

Executive Summary

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INTRODUCTION

This report is a key deliverable (D4) of the EU funded research project FOODCOMM, whose overall objective is to analyse the role (prevalence, necessity and significance) of economic relationships and communication in selected European food chains and to identify the economic, social and cultural factors that influence co-ordination within these chains. The report describes the technicalities of the surveys carried out in the participating countries and presents the questionnaires used in each of the countries. The main aim of this Workpackage 3 (WP3), the core empirical package of 7 WPs within FOODCOMM, is to collect representative quantitative data to analyse the role (prevalence, necessity and significance) of economic relationships and communication in selected European food chains and to identify the economic, social and cultural factors that influence co-ordination in selected commodity chains. In total, data on farmers, processors and retailers for 13 agri-food chains were obtained: 3 cattle to beef (Ireland, Poland and the United Kingdom (UK)), 2 barley to beer (Germany, the UK), 3 cereals to bakery products (Finland, Germany, Spain), and 5 pigs to pigmeat/pigmeat products (Finland, Germany, Ireland, Poland and Spain). A total of 1,163 interviews have been conducted using a structured questionnaire (at 15 march 2007, although the survey will finish by the end of April). As far as local survey condition allowed, the survey had been conducted online. However, in many cases, either face to face, telephone or mail interviews were used. Summaries of the sampling frame, sampling size and carry-out survey details for each country are presented followed by a summary of the conclusions.

2. FINLAND

Two agro-food chains were surveyed in Finland: rye to bread and pig meat to sausage chains. Following the Technical Annex of FOODCOMM, the survey responses were required from 75 producers, 25 processors and 20 retailers in each chain. The Finnish target population in all instances was national due to the relatively small population and small numbers of instances involved. However, it was likely the sample was concentrated in the Western and Southern Finland. TIKE (The Information Centre of the Ministry of Agriculture and Forestry) sampled the producer population. The producer samples were stratified by land area in the case of rye and number of animals in the case of pigs. Tilastokeskus (Statistics Finland) provided the processors and retailers samples, but extra samples were also used. The processors sample was stratified by stage (primary, secondary) and number of employees. The sample of retailers was stratified by ownership (chain, private) and area of sale in retail store. Promotional activities for the survey were primarily made by emails and text messages to mobile phones, but several postal questionnaires were also sent. Some retailers and pig meat processors were also contacted personally by telephone. Furthermore, press releases, articles and newsletters were sent to the media to reach other chain actors nationwide. Approximately 75% of all Finnish respondents answered the survey using the Internet, while 25% used the postal questionnaire. Up to the 15th of March 2007, a total of 210 valid responses were received, but additional responses are still required especially from pig meat processors and sausage retailers.

3. GERMANY

In Germany, three agri-food chains were surveyed: wheat to bread, swine to sausage and barley to beer. The target population considered all regions of Germany. The survey started as an online questionnaire (offering immediate benchmarking functionality) and was accompanied by a wide range of public relation and marketing measures aimed at maximising the chances that relevant businesses get to know of the survey and thus have the opportunity to take part. Active collaboration with sector organisations and consulting panel associations was sought which informed relevant farms and companies using (i) newsletters, (ii) press releases, (iii) animated banners, (iv) telephone calls, and/or (v) flyers. After six weeks, 10 responses were collected. In addition to the online survey, a postal survey was conducted. Contact details were collected through address databases and the internet. Additional addresses were provided from the consultation panellists. In addition to the questionnaire, the mail included a FOODCOMM flyer for informative purposes and a pre-paid return envelope to increase the probability of response. Two weeks after the first letters were posted, recipients were reminded by telephone or by a second letter containing again the questionnaire. Up to now, about 2,000 questionnaires were sent out to farmers, processors and retailers. So far, 87 usable responses were returned by mail increasing the total number of collected responses to 97 (as of 15 March). The survey is currently ongoing in collaboration with the Chamber of Agriculture in Bonn whose advisers distribute FOODCOMM questionnaires personally to relevant farmers.

4. IRELAND

The two chains selected for study in Ireland were the cattle to beef and the pig to pigmeat chains. Farmers, processors and retailers were surveyed in both chains. According to the Technical Annex, the target for Ireland was 75 farmers, 25 processors and up to 20 retailers in each chains. In the case of farmers, only those dealing directly with processors were included. Those selling solely to other farmers were excluded. Of the processors, only large-scale export approved processors were included as they account for the vast majority of processing in both chains. At retail level, representatives from different types of outlets were included: multiple retailers, discounters, symbol groups and independent retailers. Population and sample lists were generated from lists compiled by various state and semi-state agencies, representative bodies and trade directories. Data were primarily collected by telephone interview, however some surveys were conducted using a face-to-face interview technique to learn whether the questions raised additional issues among survey respondents and also to increase the response rate. Considerable effort was expended on publicity activities to raise the profile of the study with a view to improving response rates. The support of the consultation panel was enlisted for this activity. The Teagasc advisory service was also of considerable support.

