



## Strengthening European Food Chain Sustainability by Quality and Procurement Policy

### **Deliverable 9.3:**

#### **REPORT EVALUATING THE PILOT INITIATIVE ON IMPROVING FQS SALES IN POLAND**

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## Executive summary

Poland is one of the largest EU countries in terms of its population and the size of its agricultural sector; however, the participation of agri-food producers in the FQS certification schemes is limited. As of December 2020, 44 Polish names were registered as PDO, PGI, or TSG products, involving 860 certified producers. **Since 2007 the total number of certified producers has been continuously increasing. While after 2012 the significant increase was due to the entering the registration scheme by a large group of apple growers, the number of other participants in the system has decreased. Thus, the main aim of the study was to identify the main challenges encountered by producers and to develop a set of recommendations to support the growth of the market of FQS products in Poland.**

The main sources of information, besides secondary data, were surveys conducted in 2018-2019 with both consumers and producers. Consumers' survey aimed at exploring levels of recognition of PDO, PGI, and TSG certificates and awareness of brands of FQS products on the Polish market, while producers' survey focused on several aspects of the certification processes and functioning of FQS producers in the food market. Additional information for the analysis was obtained through interviews and consultations with representatives of governmental administration responsible for the functioning of the FQS system in Poland.

Findings indicated that there are many problems disrupting the functioning of the Polish FQS market. On one hand, most products are characterized by low added value (fruit and vegetables; honey,) and this makes them difficult to distinguish on the market and therefore easily exposed to counterfeit. On the other hand, there are also PDO and PGI products with greater added value (mainly cheeses and sausages), but the lack of collective action from producers groups reduces the possibilities of more effective promotion and distribution. Furthermore, especially for PDO products, a limited number of certified producers and small cultivation areas constraint the use of effective marketing strategies, hindering producers' ability to gain more visibility for their produce. As a consequence, Polish FQS producers are not able to create more profitable market niches, often selling their certified products at regular market prices, without the expected price premium. A further significant problem signalled by producers of PDO, PGI, and TSG products is the indirect and illicit use of the protected names by counterfeit products, which exploit the reputation of registered names by imitating or suggesting a connection with the FQS.

In order to improve the FQS sales in Poland, a joint commitment of the public administration agencies and producers is necessary. The most important recommendations are as follows.

- Most producers experience difficulties in preparing the application for FQS. This is linked to a lack of adequate knowledge and necessary skills. There is therefore a need for more support to producers in the process of developing applications and specifications from public administration or/and independent organizations.

- It is suggested to construct a national system for monitoring FQS distribution and reporting counterfeits. A built-in mechanism of reporting frauds and illegal use of the reputation of the registered name could help preventing fraud in the distribution chain. Moreover, in order to ensure an effective control system, a permanent and professional staff of control body should be built, constituted and managed by trained and competent staff.
- Considering the very low bargaining power of individual, small scale producers, as well as their relatively poor economic stand, it is important to provide more support for their market-related activities. Our key recommendation is to facilitate the creation – or to create altogether – an "umbrella" association of certified producers acting on behalf of all the participants of the system. The specific functions of this organization would be: building consumers' awareness and promoting FQS labels in Poland; providing training for the producers; supporting the development of supply chains; linking producers with potential buyers; encouraging producers to develop joint (group) sales to avoid internal competition; strengthening producers' position in supply chains; searching for potential sources of funding for investments; and helping with applications writing.
- Taking into account that most FQS products are registered and produced by small groups or even by single producers, increasing the scale of production and attracting new farmers to join existing certificates is the main path towards strengthening the market position of FQS producers. This is important also from the perspective of the effectiveness of promotional activities, which may be considered reasonable only if the promotion is followed by an adequate offer.
- Lack of uniform packaging with a visible identification of the certified product and its origin may be considered as one of the key obstacles in the effective promotion and sales of certified products. In order to increase recognition of specific qualitative characteristics of FQS products, whenever possible producers should arrange common labels and packaging, in order to make their product distinguishable on the market.
- Joint sales and distribution are also recommended in order to avoid producer–producer competition and to strengthen bargaining position in the distribution chain. Joint transportation and sales would possibly allow for savings in time and costs allocated to individual transportation and decrease dependence on intermediaries.

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## **List of Abbreviations and Acronyms**

EC: European Commission

FQS: Food Quality Schemes

GMO: Genetically Modified Organisms

IP: Integrated Production

PCR: Polymerase chain reaction

PDO: Protected denomination of origin

PGI: Protected geographical indication

TSG: Traditional specialty guaranteed

GIJHARS: Inspectors of the Agricultural and Food Quality Inspection



## **Report evaluating the pilot action on improving FQS sales in Poland**

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### **Aim of this report**

The aim of this report is to assess the possibilities of improving FQS sales in Poland. Poland is one of the largest EU countries in terms of its population and the size of its agricultural sector (both in terms of land area and employment). However, while there are 44 (in 2020) EU-registered PDO, PGI and TSG products, the involvement of agri-food producers in the FQS certification schemes is very limited.

GIJHARS, in co-operation with SGGW, interviewed a number of certified PDO, PGI and TSG producers, along with representatives of institutions responsible for the functioning of the FQS registration and certification system. The survey focused on current promotion and sales practices, as well as problems and challenges encountered by producers. This research also considered how fraud and falsification of certified products could be reduced, investigating novel technologies in DNA genetic testing in the Polish / New Member State context.

Based on our findings, a set of recommendations and an action plan was produced. Recommendations were implemented by GIJHARS in the second stage of the Task and their effectiveness was evaluated. For instance, this involved developing dedicated training courses and consultancy, and then evaluating their effectiveness. The Task contributed to developing verified strategies for improving the operation of FQS in non-traditional markets such as the New Member States, which possess a substantial agri-food sector and which urgently need to identify ways of adding value.

It should be emphasized that evaluating the effectiveness of the recommendations revealed to be challenging. In the first place, in line with the nature of market activities, the effects of implemented recommendations are generally postponed, extending beyond the project lifetime; thus it is difficult to capture their impact in initial evaluations. Second, the adoption and implementation of research recommendations require decisions made by relevant public administration institutions or by producers. Taking into account the existing resistance to changes, as well as the inertia of administrative offices, it was not possible to fully implement all the proposed measures. Where it was possible, however, the usefulness of the proposed solutions was assessed and included in this report.

## **1. FQS system in Poland - state of the art**

### **1.1. Polish regulations and institutions dealing with Food Quality Schemes**

In Poland, the control system of FQS is based on private certification bodies recognized and supervised by the designated authorities and public control bodies. From a legal perspective, the Act of 17th December 2004 on registration and protection of names of agricultural products, foodstuffs, and traditional products is a legal basis for the existence of PDO, PGI and TSG products on the food market in Poland. The Polish system consists of the following entities: 1) Minister of Agriculture and Rural Development - which issues and revokes certificates of conformity in FQS, and authorizes the certification bodies to carry out inspections; 2) Agricultural and Food Quality Inspection (Inspekcja Jakości Handlowej Artykułów Rolno-Spożywczych IJHARS) together with the Chief Inspector and Regional Inspectors – who supervise the certification bodies, monitor the use of registered names placed on the market, control the conformity process of production of PDO, PGI, and TSG products with the specification, issue and withdraw certificates, 3) authorized certification bodies that carry out control of conformity process of production of PDO, PGI, and TSG products with the specification, issue and withdraw certificates of compliance.

### **1.2. Registration procedure**

The producer group submits an application for registration to the Minister of Agriculture and Rural Development, which is then submitted to the Council for Traditional and Regional Names of Agricultural Products and Foodstuffs. The Council is an advisory body of the Minister of Agriculture and Rural Development and its task is to provide an opinion on whether the application for registration is justified and whether it meets the requirements of the system. Upon acceptance of the application, a national objection procedure is initiated to ensure proper publication of the application and to allow a reasonable period during which any natural or legal person having a legitimate interest and established or resident in the country may object to the application. If an objection is raised, the Ministry of Agriculture and Rural Development examines the admissibility of the objection. If the Minister of Agriculture and Rural Development deems that the requirements have been met, it submits the application to the European Commission.

The names of agricultural products and foodstuffs are subject to temporary protection in the territory of Poland from the date of the decision on compliance with the requirements by the application for registration. Temporary national protection expires on the day the name of an agricultural product or foodstuff is entered in the register of protected designations of origin and protected geographical indications.

### 1.3. Control of compliance of the production process with the specification

One of the basic elements ensuring the protection of registered names is an effective control system, which consists of control of the compliance of the production process with the specification and monitoring of the use of registered names as PDO, PGI, TSG to describe the product placed on the market.

In Polish regulations, the rules of control are defined by the Act of 17 December 2004 on registration and protection of names of agricultural products, foodstuffs, and traditional products. The act defines the institutional framework enabling the implementation of the system at the national level, including the tasks of individual authorities with regard to PDO, PDO, TSG.

The compliance of the production process with the specification is checked at the request of the producer and before the product is placed on the market. This has the purpose of confirming that the requirements of the specification under which the product name was entered by the EC in the PDO and PGI register or the TSG register are met at all stages of production.

The control is carried out at the sites where the agricultural product or foodstuff is produced. During the control, it is assessed whether each stage of production is performed in accordance with the requirements of the specification. In addition, the inspector checks the documentation kept by the producer, such as registers of production showing the relationship between the incoming and outgoing batch, documentation of goods circulation showing the level of production and sales, etc. From the documentation, it is determined whether the specification requirements are consistently followed. During the control, samples may be taken of the product whose production process has been completed. The full cost of control of compliance with the specification has to be borne by the producer.

In Poland, control is carried out by Inspectors of the Agricultural and Food Quality Inspection (IJHARS) or by certification bodies accredited in accordance with ISO/IEC 17065 and authorized by the Minister of Agriculture and Rural Development. Based on a positive result of the inspection, the producers are issued certificates, which authorize the use of:

- name of the product registered as a PDO, PGI or TSG
- labels: protected designation of origin (PDO), protected geographical indication (PGI), traditional specialty guaranteed (TSG), and PDO, PGI, or TSG symbols.

If the control did not confirm the compliance process of production with the specification, the producer is called to remove the irregularities. If the producer does not remove the irregularities within the prescribed period the following actions may be undertaken:

- certification body refuses to issue the certificate (in case the control is carried out by the certification body)

or

- the regional inspector of IJHARS issues adequate decisions prohibiting the use of the protected name and logo, prohibiting the sale or ordering withdrawal of an agricultural product from the market (in case of control carried out by IJHARS).

#### 1.4. Protection of registered names

GIJHARS carries out official control of agri-food products with registered protected names PDO, PGI, TSG. Official control ensures that registered names are protected against:

- (a) any direct or indirect commercial use of the registered name for non-registered products;
- b) any kind of improper use, imitation or recall;
- c) any other false or misleading indications relating to the origin, nature or essential characteristics of the product;
- d) any other practice likely to mislead the consumer as to the true origin of the product.

The Act of 17 December 2004 provides that fines are imposed in the following cases:

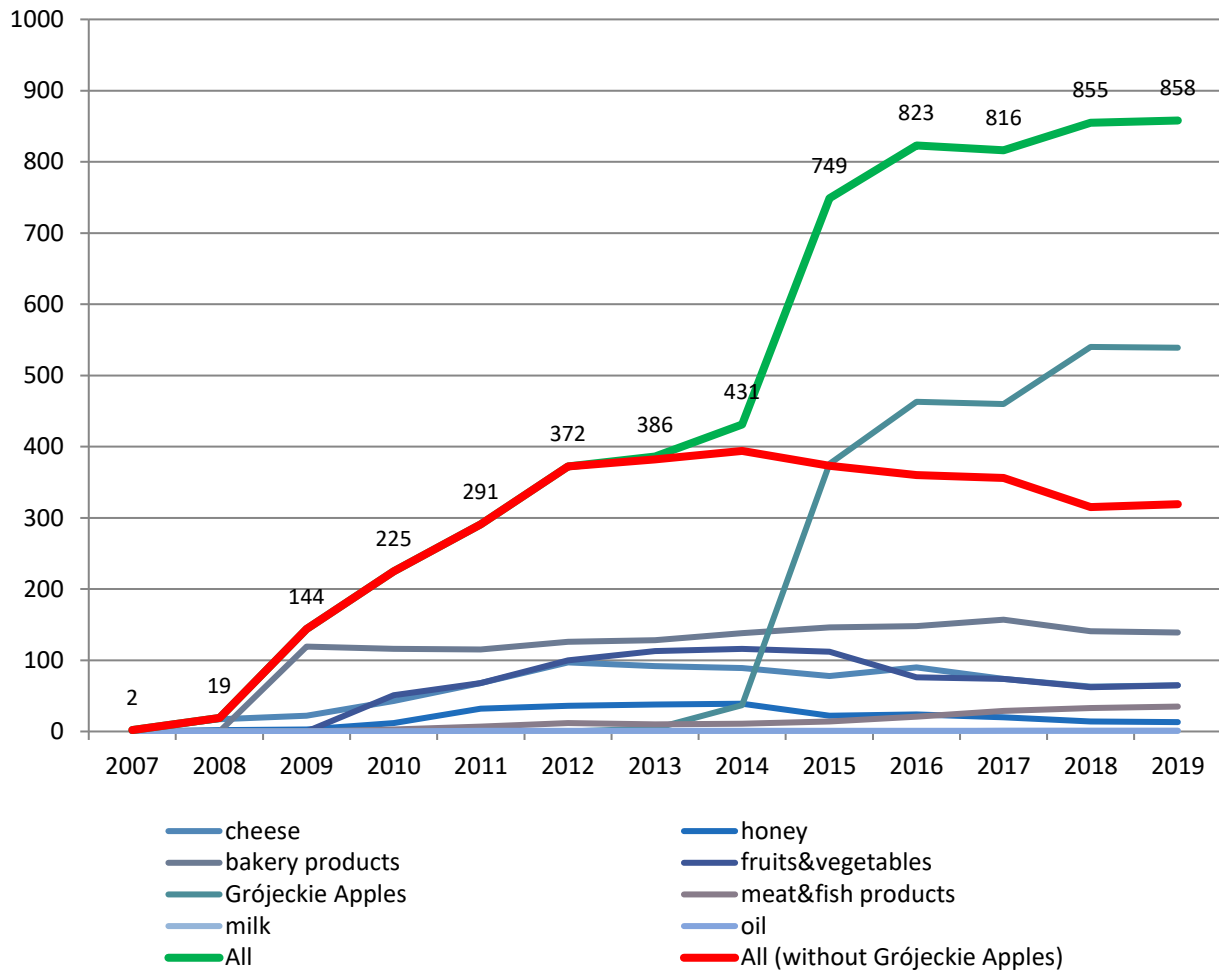
- using a name registered as PDO, PGI, TSG for an agricultural product or foodstuff not in accordance with the specification or violating the scope of its protection defined in art. 13 sec. 1 or art. 24 sec. 1 of Regulation No 1151/2012 - **a fine of up to ten times the average wage,**
- using the sign, its abbreviation or symbol in violation of Art. 44 sec. 1 of Regulation No 1151/2012 - **a fine of up to 200% of the material benefit** obtained or the material benefit that can be obtained for an agricultural product or foodstuff placed on the market,
- placing on the market of an agricultural product with PDO, PGI, TSG name, which, contrary to the obligation under Art. 12 sec. 3 or article. 23 sec. 3 of Regulation No 1151/2012 has not been marked or has been marked in violation of these provisions - **a fine of up to three times the average salary,**
- re-placing on the market or re-using the name of a PDO, PGI, TSG product, which, contrary to the obligation under Art. 12 sec. 3 or article. 23 sec. 3 of Regulation No 1151/2012 has not been marked or has been marked in violation of these provisions - **a fine of up to twenty times the average wage, not lower than the amount of the previously imposed fine for such a breach.**

#### 1.5. FQS products in Poland

The first products with the PDO, PGI or TSG certificates appeared on the Polish food market in 2007. A systematic, but relatively slow increase in the number of granted certificates continued until 2013 (Figure 1), in which a total of 386 producers were registered (Annex, Table A). In 2019, the number of issued certificates more than doubled to 858 compared to the year 2013. This was due to the decision of the "Grójec Apples" Association to join the FQS system in 2013. Apple growers from the association accounted for 62.8% of all FQS producers in Poland in 2019. The Grójec region is the largest area of fruit production in Poland and one among the largest in Europe, accounting for about 40% of domestic apple harvests. As any apple grower from this region that follows Integrated Production (IP) or GLOBALGAP specifications<sup>2</sup> as well as fulfils requirements of Grójec Apples PGI's specification can be certified, even a small percentage of apple growers joining the Association results in their dominant share of the FQS certification system. For this reason, when analysing the number of FQS certificates granted in Poland, we separated part of the whole population excluding apple growers with the Grójec Apples certificate.

