FOCUS-BALKANS

“FOCUS on FOOD Consumers in the Balkans”

2ND OPEN SEMINAR, 23RD SEPTEMBER 2011, BRUSSELS

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1. **Introduction to food consumer science**

*Consumer science* is of major importance to improve the functioning of the food markets all over the world, and especially in the transition countries. These countries are facing a rapid turn from a state-driven economy to a market-driven economy. In this turn, the food industries experience the competition of the global markets. Understanding the consumers’ behaviour and expectations are keys for their future development.

At the same time, there are urgent needs for the consumers to establish their rights towards the industry, including the retail:

- Right to be informed.
- Right to fight against the misuse of claims and designations.
- Right to know about the nutrition facts, the content of the food and the health-related concerns.

The market is evolving quickly, the transactions move from the domestic sphere to the supermarkets. The asymmetry in the information is growing, as the distance between the producers and the consumers is growing as well. A learning process of sharing knowledge for a better functioning of the food market is really needed.

The situation is not so different in the Western Europe. *Consumer science* is a relatively young science. Engel et al. (1995) describe the emergence of consumer science in the 1960’s, especially the phenomenon of consumer behaviour. The closely related area of marketing research and its methodology is extensively described by various authors, for instance by Churchill and Lacobussy (2005). In all literature, the interaction between consumer and the market is paramount.

*Food consumer science* aims to explain the complex interactions between the consumers, the market place and the industry. These pillars (consumer, market and industry) are explored within several disciplines, which are food science, nutrition, medicine, psychology, psychophysics, sociology, economics, marketing and anthropology (Steenkamp, 1997). FOCUS-BALKANS project aims at implementing and improving the major methods used in the food consumer science, illustrating each of them with concrete results, obtained through both qualitative and quantitative surveys across six Western Balkan countries.

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**Market of local fruits**

**Local peppers**
The objective of FOCUS BALKANS is to provide a thorough understanding of both the main theories that inform consumer food science, together with methods can be used to garner an empirical understanding. Since it was not possible in the scope of the project to explore all food market segments, the methods are illustrated with examples from the:

a. The fruit market.
b. The food products with “health/nutrition” claims (as part of the functional food).
c. The organic food products.
d. The traditional products.

Quantitative methods will be illustrated from results of a quantitative survey conducted in six Western Balkan Countries (Bosnia-Herzegovina, Croatia, FYRoM, Montenegro, Serbia and Slovenia), which covered 3,000 adult respondents. Approximately 500 respondents completed the Food Choice Questionnaire (FCQ) (Steptoe et al. 1995) in each mentioned country, and the sample was stratified to match key characteristics of the population. The survey sought to understand the motives for food choice in the WBCs, segmenting and profiling groups of consumers. The approach formed the basis of consumer profiling.

The methods and results about each topic of the researches (fruits / “health claim” / organic / traditional food) are presented through the following matches between scope/methods and illustrations:

<table>
<thead>
<tr>
<th>Scope</th>
<th>Method</th>
<th>Illustration</th>
</tr>
</thead>
<tbody>
<tr>
<td>Market study</td>
<td>In-depth interviews with experts</td>
<td>Health claim products</td>
</tr>
<tr>
<td>Motives of consumption</td>
<td>Consumer focus groups</td>
<td>Fruits</td>
</tr>
<tr>
<td>Future trends and challenges on a niche food market</td>
<td>Delphi-method</td>
<td>Organic</td>
</tr>
<tr>
<td>Consumer’s preferences</td>
<td>Conjoint analysis</td>
<td>Traditional products</td>
</tr>
</tbody>
</table>

Beside the research, the objective of FOCUS BALKANS was to establish a network between the scientists, of the Universities of Agriculture, Economics and Food science, the Public Health Institutes, the food industry and the Ministries of Agriculture, Science and Public Health. The objective is that this network continues after the project, developing research and learning about food consumer science. This network should as well connect with Western European networks in that field, which could emerge in the future.
2. Overview of the project achievements

- General introduction of the Focus-Balkans project
- State of the art
- Knowledge system in Food Consumer Science in the Balkans
- Consumer Quantitative Survey
- Fruits & health, with special focus in Bosnia-Herzegovina
  - Exploration of consumer’s perception and consumption of fruits in the WBC
  - Fruits sector in the WBC
  - Fruits & nutrition balance in Bosnia-Herzegovina
- Products with health claims, with special focus in Montenegro, Serbia and Macedonia
  - Consumer motivations and behaviours for products with nutrition and health claims
  - Products with health claims in Macedonia
  - Products with health claims in Montenegro
  - Products with health claims in Serbia
- Organic products, with special focus in Croatia
  - Organic products
  - Organic products in Croatia
- Traditional food, with special focus in Slovenia
  - Consumers’ Attitudes, expectations and behaviours towards Traditional Food in the WBC
  - Traditional food in Slovenia
- Networking
- Building competences for food consumer research
- Dissemination of the results
General introduction of the Focus-Balkans project

BACKGROUND

A Research EU-Programme funded through the FP7
Duration: 3 years
Co-ordinator: Dr Dominique Barjolle, ETHZ, Switzerland

Objective
To improve competencies and understanding in the field of food consumer science in six Western Balkan countries (WBC).

Research questions
1. What are the drivers and determinants of food consumption behavior in the WBC?
2. What are the situations of four products’ markets and motives of their consumption in the six participating WBC?

Areas of interest
“consumer science”, “market studies”, “consumer behavior”

STRUCTURE

Figure 1: Structure of the project

Market studies
1. Consumer study implementation for fruits and nutrition balance
2. Consumer study implementation for products with health claims
3. Consumer expectations towards organic products
4. Consumers’ attitudes, expectations and behaviours towards traditional food

Countries covered by the research
Slovenia, Croatia, Serbia, Bosnia-Herzegovina, Montenegro, Macedonia

State of the art
225 publications from the Western Balkan Countries have been gathered and analyzed. This collection has highlighted the lack of primary data and the disproportion between qualitative and quantitative studies: the quantitative are dominant. There is a lack of international publications in the field of food consumer science published by scientists in the region.

PARTNERS

Figure 2: Localisation of the partners

Partners of the project
Mainly universities and apply institutions
ETH Zürich*, Switzerland
AGRIDEA, Switzerland
GEM, France
SDL, The Netherlands
VetAgroSup, France
UNEW, United Kingdom
University of Parma, Italy
ECOZEPT, Germany

* Coordinator of the project

CONCLUSION

Main contributions of the project
1. Determination of consumer perceptions, attitudes and behavior in the WBC.
2. Contribution to regional and European nutrition and health policies.
3. Increased dialogue between consumers and food producers, including industry.
4. Enhanced cooperation in the area of consumer science with EU and neighboring countries.
5. Contribution to consumer policy making, in particular in the areas related to health, nutrition and food safety, relevant to the Health and Consumer Protection Directorate General.

Figure 3: Consortium of Focus-Balkans project

FOCUS-BALKANS PROJECT
WWW.FOCUS-BALKANS.ORG

ETH ZURICH
INSTITUTE FOR ENVIRONMENTAL DECISIONS IED
AGRICULTURAL ECONOMICS - AGRI-FOOD & AGRI-ENVIRONMENTAL ECONOMICS
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State of the art

**FOOD CONSUMER SCIENCE**

“The field of consumer science is young and in flux. It is constantly being cross-fertilized by perspectives from different disciplines: every social discipline, plus a few represent the physical sciences and arts. From this melting pot comes a healthy debate among research perspectives and methods, and even deeply held beliefs about what are and what are not appropriate issues for consumer researchers.”

As illustrated in the pyramid-circle figure, a set of science disciplines relates to consumer science, and to each of the three pillars (consumer, market and processor/producer) behind food consumer science. Communication and corporate social responsibility are added as a form of supply chain management. The disciplines between brackets in the figure are considered as not being essential to the FOCUS-BALKAN project.

Figure 2: Pyramid-circle model explaining the interrelation of consumer, market and food processor/producer in a consumer science approach.

**CONCLUSION**

General models and food choice:
- economic household model
- food choice process model
- theory of reasoned action / planned behaviour

Description of marketing

<table>
<thead>
<tr>
<th>What I know</th>
<th>What I don’t know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Every one knows</td>
<td>My missing gap</td>
</tr>
<tr>
<td>Knowledge I can transfer</td>
<td>Knowledge no one knows</td>
</tr>
</tbody>
</table>

Research methods: the choice to be made
- qualitative versus quantitative
- focus groups
- in depth interviews
- delphi methodology, cluster analysis, conjoint analysis

**References**


Knowledge system in Food Consumer Science in the Balkans

BACKGROUND

Knowledge system in the area of food consumer science (FCS) deals mainly with the topics of market study and consumers behavior. It includes three main functions: research, education and information.

Objectives

Identification of the most relevant players in the food consumer science; scan and describe the current situation in WBC in FCS.

Research questions

→ Who are the actors in WBC among socio-demographic actors, public decision makers, information providers, education centers and end-users?

→ How are FCS knowledge systems functioning in the WBC?

MATERIAL AND METHODS

The WP2 reporting consists of two entities:

- Database with information about institutions and individuals: Identification of the key food consumer science players in WBC.
- Report describing the knowledge system: Scanning the current situation in the WBC; reporting for each country and region in general. Archetypes have been elaborated in order to analyse and compare the situations of FCS knowledge systems over the WBC.

FIRST RESULTS

The archetypes help to position the main players in the food knowledge systems in each country. They allow as well characterising the main trends in possible further evolution in the different WBC. They represent the main possible stages in the evolution of the food knowledge system. A knowledge system is continuously moving, adapting itself to the new social, economical, technical and institutional conditions.

Four archetypes have been elaborated:

→ State driven economy.
→ Liberal economy.
→ Deregulated state model.
→ Socio-democracy model.

In Western Balkan countries deregulated state model has been found.

ASSUMPTIONS

The specific analysis of the FCS system used in WP2

<table>
<thead>
<tr>
<th>FCS Actors</th>
<th>FCS Elements</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Socio economic actors</td>
<td>Farmers, producers, processors, industry, retailers</td>
</tr>
<tr>
<td>2 Public decision makers</td>
<td>Public administration, Ministries</td>
</tr>
<tr>
<td>3 Information providers and education centers</td>
<td>Research institutes, NGO, BDS, associations, schools</td>
</tr>
<tr>
<td>4 End users</td>
<td>Consumer</td>
</tr>
</tbody>
</table>

CONCLUSION / OUTLOOK

- **Socio-economic actors**, (farmers, processors, producers and retailers) must comply with increasingly demanding global requirements. They are marginalized, by increasing penetration of international and big domestic retailers, focused on productivity and profit.
- **Public decision system** is weak. The absence of national programmes, focussing the activities on a limited number of well-articulated priorities. The governmental bodies cooperate too weakly between each other.
- **Information and knowledge** are not developed enough (separate parts of knowledge are developed). The food consumption research is still interpreted from the point of view of consumer impact on profit related to the “production”, rather than highlighting social, environmental, economic linkages.

Relation between consumer as an “end user” and other elements in FCS is mostly one-way relation:

→ The state administration, the scientific community and the industries are today not paying sufficient attention to the needs and the rights of the consumers.

Picture 1: Traditional products from the Balkan countries
BACKGROUND

The aim of WP9 study is the analysis of drivers and determinants of food consumption behavior in Western Balkan Countries (WBC) of four targeted products:

→ Fruits.
→ Organic products.
→ Traditional dishes.
→ Natural products and products with health claims.

MATERIAL & METHODS

Countries covered: Bosnia-Herzegovina, Croatia, Macedonia, Montenegro, Serbia and Slovenia.

Sample: 3,085 adult participants (18 years and older). Approximately 500 by country, nationally representative, stratified three-staged random.

