

Literature review WP 2

Portugal

Artur Cristóvão, Manuel Luis Tibério

*UTAD - DES
Vila Real, Portugal*

Review report

1. IDENTIFICATION OF THE MOST RELEVANT RESULTS

1.2. Abstracts of Most Relevant Papers

Alface and Oliveira (1999)

The paper presents a study of cheese production units of Évora, undertaken by means of a questionnaire submitted to 50 % of the dairies existing in the geographical area of production. The first part presents a brief history and description of this artisanal product. On the basis of the questionnaire responses, it characterises the dairies, provides a brief sociological profile of the producers, and analyses the manufacturing units and corresponding technology, as well as how the product is commercialised. This work thus provides a relatively exhaustive characterisation of Évora's cheese producers, as well as identifying some of the problems that cause the majority of producers to fail to gain certification.

Coelho (1990)

In this monograph the author describes this artisanal product and a brief historical overview, based on bibliographical research. Taking former studies into account, an analysis is made of sheep milk production and its artisanal transformation into Serra da Estrela cheese. The study also examines costs and assets of artisanal cheese manufacturing in three typical enterprises. The study of the commercialisation process is based on a questionnaire survey of commercial intermediaries and producers who attend local markets. On the basis of the information provided by intermediaries, an estimate of commercial margins is made. The importance of this work, in comparison to previous studies on this subject, derives from its approach to the means deployed in commercialisation and from its estimates of commercial value added and returns.

Dinis (1995)

This study, based on questionnaires made to non-cheese producing shepherds as well as producers of Serra da Estrela cheese, provides a description of both milk (input) and cheese (finished product). It also analyses the commercialisation and certification problem. Regarding commercialisation, Dinis analyses the strategies adopted by each producer and the way they affect each factory's profits, the family's income and the use of family labour. "Serra da Estrela" cheese is arguably the most famous traditional/typical of Portuguese products, after Port Wine. While "Serra da Estrela" cheese is, perhaps, of all Portuguese origin-labelled products, the one that generates most value added, its certification has been a failure; this paper makes an important contribution to the understanding of the reasons why.

Ferreira (1999)

This paper is a critical analysis of how value is added to Barrosão beef in each link of the chain. It analyses how process of the Barrosão Beef DOP has been constituted and how the designation functions. The author identifies some deficiencies in both these aspects of the Barrosão Beef DOP: (a) gaps in the Book of Specifications (definition of geographical area, of eligible farms, and product definition); and (b) shortcomings in the control process, resulting from insufficient human resources available to the certification body.

Mantas, Carneiro and Barbosa (1998)

The paper discusses the structural changes to be implemented by Private Certification Bodies in order to meet the requirements of EN 45011. It stresses the need for PCBs to work with a variety of products, so as to reduce the costs of certification and so that they may survive economically. The case of the Portuguese PCB "Tradição & Qualidade" is analysed.

Marreiros (1999)

This paper studies the origin-labelled protected products of the Alentejo Region, and identifies the commercial strategies of the OLPs. Regarding olive oil, an important economic asset of the region, the paper argues that the strategy of the olive oil co-operative analysed (which produces both origin-labelled and non origin-labelled oil) is influenced by the consumer perception and behaviour regarding origin-labelled and the conventional (i.e. non origin-labelled) products. Only a small part of the olive oil produced in the Cooperative is commercialised as "Moura Olive Oil DOP". The co-operative did not develop a strategy for the use of the DOP, fearing that origin-labelled oil could be adulterated using non-DOP olive oil. The danger exists because consumers rarely differentiate between olive oil with and without DOP, when both come from the same prestigious production region.

Pita (1999)

This study discusses the technical and economic issues relating to the production of lamb in the Montemor-o-Novo region. It stresses the fact that the price paid to producers for the product is similar to that paid for the undifferentiated product, thereby any economic advantages which may have accrued to the producers choosing to produce Montemor-o-Novo lamb. Only if production were to be distributed with greater regularity through commercial intermediaries, and/or seasonal variation in prices were to be significantly reduced, would there be a strong economic motivation for more sheep farmers to take up DOP certification.

Raposo and Nunes (1998)

The paper discusses the particular case of origin labelled cheese in Portugal. It highlights the existence of 13 protected cheeses, the growing number of factories, and the increasing quantities of processed milk. However, only part of this cheese, approved by the Private Certification Bodies, is sold with the PDO label. The authors underline the importance of multiple retailers in the growth of the quality cheese market, and consider "cheese fairs" held by supermarkets to be the major growth factor.