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<sup>2</sup> Association Grojec Orchards website: <https://jablkagrojeckie.pl/en/home-en/>

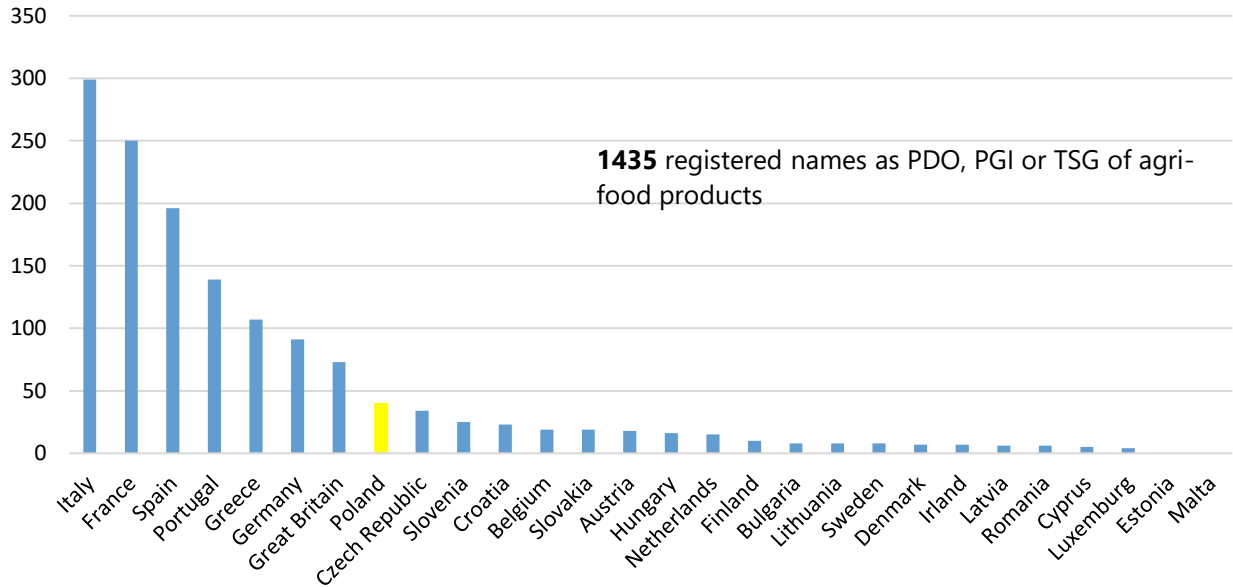
**Figure 1.** Number of FQS certificates in Poland in the period 2007-2019

Source: own elaboration based on GIJHARS data

It is necessary to distinguish between these two clusters due to the different trends in the number of certificates. While the number of certified apple growers increased significantly in 2013-2019, the total number of other participants in the system remained fairly stable. However, in some product categories (e.g. Kashubian strawberry), the number of certified farmers is noticeably decreasing. This signals the occurrence of problems that limit the increase in sales of FQS certified food in Poland. The identification of these problems is one of the key elements of our analysis.

As of December 31, 2019, 42 Polish names were registered as PDO, PGI or TSG products, of which 10 - protected designations of origin, 24 - protected geographical indications and 10 traditional specialties guaranteed. Poland ranks 8th among the European Union countries in terms of the number of registered names as PDO, PGI or TSG (Figure 2).

**Figure 2.** Registered names as PDO, PGI, TSG in the EU countries (2019)



Source: own elaboration based on e-ambrosia-database.

The most numerous group in Poland are producers of PGI Grójec Apples (539 producers entitled to use the registered name), followed by bakeries offering the St. Martin's croissant (104 producers authorized to use the registered name). The others, much less in number, are PDO, PGI, and TSG producers who registered products belonging to the following categories of food: dairy (cheeses), fruits (apples, plums, cherries), vegetables, meats, honey and vegetable oil.

## 2. Methods

The main objectives of the task WP9.3 were to identify key problems of FQS producers and to develop a set of recommendations that may support the growth of the market of FQS products in Poland. Conclusions from this task will contribute to developing verified strategies for improving the operation of FQS in non-traditional markets such as the New Member States, which possess a substantial agri-food sector and which urgently need to identify ways of adding value.

The basic sources of information, besides the secondary data, were surveys, conducted in a form of face-to-face interviews with the use of the pre-designed questionnaire:

- Consumer survey - aimed at identifying the level of recognition of PDO, PGI and TSG certificates and awareness of brands of FQS products on the Polish market. Consumer surveys were performed in May and June 2018 on a group of 78 consumers of Korycin Cheese, which is a well-established registered name on the Polish market. About half of the sample was constituted by consumers buying cheese at the retail outlet, selected with a convenient sampling approach. Another proportion of involved consumers was identified through the Facebook social network of Korycin Cheese consumers. The average age of respondents was 39 and 62% of respondents were women. In addition to questions regarding the recognition of the FQS logo, consumers were asked about the reasons for purchasing FQS labelled products and the sources of information about these products.
- Producer survey – focused on several aspects of the certification processes and functioning of FQS producers in the food market. Producers selected for interviewing represented seven categories of products, as presented in Table 1. For each FQS product, the additional section of the questionnaire was answered by the group leader and / or by someone who participated in the registration process. This allowed us to receive feedback on the main problems of the functioning of the entire group, as well as on the registration and certification process.



**Table 1.** Number of interviews according to category of product\*

Category of product	Number of producers registered in Poland	Number of interviews	% of registered
Fruits&Vegetables	65	36	55,4
Cheese	65	11	16,9
Bakery products	139	5	3,6
Other	50	6	12,0
<b>Total</b>	<b>319</b>	<b>58</b>	<b>18,2</b>

Source: own elaboration

\* excluding Grójec Apples

There are several products and producer groups in the category “fruits&veg” that have a very distinctive not only produce (apples, plums, strawberries, cherries), but also characteristics of the organization of groups and their successes or failures on the market. Only a few bakery producers were surveyed because of the specificity of this category – producers are not linked directly with agricultural activities and in most cases their FQS certified product was well established on the market long before entering the certification system.

The fieldwork was carried out between June 2018 and June 2019. Supplementary data and information from statistics, literature and internal data of the GIJHARS were also used in the analysis. The number of farmers in the sample and the average farm size are presented in table 2.

**Table 2.** Basic characteristics of FQS farms in the sample

	Farm size (ha)	Certified product area (ha)
Number of farmers	47	
Agricultural Area (ha)	21.97	3.20
St. deviation	38.9	2.8

Source: own elaboration

The mean of the farm size in the sample (nearly 22 hectares) exceeds significantly Polish average (around 14 hectares), although a relatively high standard deviation indicates a variation.

The key issues covered in the survey were:

- FQS registration and certification process;
- costs and benefits of participation in the FQS scheme;
- promotional activities;
- problems related to the functioning of the FQS distribution chains, including fraud and falsifications of certified FQS products;
- evaluation of the activities of producer groups.

Additional information for the analysis was obtained through interviews and consultations with representatives of governmental administration responsible for the functioning of the FQS system in Poland.

### 3. Results

#### 3.1. Producers' opinions regarding their participation in the FQS certification process

One of the key issues of the study was to examine the FQS registration process and present recommendations for improvements based on the experience of Polish FQS producers involved in the process of preparing specifications and writing FQS applications. Table 3 presents the categories of respondents depending on their involvement in the process of developing submissions for registration products as PDO, PGI or TSG.

**Table 3.** Involvement of interviewed producers in preparing FQS application

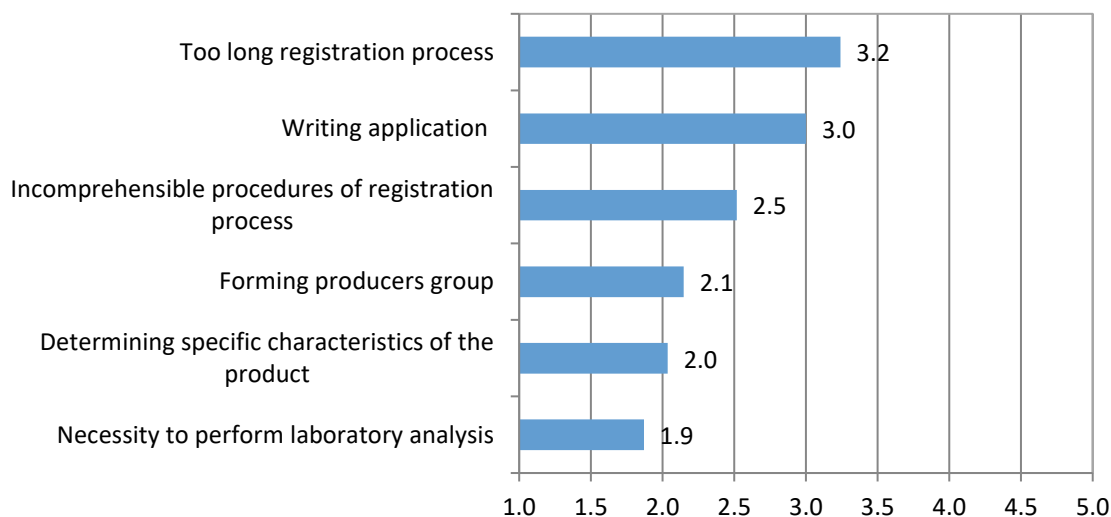
Type of involvement	Number	Share in the sample
Initiator	11	19%
Co-author	18	31%
Not involved	29	50%
<b>Total</b>	<b>58</b>	<b>100%</b>

Source: own elaboration

The first section of the questionnaire related to the evaluation of the registration process was handed only to those producers who belonged to the group of initiators to apply for the PDO, PGI or TSG. They constituted 50% of the sample, thus their opinion on the registration process may be treated as valid.

The key difficulties regarding registration are presented in Figure 3.

**Figure 3.** Difficulties experienced in relation to registration process (scale from 1 – not difficult at all to 5 – very difficult)



Source: own elaboration

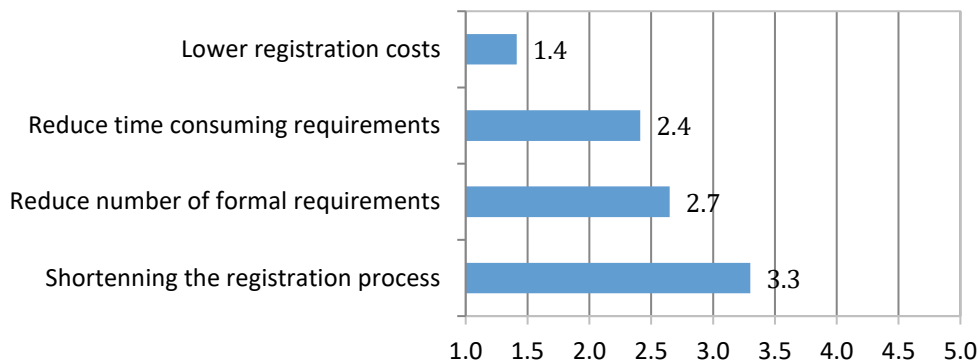
On average, producers found the registration process relatively difficult. It should be emphasized, however, that most of the respondents were precursors of FQS in Poland, and institutions from the agricultural environment - potentially responsible to provide support to producers - lacked appropriate experience with the FQS .

On the "difficulty" scale, the highest scores were given to the length of the registration process and writing applications, as well as the poor understanding of registration procedures. This clearly shows a lack of the necessary skills and experience of both producers and supporters.

The registration process was defined in the survey as a sequence of events from the decision to apply for a registration, preparation and submission of the application, to the receipt of a PDO, PGI or TSG registration. Depending on the group of producers, the length of this process ranged from 24 months to 54 months (32 months on average).

The remaining difficulties were individually less severe from the producers' perspective, but as a consequence of all these individual factors, producers generally perceive the registration process as very onerous (difficulty score 2,86 on average in the 1 to 5 scale). Consistently, when asked to present ideas for improvements in the registration process, respondents assigned the highest weight to shortening the registration process (figure 4).

**Figure 4.** Changes in the registration process suggested by respondents



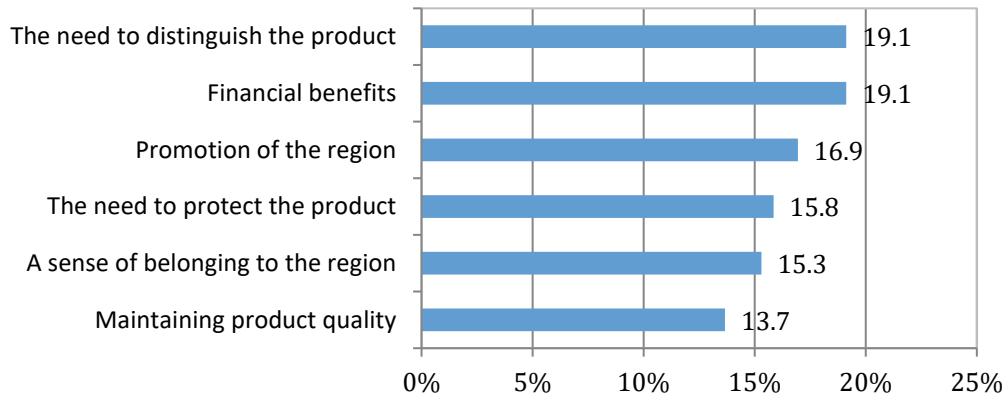
Source: own elaboration

The suggestions regarding formal requirements and time-consuming work mostly relate to the difficulty of preparing the specifications. However, as indicated earlier, this is related to the lack of experience and the necessary skills within the producers' groups. Our respondents were the pioneers of FQS and had no opportunity to use the experiences of other producers. The registration costs were assessed as practically insignificant because in the Polish context they are actually not high.

### 3.2. Producers' opinions on the functioning of the FQS system

An important part of the survey is related to the motivations and conditions of participation in the certification system. The key motives driving producers to apply for a certificate are presented in Figure 5.

**Figure 5.** The main reasons behind the decision about certification of the PDO, PGI, TSG product (% of answers)



Source: own elaboration

It should be recognized that the answers to this question relate to the essence of the FQS certification system and correspond to the key challenges for producers. Most often, the respondents mentioned "the need to distinguish the product" from other products in the same category and "financial benefits" - in both cases it is fully understandable. FQS certified products are distinguished due to their special values (quality, tradition, geographical origin), and also because they are largely targeted at market niches with the use of short food supply chains. The high percentage of indications for other motives is also fully justified, both due to the fact that the registered names are linked to the region of origin, as well as the importance of protecting the product against falsification and maintaining its quality.

Answers to the next question show that requirements related to participation in the certification system are not burdensome for producers (Table 4).