Technique: face to face interview in respondent’s home.

Instrument: 7 sections and socio-demographic questions; includes Food Choice Questionnaire (FCQ) developed by Steptoe et al.

Dependent variable: frequency of consumption.

Length of interview: 30 minutes.

Data collection: September 2010.

FIRST RESULTS

Motives underlying food choice are in the WBCs (listed by importance):

SENSORY APPEAL; PURCHASE CONVENIENCE; HEALTH & NATURAL CONTENT;
PRICE; PREPARATION CONVENIENCE; MOOD; WEIGHT CONTROL;
FAMILIARITY & ETHICAL CONCERN.

Clusters of consumers according to their dominant motives for food choice in WBC’s are:

Unconcerned

→ No differences by gender were found for the most important concerns.

ASSUMPTIONS

FOR FOOD IN GENERAL

FOR EACH PRODUCT CATEGORY

INDEPENDENT variables
MEDIATOR variables
DEPENDENT variables

CONCLUSIONS

From a public health perspective three clusters raise concern:

1. Unconcerned consumers (food knowledge and fruit consumption are below average), there is a need to promote more balanced diets.

2. Price oriented and distressed consumers (fruit consumption is low, group of “low income”), they are consuming relatively unhealthy food for comfort and this is a worrying development in the WBC.

→ Public health campaigns should stress both the financial and health benefits from reducing fatty food intake and increasing consumption of fruit and vegetables.

3. Purchase convenience (higher income but with the highest incidence of obesity) therefore the promotion of ready to eat light meals would be appropriate.
Exploration of consumer’s perception and consumption of fruit in the WBC

BACKGROUND

Facts:
Balkan countries have a mild weather in favour for growing fruits. The consumption of fruits in those 6 countries is therefore strongly connected each sharing common cultural habits and traditions.

State of the art:
→ Food culture in WBC more Mediterranean than European
→ Availability of traditional fruit is high combined with low price.
→ Lower consumption of fruit than in EU countries

Research questions:
→ How much fruit is consumed?
→ Where do WBC consumer fruit?
→ What are motives and barriers of fruit?
→ How is health perceived?

MATERIAL & METHODS

Same methodology in each country:
Croatia, Slovenia, Montenegro, FYR Macedonia, Serbia and Bosnia and Herzegovina

QUALITATIVE RESEARCH

In depth interviews
face to face
(In each country)
30 consumers
→ 183 interviews in total

Focus Groups
(in each country 3 groups)
96 participants in total

RESULTS

Consumption:
→ Fresh fruit consumption is rather high
→ For half of the respondents, one third of consumed fruit is home grown.
→ Fruit is mainly consumed at home, not out of home

Motivations
→ Taste and health are important motives.
→ Appearance isn’t that relevant for WBC consumers compared to EU consumers

Perceived image of fruit eaters:
Heavy fruits users:
Fit good looking healthy living person
Happy
Healthy mind in a healthy body
Strong personality

Light users:
Overweight clumsy looking person
Unhappy
Bad character varies from lazy to angry

In marketing and policy aiming for specific segments of consumers

Future research
→ Home grown— get insight in total amounts related to the actual consumption
→ Perception of processed fruit products
→ Combinations of all benefits related to health and convenience are becoming more important.
→ In marketing and policy aiming for specific segments of consumers
→ Product development – product differentiation
→ Interaction between fruit innovation and consumer research
Fruits sector in the WBC

BACKGROUND
Facts:
The consumption of fruit is recommended as part of a healthy diet. In Western Balkan Countries (WBC) fruit consumption strongly decreased since the 1990’s.

State of the art:
→ Consumption of fresh and processed fruit is increasing
→ Most consumed fruit in West Balkan: apple

→ Lower consumption of fruit than in EU countries

Research questions:
→ To identify the consumption and position of fruit and processed fruit in a well-balanced diet from point of the perspective of the Balkans industry.

MATERIAL & METHODS
Same methodology in each country:
Croatia, Slovenia, Montenegro, FYR Macedonia, Serbia and Bosnia and Herzegovina

Market survey

In depth interviews face to face
(In each country)
4 representatives of the processing Industry
+ 2 representatives of the authorities responsible for the fruit processing sector

An insight into the Balkan fruit producing industries and their market expectations and consumer knowledge.

RESULTS
Importance of the family fruit orchards and homemade processed fruit.
→ Family orchards are typical for the West Balkan
→ Different area and yield estimates for each country
→ Two types of family orchards: home grown fruit (private use) and grown for the market.

Analysis of the FRUIT CHAIN:

Main strengths
→ Climate conditions
→ Quality of raw materials
→ Optimal price/quality ratio
→ Trust among consumers
→ Traditional way of growing
→ Prices

Main weaknesses
→ Underdeveloped technology
→ Inadequate access to commercial credits
→ Poor monitoring of product safety
→ Lack of uniformity of products
→ Small advertising budgets

Main opportunities
→ Growth in exports
→ Increase in primary production
→ EU and government support for production and rural development
→ Creating brands and value added products (organic)

Main threats
→ Concentration of retailers
→ Well-organised producers from EU countries
→ Lack of organisation in the product chain

CONCLUSION
National health policies and fruit consumption
→ Level of awareness and education is still insufficient, although it is rising
→ State programs are assessed as unsatisfactory or even non-existing
→ Slovenia is the only country where fruit consumption is included in National health Program
→ Respondents agree that fruit consumption should be promoted on national as on region/EU level

Governmental objectives and actions to help the sector
→ Estimation of the share of family orchards in overall production (no official data for now).
→ Updating fruit assortment and updating technology.
→ Adapting and building of (new) capacities.
→ Participating in agricultural fairs and other international significant events.
→ Support for revolutionary and experimental research activities.
→ Educating and training of farmers-producers.
→ Introducing international standards for fruit quality, both in primary production and in fruit processing.
The analysis of the scientific publications in the field of food consumer science in B&H clearly showed the absence of multidisciplinary approach. No research places an emphasis on consumers and their attitudes or eating habits. These results clearly raise the need for large scale research in the field of food consumption using modern methodological principles.

**CONSUMER STUDY IMPLEMENTATION FOR FRUITS AND NUTRITION BALANCE FOR BOSNIA AND HERZOGOVINA**

**Results**

→ Consumers in BiH eat usually fruits in their own home with their family without a strictly defined time frame.

→ They mostly eat apples, grapes and oranges. Bananas are also frequently consumed.

→ Female consumers preferred season fruits (strawberries and peaches as the earliest very present seasonal fruit).

→ The taste is the most relevant motive for fruits consumption.

→ Most consumers believe that they consume enough fruit. The major obstacle to a larger fruit consumption is the product safety.

**Recommendations**

→ Stronger and more meaningful campaigns about the importance of fruits and well balance food in the daily diet.

→ Transparent control of pesticide residues.

**Future Projects**

→ Sensory and chemical characteristics of apple and pear and attitudes of consumers towards fruit consumption - funded by Ministry of science and technology Republic of Srpska Government (2010-2011).

→ Focus-Balkans Network - on regional and national level.

→ Institutional cooperation.

**References**


Consumer motivations and behaviours for products with nutrition and health claims

**BACKGROUND**

Market segment was initiated during mid-1990’s firstly in WBC dairy sector, followed by other products categories. The market development was not followed by significant scientific interest.

**Purpose:** is to better understand the N&H claimed products market in WBC. The analysis covers competitiveness, market structure, economic trends and estimations, as well as consumers demand and expectations.

**Research questions:**

→ What are the main drivers of functional food market development in WBC? Do consumers in WBC associate products with N&H claims with specific benefits?

→ Does specific form of communication influence consumers’ choice of food?

**MATERIAL & METHODS**

→ A multi-technique approach: qualitative and quantitative.

→ A multi-stakeholder approach: different stakeholders were interviewed.

→ Different families of N&H products have been covered, i.e. milk and nectars enriched with vitamins and minerals, dietetic jam, light margarine and yoghurt with probiotics.

**RESULTS**

Market structure and trends

The market share of studied categories of N&H products is higher in Slovenia (EU trends or producers influence) - and lower in Montenegro, Bosnia and Macedonia, while Serbia and Croatia represent an average of the WBC market. However, market growth for these products is high in all countries.

<table>
<thead>
<tr>
<th>Country</th>
<th>Regulations (Regulated)</th>
<th>Market share (Market share)</th>
<th>Growing rates (Growth rates)</th>
<th>Profit (Profit)</th>
<th>Barriers (Barriers)</th>
<th>Health claims (Health claims)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Slovenia</td>
<td>Yes</td>
<td>EU 1</td>
<td>Higher</td>
<td>High</td>
<td>Profit</td>
<td>Information</td>
</tr>
<tr>
<td>Croatia</td>
<td>Yes</td>
<td>EU 2</td>
<td>Average</td>
<td>High</td>
<td>Consumers</td>
<td>Regulative</td>
</tr>
<tr>
<td>Serbia</td>
<td>Ni</td>
<td>YBC 3</td>
<td>Average</td>
<td>High</td>
<td>Consumers</td>
<td>Lack of scientific support</td>
</tr>
<tr>
<td>Montenegro</td>
<td>Ni</td>
<td>YBC 4</td>
<td>Lower</td>
<td>High</td>
<td>Lack of scientific support</td>
<td>5</td>
</tr>
<tr>
<td>Bosnia</td>
<td>Ni</td>
<td>VBC 5</td>
<td>Lower</td>
<td>High</td>
<td>Profit</td>
<td>France</td>
</tr>
<tr>
<td>Slovenia</td>
<td>Yes</td>
<td>EU 6</td>
<td>Higher</td>
<td>High</td>
<td>Consumers</td>
<td>Information</td>
</tr>
</tbody>
</table>

→ Nutritional knowledge, awareness of food intake and promotion of healthy life style are key factors of change that could influence future consumption of nutrition and health claimed products in WBC.

**CONCLUSION**

Perceived benefits of functional food by consumers

→ Innovative (new, trendy and modern)

→ Scientific (based on scientific medical research)

→ Beneficial for health

Barriers for functional food purchase and consumption

→ Lack of information for consumers (identification of functional food and potential for health benefit).

→ High level of distrust.

→ Consumers perceive functional food to be targeting small specific groups (older, chronically ill or with uncommon or specific health problem).

An effective health claim should be:

→ Understandable to the consumers - simple, not overly scientific.

→ Convincing - officially confirmed by established institution or regulatory body.

→ Relevant - consumers should feel targeted by the product.

**Figure 1: Research methods and results**

**Figure 2: Factors contributing to effectiveness of a health claim**

**References:**


**NATIONAL CONTEXT**

Food consumer science is new area of scientific interest in Macedonia. There is a big gap of knowledge in this field and very little research has been done. Moreover, no research results have been published internationally, on languages other than Macedonian. This insufficiency should be used as advantage for putting new research initiatives in progress.

The reviewed publications mostly utilize the theoretical approach to the issue of consumer’s science, consumer’s behavior and approximation of national to EU legislation. This is good base for future process of gaining knowledge but authentic, comparative national approach and research is still missing.

**NETWORKING MEETINGS**

The organizing Team

- Institute of Public Health, as the major public health institution in the country and project partner, established national team consisted of team coordinator, senior and junior researchers.
- In addition, existing capacities of the institute, both in human and material resources, were used to reach the project research goals.
- As the institute combines researchers from different backgrounds, Focus-Balkans project was a great opportunity to validate our own research standards and approximate them to those existing in the European research environment.

**CONSUMER STUDY IMPLEMENTATION FOR PRODUCTS WITH HEALTH CLAIMS IN REPUBLIC OF MACEDONIA**

**Striking Results**

- Almost all of the products produced by the companies contain either nutritional or health claims.
- 19% of the surveyed products come from domestic production.
- Consumers choose the products that are traditionally present at the market for a long time regardless of having or not any type of claim.
- 68% of respondents find claims on products useful in helping them to decide which product to buy.

