

WP7: Delphi first round Questionnaire

Country: SLOVENIA

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Partners

- Ministry of Agriculture, Forestry and Food of the Republic Slovenia
- Control / Certification body – Institute KON-CERT Maribor
- Biotechnical Faculty
- Department of Animal Science of Biotechnical Faculty
- Chamber of Agriculture and Forestry of Slovenia
- Agriculture Extension Service of Slovenia
- Union of Slovenian Organic Farmers Associations (USOFA)
- MERCATOR d.d., Ljubljana
- TUŠ d.d., Celje
- Organic shop “Kalček”, Ljubljana

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Q1: The most important influences that have shaped the development of the organic market in the past 10 years

- National and EU policies and regulations concerning organic production and processing
- EU agricultural development strategies – sustainable forms of agriculture – organic farming
- Slovenia's accession to the EU
- Examples in neighbouring countries, particularly Austria and other west European countries
- Promotion – especially promotion programme "Bio Delight"
- Media reporting on the impact of organic products on public health
- Purchasing capacity of informed consumers
- Consumer awareness and behaviour
- Increased recognisability of organic products
- The possibility to sell at higher prices which partly make up for lower production and greater effort involved (mainly manual work)
- The willingness of store chains to include organic products in their offer
- Establishment of local organic marketplaces
- Improved organisation of the production and processing chain
- Environmental topics that automatically make people consider organic food as an environment-friendly solution;
- Increased attention paid to climate change
- National campaign "Nothing added, nothing taken away"

Q2: How would you describe the current state of the organic market (including regional variations, if any)?

- The Slovenian organic market is divided into two parts.
- A large share of domestic products is sold at farms, i.e. directly from the producer.
- Other domestic organic products are sold at marketplaces, various events, through public procurement, and to some extent in the stores
- The other large portion of the market with organic products, sold in large stores, includes imported organic products
- Better organisation within the agricultural and processing chain of organic products is necessary
- Organic products are best sold where the purchasing capacity is the highest, i.e. in the capital Ljubljana and in areas where population is more aware of the importance of the environment and healthy food.
- As regards organic crops and food products, many traders have taken advantage of increased demand for organic food products and expanded their offer with imported organic food products.
- Several trade companies have shown interest in cooperating with organic farmers.
- Certain companies began to offer organic products on the Internet
- The volume of trading is mainly related to the purchasing capacity of consumers in a certain region and to the vigour of the regional association of organic farmers
- Slovenian retailers stores offer mainly organic products from EU countries, some goods from the southern hemisphere and the Equator, and only a few products of Slovenian origin

Q3: How do you expect the organic market to develop over the next 10 years?

- The organic market will probably continue to develop in the manner established so far:
 - Large number of distributors of imported organic food
 - Imported organic food (possibly repacked in Slovenia) will prevail in retail chains and stores
 - Organic farmers will not integrate and will thus find it difficult to participate in public procurement and gastronomy supply
 - Web stores supplying baskets might become more successful (mainly in Ljubljana)
 - Door-to-door selling is very interesting and could have some potential
- The importance of the organic market will grow
- The offer will be larger and more diverse also in supermarkets
- Demand for organic food will increase, maybe also as a result of scandals related to unhealthy food produced in different ways and different environments.
- The most important influences are expected in education of children (youth), in kindergarten and schools.
- Organic should be considered a »luxury« brand characteristic of any food product.
- The development of the organic market will, in general, follow the trends observed in Europe
- Many organisations raise consumer awareness about healthy food and highlight the importance of organic food products
- The use of organic food and other products will also depend on the purchasing capacity of certain population groups

Q4: The motives in organic food consumers' behaviour (including typical consumers profile)

- Organic products are purchased mainly by those who appreciate a higher quality of life, free time, a healthy way of living, and nature
- Consumers of organic food pursue the following principles: healthy diet, knowledge of negative impacts of food production on ecosystems, animal wellbeing, animal protection (vegetarians), negative impacts of chemical synthetic products on health, diseases, etc.
- Most people decide to buy organic food because of their own health and not because of nature conservation, although by purchasing organic food they support organic farming and the environment
- Consumers' behaviour is largely influenced by the media publishing opinions and assessments made by physicians and distinguished experts
- Influential individuals can also significantly contribute to improving reputation of organic food
- For the consumers of organic food, the price has minor importance and attach more significance to the trust in a certain organic farm
- Quite often, they wish to learn about the production processes on farm and personally visit the farm where they buy their organic products
- They are demanding buyers and wish to be well-informed on the products they are buying.
- Organic products are purchased by a rather profiled population – consumers who are young, educated and well-off, and have a well-defined attitude toward themselves and the environment or group of the elderly who wish to consume healthy food

Q5: Have organic food initiatives had an influence on economic, ecological or social development in disadvantaged areas?

- Organic farming in disadvantaged areas indeed presents some advantages.
- This type of production is more extensive and thus appropriate or even natural for such environments.
- It adds value to the products, which has a beneficial effect on the social and economic situation in the area.
- Organic production presents considerable ecological advantages
- Initiatives by conscientious individuals and the financial support by the state have had a significant influence on the production of organic products
- Increased production, together with growing demand, has a positive impact on economic, ecological and social development of individual areas
- Most influences in such areas may thus be attributed to the rural development programme envisaging incentives for the development of organic farming
- State initiatives for development indeed had a positive impact on the development and production of organic food

Q6: What characteristics make an organic food distribution channel chain successful?

- Prompt and constant supply of the market, which depends on the organisation and integration of producers
- The organic food distribution chain will only make sense and will only be successful if demand is sufficiently high, which depends on the general economic situation
- Certain distribution channels are successful because of a positive cooperation of all the subjects involved. For example:
 - **Organic marketplaces** in large shopping centres – the distribution channel is successful owing to diligent and persistent work of the farms that participate in marketing
 - **General marketplaces** – a most positive aspect is direct contact with producers
 - **Home selling** – a positive aspect is knowing the farm and its production process; this which has several economic advantages for the producer (no costs relating to transport, distribution, advertising, selling, etc.)
- **The most important characteristics are:**
 - An ambitious and skilful organiser – usually private undertaking
 - Sufficient production of individual cultures
 - Surpluses may be favourable for the running of the chains
 - Some examples may be found in school supply with fruit, although profit is very low;
 - Some farms supply tomatoes, eggplants, zucchini and peppers to hotels during the summer season
 - ensuring traceability for each product offered and enabling insight in the certificate upon request
 - Slovenian organic farmers should integrate more closely



Questions?