**Table 4.** Assessment of the nuisance of meeting the requirements related to participation in the system (1 - not at all burdensome, 5 - very onerous)

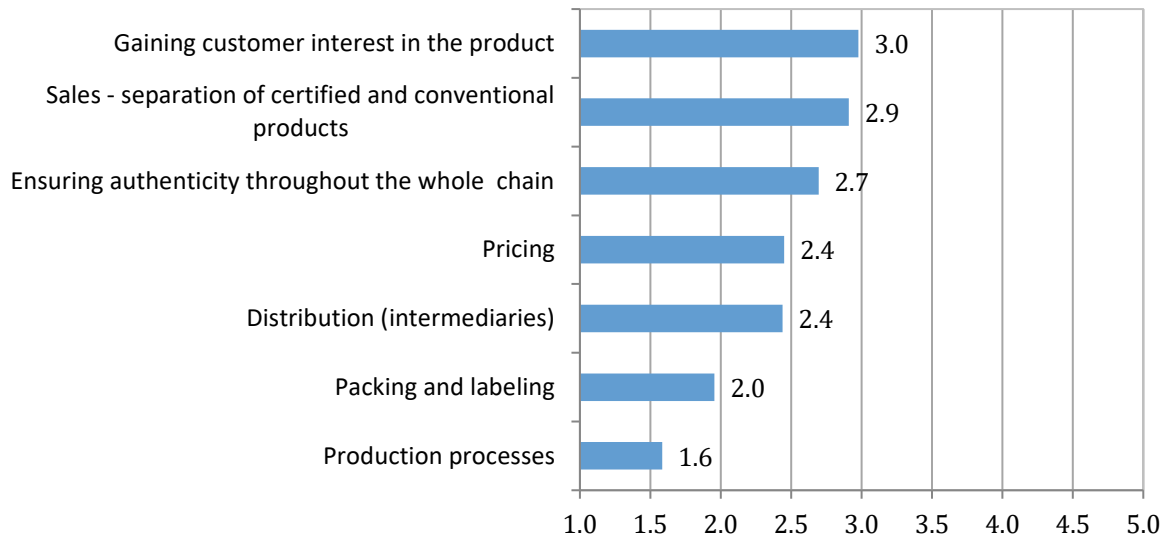
Item	Assessment	Standard Deviation	Coefficient of Variation [%]
Thoroughness of control of compliance with specification	2,77	2,80	101
Overly detailed specification	2,20	1,41	64
Necessity to keep detailed documentation	2,15	1,07	50
Costs of checking compliance with the specification	2,07	1,44	70
Adaptation of production to the requirements of the specification	2,04	1,30	64
Frequency of checking compliance with the specification	1,67	0,97	58
Sourcing the right raw materials	1,56	1,06	68
The risk of violating the terms of participation in the system	1,55	0,98	63
Official controls under surveillance (IJHARS)	1,49	0,94	63
Costs of laboratory tests	1,21	0,77	64

Source: own elaboration

All ratings, except one, were below the average value on the 1-5 scale used. Producers assessed “Thoroughness of control” (2.77) as the most impactful nuisance, although not all of them, which is indicated by the high value of the standard deviation.

Clearly greater difficulties are associated with current operations, in particular with participation in the market (Figure 6).

**Figure 6.** At which stage of activities do you think most problems occur? (1 – no problems; 5 – significant problems)



Source: own elaboration

The respondents indicated "gaining customer interest in the product" as the most important issue. It can be considered to be a key factor for any market good. However, it seems that in the case of FQS-certified products, this has a particularly important double meaning:

- due to the relatively recent introduction of these products to the market and their specific properties, it is necessary to attract the interest not only of end consumers, but also of traders participating in the distribution chain;
- various previous studies as well as own analyses conducted in detailed case studies presented in the following part of the deliverable show that the recognition of PDO, PGI, TSG by consumers is very low. This means that shaping customer awareness is one of the key factors of market success.

***Unlawful use of the registered name***

The majority of respondents (63%) have encountered unlawful use of the registered name. About 50% states that the scale of this procedure is increasingly growing after registration of the product. Examples indicated by producers are listed in Table 5.

**Table 5.** Types of unlawful use of registered names

<b>Unlawful uses of a registered name</b>	<b>Number of responses</b>	<b>Share [%]</b>
Direct or indirect commercial use of a registered name in respect of products not covered by the registration where those products are comparable to the products registered	28	25.9
Use of the PDO / PGI / TSG logo when selling products by producers who do not have a certificate	5	4.6
Using the PDO / PGI / TSG logo in advertising, information material, etc.	9	8.3
Exploiting the reputation of the protected name, including when those products are used as an ingredient, by selling similar products, e.g. having a similar shape or containing a characteristic ingredient	29	26.9
Use of a name similar to the registered name (misuse, imitation or evocation)	22	20.4
Suggesting customers that the product is certified or any other practice liable to mislead the consumer as to the true origin of the product	15	13.9
<b>Total</b>	<b>108</b>	<b>100%</b>

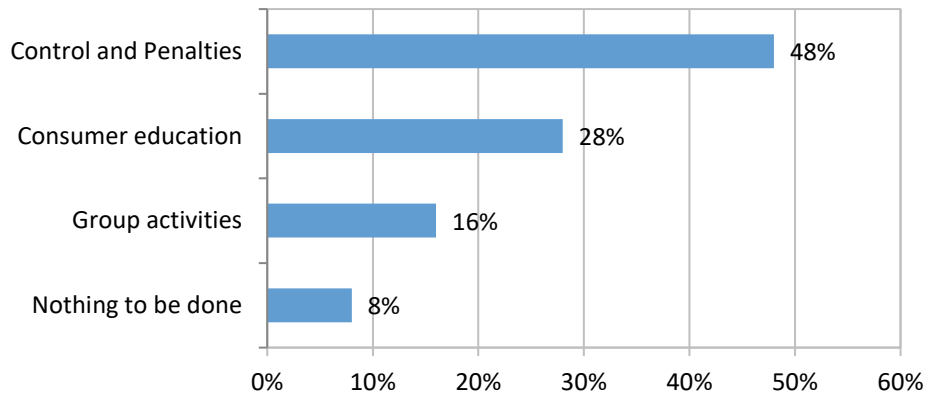
Source: own elaboration

Actions suggested to reduce these practices are presented in Figure 7.

A high number of indications show that the unlawful use of a registered name is one of the main problems the FQS producers have to face in Poland. Mixing certified and non-certified products at various stages of distribution is a quite common practice.



**Figure 7.** Producers' ideas to reduce the practice of unlawful use of the reputation of a registered name (% of all suggestions)



Source: own elaboration

The method preferred by the majority of respondents to address unlawful appropriation of certified names is to tighten market control and increase penalties (48%). Individual discussions with many producers indicate that the control system does not sufficiently enable the enforcement of full protection of registered names. Moreover, producers who notice various falsifications and unlawful uses of registered names do not report these observations, both because they do not believe in the results of these reports, and because they fear for their own safety.

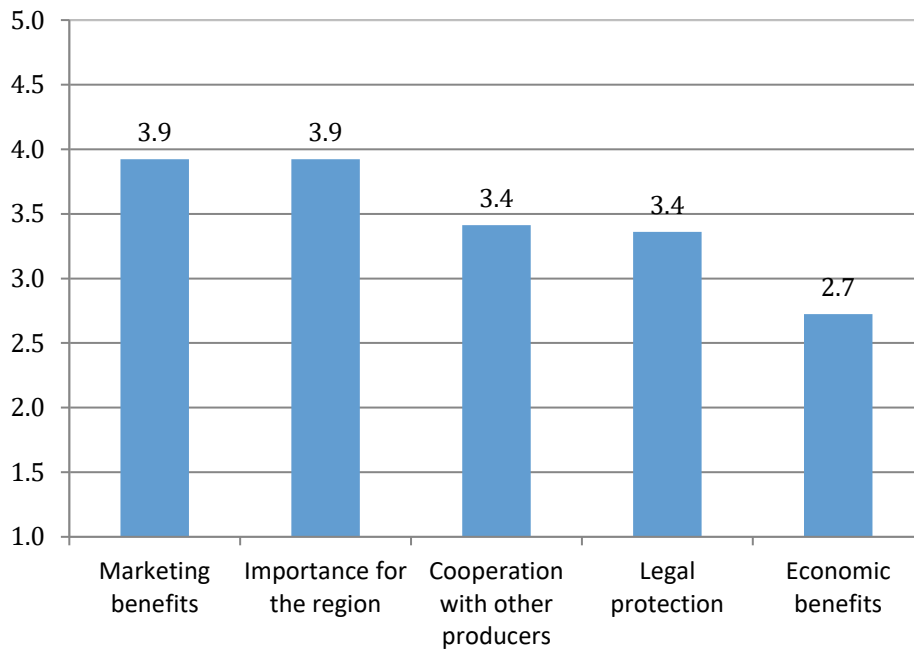
A significant number of responses (28%) related to the need to educate consumers. As our consumer survey shows, the recognition of FQS certificates is low, and Polish consumers have little knowledge about the value of certified products. Educating consumers about the FQS certification scheme and raising awareness of the problems linked with potential falsifications may be considered a suitable course of action in support of a stricter monitoring system. It is also important that producers see the importance of group functioning on the market (16%), because activities on a larger scale may facilitate the distinction, thus also recognition of FQS products and certificates.

### ***Benefits of participating in the system***

Responses to the question about the benefits of participation in the system are emblematic of producers' attitudes (Figure 8).

**Figure 8.** Benefits of participating in the FQS system assessed by producers

(1 - least important, 5 - most important)?

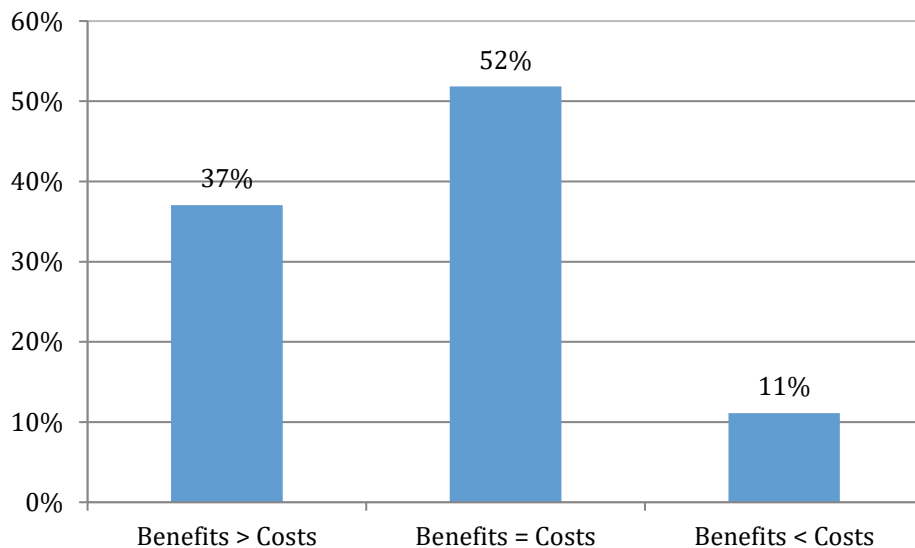


Source: own elaboration

Quite understandably, the marketing benefits were rated the highest, due to the potential to distinguish products and create market niches. The importance of FQS certified products for local tradition and economic development of the region was also indicated as a key factor (3.9 on a 1-5 scale). The respondents also assessed significantly above the average value (3,4) the required "cooperation with other producers" and "legal protection" offered by the system. It is noteworthy that economic benefits were given the lowest scores (2.7), which results from the problems highlighted above and the low effectiveness of activities undertaken by producers. This aspect will be discussed later in the deliverable.

The issue of financial benefits was analysed more in-depth based on answers to the question regarding the balance of costs and benefits of participation in the FQS certification system (Figure 9).

**Figure 9.** Are the financial benefits greater than the costs of having a PDO / PGI / TSG certification? (% of answers)



Source: own elaboration

A 37% share of producers reported they perceive the benefits of the certification as greater than costs. This cannot be fully satisfying, considering the market potential of FQS products. Most of the respondents (52%) indicated that there were no financial benefits deriving from participation in the system. This result is undoubtedly influenced by the fact that almost 47% of producers declare that they sell some FQS products without the FQS logo, and thus also without a price premium. This should be considered as one of the key factors weakening the development of sales of FQS products. The structure of responses to this question varied across the product categories and producer groups (Table 6).

**Table 6.** Are the financial benefits greater than the costs of having a PDO / PGI / TSG certification? Structure of answers across product categories (%)

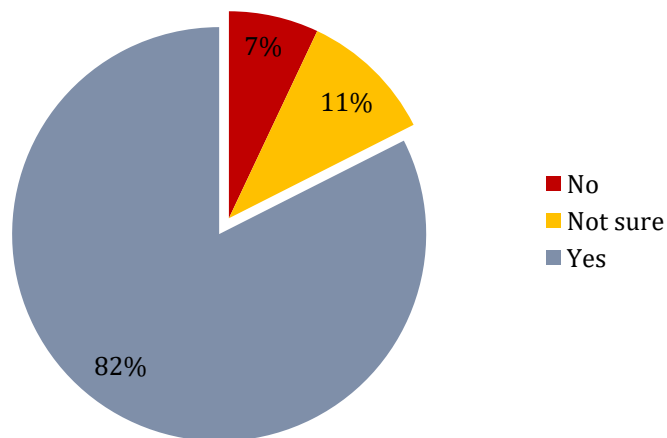
	<b>Benefits &gt; Costs</b>	<b>Benefits = Costs</b>	<b>Benefits &lt; Costs</b>
Korycin Cheese	73%	18%	9%
Smoked plums	38%	63%	0%
Kazubaska Strawberry	15%	69%	15%
Other Fruits&Veg	31%	54%	15%
Other	33%	56%	11%
<b>Total</b>	<b>37%</b>	<b>52%</b>	<b>11%</b>

Source: own elaboration

The only respondent group highlighting advantages over costs were cheese producers. This applies Koryciński Cheese, produced by a relatively small group of farmers in the north-eastern part of Poland. This cheese can be easily distinguished due to their specific characteristics. As for the remaining products, producers who did not see the net benefits clearly prevailed. The cases of Smoked Plums (Suska sechłonska PGI) and Kaszubska Strawberry PGI are particularly interesting. The latter (Kaszubska Strawberry) will be discussed in detail in the chapter "Case Studies".

Regardless of the problems experienced by producers and the lack of clear financial benefits, the vast majority (82%) declared their willingness to continue participating in the system (Figure 10).

**Figure 10.** Do you plan to continue your participation in the PDO / PGI/ TSG certification scheme?



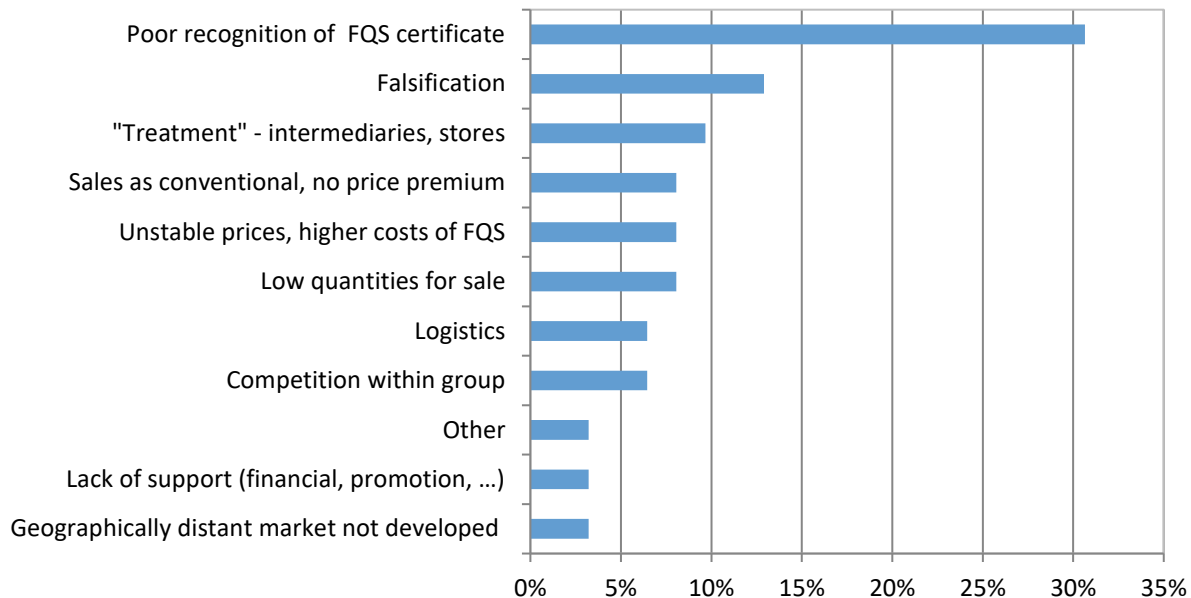
Source: own elaboration

However, in the months running from the survey to the end of 2019, about 10% of producers resigned from participation in the system (excluding new participants in the system from the Grójec Apples Association). It is probable that if producers do not strengthen the market position of their products, this trend will continue in the coming years.