**Recommendations**

- Consumers still need additional information on functional foods.
- N&H market should be additionally regulated.

**Future Projects**

- Focus – Balkans Network.
- Institutional cooperation.
- National and/or European funding.

**References**


Products with Health Claims in Montenegro

NATIONAL CONTEXT

Improper diet is the leading cause of comorbidity in Montenegro and 55% of the adult population is overweight or obese, and in children aged 7-19 years this percentage is 21%. This observation raises great concerns.

The analysis of the situation of Food Consumer Science in Montenegro shows insufficiencies.

It is necessary to focus researches among target population groups in order to obtain a clear picture of the situation and monitor trends in food consumption in Montenegro.

NETWORKING MEETINGS

The organizing Team

Institute of Public Health as a preventive-medical-health organization, deals among other tasks, with healthy lifestyles, quality of nutrition and nutrition habits, analysing of health quality of foods, consumer goods and drinking water.

Dr. Boban Mugoša; Pirm. Dr. Ljiljana Žižić; Zorica Đorđević; Dr. Borko Bajić; Sanja Šćepanović; Balša Radulović.

Data on nutritional status and food habits of the population are obtained mainly through quantitative studies that are done on a representative sample of the population through different programs and different approaches.

The impact of different public health aspects related to food consumption is shaped by a variety of strategies and action plans of the Government and relevant ministries in cooperation with public health institutions.

Recommendations

→ Declarations on products should be more visible and understandable.
→ To rise awareness and inform consumers about importance and meaning of the labels and claims.
→ To reduce youth obesity by developing strategies based on research on food consumption among this population group.
→ To improve regulations and develop new laws in order to protect interests and health of the population.
→ To enhance cooperation and strengthen the capacities of different actors in the area, “from farm to fork”, through projects with partners from the EU and WBC.

CONSUMER STUDY IMPLEMENTATION FOR PRODUCTS WITH HEALTH CLAIMS IN MONTENEGRO

Striking Results

→ Offer and consumption of products with H&N statements is increasing.

→ The main barrier for consumption of N&H claims products is the price and the taste.

→ Younger consumers pay more attention to content of labeling compare to older consumers, especially women.

→ Older and younger consumers do not fully understand the labels on products, especially those written in small font. They pay more attention to expire date, manufacturer and prize.

→ Consumers prefer products whose claims are verified by the local health agencies.

Graphic 1: Origin of N&H products in Montenegro

Networking Meetings

<table>
<thead>
<tr>
<th>Presentations, main topics</th>
<th>Number and structure of participants</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project presentation, main goals, state of art in Montenegro.</td>
<td>18 (researchers, producers, government representatives, consumer organizations...).</td>
<td>27.04.09</td>
</tr>
<tr>
<td>Consumers protection, food safety and practice in Montenegro.</td>
<td>14 (producers, retailers, processors, researchers, policy makers, NGO).</td>
<td>15.12.09</td>
</tr>
<tr>
<td>Products with health and nutrition claims, situation on the market in Montenegro, risks and needs for improving.</td>
<td>25 (producers of dairy products and juices, processors, retailers, government representatives).</td>
<td>16.06.10</td>
</tr>
<tr>
<td>Traditional products, producers, protection and science, introducing participants with results of the focus groups for traditional products.</td>
<td>15 (producers of dairy products, baking and pastries, Veterinary Directorate, Association of chefs).</td>
<td>08.12.10</td>
</tr>
<tr>
<td>Fruits consumption and products with health claims considered by consumers (participants in the study).</td>
<td>21 (producers, processors, consumer organizations, researchers, retailers, NGO).</td>
<td>17.03.11</td>
</tr>
<tr>
<td>Extended networking meeting “Focus on Food consumers in Balkans”. Organic products consumption and organic markets; traditional food consumption in WBC’s.</td>
<td>Around 80 different stakeholders from all WBC countries and EU.</td>
<td>07.06.11</td>
</tr>
</tbody>
</table>
NATIONAL CONTEXT

Although the general marketing concepts have been a part of the teaching curricula in Serbian universities for a decade without any exception, the state of art confirms the weak position of Food Consumer Science in Serbia. An emphasis on production and technology was detected rather than on market and consumer behaviour. Serbia needs to increase its investments in science from the present (0.35%) to at least 1% of its GDP. This level is, according to the guidelines of the EU, the minimum GDP share that enables positive effects on the economic development.

NETWORKING MEETINGS

The organizing Team

Faculty of Economics, including Faculty of Philosophy, University of Belgrade.

Associate Professors: Zaklina Stojanovic, Galjina Ognjanov, Radmila Dragutinovic Mitrovic and Nebojsa Petrovic.

Assistant Professor: Aleksandra Zecevic.

Assistant: Iris Zezelj, Svetlana Popovic, Jelena Filipovic, Dragan Stojkovic and Mirjana Gilgorijevic.

Project aims to promote cooperation between Food Consumers stakeholders with research institutions to reinforce a multidisciplinary approach, such as: Ministries of Science, Agriculture and Health, Public Health Institutions, Scientific Society, Consumer Associations, Producers, Retailers, Media, Enterprises and Traders.

CONSUMER STUDY IMPLEMENTATION FOR PRODUCTS WITH HEALTH CLAIMS IN SERBIA

Figure 1: Structure of the Serbian N&H claimed products market by origine

The improvement of company’s image is the most important factor for the development of products with N&H claim in Serbia.

Figure 2: Criterias of consumer’s choice of food

→ Serbian market covers above 1/3 of all N&H claimed products present in the WB region. However, this market segment operates under unregulated conditions.

Future Projects

→ Biological Effects of Food: the role of Follic and Polysaturated Fatty Acid (Pufa) with Potential Health Improvement in Vulnerable Population (Republic of Serbia Ministry of Science and Technology Development, Project number III 46030).

→ Development and Application of New and Traditional Technologies in the Production of Competitive Food Products with Added Value for European and World Market (Republic of Serbia Ministry of Science and Technology Development, Project number III 43001).
ORGANIC PRODUCTS

BACKGROUND

Facts:
The production of organic products started to develop recently in WBC. The organic market is still a niche market, but there is a growing interest by the consumers to buy organic food products in WBC. This goes along with the overall trend towards a more health-oriented life style and growing concerns about sustainable development.

MATERIAL & METHODS

DELPHI METHOD:
3 rounds of the Delphi have been done. The procedure of application was as follows:
→ Experts identification and recruitment.
→ Definition of 1st round questionnaire.
→ 1st questionnaire introduced to the panel of experts.
→ Collection of individual opinions of the experts on this issue.
→ First round report from each country.
→ Report was sent to the same group of experts in order to get first feedback.
→ At this stage a second questionnaire was also applied.
→ After processing the data collected on the basis of the second questionnaire the third questionnaire was sent to the same group of the experts in order to get final feedback.

The experts’ point of view about:

a) The current situation of the organic market in each country and the organisation of the supply chain.

b) The forecasts of the experts related to organic market development.

RESULTS

Between 39 and 44 experts have been interviewed in total. The maximum was 14 experts in Slovenia and the minimum 3 in Macedonia.

STRIKING RESULTS

| Government & Policy Impact          | National development strategy for organic farming is very important. |
| Production                          | Motivation of the producers is important for the development of organic sector. |
|                                    | Teaching and training for organic farming is very much needed. |
| Market                              | Clear labelling of organic products is necessary to enhance market development. |
|                                    | The organic market is increasing. |
| Trends                              | Marketing for organic products has to be improved. |
|                                    | Eco-tourism is important for the development of the value chain of organic products. |
| Supply chain                        | Quality management and traceability are important for a better organisation of supply chain of organic products. |
| Consumer behaviour                  | Health concerns are very strong motives for buying organic food. |
|                                    | Key promotional activities are education and information to consumers. |

The forecasts

→ In the future, the importance of the organic market will grow in WBC (tourism, agro ecotourism, schools, and hospitals).
→ For the development of organic sector in WBC, all experts reached the consensus that National strategy for organic farming is needed, as well as regional and local government support.
→ In the future all experts consider increasing promotional activities, education and information of consumers.
→ The influence of EU Agriculture Policy will push the development of organic sector in WBC according to all experts in this research.

CONCLUSION

The current situation
→ Committed market actors, farmers associations, stakeholders in rural development an environmental protection, consumer associations and policy makers act in favour of the expansion of the organic sector in all WBC.
→ All experts reached the consensus that organic market in WBC is in the initial phase of development, but with great preconditions for production in the future. Consumer’s motives for buying organic food are health, prestige and environmental awareness.

The forecasts

References:
NATIONAL CONTEXT

The volume of the Croatian food market is estimated at €4.98 billion. Croatia has a diverse and well established food production and food processing. The capacity of its industry satisfies domestic needs and has the potential for export to neighbouring countries. Croatian consumers are becoming aware of the food they consume and its origin.

Previous research on food consumer science in Croatia was oriented towards: consumer behaviour and the organic sector study of young consumers’ perception of functional foods; comparison of dietary habits in the urban and rural schoolchildren; study of breakfast quality differences among children and adolescents in Croatia.

NETWORKING MEETINGS

The organizing Team

• ZAG Team and leader: Professor Natasa Renko, Ružica Butigan, Ante Vuletic, Sanda Renko and Josip Jagušt.

• Faculty of Business and Economics is an educational Institution by far the oldest and largest in Croatia and in the region. It offers high-quality education to students and senior executives. It is also working intensively on internationalization by expanding network of international partners, both academic and business.

• SEEDEV (South East European Development) is a consultancy company operating in Southeast Europe and active in the fields of Rural and local development, Agriculture policy, Agribusiness development, Cross-border cooperation and European Integration.

Networking Meetings

<table>
<thead>
<tr>
<th>Topic</th>
<th>Total of Participants</th>
<th>Place &amp; Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>WP1&amp;WP2 Food Consumer Science in Croatia- overview</td>
<td>35</td>
<td>20.05.09</td>
</tr>
<tr>
<td>WP5 Fruit consumption in Croatia</td>
<td>37</td>
<td>17.12.09</td>
</tr>
<tr>
<td>WP5 FG Results of Focus Group about Fruit Consumption in Croatia</td>
<td>30</td>
<td>18.06.10</td>
</tr>
<tr>
<td>WP6 Results of Production and Consumption of functional food in Croatia</td>
<td>30</td>
<td>15.12.10</td>
</tr>
<tr>
<td>WP9 Results of quantitative survey about Food Consumption in Croatia</td>
<td>40</td>
<td>14.04.11</td>
</tr>
</tbody>
</table>

Networking meetings were successful in presenting the project progress results and establishing contacts and exchange of opinions and experience among various groups of stakeholders involved.

In the future, the legacy of the networking meetings should make it possible for different groups of stakeholders (public and private sector actors, and most importantly, consumers) to continue the dialogue about food consumer science and food consumption trends in the Balkans.

CONSUMER EXPECTATIONS TOWARDS ORGANIC PRODUCTS IN CROATIA

Striking Results

<table>
<thead>
<tr>
<th>What is happening? The organic market is increasing.</th>
<th>What has to be done?</th>
<th>What about consumers?</th>
</tr>
</thead>
<tbody>
<tr>
<td>→ National development strategy for organic farming is very important.</td>
<td>→ Marketing for organic products has to be improved. No changes in the future are to be expected.</td>
<td>→ Health concerns are very strong motives for buying organic food.</td>
</tr>
<tr>
<td>→ Quality management and traceability are important for a better organisation of supply chain of organic products.</td>
<td>→ Clear labelling of organic products is necessary to enhance market development.</td>
<td>→ Key promotional activities are education and information to consumers. Additional efforts should be made including on environmental dimension of organic farming.</td>
</tr>
<tr>
<td>→ Eco-tourism is important for the development of organic value chains</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Organic Products in Croatia
Consumers’ Attitudes, Expectations, and Behaviors towards Traditional Food in the Balkan Countries

BACKGROUND

Facts:
Balkan countries have a strong heritage of culinary tradition. The consumption of traditional food is therefore strongly connected with their cultural habits. This may have influence on what traditional food means in each country.