Ribeiro and Martins (1998)

This paper stresses the important role played by women in what are known as "products with history", especially those in the food sector. From production to management, and from distribution to consumption, women tend to have a monopoly, namely of the associated know-how – the rituals, production techniques and marketing processes. In fact, women have been the main authors and guardians of these products' history and, as a result, of the history and culture of the community. Considering the growing importance of the local products historical dimension, and the value of certification and protection, it is extremely important to know more about the products and their history (both their roots and recent evolution) and how they relate to the history of the regions and communities where they exist. The paper focuses on the particular case of sausage products in Trás-os-Montes.

Rodrigues, Pinto De Andrade and Várzea Rodrigues (1999)

There is an emergent market for beef products from Portuguese indigenous breeds raised in extensive production systems. Product differentiation has allowed the enlargement of small niche markets and has led to an increase in the value of origin labelled meat. The value added associated with certification can be as high as 62% in meat from some breeds. However, the differential between the price paid to the producer and the market price for origin-labelled meat is insufficient to cover the costs of PDO Management Groups. The main reason for this is the small number of animals marketed, and the fact that they are mainly sold to niche markets.

Sousa (2000)

This paper compares the respective producing strategies of the wine producing enterprises of two regions - the Alentejo (Portugal) and Extremadura (Spain). Points both in favour of and against the adoption of Quality Wine Produced in a Specified Region (QWPSR) designation and involvement in the corresponding supply chains. In the case of the Alentejo, the wine producing companies appear to be innovative in technical-productive terms, but perform more weakly in terms of launching new products (which have so far been limited to mono-varietal wines) and in commercial and marketing processes (where a few new brands have been introduced). The author suggests that: low alcohol wines could be launched, new bottle and label designs introduced, incentives provided to encourage the practice of selling wine per glass in restaurants and bars and, finally, that much more could be done in the spheres of communication (information, marketing, publicity), in improving distribution networks and in targeting exports.

Talhinhas (1997)

This is a study based on interviews with producers of Évora cheese in a small county located in the geographical production area. This county has the particularity of possessing a large number of producers responsible for a large volume of the output, and yet is an area in which the adoption of the certification process has been very limited. A survey was made of the most popular distribution channels, the origin of the raw materials, and the degree of producer adherence to certification. The importance of this work resides in the fact that it manages to explain some of the reasons for the reduced support given by producers to certification, despite their having full knowledge of its mechanisms.

Tibério and Cristóvão (1998)

Using the case of Trás-os-Montes OLPs, the authors discuss the issue of quality, stressing its multiple dimensions. It can be said that a given product does not have a single quality but a set of diverse qualities. Several cases of OLPs are analysed. Finally, the paper discusses the processes through which quality is constructed and guaranteed.

Trallosmontes (1998)

These proceedings bring together the papers presented in a major meeting organised to discuss the importance and roles of OLPs in Portugal and other EU countries. The program included the following major topics: OLPs and rural development; the OLP situation in the EU; the history and consumption of OLPs; control and certification; analyses of major products (olive oil, various types of fruit, honey, meat, cheese and sausages). Most papers refer to case studies and have a very descriptive nature. The strengths, weaknesses, opportunities and threats regarding OLPs development in Portugal are also discussed in most papers. Some of the developments identified are: the emergence of producers' organisation; the establishment of control and certification mechanisms;

and growing consumer demand. On the negative side, many papers stress the lack of information on OLPs among producers and consumers; the lack of collaboration between institutions which deal with OLPs, public and private. Only abstracts of the papers are available in English and French.