### *Dysfunctions of the FQS supply chain*

The downturn trend in the number of FQS producers in Poland is to a large extent related to the problems producers encounter on the market. Figure 11 shows the difficulties experienced by producers in the sales of FQS produce.

**Figure 11.** Difficulties in the sale of products with the designation PDO / PGI / TSG certificate (% of answers)



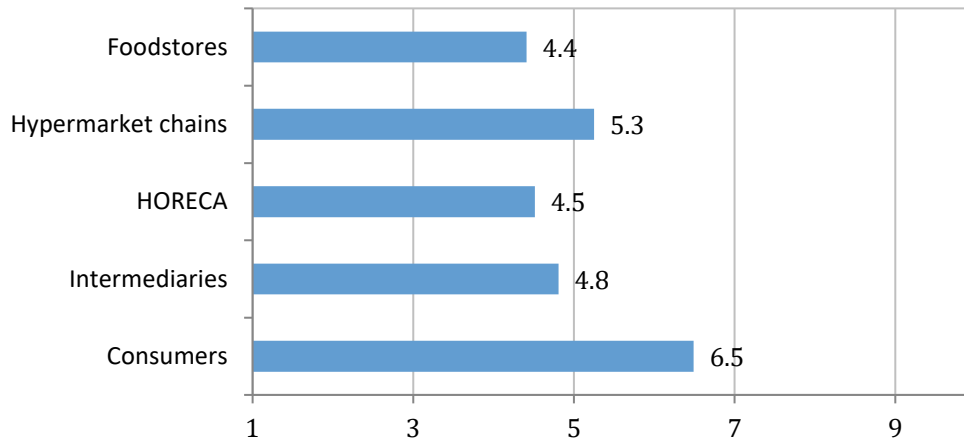
Source: own elaboration

The largest number of responses (32%) refers to the "poor recognition of FQS certificate" as the most pressing difficulty. This suggests the need for an educational campaign raising awareness among consumers about the certification system and the products available on the market. The poor recognition of FQS products on the Polish market, with the exception of cheeses, results in, inter alia, sales without product distinction, which is also raised as a concern by producers (8.2%). A significant percentage of responses also applies to counterfeits on the market (13.1%).

The relatively low number of indications for "low quantities for sale" is also noteworthy (7%). It seems that producers do not see the shortcomings resulting from small-scale production, which is limiting the possibility of attracting potential customers requiring large deliveries, evenly distributed throughout the year (e.g. hypermarket chains).

While the awareness of FQS labels on the Polish market is low, producers estimate that consumers' interest in FQS products is relatively high (6.5 on a scale of 1-10). This value is higher than the ones associated with other participants in the distribution chain (Figure 12).

**Figure 12.** Producers' assessment of the degree of interest in certified products by different stages of the supply chain (1-10 scale)



Source: own elaboration

It is very likely that this assessment is shaped by the prism of individual, direct contacts with consumers who purchase FQS products.

### *(Dys)functioning of producers' groups*

In accordance with the applicable law, a group of producers may submit an application for registration of the name of an agricultural product or foodstuff. In Poland, it can be either a previously existing organization, usually established for purposes other than registration of PDO, PGI or TSG names, or a new one, created for the purpose of participating in the FQS registration system. After obtaining registration with the European Commission, these organizations usually do not transform into groups of producers conducting joint distribution, which may weaken the effectiveness of the role of the group in protecting the reputation of the registered names and their promotion.

Due to the small number of FQS-certified producers and the relatively small scale of production, cooperation between producers should be an important factor in shaping their position on the market. Table 7 presents the results of the self-assessment of the functioning of producer groups.

**Table 7.** Assessment of the functioning of producers' groups by members (1 - very bad, 5 - very good)

Item	Mean - whole sample	Koryciński Cheese	Smoked plums	Kaszubska Strawberry
Promotion and information activities	3.29	2.25	3.25	<b>3.91</b>
Cooperation in sales	x	x	<b>4.25</b>	x
Leadership in the group	3.38	2.37	3.5	<b>3.73</b>
Developing uniform packaging	x	x	<b>4.3</b>	x
Cooperation of group members	3.1	2.2	<b>4</b>	2.7

Source: own elaboration

Evaluations of promotional activity, leadership and cooperation of members refer to the entire studied sample and are slightly higher than the mean value on a scale of 1-5. In only one group (smoked plums) sales were centralized and uniform packaging was used, and this strategy was highly appreciated by the members of the group. Noteworthy are the scores in the group of the Kaszubska Strawberry's producers - the highest on the scale of the entire sample for leadership and promotion / information activities. This is probably due to the fact that information activities are carried out on a broad scale, using various forms of communication with the market. However, for reasons that will be discussed in detail in the section dedicated to the Kaszubska Strawberry in the Case Studies, these promotional activities do not translate into market share and financial benefits. Figure 13 illustrates respondents' expectations regarding the changes in the functioning of producer groups required to gain more from the participation in the FQS system.

**Figure 13.** Changes in the functioning of producer groups required to benefits more from participation in the FQS system



Source: own elaboration

Although respondents' answers to this question varied, depending largely on the product category, responses coalesced around two key problems of FQS producers – the small scale of production and the lack of packaging that effectively distinguishes products on the retail market.

A few suggestions concerned arranging contracts with hypermarkets and exports. However, these were assigned little importance (close to the lowest value "1" in the 1-5 scale of importance), which indicates a realistic assessment of the current production potential. A small scale of production limits the possibilities of cooperation with retail chains that require systematic and regular deliveries of goods, and small production makes it practically impossible to export profitably, despite individual sales transactions.

### ***Promotional activities***

Most of the FQS certified products in Poland, with the exception of a few with many years of tradition (e.g. "Oscypek" cheese), before registration have been introduced on the market only locally. Because of this, consumers' recognition is low, and this makes promotion a key instrument in introducing and disseminating products on the market. All producer's groups carry out promotional and information activities, as do some producers individually. Table 8 shows the effectiveness ratings of various forms of FQS product promotion.



**Table 8.** Assessment of the effectiveness of various forms of promotion of FQS products (1 – very poor, 5 – very effective)

<b>Forms of promotion</b>	<b>Assessment</b>	<b>Share of answers [%]</b>
Stands in supermarkets, shops, restaurants	3.00	<b>28.3%</b>
On agri-tourism farms (e.g. shows, refreshments, gifts)	2.84	<b>23.9%</b>
Advertising in the press / radio / television	3.55	<b>14.1%</b>
Using personal contacts of members of the group	3.17	13.0%
Regional fairs, national and international fairs, competitions	<b>4.07</b>	5.4%
Promoting the product on Internet websites / social networks	<b>3.61</b>	5.4%
Local initiatives (e.g. picnics, local product day celebrations)	<b>3.96</b>	4.3%

Source: own elaboration

The largest number of indications concerning promotions in shops, restaurants, and agro-tourism farms, which probably result from the fact that producers have direct, most frequent contact with them in commercial transactions. However, these two types of promotional activities were rated the worst in terms of effectiveness. The next place in terms of the number of responses was taken by advertising in the media, rated relatively high regarding effectiveness, followed by the use of personal contacts. Other forms of promotion were highly rated in terms of effectiveness, but with a small number of responses.

Producers also indicated individual promotion activities. The latter are outlined in Table 9.

**Table 9.** Individual methods of promoting and distinguishing products coded by FQS producers (% of answers)

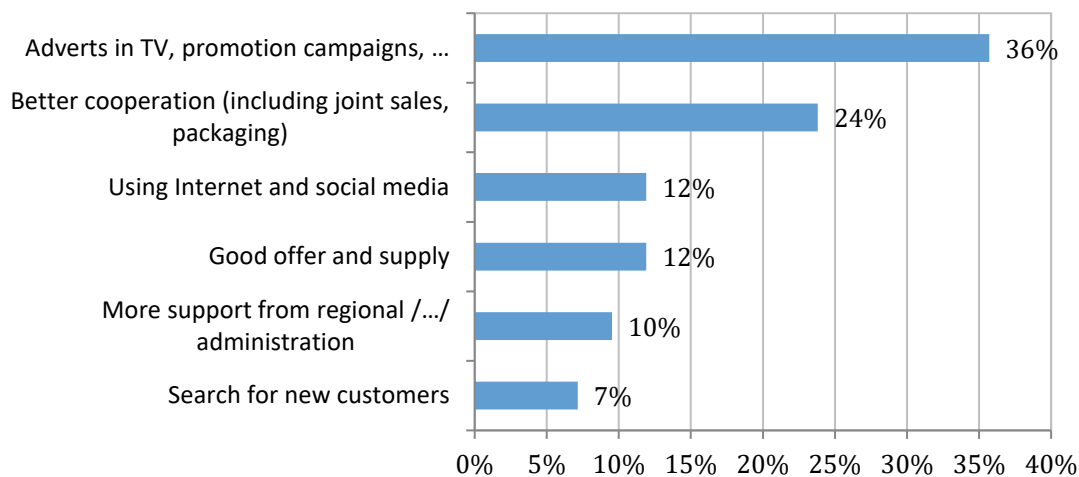
<b>Forms of promotion</b>	<b>Share of answers [%]</b>
Printed information materials (brochures, leaflets)	<b>33%</b>
Own Logo	<b>28%</b>
At-the-farm displays	<b>26%</b>
Own, distinctive packaging	21%
Advertising in the press / radio / television	17%
Internet	16%
Using personal contacts of members of the group	16%
Promotion in agri-tourism farms (product samples)	12%
Stands in supermarkets, shops, restaurants	10%

Source: own elaboration

Each of the most frequently used forms of promotion (printed information materials, own logo and at-the-farm displays) was indicated by approximately 30% of producers. However, these forms can be considered as standard and traditional. More innovative forms (e.g. Internet and other social media), as well as those that serve to distinguish the product (own, distinctive packaging), were mentioned less frequently. Nonetheless, the producers' efforts in the area of promotion should be emphasized, although their effectiveness may be questioned, especially taking into account the non-local scale of impact.

Participation in fairs, food fairs, etc. indicated by many producers was not included in promotion activities. This is because, according to the survey results participation in such initiatives represented a distribution strategy rather than a form of promotion - although the promotion was probably a side effect. The methods of promotion preferred by producers are shown in Figure 14.

**Figure 14.** How do the producers think the group should be promoted and what actions should be taken? (% of answers)



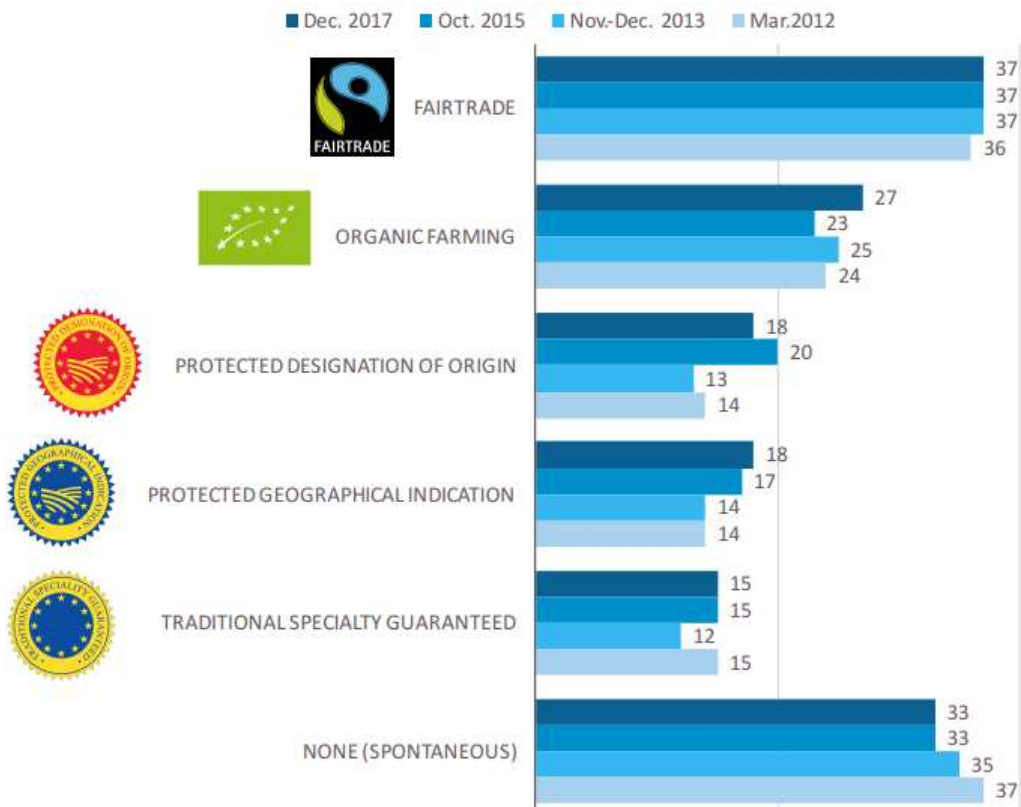
Source: own elaboration

### 3.3. Consumers' perception of certified food products

According to the 2018 EU Eurobarometer 473 Report (European Commission, 2018), the awareness of the EU's food quality assurance system among the European consumers (PGI, PDO, TSG designations) is low. Only 15% of the respondents reported to recognise the TSG symbols, with 18% reporting to recognise the PDO and PGI symbols. Among Polish consumers, the awareness was even lower: TSG 15%, PGI 14%, PDO 12%. There is no consistent relationship between the level of awareness of the FQS logo and its importance as a reason to purchase food products. Poland has a low proportion of respondents who are aware of the PDO logo. Irrespective

of this, 74-77% of the respondents stated that the FQS logo is important when making purchasing decisions.

**Figure 15.** Recognition of quality foods labels in the European Union countries (which FQS logo are you aware of)



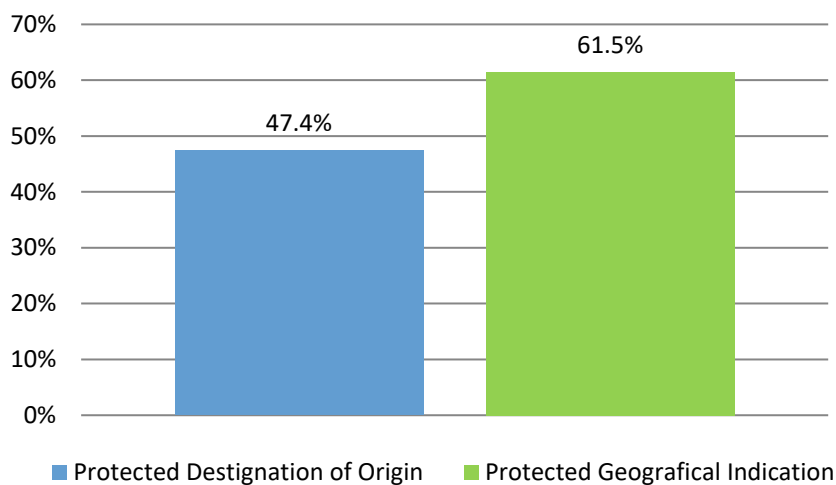
Source: European Commission 2018: Europeans, Agriculture and the CAP. Special Eurobarometer 473/Wave EB88.4 – TNS Opinion & Social, February 2018

In our own survey, more than half (61.5%) of the 78 respondents declared they recognize the Protected Geographical Indication (PGI) logo (Figure 16). However, the percentage of respondents who declare to know the designations of individual PGI products, indicated in table 10, is definitely lower and does not exceed 50%. Knowledge of the designation of Koryciński Cheese is confirmed by 48.7% of the respondents, and Cebularz Lubelski by 41.0%. Grójeckie Apples are associated with the PGI designation only by 39.8% of respondents, although the product is generally well known in Poland.

Discrepancies between the knowledge of the generic PGI concept and the knowledge of individual designations may result from the lack of recognition of the specific certified products. Due to multiple information and promotion campaigns, consumers have heard about food labelling, or have seen and associated PGI and PDO symbols, but do not identify these labels with specific

products on the Polish traditional and regional food market. They also often do not understand the meaning of the labels and their assumptions.