Purposes:
→ Measure the attitudes towards traditional food products expressed by Balkan consumers.
→ Assess the purchasing behaviour of Western Balkan’s consumers for traditional food.
→ Identify specific segments of consumers sensitive to traditional food.

Research Questions:
→ What is traditional food in Western Balkan countries?
→ Is there a different perception of tradition food between rural and urban consumers, according to the country?
→ Are there different segments of consumers sensitive to traditional food?

MATERIAL & METHODS

Same methodology in each country:
Study of the legal framework for traditional food
12 focus groups in 6 countries
Quantitative survey associated to trade-off measurement (1 200 consumers)
Analysis with a special focus on homogeneous groups of consumers

Focus on quantitative survey applied to fresh cow cheese (*Mladi sir*):
→ Ranking of 11 cards by consumers according to their preferences in a context of purchase.

→ Face to face interview with additional questionnaire.

RESULTS

Importance given to attributes by consumers in a context of purchase and their preferences between levels for each attribute:

![Figure 1: Importance of attributes](image1.png)

Clusters of consumers:

<table>
<thead>
<tr>
<th>Cluster</th>
<th>(12% - 256 resp.)</th>
<th>Cluster</th>
<th>(32% - 554 resp.)</th>
<th>Cluster</th>
<th>(20% - 238 resp.)</th>
<th>Cluster</th>
<th>(32% - 382 resp.)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Local origin</td>
<td>Rejection of industrial level</td>
<td>Rejection of high prices</td>
<td>High prices &amp; industrial production</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Less festive consumption.</td>
<td>- Fewer purchases at supermarkets</td>
<td>- More home-production, (family, friends)</td>
<td>- Fewer main cooks</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Less consumption as a child</td>
<td>- Less home-production, (family, friends)</td>
<td>- More requiring about hygiene condition for small-scale production</td>
<td>- Fewer purchases at farms, friends, families but more at supermarkets</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Less requiring about hygiene condition for small-scale production</td>
<td>- More purchases on markets</td>
<td>- Less people having finished faculty</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

![Figure 2: Partial utilities](image2.png)

Cluster 1
- Under-represented: Macedonia
- Over-represented: Croatia, Slovenia

Cluster 2
- Under-represented: Macedonia, Croatia, Slovenia
- Over-represented: Montenegro, Bosnia, Serbia

Cluster 3
- Under-represented: Bosnia, Slovenia, Croatia
- Over-represented: Macedonia (41%)

Cluster 4
- Under-represented: Bosnia, Slovenia, Croatia
- Over-represented: Macedonia (41%)

CONCLUSION

Consumers express a positive attitude towards traditional food.

Drivers for traditional food consumption are:
→ To take care of the natural content of food.
→ To promote the local or country origin of the traditional food.
→ To favour the on-farm and small dairy production.

Key adaptation of traditional foods supply should be aimed to different segments of consumers:
Those who...
...favour local origin, ...favour small or on-farm production, ...seek affordable prices, ...are more confident in industrial products.

Innovation in traditional food is better accepted for dishes than for products:
→ Is there a potential market for ready-to-eat traditional dishes sold in supermarkets?

A need to protect traditional food in order to preserve the strong heritage of Balkan culinary traditions, especially for the new generations, is highlighted.

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STUDY OF THE LEGAL FRAMEWORK FOR TRADITIONAL FOOD
12 FOCUS GROUPS IN 6 COUNTRIES
QUANTITATIVE SURVEY ASSOCIATED TO TRADE-OFF MEASUREMENT (1 200 CONSUMERS)
ANALYSIS WITH A SPECIAL FOCUS ON HOMOGENEOUS GROUPS OF CONSUMERS

CONCLUSIONS

- Consumers express a positive attitude towards traditional food.
- Drivers for traditional food consumption are:
  - To take care of the natural content of food.
  - To promote the local or country origin of the traditional food.
  - To favour the on-farm and small dairy production.
- Key adaptation of traditional foods supply should be aimed to different segments of consumers:
  - Those who...
    - favour local origin,
    - favour small or on-farm production,
    - seek affordable prices,
    - are more confident in industrial products.
- Innovation in traditional food is better accepted for dishes than for products:
  - Is there a potential market for ready-to-eat traditional dishes sold in supermarkets?
- A need to protect traditional food in order to preserve the strong heritage of Balkan culinary traditions, especially for the new generations, is highlighted.
Traditional food in Slovenia

NATIONAL CONTEXT

Among the countries that FOCUS-Balkans covered, Slovenia is the only one which is a member of EU. Nevertheless, Slovenia is part of the history of the Balkans countries. Therefore, the state-of-art of food consumer science in Slovenia was found to be very similar to other West Balkan countries.

The majority of previous researches were found to be dealing with a static description of situation in the field of “production” and “producers”. The cause-consequence interpretations were missing and a holistic approach of issues was rare. The research methodology tended to be unsophisticated and research methods applied were rather simple.

MATERIALS & METHODS

The organizing team

- Department of Animals Science of Biotechnical Faculty, University of Ljubljana: is involved in research, education and knowledge transfer in many food consumer sciences related topics: production, processing, distribution and consumption of food products.
- Slovenian Consumers’ Association (ZPS), as co-partner, transferred their comprehensive knowledge about consumer rights and protection, especially in the field of food to other partners within West Balkan Countries.

CONSUMER’S ATTITUDES, EXPECTATIONS AND BEHAVIORS TOWARDS TRADITIONAL FOOD IN SLOVENIA

Striking results

- European legislation on the protection of geographical indications and designations of origin for agricultural products and foodstuffs is implemented in Slovenia.
- 30 products protected at national level, 5 of them already at EU level, while 15 of them are in the process of EU registration.
- There is the gap between what is considered to be traditional by consumers and what is protected as traditional food product.
- The label of identification is overlooked by consumers and the meaning of label is not clear.

Recommendations

- Studies about perception of traditional food products in different target groups are needed.
- Before procedure for protection is initiated, costs and benefits analysis has to be done.
- Influence of labels of identification on positioning of products has to be clarified.

Future projects of interest

- Acceptances of traditional products between youngsters.
- Influence of traditional food on health status (obesity).
- Obstacles hindering consumption of traditional food

References:


Picture 1: Networking meeting of different stakeholders on 30th November 2010 at Department of Animals Science of Biotechnical Faculty, University of Ljubljana.

Picture 2:

(1) Extra virgin olive oil from Slovenian Istria
(2) Přeskačka činka
(3) Djija dumplings
(4) Bела Krajina cake
(5) Prekmurijski layer cake

Networking Meetings

<table>
<thead>
<tr>
<th>Place &amp; Date</th>
<th>Topic</th>
<th>Participants</th>
</tr>
</thead>
<tbody>
<tr>
<td>Domžale, 28/01/10</td>
<td>Theoretical stakes and frames; Knowledge system for food consumer research; Network building; Consumer study implementation for fruits and nutrition balance and for products with health claims; Perception of cheeses and sausages in Slovenia.</td>
<td>27 participants</td>
</tr>
<tr>
<td>Ljubljana, 7-8/10/10</td>
<td>Regional training for Consumer protection Associations from WBC organised by Slovenian Consumers’ Association (ZPS)</td>
<td>18 participants</td>
</tr>
<tr>
<td>Domžale, 30/11/10</td>
<td>Results of the Qualitative studies by particular WP’s; Strength and weakness of consumer associations in WBC, topics and contents of executive Trainings in the frame of FOCUS-BALKANS project.</td>
<td>32 participants</td>
</tr>
<tr>
<td>Ptuj, 19/05/11</td>
<td>Consumer expectations towards organic products; consumer study implementation for traditional food; Importance and future of food consumer science.</td>
<td>13 participants</td>
</tr>
</tbody>
</table>

Picture 3: Networking meeting of different stakeholders on 30th November 2010 at Department of Animals Science of Biotechnical Faculty, University of Ljubljana.
Networking

OVERALL OBJECTIVES

• WP3 focuses on the development of a network of universities, institutes, high schools, consumer associations, NGOs and private enterprises active in the field of consumer science related to food networking.

• The objective of the networking activities shall also be to better define the role of consumer associations in relation to consumer protection and to promote fair practices in food trade and product quality.

SPECIFIC OBJECTIVES

Second year networking meeting topics

a) Started with FOCUS Balkans presentation – objectives and activities, needs for cooperation and proposals for better networking;
b) Enhanced project visibility, reporting on the current research activities and exchange with other FP7 projects. Links to consumer protection;
c) Presenting country specific results and main findings for the research WP5 (fruits: focus groups, expert in depth interviews) and WP6 (health and nutrition claims);
d) Participation of guest presenters, giving their views on product development, trends on markets, policy issues & development.

COUNTRY-SPECIFIC CHALLENGES & SPECIFICITIES

**CROATIA**

- **Specificity**: constant participation of other partners of Faculty of Economics and particular product groups; multidisciplinary research community and consumer protection organisations’ participation needs to be strengthened.

**MACEDONIA**

- **Particular challenge**: Attracting industry is one of the very difficult tasks, as well as participation of consumer associations; on the other side strong consistent participation of the scientific community.

**MONTENEGRO**

- **Particular challenge**: particularly small stakeholders group, an advantage in establishing close links and cooperation, otherwise an insufficient capacity for continuous participation.

LESSONS AND RECOMMENDATIONS:

- Networking meetings need to be attractive and useful for participants, offering clear long-term benefit.
- WP leaders can facilitate in presenting of the project results and in interpreting regional and country-level specifics.
- Stronger media coverage would be beneficial, but is also quite difficult to achieve.
- Possible introduction of training for larger number of target group stakeholders.
- Networking meeting were instrumental in implementation of the research packages via creation of relevant stakeholder dialogue and partnerships.

OVERALL APPROACH TO IMPLEMENTATION

Strategic approach towards gradual and persistent construction of the network has involved several lines of handling:

1. **Multidisciplinary approach** – following the rationale of the consumer science and the idea that researchers, experts etc. various backgrounds should be connected such as nutrition, marketing, agronomy, psychology, sociology, medicine.

2. **Multi-stakeholder approach** – in addition to the various disciplines striving is to involve as many different stakeholders from the same area – health, agronomy, nutrition etc such as public and private research, governmental institutions, consumers.

3. **Continuity approach** - motivation to join for the duration of a project and to ensure stable participation on the networking meetings.

4. **Sustainability** - Identification and development of activities implemented jointly at national level (research projects, funding opportunities)… and subsequent to the FOCUS Balkans project. The level of achievement is various in different countries partly because approach is coordinated in the background of the lead national organization.

**COUNTRY SPECIFIC CHALLENGES & SPECIFICITIES**

**Slovenia**

- **Specificity**: clearly structured public, already familiar with the concepts of consumer research and the importance of exchange, accompanied by strong media coverage.

**Serbia**

- **Specificity**: focus shifted from research towards business community which has shown significant interest in results and especially recommendations, resulting in a public policy brief and some business strategy recommendations.

**Bosnia and Herzegovina**

- **Particular challenge**: to develop a national presence and to achieve network continuity due to difficult political circumstances; consequently organization of meetings demands lot of time and effort.