1.2. Main Results

1. Awareness of OLPs is poorly distributed both among producers and consumers (TALHINHAS, 1997; TRALLOSMONTES, 1998). Among consumers, there is considerable confusion concerning the multiple labels being used by enterprises and retailers, such as "home-made", "traditional" or "hand made" (TRALLOSMONTES, 1998). In the case of producers, many know of the existence of the OLP but do not use it (cases of cheese, honey and fresh meat, among others) (ALFACE and OLIVEIRA, 1999; DINIS, 1995; MARREIROS, 1999; PITA, 1999). For instance, in the case of Évora Cheese, 92 % of producers know of the label, but 84% opt neither to adopt the approved production process and thereby be eligible to use the label. This seems to be related to two different factors, namely: (a) the high cost of the label per unit, given the very small size of the cheeses (60 to 90 gr.); (b) the use, in some areas, of imported milk, namely from Spanish farms (TALHINHAS, 1997).
2. Indigenous national breeds are an important alternative in less favoured areas (FERREIRA, 1999; RODRIGUES; PINTO DE ANDRADE and VÁRZEA RODRIGUES, 1999; TIBÉRIO, CRISTÓVÃO E ROCHA, 1997). In terms of production levels, however, they cannot compete with imported breeds. For the preservation of these breeds, it is both necessary to maintain the CAP premium payable for cows feeding calves that is currently available through the Agro-Environmental Measures, as well as support for wholesale and retail prices of origin labelled meat, in order to compensate farmers for the lower productivity of their extensive systems of production (RODRIGUES, PINTO de ANDRADE and VÁRZEA RODRIGUES, 1999).
3. Not only have many "Specification Agreements" been defined with very little contribution from the actors most concerned, but also there remain many lacunae and imprecisions (definition of geographic area and product, registers of eligible farms, etc.), which have generated considerable criticism and undermined interest and motivation on the part of producers and others involved (FERREIRA, 1999; TALHINHAS, 1997). Some argue that OLP geographic areas should be as broad as possible, avoiding restrictions which diminish competitiveness and market power (TRALLOSMONTES, 1998). However, human resources with training at the various levels and of the different types necessary to support the development of the production chain, remain scarce (FERREIRA, 1999).
4. There is a great diversity of means and channels of commercialisation (ALFACE and OLIVEIRA, 1999; COELHO, 1990; DINIS, 1995; RAPOSO and NUNES, 1998; TIBÉRIO, 1995; TRALLOSMONTES, 1998). While, in the case of fresh meat, Producers' Organisations are quite active in the distribution chain, the situation is much more diversified with regard to cheese-making, with middlemen playing an important role (DINIS, 1995; TALHINHAS, 1997).
5. Most producers (farmers, co-operatives, processing units) do not take individual action to promote their product(s) (SOUSA, 2000; TALHINHAS, 1997). This task is actively developed by local government (municipalities), local development associations, farmers' organisations and others, mainly through fairs and food and gastronomy festivals, leaflets, posters, web pages, and competitions.
6. From the producer's standpoint, the legal (technical and hygiene and sanitary) requirements to approve and licence new production units imply significant investments, complex bureaucratic procedures and considerable time, all of which tend to reduce producers' motivation and interest (DINIS, 19995). On the other hand, the impact of such units upon the traditional qualities of the products is open to question. In this respect, some argue that efforts should be made to adapt the legal frameworks to the regional realities and the methods used by producers, thereby encouraging innovation without compromising traditional knowledge, sources of raw materials, and flavours (TRALLOSMONTES, 1998).

2. SELECTION OF SCIENTIFIC AND RECENT (SINCE 1980) PAPERS, PUBLICATIONS, MEMORIES AND STUDIES IN THE COUNTRY (INCLUDING INTERNATIONAL AND NATIONAL MEETINGS HELD IN ENGLISH)

2000

Fragata, A. ; Sousa, F. ; Rodrigues, L.

Prémios, margens e incertezas dos criadores de bovinos da raça mirandesa.

INIA – EAN – DEESA, Oeiras e Malhadas (to be presented to the "XI Congresso de Zootecnia", Ilha da Madeira, Novembro 2001).

Perdiz, L.

Estudo e avaliação das possibilidades de penetração do Queijo de Évora D.O.P. no mercado da Grande Lisboa.
Trabalho de fim de curso de Engenharia Zootécnica (BSc thesis). Évora: Universidade de Évora.

SANTOS, J. Côrte-Real

Cachena: Uma Raça de Bovinos. Primeira Abordagem ao Sistema de Criação.
O Minho a Terra e o Homen, 44, pp. 35-44.

Sousa, A. J. Coelho

Estratégias empresariais em contexto dinâmico: lógicas de reorganização das empresas vitivinícolas do Alentejo e da Extremadura face à evolução do Mercado Comum Europeu.
PhD thesis. Évora: Universidade de Évora.

1999

Alface, M.J. ; Oliveira, S. C. F.

Caracterização da indústria de fabricação do Queijo de Évora.
Évora: CCRA.

Coelho, I. Seita ; Fragata, A. ; Galvão-Teles, C. ; Simões, J.

Raça Preta, a Portuguese beef cattle: economic and environmental objectives in natural resources management.
Livestock Production in the European Less Favoured Areas. Second Conference of the LSIRD Network, Aberdeen.

Ferreira, L. M.

Sistema de Valorização da Carne de Bovino: Caso Específico do Bovino Barrosão: Análise Crítica ao Sistema.
Relatório Final de Estágio (BSc thesis). Vila Real: Universidade de Trás-os-Montes e Alto Douro.

Fragata, A. ; Martins, A. ; Vasconcelos, M.