**Figure 16.** Recognition of PDO and PGI labels



Source: own elaboration

The same situation arises when identifying products bearing a PDO label. About 48% of surveyed consumers declare to know the PDO label, which is less recognized by consumers than the PGI designation. The only exception is Oscypek cheese, which is widely known among Polish consumers as a traditional product, and 48.8% of respondents declare to know that this product is PDO certified. Both the designation of the PDO of Beens from Dunajec and Podkarpacki Honey is very poorly recognized, as only 28.2% of consumers identify this designation. Consumers know the products indicated in Table 10, they also know that these products are classified as regional and traditional products. They are also often aware that they have quality markings, but are unable to specify what type of markings they are.

**Table 10.** Recognition of PGI and PDO designations of selected products

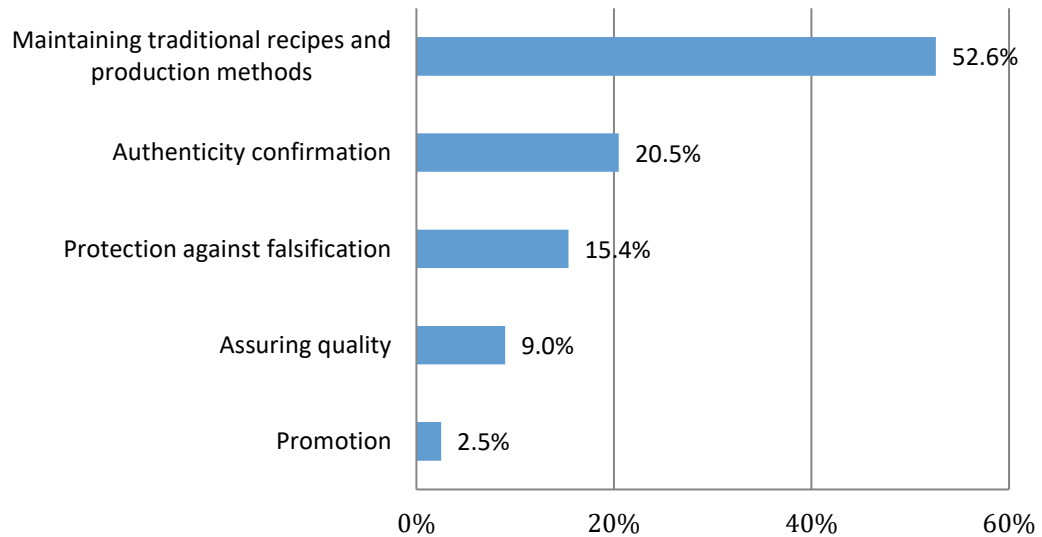
<b>Product</b>	<b>Associating products with the labels [%]</b>	<b>Incorrect identification [%]</b>	<b>Lack of recognition [%]</b>
Koryciński Cheese (PGI)	48,7	32,1	19,2
Grójec Apples (PGI)	39,8	25,6	34,6
Oscypek Cheese (PDO)	48,8	25,6	25,6
Cebularz Lubelski (PGI)	41,0	14,1	44,9
Beans from Dunajec Valley (PDO)	28,2	25,6	46,2
Podkarpacki Honey (PDO)	28,2	29,5	42,3

Source: own elaboration

Nowadays, consumers are starting to pay attention to product label markings<sup>3</sup>. A product marked with a certification gives consumers a sense of security. It is also better assessed compared to similar products. Consumers are also willing to pay a higher price for the certainty of a higher quality product.

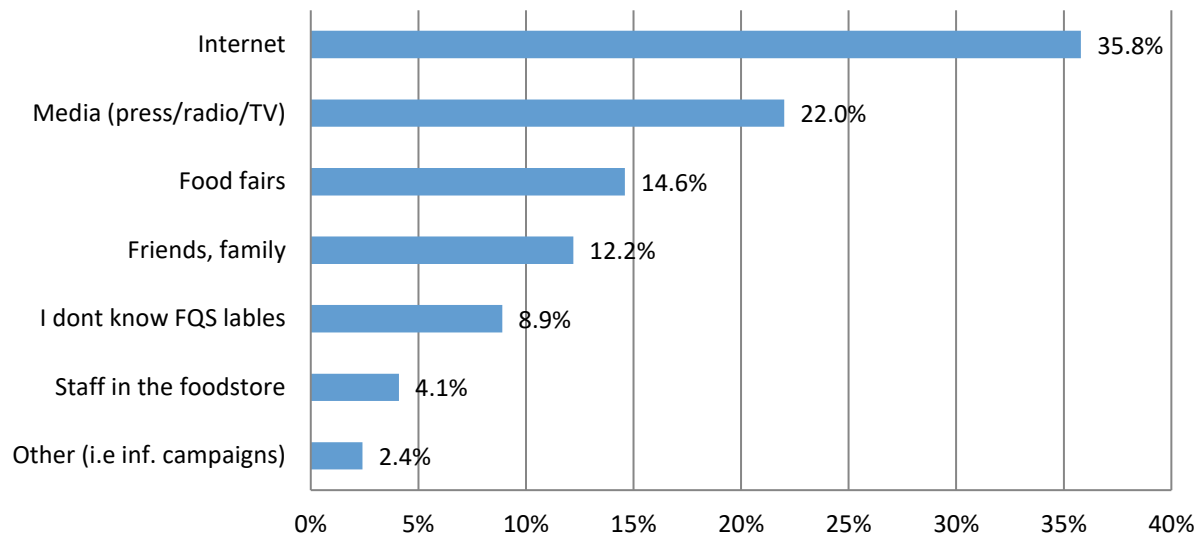
We also surveyed consumers to analyse their views on the motivations to distinguish food products with the FQS labels. According to consumers, the most important purpose of using PGI and PDO product designations is to preserve traditional recipes and production methods (52.6%). Contemporary consumer trends highlight a return to tradition, looking for unprocessed and non-mass-produced products. Consumers are also looking for authentic products and 20.5% of respondents believe product certifications provide such a guarantee. The authenticity of products is also related to their protection against counterfeiting and for about 15% of respondents this is the most important reason for using food labelling.

<sup>3</sup> European Commission 2018: Europeans, Agriculture and the CAP. Special Eurobarometer 473/Wave EB88.4 – TNS Opinion & Social, February 2018

**Figure 17.** Why quality foods are labelled – consumers view

Source: own elaboration

Consumers learn about certified products from a variety of sources (Figure 18). The most common source of information is the Internet (35.8%). Social media through various forums and profiles also help in disseminating opinions, views and information. Traditional media, i.e. press, radio and television (22.0%) are also important sources of information. Traditional media present many opportunities to promote food and sensitise consumers to product certifications. Consumers also often find out about labels at food fairs (14.6%). Food displayed at this type of event has unique properties. It can be a unique flavour, traditional manufacturing methods or an original appearance. Often, a characteristic feature of products promoted during food fairs is labelling them with various types of certificates. These can be organic or traditional products. Word-of-mouth marketing, that is, obtaining information from family and friends (12.2%) plays a further significant role in providing information. This information is treated as reliable and better remembered as it is obtained from trusted people. Only 9% of respondents declared that they did not know any type of food labelling at all. A low number of consumers receive information about product labels, but also about their features and properties, as well as origin from the seller in the store (4.1%). Typically, such information is provided in small shops specializing in the sale of unconventional food, e.g. traditional and organic.

**Figure 18.** Sources of information about certified food

Source: own elaboration

## 4. Case studies

### 4.1. Koryciński cheese PGI (Ser Koryciński Swojski)

#### Product

Koryciński cheese is a ripening cheese. It is made from raw whole cow's milk using the enzyme rennet and the addition of table salt. The cheese is available in a natural version and with the addition of herbs and spices. Its name indicates the region where it is produced. The area covers three communes of the Podlaskie Province, in the district of Suchowolski: Koryciński, Suchowola, Janów.



**Figure 19.** Koryciński Cheese

The region is located in the north-eastern part of the country within the Białystok Upland mesoregion belonging to the North Podlasie Lowland macro region. The area is characterized by a moraine area of a lake district with marshy depressions among extensive elevations.



**Figure 20.** The geographical location of Koryciński Cheese producers on the map of Poland

The region where Koryciński cheese is produced is characterized by a lack of heavy industry. Operating industrial plants are related to agri-food processing, especially dairy. Agricultural land, which is almost entirely owned by individual farms, constitutes a significant part of the area. The domestic Koryciński cheese is a special regional product and it is worth emphasizing its presence in the culinary heritage of the region.



**Specification**

Koryciński cheese was added to the EU register as a Protected Geographical Indication (PGI) on 10 August 2012. The production characteristics of the cheese are shown in Table 11.

**Table 11.** Characteristics of the production of Koryciński Swojski cheese

Characteristics	
Characteristics of the geographical area	Wysoczyzna Białostocka, the North Podlaska Lowland in the north-eastern part of Poland, characterized by a moraine lake-like area with marshy depressions among extensive elevations.
Registered types	Cheese is sold under the name "ser koryciński swojski", with three maturing periods: - fresh - cheese maturation from 2 to 4 days, - aged - cheese maturation and aging from 5 to 14 days, - mature - cheese maturation and aging over 14 days.
Appearance / Shape	A flattened ball (geoid) with an elliptical cross-section with numerous holes of various sizes and shapes.
Colour	The colour of the inner and outer layer is creamy-yellow, it becomes more intense as the period of maturation increases.
Size	The diameter is usually 25-40 cm. Weight 2-4 kg. The size depends on the size of the colander used and the length of the aging period.
Consistency	Spongy, hardening, depending on the period of ripening.
Taste	Mild, creamy with a slight salty aftertaste or slightly spicy.
Accessories	- dried spices and herbs: pepper, chili, basil, dill, parsley, lovage, mint, black cumin, wild garlic, paprika, marjoram, cumin, oregano, czubrzyca, dried mushrooms; - fresh spices and herbs: garlic, pepper, olives, dill, chives, basil, mint, marjoram.
Manufacturing Practices	Milk for production must be raw and whole. No physical or chemical treatment of the milk is allowed. Filtration of impurities and cooling at ambient temperature for maintenance are allowed. The cheese-making process must start a maximum of 5 hours after milking.
Stages of production	<ol style="list-style-type: none"> <li>1. Heating milk, adding salt and rennet.</li> <li>2. Cutting the milk.</li> <li>3. Separation of the whey.</li> <li>4. Forming the shape.</li> <li>5. Rubbing cheese with salt.</li> <li>6. Maturation of the cheese.</li> </ol>
Conditions for breeding cows	Cows grazed on pastures minimum 150 days a year. Feeding cattle in winter - meadow hay, haylage, concentrated feed, incl. rye, oats, wheat, grain mixtures.

**Producers**

Koryciński Cheese was registered as a PGI in June 2012 by a group of producers who created the Koryciński Cheese Producers Association. At the time of registration, the producers' association had less than 30 members, but only 9 producers could sell cheese under the name "ser koryciński swojski". In 2017, the number of producers increased to 12. This shows that there were problems with adapting farms to cheese production according to the strictly defined certificate requirements.

However, when asked about the motives for joining the FQS labelling system, producers unanimously indicated the need to protect the product and promote the region. The producers agreed that the benefits of joining the system outweigh the costs of participation.

Producers indicated also the non-financial benefits:

- shaping the image and promotion of the region,
- better distinction and increased recognition of the product,
- maintaining product quality,
- prestige.

**Promotion**

In the interviews, the producers of Koryciński cheese mentioned a number of activities that they undertake to promote cheese and provide information about it to consumers. All producers from the examined group mark their cheeses with a logo with a Protected Geographical Indication and producer's data. Producers participate in fairs, fairs, festivals or festivals at least once a year. During these events, they have a booth where cheese tasting and sales take place. Various information materials are prepared, e.g. brochures attached to cheeses, posters, promotional gadgets. There are also websites. Activities used on a smaller scale include, for example, promotion in agri-tourism farms.

**Distribution – food chain**

In Poland, the production of cheese and cottage cheese is a very important branch of milk processing. Poland is one of the world's largest cheese producers - the sixth producer in the world (after the USA, Germany, France, Italy and the Netherlands) and fifth in the European Union.

Cheese production in Poland is constantly increasing and in 2018 it amounted to about 260 thousand. tone. In the structure of cheese and cottage cheese exports, rennet ripened cheeses have the largest share (approx. 60–70% in the export of the entire cheese group). In 2018, 162,000 tons of these cheeses were exported from Poland.

Most of the producers of Koryciński Swojski cheese run family farms. The average area of farms producing cheese is approx. 29 ha. The largest farm covers an area of 70 ha, and the smallest - 11.5 ha. On average, 2 family members work on the farm. In most farms, there is no contract work, and farms with contract work usually employ 1-2 people. The only exception is one farm, which employs 9 people. Not all producers produce only the certified product, i.e. domestic Koryciński

cheese. On average, the percentage share of the certified product in the total production value is approx. 87%. Some producers also make other cheeses, such as Gouda. The entire production of Koryciński cheese is sold. Only a small amount is intended for personal use or promotional activities. One of the 9 surveyed farms uses export as one of the distribution channels.

The specificity of Koryciński cheese is that the cheese packaged for sale is freshly produced cheese. After unpacking the cheese from the foil packaging that is used for sale, it should be stored in a dry and cool place - preferably in the refrigerator. The best way to store it is by wrapping the cheese with parchment paper or placing it in an air-accessible container. Wrapping the cheese tightly needs to be avoided, as the lack of air stops its natural maturation process. Properly stored cheese is fit for consumption even after several months. Packaging is a significant problem in the distribution of cheese, as it cannot be stored in a foil package in wholesalers / stores for too long.

Although the producers are affiliated to an association, they do not jointly sell a certified product. Each producer sells their cheeses individually. Koryciński cheeses are sold using various distribution channels. Producers also sell the cheese directly on the farm. An important distribution channel is sales to wholesalers who then deliver the product to retail chains and stores with regional and traditional food.

Producers deliver the product to the stores individually, without the use of intermediaries. The product is also sold at all kinds of fairs, not only local, such as the Cheese Festival in Koryciński, but also at the Dominican Fair in Gdańsk. Internet sales are an intensively developing distribution channel. It reduces the time spent by producers on selling, but it is associated with uncertainty as to the planned volume of products that will be sold. Two farms also run their own shop.

### **Key problems**

#### ***Sales without common logo / uniform packaging***

Koryciński cheese producers do not have a common logo or product label for certified cheese. The only common element of the labels placed on the cheese is the symbol of the Protected Geographical Indication, which allows for easy identification of the PGI certification. Each producer prepares its own, unique label showing the characteristics of the product. However, labels differ significantly from each other and thus do not sufficiently support recognition of the product and its label.

#### ***Falsification***

Each producer of Koryciński Cheese at least once encountered the unlawful use of the reputation of the registered name, i.e. falsification of the product they manufacture. The most common ways of counterfeiting a product were:

- unlawful use of the registered product name;
- sale of similar products, but without identification;
- using a similar name, e.g. Cheese from the vicinity of Koryciński, Chees like Koryciński;

- suggesting to customers that a given product has a certificate - by providing incorrect information, e.g. at fairs, markets, stands.

The logo of the Protected Geographical Indication does not appear in the counterfeit products. Despite this, consumers are misled and certified producers lose their credibility and trust, and the product is thus deprived of its uniqueness. The scale of unlawful use of the reputation of the registered name has definitely increased since the product was registered. On average, the price of adulterated products is about 35% lower. Consumers are therefore attracted by the competitive price.

### ***Competition instead of cooperation***

The interviews with the producers show that there is not a sufficient level of cooperation between them. To effectively promote a product, producers should work in a group. They produce cheese, which is a homogeneous product, produced in the same way, using the same technologies and ingredients. Joint actions and division of responsibilities would allow for an increase in the range of influence and an improvement in the effectiveness of actions.

## **Recommendations for Koryciński Cheese producers**

### ***Target groups***

Promotional activities should be targeted at the urban population, rather middle-aged people of around 40 and older with monthly income per family member usually exceeding EUR 1000, who are willing to pay a higher price for the product of the unique taste and geographic origin. The message for consumers should indicate that the Koryciński Cheese is a unique - one-of-a-kind, added value regional product, produced in a traditional way.