CASE STUDY – “ORGANIC NETWORKING”

Through its networking activities the FOCUS Balkans project has linked companies with similar goals and activities in a dialogue, offering them the platform to communicate and exchange ideas. Most often such contacts were facilitated through project networking meetings.

As a result of one bilateral meeting organized through the project, a visit of a Serbian company – GLOBAL SEED, to their Croatian colleagues – BIO VEGA was organized, and was continued with their joint visit of the company FOOD-LAND.

The outcome of this bilateral exchange is an agreement of all three companies to form a joint venture company specializing in the promotion and retail of organic products in the Western Balkan region.

ACHIEVEMENTS

- Good level of interest and positive feedback on the presented ideas and results.
- Events were very useful for better outreach within research WPs (value chain and institutional stakeholders in particular).
- Good visibility of the project – follow up in the conferences and meetings.
- Capacity building on the wider scale in the countries – follow up to the regional trainings.
- Partners and constant network members identified and animated.

OUTCOME: The Focus Balkans network continues, developing research and learning about food consumer science, connecting with Western European networks in this field.

**CHALLENGES**

- Limited ability to respond with the actual activities or invitations (for involvement in the research or some activities…).
- Still insufficient level of stakeholder involvement, especially on the continuous basis.
- Hard to break from one way communication and to animate more long term partnerships.
- Formulating the purpose of the network and the modalities for the future involvement and cooperation remains one of the biggest challenges.

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Building competences for food consumer research

BACKGROUND

Six trainings were organised within the FOCUS Balkans project to develop the competences and understanding of public organisations, private enterprises and NGOs in the WBC countries regarding food consumer science. Trainings follow the consumer research within the FOCUS Balkans work packages concentrating on specific case studies: fruits, health and nutrition claims, organic food and traditional products. Apart from the Consortium partners each training was attended by participants active in the relevant field – researchers, policy makers, activities in quality food production and local development

METHODS

The starting point for tailoring the training curricula was the inventory of the competences within the consortium, so that training fits the needs of the involved experts and organizations. It resulted in the LOGICAL FLOW OF theoretical and methodological topics for building capacity of food consumer researchers, according to the expertise and the interests.

Training 1: What is food consumer science?
February 2009; Kozara, Bosnia and Herzegovina

The first training aimed to upgrade the level of knowledge of all project partners to adopt common language and principles. The participants become familiar with theories and basic concepts related to food habits and eating behaviors and reviewed the topics like: 1. Why do people eat what they eat? 2. Food related behaviour – understanding and explaining food related behaviour and food habits. 3. Theories for the Food Consumer Science 4. Qualitative Research: Focus Groups and in depth interviews and the use of the results

Training 2: Fruit consumption research – training on theoretical basis and top current methods.
June 2009, Ohrid, Macedonia

The module included history as well as measurement of fruit consumption in WBC and Europe from consumers point. An overview of the results of the similar EU projects (such as ISO FRUIT) was given and developed scales as measurement instrument in food consumer research. The stepwise approach to social research was used as main frame for research planning. Finally, transitional influences to food consumption, consumer choices and preferences, supply chain organization were discussed in a special topical segment of transition and food consumption.

Training 3: Consumer research on products with health and nutrition claims
October 2009. Becici, Montenegro

The participants worked to understand the development of products with nutritional and health claims and the driving forces behind. Which claims, which groups of products, which are the working definitions and procedures for registration of health claim in EU, and what are the implications of highly unregulated WBC market, were some of the topics discussed. The trainees took a look at obesity from the perspective of food related behavior, the public health concerns, and explored the ways products with H&N claims could help in prevention.

Training 4: Organic food products and markets
February 2010, Split, Croatia.

Focusing on the perspectives of the organic market in the Western Balkans, the module program included discussion of the organic marketing channels and trends, research of the organic consumer and their motives, factors that affect the demand and market development... The concepts of the organic production and consumption, theories and methods for research of the consumer expectations from organic products, in particular conjoint analysis and Delphi approach, were part of this trainings agenda.

Training 5: Traditional food products and Sensory analysis
June 2010 in Brdo at Kranj, near Ljubljana, Slovenia

Consumer research of traditional food:
The trainees were introduced to the critical features of traditional foods, the issues of legal recognition and promotion, as well as to consumer expectations of the traditional food products - authenticity, traceability and specific sensory properties. In order to prove the last, sensory assessment, as a driving factor in constructing the product's typicity, was presented.

Training 6: Scientific Writing and Publishing
Improving skills for publishing results of the food consumer research
January 31st – Tuesday 01st February 2011.

As we approached the end of the project, skills and knowledge aimed to increase chances of acceptance by suitable peer-reviewed scientific journals became crucial.
The last training offered the reflection on the good quality research, discussion of the data analysis process, scientific writing – manuscripts, abstracts etc. and preparation of successful project proposals for the follow up ideas. Statistical models of data analysis (SEM and IRT) were introduced using actual datasets of FOCUS Balkans quantitative survey.

CONCLUSION

The FOCUS BALKANS training activities leave the participants with knowledge of the principles of food consumer science and its application and a good impression on the training quality as expressed in the evaluation of each training.

ACHIEVEMENTS

• Good regional coverage
• Excellent level of exchange and network established (even in heterogeneous groups)
• Becoming familiar with consumer science multidisciplinary approach
• Great interest evoked - FOCUS Balkans brand in training has been established

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Dissemination of the results

BACKGROUND

Context
All the results coming out of Focus-Balkans project needs to be spread between the partners, between the stakeholders in Balkans countries itself (government, organization, NGOs, SMEs, etc.), and in the European Union.

DESCRIPTION OF WORK

Assumptions
→ Need of knowledge in the field of food consumer science for future policy making process in health, food safety and rural development, etc.
→ Interest of local SMEs, NGOs, and institutes towards the results of the project.
→ Interest of the European Union for a better understanding of the consumption in the WBC and therefore of the potential market.
→ Bringing all the WBC to work together, to exchange and learn.

How to disseminate results?
WP11 delivers a concept of dissemination. Networking activities (WP3) and training activities (WP10) are also part of the dissemination process.

→ ETH Zürich handles the dissemination part (organization of the meetings, open seminars and publications)
→ SEEDEV has subcontracted a local agency for the frame design of the FOCUS-BALKANS web site.

The dissemination of results to the scientific community involved in food science in the WBC include methodology description and participate to the capacity building of research organizations in the region.

RESULTS

Web site: In English and local languages, www.focus-balkans.org

3 Open Seminars: Three open seminars bring together a wider spectrum of stakeholders including food supply chains representatives and policy-makers.
→ 1st Open Seminar: 2nd of February, Belgrade, Serbia
   150 participants, 5 short movies
→ Extended Networking Meeting: 7th of June, Podgorica, Mtn
   60 participants
→ 2nd Open Seminar: 23rd of September Brussels, Belgium
   80 participants

Publications for wide public
→ 4 Newsletters
→ 3 Leaflets
→ Posters
→ Presentations in conferences, seminars
→ Book about “Food Consumer Science”

Scientific papers in progress

<table>
<thead>
<tr>
<th>Title</th>
<th>Authors</th>
</tr>
</thead>
</table>
| Understanding food choice in the Western Balkan Countries (WBCs): a comparison with Western Europe, *already accepted by Appetite*
| Jasna Milosevic et al.                                              |
| Exploration of consumption of fruits and fruit products in WBC; perceptions, motives and barriers of consumers and representative experts
| Siet Sijtsema et al                                                  |
| Consumers of functional food in Western Balkans: nutritional knowledge, food choice motives and impulsiveness in food consumption
| Zaklina Stojanovic et al                                            |
| Functional food consumers’ profile in the Western Balkans
| Zaklina Stojanovic et al                                            |
| Regulated and unregulated functional food markets – A Case Study in Western Balkan
| Zaklina Stojanovic et al                                            |
| Traditional Food Products and Consumers: a Cluster Analysis over Western Balkans Region
| Georges Giraud et al                                                |
| Traditional Food Products seen from W Balkans Consumers
| C. Ambiard                                                        |
| Are Consumers of Traditional Food Products Healthy Concerned in WBC? | J. Mardon                      |
| Food Consumption Driven by Health Concerns in WBC
| J. Mardon                                                          |
| Consumption On Functional Food in Croatia*
| R. Butigan and al.                                                 |

CONCLUSION

Expected impact
→ To bring awareness about “food consumer science” in the Balkans.
→ Enhanced dialogue between consumers and food producers, including industry, in the area.
→ Contribution to regional and European nutrition and health policies.
→ Enhanced cooperation in the area of consumer science with EU and neighboring countries.
→ Contribution to consumer policy making, in particular in the areas related to health, nutrition, food safety and rural development.

Future
All the stakeholders will be invited to participate in the “Balkan Network for Food Consumer Science”, which will seek to stimulate regional and interdisciplinary co-operation.
3. Key findings and actions for further development in the Western Balkans Countries

In Western Balkans Countries, food supply chains can be relatively short for products originating from small-scale farms, but an increasing number of intermediaries take part to the commercialisation of food products in formal supply chains. The supply chain usually includes at least four main stages:

- **The farm level** which include farmers and upstream industries.
- **Processing** which could be very short or very long depending on the type of product. On farm transformation is widespread as well as industrialised processing.
- **Selling** is made by the retailers who will distribute and advertise the population about the products.
- **The consumption level** is the act of buying. The main actor is then the consumer, acting under different reasons (intra-individuals determinants and sensory characteristic of the products) and pressures (society also called inter-personal determinants).

In very short supply chains, all steps can take place on the farm or within the local communities.

![Diagram](image)

**Legend:**
- Target groups for recommendations and actions to improve the food chain
- Actions needed by the actors themself
- Actions needed from the stakeholders outside of the food chain

**Figure 1:** Scheme representing the food supply chain, its actors and the main outsiders’ stakeholders who can impact on the food chain in the Balkans.
Along these chains, there are actors (farmers, industry for transformations, wholesalers, retailers and consumers) but also outsiders who have the possibility to impact and modify the actual chain at different levels, such as: the policy-makers, universities and researchers, agricultural schools or other types of education institutions, health institutes and all type of non-governmental organisations and associations such as consumers protection associations.

The needs for further development exist at every stage of the food supply chain with different key stakeholders involved and responsible for changes.

3.1. Fruits & balanced diet

3.1.1. Key findings and today situation

Western Balkan countries have a mild climate very favourable for fruit growing. The consumption of fruits in those 6 countries presents many similarities due to common cultural habits and traditions. The food culture in the Western Balkan countries is closed to the Mediterranean diet for the regions located at the coast, and European for the East Croatia and Serbia. In the WBC, fruit consumption strongly decreased since the 1990’s but in the last years the consumption of fresh and processed fruit has increased. Although, the consumption of fruits in general is lower than in EU countries. The consumption of fruit is recommended as part of a healthy diet. All over the region the availability of traditional fruits is high combined with low prices.

The results of the research give insights to clarify the present situation in the region and to formulate future strategies to facilitate the fruit sector to increase fruit consumption.

The market

Home-grown fruits strongly contribute to the general fruits’ consumption in the region, but also make the actual production and consumption data in the west Balkans region less trustful. The market suffers on the one hand of inadequate coordination of production, quality and contract with trade and processors and on the other of the increasing influence of European retailers and their worldwide sourcing strategies to obtain low price, high quality and assortments standards.

Production

The production of fruits is divers in terms of varieties, production areas, purposes (processing, ready to eat), cooperation etc. To strengthen the production based on the market demand would improve the competiveness of the sector incredibly.

Supply chain

Due to the fact some WBC are new EU members or in transition to become an EU member, adequate strategies and actions to increase competitiveness of the processing industry and trade are necessary. Cooperation, market information and innovations are the pillars to increase this competitiveness.