Artisanal and Industrial models of the PDO Cheese "Queijo de Nisa".
The Socio-economics of origin labelled products in agrifood supply chains: spatial, institutional and co-ordination aspects. Proceedings of the 67 th EAAE Seminar, Le Mans, October 28-30.

Loureiro A. ; Alonso, J. ; Marques, J.

Castanha da Padrela: a valorização como uma mudança necessária.
Estudos Transmontanos e Durienses, 8, pp.345-401.

Loureiro, M.L. ; Mccluskey, J. J.

Effectiveness of PGI and PDO Labels as a Market Incentive for Rural Development Policies.
The Socio-economics of origin labelled products in agrifood supply chains: spatial, institutional and co-ordination aspects (67 th EAAE Seminar), Le Mans, October 28-30.

Marreiros, C.

O marketing e as denominações de origem e indicações geográficas.
O caso da Região Alentejo. Lisboa: APDEA.

Pita, H.M.

Caracterização Técnica e Económica dos Sistemas de Produção de Borrego com Origem Certificada da Região de Montemor-o-Novo.
Trabalho de fim de Curso de Engenharia Zootécnica (BSc thesis). Évora: Universidade de Évora.

Rodrigues, A. M. ; Pinto De Andrade, L. ; Várzea Rodrigues, J.

Extensive beef cattle production in Portugal: the added value of indigenous breeds in the beef market.
In J. P. Laker & J. A. Milne, Livestock production in the European Less Favoured Areas: Meeting future economic, environmental and policy objectives through integrated research, 2nd International Conference of the LSIRD network, pp. 61- 69. Aberdeen: Macaulay Land Use Research Institute.

1998

Calção, S. ; Ventura Lucas, M.R.

A vitela do montado-Alentejo com origem certificada: estudo de marketing.
Proceedings of the "VII Congresso de Zootecnia", Angra do Heroísmo (a publicar)

Coelho, M.L.Seabra ; Ventura Lucas, M.R.

Análise da Rendibilidade das Actividades e dos Sistemas de Produção de Borrego de Montemor-o-Novo Certificado.

Proceedings of the "VII Congresso de Zootecnia", Angra do Heroísmo (a publicar)

Fernandes, C.

Os queijos tradicionais certificados do Alentejo.

Évora: CCRA.

Fragata, A. ; Alberto, D. F. ; Coelho, I. Seita ; Gordo, F. T. M.

Northern Alentejo Quality Products Valorization.

In TRALLOSMONTES (1998). *Proceedings of the Agricultural and Food Products International Meeting*. Mirandela: Trallosmontes, Associação para a Valorização dos Produtos de Trás-os-Montes e Alto Douro.

Mantas, A. ; Carneiro, M. ; Barbosa, L.

The Observance of the EN 45011 and the Assemble of Several Agricultural and Food Products in the Same Private Certification Body.

In TRALLOSMONTES (1998). *Proceedings of the Agricultural and Food Products International Meeting*. Mirandela: Trallosmontes, Associação para a Valorização dos Produtos de Trás-os-Montes e Alto Douro.

Piteira, A.

A comercialização do Borrego de Indicação Geográfica Protegida de Montemor-o-Novo.

Trabalho de fim de curso (BSc thesis). Évora: Universidade de Évora.

Raposo, C. ; Nunes S.

Protected Designation of Origin Cheese in Portugal: Azeitão Cheese.

In TRALLOSMONTES (1998). *Proceedings of the Agricultural and Food Products International Meeting*. Mirandela: Trallosmontes, Associação para a Valorização dos Produtos de Trás-os-Montes e Alto Douro.

Ribeiro, M. ; Martins C.

From Mothers to Daughters - Constructing and Reconstructing the History (a great part) of "Products with History".

In TRALLOSMONTES (1998). *Proceedings of the Agricultural and Food Products International Meeting*. Mirandela: Trallosmontes, Associação para a Valorização dos Produtos de Trás-os-Montes e Alto Douro.

Tibério, M. L.

Produtos Tradicionais: Sua Importância Socio-Económica na Defesa do Mundo Rural.

1^{as} Jornadas de Queijos e Enchidos. *Actas das Jornadas*. IAAS, Exponor, Porto, 12p.

Tibério, M. L. ; Cristóvão, A.

The Origin as a Quality Agent of Agricultural and Food Products - The Case of the Products with Community Protection (PDO) in Trás-os-Montes.

In TRALLOSMONTES (1998). *Proceedings of the Agricultural and Food Products International Meeting*. Mirandela: Trallosmontes, Associação para a Valorização dos Produtos de Trás-os-Montes e Alto Douro.

1997

Talhinhas, A.

Produtos alimentares artesanais. O Queijo de Évora no concelho de Borba.