### ***Communication with consumers***

When choosing the producer's communication channel with the consumer, one should bear in mind that the perception of messages concerning traditional and regional products in traditional media is low. That is why the Internet and social media should be used to a greater extent. Promotion may also take place during all kinds of food fairs, festivals, etc. Traditional promotional materials such as leaflets, but also samples of cheese with the PGI logo may be used to be displayed in appropriate places (e.g. supermarkets).

### ***Costs of promotion – group activities***

The costs of promotional activities are a significant burden for producers, especially if they are operating small family farms. Traditional and regional products with quality certificates can apply for co-financing for promotional activities, e.g. from RDP funds. It is recommended to undertake joint actions within the group of producers of a uniform product, which will make it easier to obtain financial support. Financial assistance can also be sought from local authorities. Product promotion is also a promotion of the region where the product comes from.

### ***Labelling and controlling of intermediaries***

A significant problem in the promotion of PGI products is the lack of proper labelling of the product at the points of sale. The price of labelled products is usually higher than the price of conventional cheese, therefore sellers should show the label, explain and inform consumers about the uniqueness of the products. This will make increasing awareness of the product possible, and thus can bring financial benefits, as a conscious consumer is willing to pay a higher price for a given product. Intermediaries need to be aware of what product they are selling and what a certain certificate means. Good, long-term relationships will allow producers to build a relationship with the broker, which may also have an impact on greater respect for the product.

***Increasing number of producers and volume of production***

Koryciński Cheese is gaining popularity among consumers, but a low volume of certified production does not allow achieving benefits deriving from satisfying existing and possibly future demand. This situation creates a vicious circle situation – Koryciński Cheese producers complain about counterfeit cheeses on the market but because of limited production of certified cheese, they open a relatively large niche for fraudulent suppliers.

***Vertical integration - joint sales***

Working in a group gives a chance for increasing efficiency of sales (e.g. due to lower costs of transportation per unit of produce in the case of completion of larger quantities) and easier access to better markets. Selling cheese by the producers' group would probably allow negotiating higher prices.

## 4.2. Kaszubska Strawberries

### Product

“Nowhere are strawberries like in Kashubia” – this is the phrase used in Kaszubska Strawberry adverts. Kaszubska Strawberry is not a variety – the name indicates the region Kaszuby (Kashubia) where strawberries are grown. The region, located in the northern part of the country about 80 kilometers from the Baltic sea coast and thus exposed to the winds from the sea, with its mix of arable land, lakes and pine forests creates a specific, favourite microclimate.



Figure 21. Geographical location of Kaszubska Strawberry producers on the map of Poland

A commonly shared opinion is that strawberries from this region are more aromatic than fruits from other areas of the country. This is not only because of the raw climate and properties of soils in the Kashubian Lake District, but also due to specific "thermal shocks" (significant daily temperature amplitude) that make the fruits sweeter and more aromatic. Kashubian strawberry contains more sugars than other varieties, which makes the fruits ideally suited for jams and preserves.

### Specification

The Kashubian Strawberry entered the EU register as a Protected Geographical Indication (PGI) in November 28, 2009. The key technical specifications are presented in table 12.

**Table 12.** Technical specifications of the Kaszubska Strawberry cultivation

<b>Territory</b>	
Characteristics of the geographical area	Kashubian Lake District in the northern part of Poland (Figure 21), characterized by moraine hills and a high share of lakes and pine forests in the land structure.
Varieties/breeds registered	Elsanta, Honeoye and Senga Sengana
Climate	Raw climate causes the specific "thermal shock" (significant daily temperature amplitude) which makes the fruits sweeter and more aromatic.
Soil and other growing conditions	Light, sandy soils, favourite for cultivation of strawberries. Most of the Kashubian strawberry is grown on slopes, so the bushes are exposed to sunlight, which guarantees ripening of the fruit and the formation of sugar in the fruit.
<b>Farming practices</b>	
Fertilization, crop protection, field operations	All treatments are performed in accordance with the principles of good agricultural practice. The level of intensity of production is moderate: chemical treatments are limited, natural fertilizers (manure) are used with addition of mineral fertilizers. Natural materials are used in the process of mulching and covering seedlings against frost (straw), which improve the quality of strawberries. All fruits must be harvested by hand.
Other	Harvest starts quite late, about 2 weeks later than in the Central Poland, the main area of strawberry production. Normally it lasts from the beginning of June to the end of July.

### **Producers**

The Kaszubska Strawberry has been registered as PGI in November 2009 by the group of 18 producers who formed the Association of the Kashubian Strawberry Producers. The number of growers applying for certificates grew steadily until 2014, reaching a peak of 51 farmers. Since then the number of active growers of certified Kaszubska Strawberry went down to 20 in 2019. This shows that serious challenges prevented more than 50% of certified farmers from renewing their certificates.

**Kaszubska Strawberry value chain**

Poland is a significant producer of soft fruits in the EU, with 17,4% share in the strawberry market, after Spain (31,6%). Production of strawberries has been stable for many years and amounts to around 200 thousand tonnes per year. The strawberries cultivated area in Poland ranged between 49-53 thousand hectares in the last years. About 10-15% of the strawberries harvested in Poland are exported to several EU and Non-EU countries.

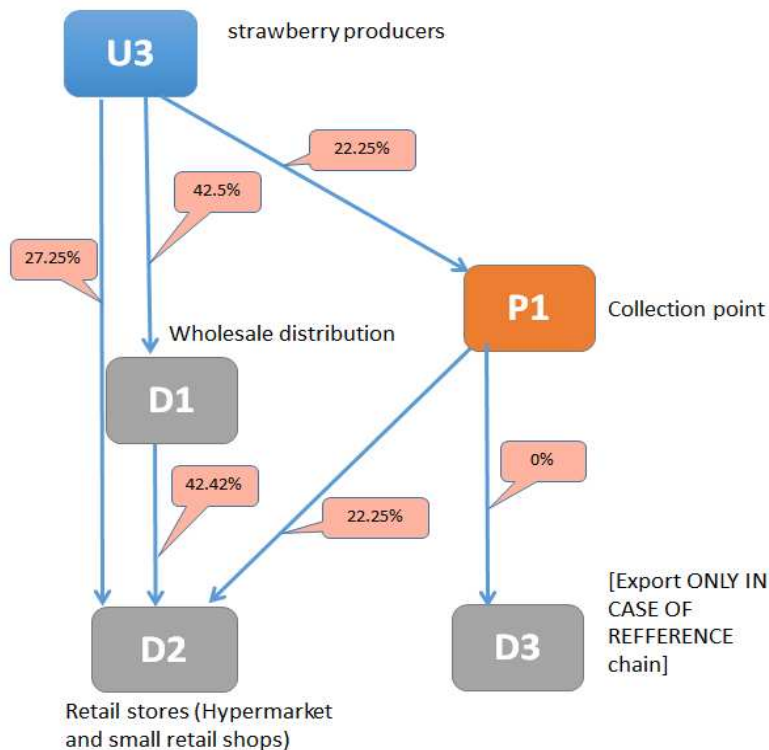
The strawberry growers sector is strongly fragmented in Poland. About 50% of production comes from small plantations (below 1 ha) with relatively extensive production systems. The other half of production is managed by a cluster of large scale producers (3-4 hectares plantations on average) that use modern production systems, including irrigation. Large scale producers who invested in irrigation systems and grow better yielding varieties of strawberries have a dominating position on the strawberry market in Poland due to greater bargaining power.

All Kaszubska Strawberry PGI producers run small scale family farms - 14,86 ha of agricultural land on average, which is a bit more than an average farm in Poland in (10,56 ha). All farms can be classified as mixed: with cereals and animal production, cereals and vegetables, and with all these types of products. The average size of Kaszubska strawberry plantation is 1,7 ha ranging from 0,5 to 6 hectares. The majority of Kaszubska strawberries is sold to the fresh strawberry chain. Only 13,5% goes to processing, there are no exports.

A specific feature of strawberries relates to distribution. Fruits should be delivered to consumers in a few hours after collection, unless refrigeration systems are used. Producers of Kaszubska Strawberry do not have their own cold stores. Although producers are affiliated with the Strawberry Producers Association, there is no joint sale of the certified product and each producer sells fruits individually. Approximately 42% of PGI strawberries are transported to the wholesale market in Chwaszczyna located in the distance of 60-70 km, near the Gdansk agglomeration. The buyers at the market are mainly owners of small retail shops and stands on local, traditional bazaars.

Farmers supply also small retail shops in Gdansk or in neighbouring towns (27,25%). Around 22,25% is purchased by intermediaries who act as an additional link in the chain between farmers and retail markets. They capture part of the farmers' margin and what is important in the case of the FQS product, they are not interested in selling Kaszubska strawberry with the certificate and under the PGI logo. For them, what counts is simply that the fruit is accepted by consumers, who are not aware, on average, of the system of FQS certificates. Thus, the market potential of the certificate and the PGI logo is not used.





**Figure 22.** Kaszubska Strawberry value chain

Depending on the situation on the market, in some periods intermediaries transport Kaszubska strawberries also to other regions of the country. Producers from the Kaszuby region have strong competitors in Mazovia, which is a "strawberry basin" in Poland. However, the period of collection in Kashubia represents a favourable condition for producers, as it starts when the peak of the harvest in Mazovia is over.

### Key problems

#### ***Small scale of production, Selling not under PGI logo / packaging***

Leaders of the Association of Kaszubska Strawberry Producers made in the past several attempts to distinguish PGI strawberries, e.g. through a uniform packaging with the logo of Kaszubska Strawberry and a PGI certificate. This, however, never succeeded on a wider scale. The same wooden baskets ("Łubianki") holding approximately 2 kg of produce have been often used by different producers, including those who have no PGI certificate.

#### ***Falsification***

Without unique packaging indicating the origin of the product almost every strawberry could become "Kashubian", which is a straightforward path to product falsifications. This is still happening, although it is illegal. Some sellers are bypassing the rules and sell under the name "Strawberry from Kashubia".

As a result, the Kaszubska Strawberry is currently sold by most PGI certified producers as a regular strawberry, without the price premium, in baskets without any special designation. Only a few farmers attempt to promote their strawberries as certified.

***Dependence on intermediaries and competition instead of cooperation***

Through our interviews with Kaszubska Strawberry farmers, we observed that there is no sufficient level of cooperation between producers. One can only observe the existence of informal, several-person groups of "good friends", between whom there is a thread of understanding.

***Unsuccessful promotion (not all opportunities used)***

The Association is active in attempts to promote the Kaszubska Strawberry, however so far without an expected success. There are unused opportunities such as, for instance, promotional campaigns in the harvest season targeted at consumers from the larger urban populations in the region, or collaboration with tourist agencies, hotels, and restaurants.

***No clear benefits for producers – resignation from PGI certification***

As a consequence of the difficulties outlined above, the price of Kaszubska Strawberry is not significantly different from the prices of other strawberries on the market. There were cases when intermediaries directly said that the certificate meant nothing to them and did not distinguish the Kaszubska Strawberry from other strawberries grown in the region. Given that producers often sell strawberries without any premium associated with certified products, strawberry farmers complain about the costs and burdens associated with the certification. They pay the annual membership fee of around 250€, which is not compensated by obtaining a higher sale price of the Kaszubska Strawberry.

However, due to its late harvest, the Kaszubska strawberry has a slightly better price than the price of conventional strawberries produced in the central part of Poland. This difference in price can not be, however, attributed to the PGI certificate.

Being unable to promote the brand name under the PGI logo, some farmers are considering leaving the certification system, having no clear benefits deriving from participation in this system. In fact of the initial 50 members of the Association, 30 farmers already resigned. Farmers take into account that after 5 years of participation in the system they are no longer eligible for a subsidy covering the cost of obtaining the certificate. Although the subsidy was relatively small (about 200€ per year, equivalent to 200-300 kg of strawberries) farmers accepted this payment as an incentive. Having no premium on the PGI logo they conclude that bearing such a cost without subsidy is not reasonable.

***Bankruptcy of the local processor***

The situation of producers of Kaszubska Strawberry has recently worsened because the local processing plant has gone bankrupt because of poor management. Local producers had a good relationship with the processing plant, that is why in the past much larger quantities of strawberries were sold for processing. There is another processor, however, located far away (about 350 km), with whom cooperation does not work so well. As a result, Kaszubska Strawberry farmers lost interest in using this distribution channel.

Some farmers are thinking about processing the strawberries themselves, but they are lacking capital, entrepreneurial skills and decisiveness to go into a relatively risky business. We tasted their homemade preserve - delicious, of the taste can not be “purchased” in any store in Warsaw.

## **Recommendations**

### ***Intensify joint promotional activities***

The existing Kaszubska Strawberry Association should play a more active role in promotion activities concentrating mainly in the region and aiming at two key target groups:

- Consumers from the largest municipality in the region (Gdansk and neighbouring towns);
- Tourists who come to the region in large numbers in the summer time.

There are several opportunities discussed with farmers such as displaying promotional materials in local tourist information centers, offering “pick your own” schemes for tourists, but also informing inhabitants of the region with the use of different forms of communication with consumers.

### ***Uniform packaging***

Lack of uniform packaging with a visible identification of the certified product and its origin may be considered the key obstacle in effective promotion and sales of certified strawberries at a premium price. Despite slightly higher costs, producers should invest in single-use cardboard boxes with the PGI Kaszubska Strawberry logo and producers/product/production information.

### ***Group sales***

Organizing joint transportation and sales would possibly generate several benefits for producers – less time allocated to individual transportation, lower transport costs per unit, and less dependence on intermediaries. The feasibility of establishing seasonal stands in the largest cities should also be explored.

### ***Adding Value***

Strawberry processing (preserves) can be an important activity allowing a profitable use of surpluses of fresh strawberries in the periods of excessive supply to the market. Cooperation with existing, small scale processor in the region or developing processing as own activity may be considered feasible alternatives. It is also suggested to consider opening the summertime “Strawberry Cafeteria” in the center of the most attractive tourist area, offering different strawberry based deserts and fresh strawberries sales for cafeteria clients.

## 5. Lessons learnt from PDO Parmigiano Reggiano and other Italian products (Filippo Arfini, University of Parma)

Poland, with its 44 registered FQS products (in 2020), represents an interesting case study on the potential of the qualification tool for products that have an explicit link with the territory or regional food traditions through the PDO / PGI / TSG logo. The low number of FQS products reflects a homogeneity in the food styles of Poland, but its evolution over time represents an attempt of producers to differentiate themselves in the food market by trying to enhance the products whose quality is linked to the territory through human and natural factors.

Research has shown that there are many problems that disrupt the functioning of the Polish FQS market. Poland has recently become a member of the FQS product certification system. Therefore, an attempt was made to confront the situation on the FQS market in Poland with the experience of producers from Italy - one of the few countries most frequently represented in the certification system.

Previous research has shown that the success of FQS products is uncertain and depends on a series of determinants that can be summarized in the following aspects <sup>4</sup>:

- Specificity of the product: the FQS product must be perceived, in its intrinsic and / or extrinsic aspects, specific/unique;
- Market relevance: the specific product must find demand in a relevant market;
- Governance: ability and motivations of the set of firms to manage the FQS-product collectively by considering:
  - the coordination among firms with regard to product management;
  - the coordination among firms with regard to market management;
  - the effectiveness of local, regional and national institutional support.
- Legitimacy and enforcement: The capacity of the system to protect the FQS quality against the usurpation of the name protected by the FQS system.

The simultaneous consideration of these elements through an appropriate governance action makes it possible to develop a strategy that moves in two directions: the fight against illegal actions and the promotion of FQS products.