Consumers

Fresh fruit consumption seems rather high, of which for a large group consumers it includes a large part of home grown fruits. Fruit is mainly consumed at home; there are no habits of out of home fruit consumption. Market strategies based on consumer segmentation will strengthen efforts to increase fruit consumption.
3.1.2. Recommendations

<table>
<thead>
<tr>
<th>Barriers</th>
<th>Options for policy and stakeholder actions in:</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Farm level</strong></td>
<td><strong>Policy makers</strong></td>
</tr>
<tr>
<td>- Lack of data.</td>
<td>- Creating a pool of data uniform and comparable with the EU.</td>
</tr>
<tr>
<td>- Lack of cooperation.</td>
<td>- Investing in nursery gardening for more specialization of production and higher quality of regional fruit production.</td>
</tr>
<tr>
<td></td>
<td><strong>Growers</strong></td>
</tr>
<tr>
<td></td>
<td>- Convincing the growers to introduce new varieties to obtain standard quality for retailers and processors.</td>
</tr>
<tr>
<td><strong>Processing level</strong></td>
<td><strong>Stakeholders of the fruits’ supply chains</strong></td>
</tr>
<tr>
<td>- Lack of vertical communication and collaboration.</td>
<td>- Strengthening competitiveness of the sector also via improved supply chains’ agreements and the establishment of viable producers’ organizations.</td>
</tr>
<tr>
<td></td>
<td>- Fostering the networks between supply chain stakeholders and supporting institutions.</td>
</tr>
<tr>
<td></td>
<td>- Establishing a major need of direct linkages between processors and producers.</td>
</tr>
<tr>
<td></td>
<td>- Improving the infrastructures and equipment; the implementation of HACCP system and other HACCP-based quality standards, such as IFS and BRC for those companies that are connected to export markets.</td>
</tr>
<tr>
<td></td>
<td>- Stimulating cooperation between processors and growers, in terms of quality and finance.</td>
</tr>
<tr>
<td></td>
<td>- Encouraging the growers to skip uncertainties and shortage in supplies and to stream the raw material supplies towards the processors.</td>
</tr>
<tr>
<td></td>
<td>- Encouraging products’ differentiation strategies.</td>
</tr>
<tr>
<td><strong>Retailers</strong></td>
<td><strong>Retailers</strong></td>
</tr>
<tr>
<td>- Lack of marketing based on (regional) added value.</td>
<td>- Improving the marketing of final fruit processed outcomes.</td>
</tr>
<tr>
<td>- Lack of quality.</td>
<td>- Adopting the signs and the marks to better communicate on origin and on quality.</td>
</tr>
<tr>
<td></td>
<td>- Reflecting on a higher level of specialization of production.</td>
</tr>
<tr>
<td></td>
<td>- Improving the logistics.</td>
</tr>
<tr>
<td><strong>Consumption level</strong></td>
<td><strong>Health Institutes</strong></td>
</tr>
<tr>
<td>- Lack of knowledge and awareness about healthy diet.</td>
<td>- Information and promotion about fruits consumptions to change habits, especially for children for example in schools.</td>
</tr>
<tr>
<td>- Lack of research about fruit market and consumption in WBC.</td>
<td>- Promotion aimed at specific segments.</td>
</tr>
<tr>
<td>- Lack of insights in position of home-grown fruits.</td>
<td>- Improving the knowledge about how to address recommendations to the consumers.</td>
</tr>
<tr>
<td><strong>Consumers associations</strong></td>
<td><strong>Consumers associations</strong></td>
</tr>
<tr>
<td></td>
<td>- Sensitizing the population to local fruit consumption.</td>
</tr>
<tr>
<td></td>
<td>- Promoting the ‘out-of-home’ consumption.</td>
</tr>
<tr>
<td></td>
<td>- Making the awareness of fruit safety.</td>
</tr>
<tr>
<td><strong>Research/scientists</strong></td>
<td><strong>Research/scientists</strong></td>
</tr>
<tr>
<td></td>
<td>- Increasing the research about the trends in fruits consumption to better estimate close future and integrate it in adapted actions plan.</td>
</tr>
<tr>
<td></td>
<td>- Researching more about fruit consumption (multi-disciplinary studies) and the quantities of home grown production.</td>
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<tr>
<td></td>
<td>- Developing support for a better consumers’ segmentation.</td>
</tr>
<tr>
<td></td>
<td>- Researching on the perception of processed fruits.</td>
</tr>
</tbody>
</table>
3.1.3. Focus on the research needs for the future

In general, research on fruit, including on consumers’ behaviour and expectations and on food habits, on technical as well as on sensory aspects are needed. This research must provide data to strengthen the competitiveness of the fruit sector, both at national as well regional levels.

The majority of consumers have a positive attitude towards fruit consumption. They consider that eating fruit is a pleasure. Next to pleasure, health is another main motive for fruit consumption. The aspiration at a better health is, both in West Europe and the WBC, one of the main drivers for the consumers to eat fruits. Research to increase insight in consumer behaviours, attitudes, preferences and willingness to pay, based on socio demographic data, as important predictors of consumer behaviour, is needed for the policy makers and the industry stakeholders in order to define and implement adequate strategies for the commercialisation and consumption of the fruits.

To align statistical data collection per country especially including home-grown production and consumption of fruits will give more information about the fruit intake per capita, the share of family orchard in yield, the production area, etc.

3.2. Products with health claims

3.2.1. Key findings and today situation

The market

The market of products with health claims seems to be one of the fastest growing segments of food industry in Europe and worldwide. This trend of market’s increase is already present in Slovenia and Croatia and upcoming in the rest of the Western Balkan countries (Serbia, Montenegro, BiH, and Macedonia). Young, educated, wealthy and urban women are the main consumers. The health claims are related to nutrition labelling. Thus, the analysis of the WBC market, which is rather underdeveloped, is necessarily based both on observation of products with nutrition and health claims (N&H claims). The shop-checks in 2010 have identified 475 different N&H products in all six WBC. Regarding the consumers’ preference for a particular origin, it seems that the WBC consumers tend to prefer the domestic products. However, when the origin of brands and manufacturers are observed, significant differences appear among WBC.

Production and supply chain

Both processors and retailers in WBC find the price of the products with H&N claims absolutely the most important factor influencing the local consumers’ choice. However, they also see a growing importance of health benefits of food. The main barriers for the market development are consumers related. Eating habits are the most important problem quoted by the interviewees, followed by the consumers’ lack of awareness and knowledge. Processors mostly complain about the limited shelf space in retail chains for which “they have to fight”, since retailers put priority on conventional products with higher turnover. Having in mind the rising importance of the health claim product market, some retailers in Slovenia have developed their private labels of healthy food, thus giving less space to private companies using their own brand name. Processors in WBC are highly dissatisfied with the national policies for nutrition. Namely, in most of the countries such policies have not been developed (Serbia, Montenegro, Macedonia, Bosnia and Herzegovina) or, even existing, they are not properly implemented (Slovenia).
Consumers

Generally speaking, consumers are aware that eating the ‘right’ foods can improve their quality of life. However, at the same time, there is no consensus on what ‘right’ foods are (the most frequent associations are ‘natural’, ‘fresh’, ‘with no dangerous additives’). Our study shows that WBC consumers associate healthy food mostly with natural and unprocessed products. Thus, it is interesting to get a deeper understanding of factors determining consumers’ acceptance of the health claim products.

Supplying products with health claims on the market can be useful for the image of the brands: the consumers may perceive this as innovative and socially responsible. It is however a complex process, as the health claims have to be scientifically proved and, more important, well communicated to the consumers. Based on the experts’ interviews, the best strategy identified is to choose and combine several health effects that are most important for the population health (e.g. cardio-vascular diseases and diabetes) and work on their promotion together with public health institutions. The market development is most likely linked with the existence of an effective public policy. The proactive public policy can promote the concept of healthy lifestyle and healthy eating in the region. At the same time, the regulation of the market increases the trust of the consumers, and supports efficiently the efforts of communication: the scientifically sustained information related both to diet-health and to diet-disease may be seen as reliable by the consumers.

The most important barriers and options for actions for the policy makers and stakeholder are listed in the table below.


### 3.2.1. Recommendations

<table>
<thead>
<tr>
<th>Barriers</th>
<th>Options for policy and stakeholder actions in:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Processing and retailers level</td>
<td>Supply chain stakeholders&lt;br&gt;- Enhancing cooperation between universities, research institutes and industries.</td>
</tr>
<tr>
<td>- Lack of cooperation.</td>
<td>Retailers&lt;br&gt;- Leveraging the marketing efforts to increase consumer awareness and knowledge about health claim products.</td>
</tr>
<tr>
<td>- Lack of legislation.</td>
<td>Ministry of Agriculture&lt;br&gt;- Enhancing the co-operation among the government institutions involved in food safety issues and the NGO’s by the creation of a network or platform.</td>
</tr>
<tr>
<td></td>
<td>Ministry of Health&lt;br&gt;- Adopting the most relevant EU legislation in the WBC region.&lt;br&gt;- Forbidding the use of claims that might mislead the consumers.</td>
</tr>
<tr>
<td></td>
<td>Government&lt;br&gt;- Allocating the resources in order to build the adequate institutional capacities.</td>
</tr>
</tbody>
</table>
### Barriers and Options for Policy and Stakeholder Actions

<table>
<thead>
<tr>
<th>Consumption level</th>
<th>Options for policy and stakeholder actions in:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Health institute</td>
</tr>
<tr>
<td></td>
<td>- Intensifying public awareness campaigns about health claim products and diet.</td>
</tr>
<tr>
<td></td>
<td>Consumers association</td>
</tr>
<tr>
<td></td>
<td>- Giving incentives to the consumer associations in order to support them in their efforts to educate/inform the WBC population.</td>
</tr>
<tr>
<td></td>
<td>- Controlling and testing products, as food safety is an important criterion for consumer choice of food.</td>
</tr>
<tr>
<td></td>
<td>Research</td>
</tr>
<tr>
<td></td>
<td>- Researching about the vulnerable consumer groups and “nutrition transition”.</td>
</tr>
<tr>
<td>Lack of awareness.</td>
<td></td>
</tr>
<tr>
<td>Lack of trust.</td>
<td></td>
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<tr>
<td>Lack of knowledge and information.</td>
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</tbody>
</table>

### 3.2.2. Focus on the research needs for the future

Our study confirms that the market is going through multidimensional transition - from young to the elderly population, from higher income class to middle class layers, from women to men. For example, in more developed WBC markets (Slovenia and Croatia), the most interesting population for the industry of N&H products is extended to mothers who are seen as households’ gatekeepers. Elderly with higher and middle income also became interesting consumer group for these products. The athletes and businessmen are seen as the newcomers. An emerging market practice observed in our study indicates that perception of health claims might highly depend on the communication’s effectiveness. While examining the food choice process through numerous qualitative interviews conducted all over the 6 WBC under review, the effective health claim should be: (1) understandable to the consumers (simple, not overly scientific); (2) convincing (officially confirmed by independent institution or regulatory body); (3) relevant and specific (consumers should feel them targeted by the product). Further research should be directed toward the analysis of the ‘health related official labels’ that would facilitate the faster market growing. Special attention has to be paid to the form under which the statements/claims should convey relevant information to targeted consumers. Without a clear policy, the meaning of the statements/claims would remain mostly unknown to the wider public. The communication is a main tool that may impact the level of consumers’ knowledge and their attitudes. Adequate communication may facilitate the reshaping of their decision-making processes. This is particularly true if the market is emerging, if the product is made of novel ingredients or if its health benefit is not widely known.