5. POLAND

Two agro-food chains were surveyed in Poland: pigs- to cured ham and cattle to fresh beef chain. In both chains, surveys were addressed to the main chain actors: farmers, processors, retailers. The target population at farmer and retailer level constituted units from two regions in Poland: Wielkopolska for pig- to cured ham chain, Mazowieckie for cattle to fresh beef chain. Surveys among processors had national coverage. In Poland active – personal contacts with respondents were used as the research method. Face to face mode has been used at the farmer and retailer level, while e-mail and telephone calls have been tools of survey for processors. According to the Technical Annex of the project a minimum respondent number in Poland should be: 100 farmers, 35 processors, 25 retailers per commodity. The aims of the WP3 – core empirical research package - has been reached in Poland. The survey has resulted in a base of 335 responses for further analysis. In pig to cured ham chain, 100 answers were obtained from farmers, 17 from processors and 48 from retailers. In cattle- to fresh beef 109 answers were received from farmers, 18 from processors and 43 from retailers.

6. SPAIN

Two agro-food chains were surveyed in Spain: wheat to bread and pigs to cured ham chains. In both chains surveys were addressed to the main chain actors: farmers, processors and retailers. The target population is farmers, processors and retailers located in the region of Aragón. In order to approach farmers, initial contact was with the advisory extension services in the region as well as cooperatives and veterinary services. (Twelve counties were selected because of their productive intensity and diversity.) The directors of these services got in touch with farmers as they had to approve voluntarily to respond the questionnaire. Farmers were interviewed at the extension services facilities. In the case of agro-food companies, the first step involved sending a postal questionnaire. There were some responses through a prepaid stamped envelope. The second step involved a telephone interview. The last step involved a face to face interview after initial contact. Retailers have been approached directly with face to face interviews in their own store. The survey was undertaken along the first three months in 2007. According to the FOODCOMM Technical Annex, the minimum number of questionnaires in Spain (100 farmers, 35 processors and 25 retailers per commodity) has been completed.

7. THE UK

In the UK the survey of participants in the barley to beer, and beef supply chains initially placed emphasis on on-line completion of the survey questionnaire. SAC undertook considerable promotional activity for the survey, including the issuing of press releases to 175 publications and press representatives, and promotion of the survey on its own SAC website. Considerable support and publicity was also forthcoming from relevant industry bodies (14 in total). These activities gave rise to 38 responses in the first two months of the survey (November and December 2006). This number fell well short of the target of at least 100 farmers, 35 processors and 25 retailers in each of the two chains. Since the start of 2007 a more direct approach has been followed with customised versions of the survey being mailed directly to farmers, processors and distributors. At 15 March, 2007, a total of 156 responses had been achieved but with considerable numbers still required from processors and distributors as well as malting barley growers.

8. DISCUSSION AND CONCLUSIONS

Three surveys of farmers, processors and retailers in 13 agri-food chains were conducted: 3 cattle to beef (Ireland, Poland and the United Kingdom (UK)), 2 barley to beer (Germany, the UK), 3 cereals to bakery products (Finland, Germany, Spain), and 5 pigs to pigmeat/pigmeat products (Finland, Germany, Ireland, Poland and Spain). The coverage of the surveys is national, except for some chain actors in some countries where the survey is restricted to some regions considered as representative for the analysis of the food chain.

The minimum sample size was fixed in the FOODCOMM Technical Annex at 75 farmers, 25 processors and up to 20 retailers in the smaller countries such as Ireland and Finland; 100 farmers, 35 processors and up to 25 retailers in the medium-sized countries, such as Spain, Poland and UK; and 150 farmers, 50 processors and up to 40 retailers in Germany per commodity. Although the stratification criterion have differed among countries and actors in the chain, it has been intended, as far as possible, to stratify by region (when national coverage), size and outlet type (retailers).

The survey was planned to be conducted through the internet in Finland, Germany and UK. Ireland planned to use mainly telephone interviews but around 10% of surveys face to face. On the other hand, two countries (Poland and Spain), due to their particular local survey conditions and based on their own experience in other similar studies, decided since the beginning to use face to face interviews complemented by telephone and mail. Poland planned to use on line questionnaires for processors. Both countries have already finished the survey and they have 335 and 320 completed questionnaires, respectively. However, due to the limited number of responses after two months of starting the survey in those countries which intended to carry out the survey on line, survey administration was changed to mail and telephone means. A significant effort is still being undertaken in order to get the minimum number of questionnaires needed to provide significant statistical results per each country (as required in WP4). A total of 1,163 questionnaires have been conducted at 15 March 2007.