Applying the theoretical framework proposed by Sylvander and Barjolle to the case of Poland, it emerges that most of the products belonging to PDO and PGI categories are characterized by low added value (fruit and vegetables; honey, fresh meat), with reduced production volumes due to relatively limited production areas. In addition, these products are difficult to differentiate on the

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<sup>4</sup> Barjolle and Sylvander (2000). Some Factors of Success for "Origin Labelled Products" in Agri-Food Supply Chains in Europe: Market, Internal Resources and Institutions. in (Editors) B. Sylvander; D. Barjolle, F. Arfini, (2000). The Socio- Economics of Origin Labelled Products in Agro-Food Supply Chains: Spatial. Institutional and Co-ordination Aspect. vol. 1-2. Proceeding of 67th EAAE Seminar. Paris:INRA. ISBN: 9782738009500

market due to their intrinsic features and therefore easily counterfeited. On the other hand, there are also PDO and PGI products with greater added value (mainly cheeses and sausages), but as mentioned above, these are characterized by the absence of signs of quality (for some) and by a weak collective action developed by the producers' groups. Furthermore, especially for PDO products, the production area is limited, substantially reducing the possibility of developing "aggressive" marketing strategies. In summary, the majority of Polish FQS are characterised as products with little distinctive quality, which are marketed in unprofitable markets and with a low willingness to manage FQS products collectively.

The activities to combat counterfeiting must start from the conditions set out above. Faced with this operational context, it is possible to achieve greater control of the counterfeiting of the logos of the companies involved in the FQS schemes only by resorting to collective management of products and, above all, of the value chain, with a sharing of responsibilities and commitments between the agents.

From the analyses carried out through the interviews, the responsibilities and actions to be developed to contrast counterfeiting in the use of geographical names are shared between the Government bodies and the economic agents of the supply chain. While the Government bodies are asked to promote an effective intellectual property control and protection system, economic agents are required to take proactive action, making the counterfeiting of protected names difficult and ineffective. Collective action among the producers in the value chain should not be limited to the definition of production rules, but also to the development of a collective marketing action (sectoral and/or territorial) leading to two results at the same time: to develop a collective identity of all the producers belonging to a Group and to make consumers aware of the characteristics of the product itself.

The goal is to develop an action of "control and social awareness" between the agents of the supply chain and towards consumers. The assumption that the Government, through its agencies, can control the products on the market, or rather on the points of sale, in a widespread way reveals to be difficult and expensive in practice. On the other hand, it is desirable that the same economic agents, from producers to traders, commit to respect the rules and promote virtuous commercial behaviour, following the principle that FQS products create value (in terms of added value and reputation) for producers and traders.

In order to achieve these objectives, the joint commitment of the government and producers is necessary. The latter is asked to prevent unfair behaviour and enforce the rules; in this regard, a tightening of sanctions against producers and traders who usurp collective brands is an appropriate signal that goes in the direction of protecting producers and consumers. Producers have the task of coordinating the definition of collective marketing strategies aimed at preventing and enhancing appropriate value. These actions can and should cover several aspects:

- The product: by defining the distinctive qualitative characteristics and the quantities of product to be placed on the market;

- Communication towards the distribution network and consumers. This could take place through the definition of collective quality signs (difficult to reproduce) and the communication of the specificity of the products using the media in their different formats: magazines, television, internet, and other communication channels;
- Coordination of trade and territorial development strategies. These activities become important to the extent that it is understood that collective action must benefit all agents in the value chain and local stakeholders: producers, processors, traders and policy makers. Dialogue between agents favours the understanding of problems, the sharing of strategies and more efficient distribution of the value created. This respects the structural differences of producers and the different marketing strategies that individual companies pursue.

The most important action in order to reduce counterfeiting is linked to the awareness that counterfeiting policies must follow a bottom-up approach with the support of the institutions. Producer groups are the subjects responsible of taking action adopting a tailored-made strategy specific for their product and their members, but Groups need to acquire organizational functions and economic resources. The former is implicit in the nature of the Groups which are to all intents and purposes “Inter-branch organization” (IO) with the possibility of acting at the level of the supply chain in full compliance with the CAP market policy. The task of the IO is to dialogue with the agents of the supply chain and to promote enhancement initiatives, including protection. The IOs, as organizations envisaged by the Common Market Organization (CMO), can benefit from community contributions for enhancement initiatives including the adoption of traceability system and commercial actions. To this aim, traceability is a very effective tool for controlling the flow of inputs and the volume of production that goes to the market, but it is also a tool for quality management by the groups and contributes to the reputation of member producers.

In order to be able to carry out commercial promotion and protection activities, hence paying inspectors and lawyers, the IOs must have adequate financial resources. Their financing, therefore, becomes a central aspect of the quality support policy. Certainly, a public contribution to their functioning is important, but even more important is the financing by the producers themselves. In this respect, the case of Italy is emblematic: participation in a FQS scheme is subject to the payment of a membership fee to the Group. The determination of the value of the share in relation to the characteristics of the product, its commercial value but above all to the strategy that the Group / IO wants to pursue. There is no doubt that the most successful and protected products (the success of a product leads competitors to copy the product) are those with the highest membership fees.

Italy, together with France, is the European country with the highest number of products registered as FQS products, both in the food and wine sectors. The high number of FQS products registered in Italy is undoubtedly due to the fact that Italy is a country with many "microclimates" and a long history of "cultural cross-fertilisation", which has led to the spread of different food traditions throughout the country, but also to the organisational-institutional set-up that producers have given themselves over time.

Before EEC Regulation 2081/1992, the producers of the most famous Italian typical products (Parmigiano Reggiano, Prosciutto di Parma, Prosciutto di San Daniele, Pecorino Romano, Grana Padano) were associated in a Consortium for the protection of quality, which had the precise task of promoting and protecting the quality and the brand of the Consortium. Quality protection took place through the control of product characteristics by the Consortium itself. On the other hand, the protection of the brand came about thanks to the recognition of the status of Denomination of Origin under the WIPO Lisbon Agreement and the proactive action of the Consortia that intervened in court.

Since Regulation EEC 2081/1992, the scenario has changed in form but not in substance. Quality protection is guaranteed by a third-party certification body appointed by the Ministry of Agriculture, while brand protection has remained the responsibility of the “Consorti di tutela” (*Protection Consortia*) in collaboration with the Ministry of Agriculture and the “Nucleo dei Carabinieri Anti Contraffazioni” (*Anti-counterfeit police group*) specially created for the purpose. Since 1992, FQS producers have been required by law to pay for two services: the quality control service by the certifying body and the promotion and protection service by the respective Protection Consortia. The former plays a “technical” role, while the latter plays a strategic role and can intervene directly in the definition of strategies and actions through a bottom-up structure according to a democratic approach. The activity of the “Consorti di tutela”, however, is not limited to the management of their respective products. The Consortia have created an association that brings them together at the national level (<https://www.origin-italia.it/>) with the aim of dialoguing with one voice with the national government and further strengthening the promotional activity of protection.

The activities of the “Consorti di Tutela” are defined by Italian Community Law and differ according to the economic size of the FQS represented. There is no doubt that the larger GSs, which overall have a higher turnover, are the ones that pay more contributions to the Consortium for its promotion and protection activities. These Consortia are usually very famous and therefore “copied” on the national, European and international markets. To give some examples, the Parma Ham Consortium has an internal staff of 3 lawyers, while the Grana Padano and Parmigiano Reggiano Consortia use lawyers from outside the Consortium who are specialised in protecting the intellectual property of their respective trademarks.

The starting point of the protection process is the definition of the Statute of the Consortium, which must enshrine the Consortium's brand promotion and protection functions and guarantee its democratic management by representing the types of producers and/or agents in the chain. It is from this document that the initiatives in line with the functions indicated in the Statute and the objectives of the management arise.

A virtuous example is given by the Consorzio del Parmigiano Reggiano which has a statute that allows democratic management taking into account the territorial diversity (five Provinces are represented) and the role in the chain (<https://www.parmigianoreggiano.com/consortium-specifications-and-legislation/>) and which carries out information and training activities towards

members and agents of the chain with respect to: the use of brands, the use of logos, the presentation of products inside the points of sale.

If the Parmigiano Reggiano Consortium is a virtuous example, it should not be denied that there are still many small Consortia, especially those that have been created recently, that have yet to fully develop their prerogatives in carrying out promotion and protection activities. In this case, there is the need of different strategies. A strategy that could be pursued to acquire financial resources and develop effective commercial and protection policies is that of developing "umbrella brands" that bring together products that have common qualitative aspects, such as the same quality perception or belonging to the same production area.

In Italy, in addition to the famous FQS products with high added value such as Parmigiano Reggiano and Prosciutto di Parma, there are some successful examples that demonstrate just as even in the presence of FQS products developed in small-sized areas and with low added value, an effective promotion and protection policies can be developed: the PDO apple from Val di Non and the PGI apple from Val Venosta.

In the case of the Val di Non apple it is emblematic as the PDO brand is associated with the commercial brand of the Melinda Apple (<https://melinda.it/>); in fact, the registered trademark (Melinda) brings together different types of apples, of which only those apples from the Val di Non are PDO (Fig. 23). The brand is coordinated by a cooperative which is at the same time an IO and in turn brings together 16 cooperatives and over 4000 members. The fact of using a trademark registered with a trademark (Melinda) gives the product greater commercial protection and greater communicative and operational strength in terms of strategic marketing and marketing mix.



**Figure 23.** Melinda apples: PDO and generic

In the case of the Val Venosta PGI apple, a "territorial umbrella" brand (<https://www.marchioombrello-altoadige.it/famiglia#d382>), covered by copyright, has been created. The umbrella brand covers the products of the South Tyrol area including the same PGI apple in which was the name of apple of the "Val Venosta". The Alto Adige Umbrella brand (Fig. 24) brings together different brands and products: Alto Adige quality (for common products), PGI (for apple and speck), PDO wines. The aim is to promote synergies between tourism and agriculture: "the landscape gives an emotional note to quality products (agri-food products), which at the same time become authentic ambassadors of the landscape and tourism". This union, in terms of marketing synergy, favours the mutual transfer of image, strengthening the brands. Also in this case the apple brand has double protection: that of the FQS and that of the trademark, strengthening the protection against counterfeiting on the market.

**Figure 24.** South Tyrol umbrella brands

Umbrella brand Alto Adige



PGI Apple brand Val Venosta



Also in this case, the activity and the producers associated with the Groups that manage FQS products (apple, speck and wine) together with the territorial promotion bodies are crucial. The collective brand, as well as giving a greater identity to the product, allows producers to manage more financial resources for coordination, promotion and protection activities.

Concluding this section, we can say that the activities for the protection of Polish FQS products are going in the right direction, but this must be complemented with greater awareness and willingness of producers to address the problem of counterfeiting and promotion in an organic and systemic way, using the tools and strategies shared between the agents of the value chains and territories covered by FQS.

## 6. Fraud and falsification – possibilities of decrease via DNA testing

The study also considered how fraud and falsification of certified products could be reduced, investigating novel technologies in DNA genetic testing in the Polish / New Member State context.

### PCR technique

The PCR technique (polymerase chain reaction) is a technology for exponential amplification of a fragment of DNA<sup>5</sup>, which can be used in the analysis of raw materials and food products, e.g. during:

- identification of species, types of raw materials and ingredients of the food product,
- detection and quantification of allergens,
- detection and quantification of genetically modified organisms,
- identification of pathogenic microorganisms,
- identification of organisms causing food spoilage,
- identification of genetic traits responsible for the quality of products (e.g. genes responsible for meat quality).

To achieve the main goal of GIJHARS - i.e. detection of falsification of products - PCR methods are very effective; however, considering the fact that manufacturers come up with newer and newer methods to hide the real composition of the product, sometimes they may be insufficient.

The GIJHARS laboratory uses the PCR method and the developed PCR method with quantitative research based on the Real Time PCR technique. This method makes it possible to accurately determine the amount of undeclared raw material of animal origin in the product and it is used in routine tests of meat and processed meat samples.

Currently, the percentage of falsification of meat products is small, but it does occur. In the case of detecting falsifications in meat and meat products, this method seems to be sufficiently effective. The same applies to fish and fish products. This is confirmed by the fact that the EU has indicated the Real Time PCR method as one of the methods for detecting falsification in meat and fish products. GIJHARS laboratories participated in the research as part of the coordinated European Union control plan for the detection of horse meat in processed meat and the identification of species of fish in fish products.

The same is true for Genetically Modified Organisms (GMOs), where PCR-based methods are used to identify genetic modifications. These methods are the most effective in this case. Of course, PCR has its limitations, but in combination with other methods, such as physicochemical, ELISA or chromatographic methods, they allow for effective detection of product falsification.

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<sup>5</sup> Wages J.M. Jr., (2005) Polymerase chain reaction (PCR), in Encyclopedia of Analytical Science (Second Edition), 243.

The GIJHARS laboratory uses the PCR method in the determination of GMOs and the species identification of animals and plants. The PCR technique can be used in fact in all templates from which it is possible to isolate DNA of an appropriate quantity and quality. The main factor that determines the possibility of testing with this technique is the degree of sample processing. Heavily processed samples are not suitable for PCR testing, e.g. refined sunflower oil – in these cases the sample is processed in such a way that it is not possible to isolate any DNA.

The main advantage of PCR-based tests is that they reliably and sensitively detect food falsifications, not only in the raw product but, more importantly, also in the processed product. Techniques based on DNA analysis allow to detect even one DNA molecule present in the tested sample (at least theoretically), and due to the stable structure of the DNA molecule, to detect the presence of the desired gene even in a highly processed product. In addition, this technique has the advantage of being based on a simple test with short analysis time. The disadvantage of this method is the high costs of tests.

While the method can be successfully used to detect falsification in the production process and product compliance with the specification, it is practically impossible to use it on the market for testing fraud related to the origin of the raw materials using for production PDO, PGI, TSG or final product registered as PDO, PGI, TSG.

## 7. Training and consulting activities carried out in the project and recommendations

### 7.1. Recommendations at the institutional sphere/level

#### *Registration, certification process and control system*

Identified Problems	Recommended actions	Expected effects	Realization / effectiveness assessment
<i>Low number of registered FQS products and producers</i>	<ul style="list-style-type: none"> <li>Identifying products that could be registered in the FQS system</li> <li>Supporting processes of preparing an application for registration</li> <li>Basic training for producers who consider participation in the FQS</li> <li>Allocating some budget from the Ministry of Agriculture to provide financial support for governmental or non-governmental organizations assisting producers in the registration process and certification is required</li> <li>Selecting an organization that would carry out these tasks through an open competition</li> <li>Development of a guide for producers on how to prepare for registration and for an inspection</li> </ul>	<ul style="list-style-type: none"> <li>Increasing the number of new applicants and expanding existing producers groups</li> <li>Better applications and specifications submitted for registration</li> </ul>	<ul style="list-style-type: none"> <li>Submission to the Ministry of Agriculture and Rural Development of the proposal to create financial support mechanisms for organizations helping producers</li> </ul>
<i>Low awareness of the FQS and certification system among farmers, lack of required skills in preparation of applications and specifications for FQS products</i>	<ul style="list-style-type: none"> <li>More active role of the department in the Ministry of Agriculture and Rural Development which is responsible for FQS system.</li> <li>Development of the NGO/support group/other to assist farmers in the certification and registration processes</li> </ul>	<ul style="list-style-type: none"> <li>Search for producers/products potentially qualifying for FQS, promotion, training, supporting process of preparing applications</li> </ul>	<ul style="list-style-type: none"> <li>Some ideas presented by the project team were considered by the Ministry of Agriculture in the concept of establishing the “Group on Quality Activation” (GAJ).</li> <li>Beyond capacities and influence of the project team.</li> </ul>

