has developed an unmatched reputation for quality products. Their traditional breeds of livestock are raised extensively in the wild uplands of Northumberland on a natural diet and with the highest welfare standards (Winners of 2006 UKTV Foods Local Heroes, 2008 Organic Food Awards).

<i>Country</i>	<i>Cases</i>	<i>Products</i>	<i>Comments</i>
	<p>http://www.northumbrianqualitymeats.co.uk/index.php</p> <p><u>Additional or alternative:</u></p> <p>3. Local farmers' markets in the North-East - from Northumberland (e.g., Morpeth market; Ponteland market; Alnwick market) and Tyne and Wear (e.g., Tynemouth market; several Newcastle markets).</p>	<p>All types of product categories (fresh and processed), including fruit and vegetables, meat products, dairy, cereal/bakery, seafood/fish, etc.</p>	
<i>Norway</i>	<p>1. Brødrene Berggren. Proximate: One intermediary (FISH). Fishmonger, processor and retailer located at the harbour in Sandefjord a town south of Oslo. Processes and distributes fish from local fishermen. Have own shop, deliver to restaurant in the same building and to local food stores</p> <p>2a. Matkollektivet (Bergen). One intermediary. This is a box scheme that is partly volunteer-based and sources food from (almost only) farms in the Bergen area</p> <p>2b. Kooperativet (Oslo). One intermediary. This is a box scheme that is partly run by volunteers in the Oslo area, sourcing food from local farms (replicates of this model starting up in other places in Norway)</p>	<p>Shrimps, white fish (cod, etc.), fish cakes (processed)</p> <p>Northern fruits and vegetables, fish, beef, sheep, eggs, honey, cheese, bread</p> <p>Northern fruits and vegetables, eggs, honey, apple juice, grain products</p>	<p>Local distribution of fish has decreased as the fishing industry and distribution has become more centralized. Local fish stock threatened by environmental degradation. Synergies with WP 2.4 (Hybrid Forum) and WP8</p> <p>One intermediary in local-local dimension</p> <p>One intermediary in local-local dimension</p>

<i>Country</i>	<i>Cases</i>	<i>Products</i>	<i>Comments</i>
	<p><u>Additional or alternative:</u></p> <p>3. Farmers' Market (Bondens marked): national organization of local farmers' markets. We may choose one market to study in depth</p>	All types of product categories (fresh and processed), including fruit and vegetables, meat products, dairy, cereal/bakery, etc.	Face to face (mostly)
<i>Italy</i>	<p>1. Farm selected in the Appennino Tosco-Emiliano National Park (Parco Nazionale Appennino Tosco-Emiliano, http://www.parcoappennino.it/Eindex.php) producing and selling food products directly (different food products possible: cheese, honey, vegetables, etc.), either through on-farm sales or sales at farmers' markets. No intermediary.</p> <p><u>One of the two following alternatives, depending on the case/products selection needs:</u></p> <p>2a. Kuminda, collective purchasing group organising different activities (cultural, educational, etc.) on food products and food systems. See: http://kuminda.org/. One intermediary</p> <p>2b. La Casa del Formaggio (literally: “the House of Cheese”) is a typical and historical food retailer located in Parma downtown, selling different traditional food products of the territory. See http://www.lacasadelformaggio.it/. Two or more intermediaries</p>	<p>Cheese and/or honey and/or vegetables</p> <p>Box scheme with different food products</p> <p>Different food products, mostly cheese and meat</p>	<p>This area is extremely fragile and marginal from a socio-economic point of view, subject to depopulation and abandonment of agricultural land and activities. The sustainability issue (environmental, social and economic) is therefore very sensitive. Synergies with Task 2.4 (hybrid forums) and Task 8.2 (ethnographic fieldwork).</p> <p>This may also have relevant synergies in the selection of families in Task 8.2 (ethnographic fieldwork).</p> <p>The retailer is relevant for the local population/community of the older part of Parma downtown</p>

Table 4: Case distribution across type of chain and product (fresh vs. processed)

FR, HU, IT, NO, PL, UK		No intermediary	One intermediary	More than one intermediary
PO	Fresh	(2) (3)	(2)	(4)
	Processed	(1) (2)	(1) (2)	(1) (4)
FR	Fresh	(3) (4)	(1) (5) (2)	(5)
	Processed	(3) (4)	(1) (2)	
HU	Fresh		(1)	(1)
	Processed	(2)	(2)	
UK	Fresh	(2) (3)	(1) (2)	
	Processed	(2) (3)	(1) (2)	
NO	Fresh	(3)	(1) (2)	(1)
	Processed	(3)	(1) (2)	(1)
IT	Fresh	(1)	(2a)	
	Processed	(1)	(2a)	2b



The Strength2Food project in a nutshell

Strength2Food is a five-year, €6.9 million project to improve the effectiveness of EU food quality schemes (FQS), public sector food procurement (PSFP) and to stimulate Short Food Supply Chains (SFSC) through research, innovation and demonstration activities. The 30-partner consortium representing 11 EU and four non-EU countries combines academic, communication, SMEs and stakeholder organisations to ensure a multi-actor approach. It will undertake case study-based quantitative research to measure economic, environmental and social impacts of FQS, PSFP and SFSC. The impact of PSFP policies on nutrition in school meals will also be assessed. Primary research will be complemented by econometric analysis of existing datasets to determine impacts of FQS and SFSC participation on farm performance, as well as understand price transmission and trade patterns. Consumer knowledge, confidence in, valuation and use of FQS labels and products will be assessed via survey, ethnographic and virtual supermarket-based research. Lessons from the research will be applied and verified in 6 pilot initiatives which bring together academic and non-academic partners. Impact will be maximised through a knowledge exchange platform, hybrid forums, educational resources and a Massive Open Online Course.

www.strength2food.eu