The findings show that the WBC market of health claim products is driven by the supply (the producers). The companies currently operating on the market are strongly oriented toward the social responsible behaviour – they put more and more emphasis on marketing of the benefit for the consumer related to his health and wellbeing. Thus, the development of the market relies on producers’ incentives to offer new, hi-tech products that will compete with conventional products in the same group (competitive relationships). Future research should be also focused on the stakeholders’ behaviour in the food system. More emphasizes should be put on deeper analysis and understanding of motivations and barriers both to produce and to sell the ‘health claim’ products. The food companies’ innovativeness should be addressed as well. Our research did not focus on farm level and the role that primary sector might have in the building up of a healthier diet. Technology improvements that might change farmers’ practices toward production of healthier food are an increasingly interesting focus. Further research might cover different aspects of the basic technology studies, which also may be associated with consumer acceptance of novel foods.
Finally, the food and health policies should serve as leading factors of accelerating change on products with health claims market in the future. Thus, to align the agro-food supply chain with healthier diets, key regulative aspects of nutrition labelling have to be taken into consideration. Government intervention should create a framework for positive industry action. The future research should be focused on the institutions that can help in better aligning the growing agro-food supply chain with the development and adoption of healthy diets. The institutional reforms should be targeted toward the design of the most effective tools to help public health systems to tackle more efficiently with the growing problems of food related diseases. The public health officials cannot leave this issue to chance. The extensive public programmes are needed to support and facilitate the adequate consumption of food that would lead to the healthier food choices. However, nutritional transition is not addressing the same diet-health related issues for developed and developing countries. Beyond, scientists should lead further research toward the specific problems - from malnutrition to obesity and pay special attention to the vulnerable consumer groups.

3.3. Organic products

3.3.1. Key findings and today’s situation

Compared to developed European markets and the other western markets in the organic food sector, the WBC markets are relatively young and very small.

The market

Committed market actors, farmers associations, stakeholders in rural development and environmental protection, consumer associations and policy makers act in favour of the expansion of the organic sector. In the last twenty years, the production organic production was sufficient but was not called officially organic production. During the last ten years, the market actors and their associations, but as well foreign market actors and policy makers have often pushed the sector evolution with regard to different aspects:

- **Official regulation:** in most WBC, national laws give a framework to the production and marketing of organic products. The legal framework complies with the model of EU regulations.

- **Certification:** in all WBC, domestic or international certification bodies control the organic production and guarantee the respect of the domestic law or/and of international standards.

Production

As a consequence, a clearer framework (legal frame and certification) has triggered production growth in all countries. Wild products collection plays an important role in the overall organic raw material production, mostly dominating the agricultural production. Furthermore, plant production is more significant than animal production.

Supply chain

Supply chains are generally short, with much direct selling on the domestic market. The best-developed supply chains, with intensive and high quality processing industry, are to be found in the export sectors.

Consumers

Generally spoken, regarding all the food markets in WBC, there the consumers have a growing interest to buy organic food products. The barriers are nevertheless high; there is still no clear image of organic. The willingness to pay more is therefore very limited. Mostly in rural areas, but as well generally, organic products compete with traditional and artisanal home made products.
### 3.3.2. Recommendations

<table>
<thead>
<tr>
<th>Barrier</th>
<th>Options for policy and stakeholder actions in:</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Farm level</strong></td>
<td><strong>Policy makers</strong>&lt;br&gt;- Organizing producers in associations and cooperatives.&lt;br&gt;- Encouraging regional production basins, foremost for milk, cereals, vegetables and beef &amp; meat.&lt;br&gt;- Subsidising for converting and / or maintaining organic agriculture.&lt;br&gt;- Supporting the extension service for new organic farmers.&lt;br&gt;- Supporting the know-how transfer on regional, national, international level. Creation of network.&lt;br&gt;- Making the specific organic inputs and specific technology available and affordable.&lt;br&gt;- Insuring the transparency and the accessibility of the labelling schemes.&lt;br&gt;- Making transparent the commodity prices.&lt;br&gt;- Facilitating the market access and improving the marketing conditions. <strong>Education</strong>&lt;br&gt;- Teaching and training on organic production, quality management, marketing.&lt;br&gt;- Teaching organic farming in schools and universities.</td>
</tr>
<tr>
<td>- Lack of available organic agriculture inputs.&lt;br&gt;- Economic and organizational risk for the farmers.</td>
<td><strong>Supply chain</strong>&lt;br&gt;- Encouraging vertical link-up with agriculture on the one side and distribution on the other.&lt;br&gt;- Strategic positioning of processing units in the production centres.&lt;br&gt;- Encouraging cooperation between sectors. <strong>Education</strong>&lt;br&gt;- Teaching and training about organic food processing, resourcing, quality management and marketing. Industry associations and know-how transfer from conventional to organic. Market intelligence services, market research.&lt;br&gt;- Teaching organic processing in schools and universities. Benchmarking studies.&lt;br&gt;- Teaching organic supply chain management in agricultural schools and in the Faculties of Agriculture in the universities. <strong>Policy makers</strong>&lt;br&gt;- Clarifying labelling and certification. <strong>Consumers associations</strong>&lt;br&gt;- Enhancing trust and knowledge about organic.&lt;br&gt;- Providing online information. <strong>Research</strong>&lt;br&gt;- Conducting market research.&lt;br&gt;- Conducting consumer research.</td>
</tr>
<tr>
<td><strong>Processing level</strong></td>
<td><strong>Supply chain</strong>&lt;br&gt;- Encouraging vertical link-up with agriculture on the one side and distribution on the other.&lt;br&gt;- Strategic positioning of processing units in the production centres.&lt;br&gt;- Encouraging cooperation between sectors. <strong>Education</strong>&lt;br&gt;- Teaching and training about organic food processing, resourcing, quality management and marketing. Industry associations and know-how transfer from conventional to organic. Market intelligence services, market research.&lt;br&gt;- Teaching organic processing in schools and universities. Benchmarking studies.&lt;br&gt;- Teaching organic supply chain management in agricultural schools and in the Faculties of Agriculture in the universities. <strong>Policy makers</strong>&lt;br&gt;- Clarifying labelling and certification. <strong>Consumers associations</strong>&lt;br&gt;- Enhancing trust and knowledge about organic.&lt;br&gt;- Providing online information. <strong>Research</strong>&lt;br&gt;- Conducting market research.&lt;br&gt;- Conducting consumer research.</td>
</tr>
<tr>
<td>- Lack of domestic processing.&lt;br&gt;- Lack of domestic supply chains.</td>
<td><strong>Consumption level</strong></td>
</tr>
</tbody>
</table>
3.3.3. Focus on the research needs for the future

Research about organic products and its market are needed at every stage of the supply chain.

At the farm level shortages have been noticed which prevent farmers to convert into organic farming. Universities but also agricultural research institutes and even farmers themselves should tackle the following concrete research questions, as being the ones who know and deal with their local agro-system every day.

- What are farmers’ motivations and barriers to convert (or not to convert) into organic farming?
- What are the organizational, structural, societal (etc.) challenges?
- What are efficient ways of informing farmers?
- How to reduce transaction effort (information, teaching & training, quality control, marketing)?
- How to cooperate horizontally?
- What are the tendencies in production?
- What is the development of the WBC organic production?
- What species, varieties and breeds are needed for organic agriculture and husbandry in WBC?
- What adaption of agriculture techniques is necessary?

For this topic research, supply chain analysis or SWOT analysis could be used but also production statistics (acreages, yields, herds, etc.) and research on species, varieties, breeds, techniques and technology.

At the processing and distributing level, the point of view of experts, sector by sector and cross sector and SWOT analysis could be possible approaches to answer to the following research issues:

- How to link up to local production and to local distribution?
- How to reduce transaction costs in information uptake, innovation, supply, quality control and marketing?
- What information and innovation is needed?
- Which organizational structures are in favour of organic processing?
- How to link up to local production and processing?
- How to cooperate/communicate vertically?

At the consumption level, qualitative research on motivations and barriers towards organic food consumption should be reinforced and linked with quantitative research on attitudes and behaviour. There is a need to better understand the general consumption trends and the efficient ways for the information’s’ uptake by the consumers.
3.4. Tradtional food

3.4.1. Key findings and today situation

Balkan countries have a strong heritage of culinary traditions. Therefore, consumers find a lot of traditional foods in Western Balkan Countries (WBC). In some WBC, many products are already registered and protected in a legal framework. However, traditional food is not only limited to registered products under a legal framework. All the WBC does not share the same level of regulation for traditional products. This regulation may be scarce in some countries and well developed in others. However, in a context of economic transition, the existing regulations tend to comply more and more with EU regulations for traditional products. The main objectives of this EU regulation are to keep a diversified agricultural production, to encourage rural development of less-favoured areas, to give clear information to consumers regarding the origin of products and eventually to harmonise the legal protection framework for Geographical Indications. The EU framework also intends to prevent unfair competition between producers and enhance public credibility of Protected Designation of Origin (PDO), Protected Geographical Indication (PGI), and Traditional Specialty Guaranteed (TSG) schemes. This strategy seems supported by the study outcome as 80% of the Balkan consumers think that traditional products should be protected and consider as an important purchase criterion for traditional foods the geographical origin. However, the concept of traditional products being wider than the PDO, PDI, TSG schemes, some other concepts as for example “on farm”, “regional” or “local” products exist and meet consumers’ demand as a counterforce to the development of agro-food processing industry. It seems important to preserve the strong heritage of Balkan culinary tradition, especially for the new generations. Throughout the study on traditional food, some limits regarding production, processing, information, regulation and communication have stood out.

Speaking at a market level, the current limits regarding regulation for traditional food products in WBC are more focused on the control and inspection framework, which should be established or improved according to the country and the type of food. A need for transparency is also highlighted. The study on traditional food underlined a lack of confidence about hygiene practices especially for small-scale production. Then, the consumers expect that the regulation about traditional products will enhance the sustainability and the diversity of food.

At the production/processing level, some expectations have been identified. According to our study, a segment of consumers aspires to high quality traditional food products, even if prices are a bit higher. Consumers trust such products. However, it is important not to forget that in the region price is a barrier for important segments of consumers. In addition, according to focus groups held in WBC, the negative aspect of traditional products that stands out is related to health concerns because traditional food is often considered too fat or salted. There is a need to think about health issues and to improve the nutritional content of those products.

Some advices are also given to retailers, especially about packaging and information to spread to consumers. A lack of promotion of traditional products is observed. Food miles labelling, information about nutritional and natural content, innovative packaging may be drivers for consumption for example.