<p><i>Procedures to monitor and protect against frauds and falsifications not effective enough</i></p>	<ul style="list-style-type: none"> <li>• Creation of a national system of monitoring FQS distribution</li> <li>• Creating an e-mail account to which anyone will be able to report violations of the law on the protection of PDO, PGI, TSG products</li> <li>• Conducting constant monitoring of the use of protected names with regard to products on the market (review of market offers, in stores and promotional leaflets, website review by IJHARS employees (coordination at GIJHARS, in cooperation with WIJHARS)</li> <li>• Letter of intent of the JHARS Chief Inspector for online platforms (Allegro, olx) in order to sign a cooperation agreement enabling the elimination of online offers that violate the law on the protection of registered names as PDO, PGI or GTS</li> <li>• Letter of intent to the competent authorities with a request to sign an agreement with law enforcement authorities in order to more effectively eliminate fraud in the FQS system</li> <li>• Training for inspectors</li> <li>• Articles in the "Knowledge and Quality" newsletter</li> <li>• Guides, manuals, stands for inspectors</li> </ul>	<ul style="list-style-type: none"> <li>• Establishing a mechanism to prevent fraud in the distribution chain, market monitoring and reporting abuses to the appropriate monitoring and control services</li> <li>• The system would allow producers to report on observed illegitimate activities on the market</li> <li>• Greater scope of control</li> <li>• More effective elimination of infringements</li> <li>• More effective fight against unfair commercial practices in online sales</li> </ul>	<ul style="list-style-type: none"> <li>• Suggestions presented on the meetings and occasional conversations with the policy makers;</li> <li>• Suggestion presented on several meetings and on the Hybrid Forum with policy makers</li> <li>• Created: e-mail: ochronaoznaczen@ijhars.gov.pl (eng. :protectionofindication@ijhars.gov.pl)– Implementation by GIJHARS of procedure on constant monitoring</li> <li>• Letters of intent will be sent by GIJHARS</li> </ul>
<p><i>Weak position of producers' groups in the distribution chain</i></p>	<ul style="list-style-type: none"> <li>• Supporting groups in their marketing, commercial and promotional activities by, for example, including in the budget of the Ministry of Agriculture and Rural Development, financial support for governmental or non-governmental organizations, which would help producers in the field of trade, marketing and promotion</li> <li>• Selecting an organization that would carry out these tasks through competitions for projects organized by the Ministry of Agriculture and Rural Development or KOWR</li> </ul>	<ul style="list-style-type: none"> <li>• Strengthening marketing and promotional and activities</li> <li>• Strengthening groups' efforts to protect registered names</li> <li>• Stronger bargaining power of FQS producers</li> <li>• In the long-term, increased sales and higher profitability</li> </ul>	<ul style="list-style-type: none"> <li>• Short-term assessment based on producers opinions</li> <li>• Quantitative evaluation of benefits possible only after several years from implementation of actions according to our recommendations</li> </ul>

## 7.2. Specific recommendations for distribution and sales organization by producers

### *Market related recommendations*

Identified Problems	Recommended actions	Expected effects	Realization / effectiveness assessment
<i>Low level of awareness of consumers, poor recognition of FQS labels</i>	<ul style="list-style-type: none"> <li>Restoring the portal “Three Signs of Taste” or improving “Poland Tastes”</li> <li>Improving and promote “Polski e-bazarek.pl” (eng. “Polish e-marketplace”) whose purpose is to enable a free publication of an advertisement for the sale and promotion of products offered by producers, farmers and agricultural entrepreneurs, including producers of FQS</li> </ul>	<ul style="list-style-type: none"> <li>The portal “Three Signs of Taste” (not operational anylonger) may be presented as almost a perfect example of the comprehensive source of information on FQS labels and certified registered products. This would be an informative tool to create awareness and knowledge of consumers, but also to provide practical contact data with FQS producers</li> </ul>	<ul style="list-style-type: none"> <li>After “Three Signs of Taste” a new portal was created – “Poland Tastes”.</li> <li>Portal “Taste of Poland” as well as “Polish e-marketplace” in its original construction could play a significant role in building brand recognition and providing practical information on product availability and contacts with producers</li> </ul>
<i>Poor promotion and communication</i>	<ul style="list-style-type: none"> <li>Creating an "Umbrella" organization (e.g. “Association of FQS Certified Producers”)</li> </ul>	<ul style="list-style-type: none"> <li>Joint promotion activities to increase recognition of FQS labels among consumers, also to raise awareness of the added value of FQS products</li> <li>Support for developing / improving distribution channels (supporting producers in establishing</li> </ul>	<ul style="list-style-type: none"> <li>Interest declared by several producers (bottom-up approach foreseen) but no action so far</li> <li>More time is required, also financial support (seed money) from public sources or an NGO would be important to facilitate.</li> </ul>

		business contacts, information exchange) <ul style="list-style-type: none"> <li>• Joint training and consultancy activities, e.g. consulting in preparing products for sale to retail chains, network requirements, and organizing Internet sales</li> </ul>	
<i>Poor recognition of FQS labels by retailers and consumers, no communication channels (producers – retailers)</i>	<ul style="list-style-type: none"> <li>• Employing the concept of the stand for FQS certified products in selected large retail outlets (e.g. Hala Banacha, Supersam, Bio-Bazar) in Warsaw</li> </ul>	<ul style="list-style-type: none"> <li>• Familiarizing consumers with the offer, disseminating information materials, promoting products</li> <li>• Establishing contacts with retailers</li> <li>• Potential to copy the model to other retail outlets</li> </ul>	<ul style="list-style-type: none"> <li>• Preliminary plan developed and discussed with retailers and producers - potential suppliers</li> <li>• Initial informal agreements made, however action postponed because of COVID-19 related restrictions (e.g. limited promotional activities).</li> </ul>

***General recommendations for producers***

<b>Identified Problems</b>	<b>Subject of trainings and consultancy made - recommended actions</b>	<b>Expected effects</b>	<b>Realization / effectiveness assessment</b>
<i>Poor cooperation in groups of producers</i>	<ul style="list-style-type: none"> <li>• Creating brand, joint sales (distribution), joint promotion</li> </ul>	<ul style="list-style-type: none"> <li>• Better recognition of the product, increased sales of certified products, less dependence on intermediaries, lower distribution costs, more cost effective promotion</li> </ul>	<ul style="list-style-type: none"> <li>• No willingness (exception: Suska Sechlonska Association)</li> <li>• Visible mental barrier – enlargement of the group associated with stronger competition within groups.</li> </ul>



<i>Small scale</i>	<ul style="list-style-type: none"> <li>Increasing production through enlargement of existing groups of producers</li> </ul>	<ul style="list-style-type: none"> <li>Possibility to attract larger scale buyers, increasing sales (possibly also exports), lowering distribution costs per unit of produce</li> </ul>	<ul style="list-style-type: none"> <li>Reasonable argument against – increasing number of producers creates a difficulty with maintaining overall quality</li> </ul>
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***Consultancy and recommendations for specific producer groups***

<b>Identified Problems</b>	<b>Subject of trainings and consultancy made - recommended actions</b>	<b>Expected effects</b>	<b>Realization / effectiveness assessment</b>
<b><i>Kaszubska Strawberry</i></b>			
<i>Large proportion of strawberries sold without the FQS label</i>	<ul style="list-style-type: none"> <li>Promotional materials in tourist information centers</li> <li>Promote “pick your own” scheme for tourists</li> <li>Establish “Strawberry Cafeteria”</li> <li>Uniform packaging – card</li> </ul>	<ul style="list-style-type: none"> <li>Information for tourists visiting centres, including locations of strawberry plantations;</li> <li>Suggestion discussed: farm visits for tourists guided by a charismatic, talkative leader of the sub-group of producers</li> <li>Suggestion discussed: opening for a tourist season a cafeteria serving, among others, all kinds of strawberry based sweets (cakes, jellies, etc.). This would also give an opportunity for promotion of the brand and additional</li> </ul>	<ul style="list-style-type: none"> <li>Realized in one of the sub-groups – leaflets in the information center since 2019.</li> <li>Positive reaction, however active promotion not possible in 2020 because of COVID-19</li> <li>Not accepted by farmers, although considering the large number of tourists in the region and the rather poorly developed gastronomy in the region investment in the central town in the area would be not costly and very likely low risk investment</li> </ul>

<p><i>Poor recognition of the label by consumers</i> <i>Use of traditional packaging common for all producers in Poland</i></p> <p><i>Surpluses in days of lower sales of fresh strawberries on the local market</i></p>	<p>board boxes (single use) with the logo and producers’ and product/production data</p> <ul style="list-style-type: none"> <li>• Strawberry processing</li> </ul>	<p>sales of strawberries in the harvest period</p> <ul style="list-style-type: none"> <li>• Replacing wooden or plastic boxed commonly used by all strawberry farmers in Poland would allow to distinguish product on the market. Additional benefit is limiting fake sales of non-certified strawberries marked as Kaszubska; data of producer and product/production will be helpful for tracing the product what is necessary for effective protection</li> <li>• Bankruptcy of the company processing Kaszubska Strawberry several years ago worsened situation of producers. Opportunity to process allows to manage daily surpluses and to increase sales of certified product</li> </ul>	<ul style="list-style-type: none"> <li>• Unlikely. Positive reaction of individual farmers in the group only. Majority does not support idea mainly because of higher cost of packaging.</li> <li>• Lack of funds, unsuccessful attempt to co-finance from the RDP, partially implemented as a service</li> </ul>
<p><b><i>Suska Sechlonska Plums</i></b></p>			
<p><i>Rigid specification (farmers’ conviction that changing specification is difficult and problematic)</i></p>	<ul style="list-style-type: none"> <li>• Apply for changes in the specification</li> </ul>	<ul style="list-style-type: none"> <li>• Changes in the drying technology would allow for longer shelf-life without a need of using refrigerators.</li> </ul>	<ul style="list-style-type: none"> <li>• Application submitted. Changes in specification approved by EC.</li> </ul>

<p><i>Small number of certified producers, small volumes for sale</i></p> <p><i>Low awareness the product exists on the market</i></p>	<ul style="list-style-type: none"> <li>• Increase number of producers in the Association</li> <li>• More promotional activities (offers for retailers, contacting chains of restaurants, etc.)</li> </ul>	<p>This would make product more attractive for large scales retailers allowing to increase sales of certified product</p> <ul style="list-style-type: none"> <li>• More competitive, more attractive for large scale retailers, possibility to increase sales under the logo</li> <li>• There is a potential demand (product is of very high quality) based on the feedback from a random sampling (retailers and consumers)</li> </ul>	<ul style="list-style-type: none"> <li>• Not accepted. The strategy of the Association is to keep the number small</li> <li>• Positive reaction, but such strategy would require increasing volume of production</li> </ul>
<b><i>Koryciński Cheese</i></b>			
<p><i>Poor cooperation among producers</i></p>	<ul style="list-style-type: none"> <li>• Common label, joint distribution</li> </ul>	<ul style="list-style-type: none"> <li>• A better distinguished product as an element of protection against falsification</li> <li>• More effective promotion</li> </ul>	<ul style="list-style-type: none"> <li>• Visible unwillingness to cooperate, competition within the group</li> </ul>

## 8. Recommendations - synthesis

Recommendations presented in this chapter are based on the survey results and in-depth analyses of case studies, as well as discussions with producers and other stakeholders.

Only broad recommendations that are generally applicable are mentioned here. This is because of the specific nature of problems of different groups of producers, depending on the product characteristics, self-organization of producers, their marketing skills and position on the market. More specific recommendations were discussed with respective groups of producers and were presented in chapter 7.

### 8.1. Recommendations regarding registration process

The interviews with producers involved in the preparation of applications show that most of them experienced significant difficulties resulting from the lack of adequate knowledge of the procedures in the registration system and the lack of the necessary application writing skills. There is a basic conclusion, especially important for countries with a short membership in European Union structures, that there is a need for more support for the process of developing applications and specifications by producers from public administration or/and independent organizations. Dedicated training preceding the preparation of applications for newly emerging groups would also be helpful.

It is also recommended to simplify (shorten) the procedure for changing the specification - if justified (e.g. in terms of notification of additional production, product varieties, etc.). Some surveyed producers reported that even though there is an urgent need to change their specification, because of the lengthy and difficult process they hesitate to undertake action.

Concluding, the key recommendations are:

EC level

- simplifying and shortening the length of the registration procedure;
- reducing the time needed to amend specifications;

National level

- training for newly emerging groups preceding the preparation applications;
- support for newly emerging groups in the process of developing applications.

## **8.2. Recommendations regarding control of PDO, PGI, TSG products**

### **More effective protection of the reputation of PDO, PGI and TSG products**

It is suggested to construct a national system for monitoring FQS distribution and counterfeits reporting. A built-in mechanism of reporting frauds and illegal use of the reputation of registered name should prevent fraud in the distribution chain.

### **Building an appropriate argumentation for the protection of retained names in ambiguous cases**

A significant problem noticed by producers of PDO, PGI, TSG products is the indirect use of the protected name by suggesting, alluding, or imitating or exploiting the reputation of the registered name. Considering such cases in the context of a breach of protection of registered names is often a long process due to their ambiguity and the appeal and judicial procedures. Nevertheless, such cases allow to build judicial decisions, which makes it easier to enforce the protection of geographical indications in subsequent cases.

### **Increasing the competence of inspectors from controlling bodies**

Moreover, in order to ensure an effective control system, a permanent and competent staff of control bodies should be built. Systematic training for the staff should be carried out. The effectiveness of actions aimed at protecting registered names as PDO, PGI, TSG depends on the knowledge and experience of the employees of control bodies.

## **8.3. Recommendations regarding support for producers**

Considering the very low bargaining power of the individual, small-scale producers, as well as their relatively poor economic stand, it is important to provide more support for their market related activities.

Our key recommendation is to facilitate the creation – or to create altogether – an "Umbrella" association of certified producers acting on behalf of all participants of the system.

Specific functions of this organization would be as follows:

1. Building consumers' awareness and promoting FQS labels in Poland.
2. Providing training for the producers, supporting the development of supply channels, linking producers with potential buyers etc.
3. Encouraging producers to develop joint (group) sales to avoid internal competition and strengthen position of producers in supply channels.
4. Search for potential sources of funding for investments, lobbying and new certificates development.

5. Helping with application writing, business planning, developing individual promotion materials etc.

#### **8.4. Recommendations for producers**

##### **Increasing scale of production and brand creation**

With the only exception of Grojec Apples, all other certified producers form very small groups. Some products are even represented by single producers. Increasing the scale of production and attracting new farmers to join existing certificates is probably the main path towards strengthening the market position of FQS producers and a pre-condition for creating brands of the products. This is important also from the perspective of the effectiveness of promotional activities which may be considered reasonable only if the promotion is followed by an adequate offer.

##### **Using digital channels to create consumer awareness**

Because there is a discrepancy between the way consumers learn about FQS (mainly via the internet) and the way producers try to promote FQS (traditional channels such as media) it is recommended to increase using digital channels to promote consumer awareness.

##### **Joint sales and uniform packaging**

Whenever possible producers should arrange joint sales and distribution in order to avoid producer – producer competition and to strengthen bargaining position in the distribution chain. Common label and uniform packaging allowing to distinguish products is also of key importance. In Poland, there are two good examples: Grojec Apples and Suska Sechlonska associations, which introduced successfully joint sales.

##### **Adding Value**

If the specificity of the certified product allows it, producers should attempt to add value, e.g. through investing in processing (the Kaszubska Strawberry case).

##### **Active participation in activities of Umbrella Association**

It is highly recommended to establish an Umbrella Association. Active participation of all producers is a key condition of successful realization of the main goal of the organization, which is to improve FQS sales in Poland and support producers in their market related activities.

## ANNEX

**Table A. Number of PGI, PDO and TGS certificates in Poland in the period 2007-2019**

<b>Product /Year</b>	<b>2007</b>	<b>2008</b>	<b>2009</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>
Cheese	2	17	22	43	68	97	92	89	78	90	74	63	65
Honey	0	2	3	12	32	36	38	39	22	24	20	14	13
Bakery products	0	0	119	116	115	126	128	138	146	148	157	141	139
Fruits&veg	0	0	0	51	68	100	113	116	112	76	74	62	65
Grójeckie apples	0	0	0	0	0	0	4	37	376	463	460	540	539
Meat&fish products	0	0	0	3	7	12	10	11	14	21	29	33	35
Milk	0	0	0	0	0	0	0	0	0	0	1	1	1
Oil	0	0	0	0	1	1	1	1	1	1	1	1	1
<b>All</b>	<b>2</b>	<b>19</b>	<b>144</b>	<b>225</b>	<b>291</b>	<b>372</b>	<b>386</b>	<b>431</b>	<b>749</b>	<b>823</b>	<b>816</b>	<b>855</b>	<b>858</b>
<i>All (without apples)</i>	<i>2</i>	<i>19</i>	<i>144</i>	<i>225</i>	<i>291</i>	<i>372</i>	<i>382</i>	<i>394</i>	<i>373</i>	<i>360</i>	<i>356</i>	<i>315</i>	<i>319</i>



### **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](http://www.strength2food.eu)**