Trabalho de fim de curso de Engenharia Zootécnica (BSc thesis). Évora: Universidade de Évora.

Tibério, M. L. ; Cristóvão, A. ; Rocha, F.

As Raças Bovinas Autóctones e o Desenvolvimento das Regiões de Montanha.

Revista Portuguesa de Zootecnia, Ano IV, nº1, pp. 69-92.

1996

Fragata, A. ; Condado, M.

A Castanha da Terra Fria como caso de Construção Social de Qualidade.

Série Produtos Locais 2. Messejana: ANIMAR

Ribeiro, M. ; Martins, C.

La certificación como estrategia de valorización de productos agroalimentarios tradicionales: la alheira, um embutido tradicional de Trás-os-Montes,

Agricultura y Sociedad, nº80-81, pp 313-334.

1995

Dinis, M. I. Ribeiro

Os produtos tradicionais de qualidade e o desenvolvimento rural: a denominação de origem "Queijo Serra da Estrela".

Tese de Mestrado em Economia Agrária e Sociologia Rural (MSc thesis). Lisboa: ISA, DEASR.

Ribeiro, M. ; Martins, C.

A Tradição já não é o que era dantes: A valorização dos produtos tradicionais face à mudança social.

Economia e Sociologia, nº60, pp.29-43.

Tibério, M. L.

Aspectos da Comercialização de Bovinos: O caso particular da raça autóctone Barrosã.

Dissertação de Mestrado (MSc thesis). Vila Real: UTAD.

1994

Ancoteq

Preservação e Valorização dos Ovinos da Raça Churra da Terra Quente.

Relatório Final do Projecto PAN 1. Torre de Moncorvo: Associação Nacional de Criadores de Ovinos da Terra Quente.

Carvalho, H. Brito De

Defesa e Valorização dos Produtos de Tecnologia Caseira.

A Rede para o Desenvolvimento Local n.º 12.

Carvalho, H. Brito De

Produtos Agro-Alimentares de Qualidade e de Tecnologia Caseira. Utopia?

Semente, nº8/9, pp.20-22.

Carvalho, H. Brito De

Tecnologias de Transformação Agro-alimentar de Pequena Escala.

Seminário "Sistemas Agro-Industriais", AJAP/ANJE, Faro.

Fragata, A.

Pera Passa de Viseu: um fruto a renascer?

Semente, nº8/9, pp.23-27.

Henriques, M. ; Adosinda

LEADER: Apoio à valorização dos produtos agro-alimentares tradicionais de qualidade na Beira Litoral.

Semente, nº8/9, pp.14-17.

Oliveira, C.

O Selo dos Produtos Alimentares Tradicionais: Um Trunfo para o Mundo Rural.

AGROeconomia, nº1.

1993

Pinheiro, C. ; Marinho, A.A. ; Potes, E. S. ; Bento, O. ; Abreu M.C.

The Artisanal cheese and its variability.

Proceedings of the International Symposium on Animal Production and Rural Tourism in Mediterranean Regions, Portugal.

1990

Coelho, I. Seita

O Queijo da Serra.

Lisboa: DEESA/ INIA.

1985

Lopes, J. F. P.

O queijo de Serpa.

Évora : CCRA - SNPRCN.

Discussion report

CONCLUSIONS AND FUTURE RESEARCH

- ?? In the wine sector, there is a need for more research on business strategy. Most studies are centred on the techniques of production (grapes and wine), giving little attention to issues related either to business strategy or to the commercial domain (structure of the value chain and implications for local value-added retention capacity).
- ?? Studies are needed on the reasons for the failure of many OLPs in the fruit sector. What is the importance of such factors as product differentiation or rules imposed on mass production (such as the requirement that products be of standardised, homogeneous size)?
- ?? Consumers' perceptions regarding OLPs and their implications for the strategies of Producers' Organisations also require investigation. The fact that producers seem to differentiate very little between protected/labelled and non-protected/unlabelled products from the same well-respected areas of production should be taken more into consideration (e.g. the case of olive oil).
- ?? Some large distribution chains have promoted fairs and other events to promote traditional agricultural and food products. Some of the key research questions in this respect include: how can the strategies of different distribution chains regarding OLPs be characterised and compared and what is the rationale behind them? On the other hand, what are the advantages and disadvantages of the various distribution channels both for producers and for the localities from which their products originate?
- ?? A further point on the commercial dimension: what is the attitude and current practices of the restaurant sector? How does the regulation system and respective sanctions influence the consumption/distribution of different types of OLP in local restaurants and small retail stores?
- ?? What is the impact of packaging, labelling and regulation of OLPs on commercialisation and distribution strategies?