At a consumers’ level, a lack of knowledge was noticed on traditional food products. There is no clear definition and GI’s are not well known by consumers. There may be also a confusion between organic and origin labels. Better information of consumers about labels, regulations and their stakes should be developed, including information and education programs.
### 3.4.2. Recommendations

<table>
<thead>
<tr>
<th>Barrier</th>
<th>Options for policy and stakeholder actions in:</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Farm and market level</strong></td>
<td><strong>Policy makers</strong>&lt;br&gt;- Implementing of control system adapted to the different types of traditional food products to bring transparency and hygiene in the chain. Food hygiene regulation adapted to small local workshops instead of formatting hygiene practices on big factories standards.&lt;br&gt;- Taking into account the impacts on the environment and native biodiversity when promoting a traditional product. (Avoid generalization of a traditional product, a loss of its specificity, and endangered local biodiversity.)&lt;br&gt;- Giving incentive to small-scale processing collective initiatives to offer a wider range of products including some ready to eat and easy to conserve traditional products.&lt;br&gt;- Protecting local names via EU regulation of GI scheme, preferably PDO, instead of promoting strong private branding policy.</td>
</tr>
<tr>
<td>- Lack of hygiene control and transparency.</td>
<td><strong>Supply chain stakeholders</strong>&lt;br&gt;- Creating of a luxury traditional product brand, with high quality and high prices to reach a new segment of consumers and tourists.&lt;br&gt;- Offering of traditional products with labels and controls in small shops, supermarkets.</td>
</tr>
<tr>
<td><strong>Processing level</strong></td>
<td><strong>Retailers</strong>&lt;br&gt;- Food miles labelling compulsory on the packaging to promote the short distance transportation and highlight the smaller carbon footprint.&lt;br&gt;- Communicating clearly on traditional products nutrients and healthiness.&lt;br&gt;- Depending on the chain/market: adapt packaging or sold loose.&lt;br&gt;- Maintaining green markets, not only favour the opening of several supermarkets.</td>
</tr>
<tr>
<td>- Lack of variety of products.</td>
<td><strong>Health institute</strong>&lt;br&gt;- Using of the packaging to educate people on how to consume traditional products for a healthier diet.</td>
</tr>
<tr>
<td><strong>Retailers level</strong></td>
<td><strong>Research</strong>&lt;br&gt;- R&amp;D on appropriate labelling solution (sold loose…) and market.</td>
</tr>
<tr>
<td>- Lack of differentiation between products and of communication (advertisement) about traditional food.&lt;br&gt;- Lack of retailers in some areas.</td>
<td><strong>Consumption level</strong></td>
</tr>
<tr>
<td><strong>Consumers association</strong>&lt;br&gt;- Providing vulgarization on the difference between organic and traditional food products. Having clear labels.</td>
<td><strong>Consumers association</strong>&lt;br&gt;- Providing vulgarization on the difference between organic and traditional food products. Having clear labels.</td>
</tr>
</tbody>
</table>
3.4.3. Focus on the research needs for the future

There are some studies concerning traditional food products in Western Europe but few of them are about consumers’ perception and behaviour. Interesting results are available about consumers’ perception and traditional food but they focus on European countries. For Balkan countries, this study may therefore be considered as original, especially because it includes both qualitative and quantitative approaches. However the results are applied on fresh cow cheese and not on traditional food products in general (except qualitative results). This may highlight a specific behaviour towards cheese, so it will be interesting to conduct the survey on another category of product as meat for example.

In addition, there are no real studies about foreign tourists’ perceptions of WBC traditional food products. Their export possibilities, which are currently quite limited, should be explored for the traditional food products sector development.

Moreover, in the study, health concerns appeared towards traditional food products, especially for people who control their weight or those who have diseases. Future research to improve the nutritional content of traditional food products will be interesting, including firms, scientists and stakeholders. Innovation may be considered to adapt the offer to new lifestyles. It will be also interesting to study the place of traditional food in a healthy diet.

Research more focused on economy of traditional food highlighting the benefits to protect by origin labels this traditional food in Balkan countries will be interesting to convince authorities to protect it according to a legal framework.
4. Need for future research on food consumer science in the Balkans

For all the four studied markets (fruits, products with health’s claims, organic products and traditional food), there is a need of future research on food consumption, food and health policies, and markets’ trends. The recommendation is to develop the collection of reliable data on food consumption, so to increase the scientific-based knowledge in three main general directions.

1. Research about consumers: food intake, food behaviour, consumers’ beliefs, expectations, preferences, motives and attitudes.

The main characteristics of the food intake and the food diet are highly related to food culture and habits. Therefore, the Balkan consumers are not behaving as the Western European consumers. Even if Western Balkan is a region where a strong common culture heritage leads to similarities in the food behaviour, local differences are noticeable. Food and health policies have not yet provided their impacts to enhance the general level of wellbeing of the population. Hence, it is necessary to reinforce the research particularly in these countries, both in terms of market development and public policy improvement.

2. Research about the communication and the information policies and tools (efficiency, targeting, content, up-taking, etc.)

There is a general need to improve the communication between the stakeholders within the food system, and especially towards the consumers. This goes along with the improvement of spreading information among the stakeholders of the food system. Research should play a major role in developing innovative ways of communications, extensions, labializations, etc.

3. Market research: structure, functioning, rules, organisations, standards, investments, etc.

The research should provide qualitative and quantitative data about the trends of each market to better evaluate future opportunities and threats. The various stakeholders need these data complementary to the research results on consumers, in order to elaborate the most appropriate strategies.

Networking on food consumer science in Europe

The development of an extended European network on food consumer science would increase the quality and the reliance of the research. This is needed as an infrastructure to get real impacts of the research.

Food consumer science is currently a rather poorly defined field involving a broad range of scientific disciplines. There is therefore a need to develop new knowledge and new working methods in this field. The Balkan network has been created, but needs to be strengthened and expanded. So, a common European network, including the Western Balkans, should be created and should involve all the concerned disciplines. This is the only way to better promote new knowledge and to strengthen the consumer science in Europe.

Understanding consumers’ behaviour and consumers’ preferences plays a major role in improving food industry competitiveness, as well as improving the health and wellbeing of the European and Western Balkan citizens. The development of a critical mass (scientists, scientific disciplines, facilities, etc.), facilitation and promotion of data exchange, joint activities (protocols, metrics, collaborative studies, etc.) and comparability of research actions in the field of consumer science in food is today needed.
5. Partners of the project

5.1. ETH Zürich (coordinator of the project)

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She has interest in the consumer science, the quality of food, the strategies and the policies regarding food safety, food quality and the labelling of food. She is agro-economist and has particular skills in the Transaction Cost Theory in the frame of food value chain analysis. She is international expert for the FAO, UNIDO and the European Commission. She coordinates the FP7 FOCUS-BALKANS research program.

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Recently graduated from AgroParisTech, National Graduate School of Agronomy based in Paris, Delphine is specialized in Agricultural Development. She followed the master “Compared Agriculture and Agricultural Development”, headed by Prof. M. Dutumier, who gave her knowledge in agriculture, economics and social sectors. Following her master thesis, she worked for AGRIDEA in the department of rural development and finally for ETH as assistant coordinator for FOCUS-BALKANS.

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She has experience in development policies and local food production, with a focus on South Eastern Europe. Her main interests are institutional and public policy aspects for origin labelled products and, more generally, agriculture as well as anthropologic and social dimensions of knowhow and links to “terroir”. She was involved in several international research and cooperation projects (SINER-GI 2005-2008; FAO “Quality linked to geographical Origin”).
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Pascal graduated M.A. in Agro-economics in ETH Zürich and worked in Western Africa and Latin America. Since 1999, he works in the Balkans and in the Caucasus with specific emphasis on agriculture and rural development. Since 2006, Pascal has worked on various projects related to Rural Development with a specific emphasis on the development of Geographic Indication systems Bosnia, Serbia and Croatia.

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With a B. Eng Mechanical Engineering and a M.Sc. Environmental Technology from Imperial College London, Josip has worked in Norway on sustainability issues for Norsk Hydro. Since 2002, he has been involved in the private agri-business sector in Croatia. Currently, he is running SEEDEV Croatia, and working on rural and agribusiness sustainability projects.

Dragana Tar
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The interdisciplinary approach in education and professional work has been a main drive for her career. She holds a Master degree in Development studies, and a combined experience of work in environmental field, organizational development of civil sector, and consultancy in rural development in Balkans and Caucasus. Currently, Dragana is mostly involved in the study and protection of traditional products, working as a trainer and facilitator.

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Between 2004 and 2007, Goran was the Assistant Minister and later Minister of Agriculture in Serbia. Previously, he worked three years for the UN FAO. He is currently working on agriculture and rural development projects in Western Balkan and Caucasus region for FAO, UNDP, EC, World Bank and other organizations. Since 2008 he is member of Board of directors of ProCredit Bank Serbia.

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He is the Director of IPSOS Strategic Puls of Serbia. Ipsos Strategic Puls is the largest full service company for market, media and public opinion research in the region. Ipsos Strategic Puls’ main dedication is providing best quality, reliable research in the region, and clearly contribute to client’s success by providing value added analysis and actionable recommendations.

Dr Jasna Milošević Đorđević

She is a senior consultant in IPSOS and a lecturer for Social psychology and methodology issues on the Faculty of Media and Communication; Department of Psychology. Master and PhD thesis related to voting behaviour and national identity, at the University of Belgrade. She published book on national identity and over 30 scientific articles in national and international Journals. She worked on various projects related to political public opinion issues and media, with a specific emphasis on the development of the region.

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Dr Siet Sijtsema

With expertise about consumer oriented product design, Siet participated in several EU projects about consumers’ perceptions of food. Multidisciplinary approaches and qualitative research methodology are her main interests. Within Focus Balkans she took care of the scientific content of the training curricula and the quality of the consumer research about the fruit studies fruit in WP5.

Karin Zimmermann

Her expertise is on market trends and strategy and consumer driven chains and product developments and has been involved in quantitative and qualitative market and consumer research. She is project manager and has participated in several FP6 and FP7 European projects as WP- and task leader and as member of the Management Committee. In FP7 EU-project Focus Balkan she is the administrative coordinator for the Netherlands and work package leader of WP5.

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As senior researcher in food consumer science since 1993, he wrote over than 200 publications including several ones in peer-review process in the fields: Agricultural marketing; Consumer science; Food economics; Geographical Indications; Rural development; Retail studies. G. Giraud was partner or coordinator of EU funded projects.

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Julie is an Assistant Professor at Department of Food Quality & Economics of VetAgro Sup and works in the research unit CALITYSS (Consumer, Typical Food Products and Health). Her main research area is the nutritional quality of food. Julie is graduated as Agronomist from ENSBANA Dijon and got her PhD in Nutrition at INRA (French National Institute for Agricultural Research).

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Matthew has contributed to various projects on the restructuring of the agro-food sector in Central and Eastern Europe. This has included work on agricultural water management in the Western Balkans and rural development policy in the New Member States of the EU.

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John has acted as coordinator for two EU INTAS projects on the restructuring of food supply chains in the former Soviet Union. His main research areas are supply chain management, especially in the agro-food industry of Central and Eastern Europe, and brand management. He teaches marketing communications and marketing theory at the University of Plymouth.

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Agricultural engineer, PhD on Organic markets in Germany, Burkhard Schaer co-founded Ecozept in 2000. He participated in more than 180 projects on food marketing for private enterprises, research bodies and government agencies in different countries and is involved in European research projects. Teaching activities: food marketing (guest lecturer) at several universities.
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Graduate Agro-food engineer (AgroParisTech Massy), she has also a Master degree of psychology (Université Paris-V-Sorbonne). Martine has joined GEM, a private consulting company specialized in agro and agro food sector in 1980. She coordinates market studies, value chain analysis, consumers’ behaviour analysis in France and European countries. She has performed more than one hundred studies for private agro-food companies all over Europe for public and professional organizations.

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Ljiljana is specialist of hygiene. She is author of over 70 professional and scientific works presented at national and international professional congresses and conferences. She was main researcher in the Project Endemic strum and iodine prophylaxis. She has participated in several projects related to nutrition and environmental protection. She has been member of working groups for developing legislation and policy in the field of food safety.

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Borko is medical doctor. Since 2009 he worked at Institute of Public Health Montenegro in Department of Nutrition and food hygiene. In 2009 he assigned postgraduate studies in Public health in University of Podgorica and in 2010 he started specialization in Hygiene and Preventive medicine at University of Belgrade - School of Medicine. During his work he was involved in number of educational seminars, workshops and trainings about public health aspects and nutrition.

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She graduated at the Faculty of Philosophy. She works in the Centre for Science, as an assistant for scientific-research activities. She has contributed to implementation of many partnership projects related to life style impact on health, with special emphasis to vulnerable group (Project “Support to the implementation of HIV/AIDS Strategy in Montenegro”, funded by Global Fund to Fight HIV/AIDS, Malaria and Tuberculosis; Sustainable elimination of disorders caused by insufficient iodine intake; Global Youth Tobacco Survey in population of school children, supported by WHO).

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