

Literature review WP 2

Spain

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Review report

1. IDENTIFICATION OF THE MOST RELEVANT RESULTS (ABSTRACTS)

Albisu L. M., Meza L., Laajami A., 2000.

Agrofood industries competitiveness according to the products sold in the market.

Medit, 2, 2-8.

This paper relates agrofood industries competitiveness and products sold in the market. Only small and medium size enterprises are selected. Porter's and the industrial district approaches are compared. A scheme is offered to determine some of the most important factors affecting agrofood industries competitiveness. Four competitiveness focus for the agrofood industries are defined: raw materials and their determinants, external business environment, internal firms conditions and products performance. The co-operation and relationships among firms are also taken into consideration. The main driving competitive focus stems from the kind of products they sell in the markets. Wine has been selected as a differentiated product with a specific geographic origin in comparison to other products. In all cases we can consider that they are reasonable competitive industries but their strategies are quite different.

Sanjuán A.I., Meza L., Mascaray M.A., Albisu L.M., 2000.

An integrated approach to evaluate generic promotions.

In: Sylvander B., Barjolle D., Arfini F. (ed). The socio- economics of Origin Labeled Products in agri-food supply chains: spatial, institutional and coordination aspects. INRA. Actes et Communications, 17-1, 163-172.

Generic promotions are becoming very important in the agro-food system, either to promote a particular food product or an origin labelled product. In most cases, the main objective is to enhance consumption. However, there can be other purposes such as introducing local producers into the modern channels of distribution. In this paper, an evaluation of a generic promotion campaign undertaken in Aragón (Spain) is presented. The campaign included wine and ham Protected Designation of origin (PDO), a protected Geographical Indication (PGI) for lamb and a quality label (TSG) for different products. Their typical and traditional making nature as well as their high quality distinguish all of them data have been collected through questionnaires addressed to consumers and producing firms, and personal interviews with the distribution chains managers.

Sanz Cañada J., 2001.

Las Denominaciones de Origen de aceite de oliva en España: estrategias de organización y de calidad (Olive oil Denominations of Origin in Spain: organization and quality strategies).

Paper in IV Congreso de la Asociación Española de Economía Agraria, Pamplona, España.

This paper deals with information from 6 olive oil DO in Spain. Interviews are carried out with 23 managers and DO representatives. The purpose is to find out to what extent DO regulations and functioning could affect competitive strategies. The analysis is undertaken in the framework of the Neoinstitutional Economics. DO regulatory committees have an important role on collective concerted processes along the supply chain. Somehow they act as interprofessional entities emphasising on promotion, collective commercial activities and innovations. Their DO labels are considered as quality assurance certificates which induces a better vertical coordination between chain distributors and agrofood industries. This is particularly important for foreign distributors.

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

2002

Albisu, L. M. ; Meza, L.

Evaluación de la campaña de publicidad del Ternasco de Aragón.

(Evaluation of the publicity campaign Ternasco from Aragón). Documento de Trabajo (Working Paper) 01/2. SIA-DGA.

2001

Albisu, L. M. ; Meza, L.

Los Alimentos de Aragón con Denominación de Origen y Calidad Certificada siguen aumentando su reconocimiento.

(Aragon food with Designation of Origin and Certificated Quality are growing their recognition). Documento de Trabajo (Working Paper) 00/2. SIA-DGA.

García, M.

A repositing strategy for olive oil in the UK market.

Agribusiness: An International Journal (in press).

Sanz Cañada, J.

Las Denominaciones de Origen de aceite de oliva en España: estrategias de organización y de calidad (Olive oil Denominations of Origin in Spain: organization and quality strategies).

Paper in IV Congreso de la Asociación Española de Economía Agraria, Pamplona, España.

2000

Ablán de Flórez, E.

Políticas de calidad en el sistema agroalimentario español (Quality policies in the Spanish agrofood system).

Agroalimentaria, 10, 62-72.

Albisu, L. M. ; Meza, L. ; Laajami A.

Agrofood industries competitiveness according to the products sold in the market.

Medit, 2, 2-8.

Ameur, M. ; Gracia, A.

Actividad exportadora de las empresas agroalimentarias de Aragón.

(Export activities of Aragon agrofood enterprises). Paper presented in: XIV-Reunión ASEPELT, España-Oviedo, 21-22 de junio.

Langreo, N. A.

Mercados diferenciales en aceite de oliva virgen (Differentiated markets for virgin olive oil).

Distribución y Consumo, 45, 71-81.

Langreo, N. A.

Las cooperativas en cadena de aceite de oliva: estrategias y perspectivas (Cooperatives in the olive oil supply chain: strategies and perspectives).

Revista de Estudios Cooperativos, 72, 151-174.

Loureiro, M.L. ; McCluskey, J.J.

Assessing consumer response to protected geographical identification labeling.

Agribusiness, 16 (3), 309-320.

Perry, Th.

La comercialización de los vinos de Rioja, Navarra y Aragón (The marketing of Rioja, Navarra and Aragón).

En: *Viticultura en el año 2000, Congresos y Jornadas*, Gobierno de La Rioja, 51-69.

Sanjuán, A.I. ; Meza, L. ; Mascaray, M.A. ; Albisu L.M.

An integrated approach to evaluate generic promotions.

En: Sylvander B., Barjolle D., Arfini F. (ed). *The socio- economics of Origin Labelled Products in agri-food supply chains: spatial, institutional and coordination aspects*. INRA. Actes et Communications, 17-1, 163-172.

1999

Albisu, L. M. ; Meza, L.

Consideraciones acerca de las campañas de promoción "Alimentos de Aragón con Denominación de Origen y Calidad Certificada hasta 1998".

(Considerations about the promotion campaigns "Aragón food with Designation of Origin and Certificated Quality until 1998"). Documento de Trabajo (Working Paper) 99/2. SIA-DGA.

Gómez Muñoz, A.C. ; Caldentey, P.

Signos distintivos en productos agroalimentarios (Dintinctive signes in agrofood products).

Distribución y Consumo, 45, 71-81.

Sanz Cañada, J. ; Rodríguez-Zúñiga, M. ; Mili, S.

Contraintes d'accès au marché et systèmes locaux de production : la filière de l'huile d'olive en Espagne.

Revue de l'Economie Meridionale, 47(4), 56-61.

1998

Albisu, L. M. ; Meza, L.

Evaluación de la campaña de promoción "Alimentos de Aragón con Denominación de Origen y Calidad Certificada.
(Evaluation of the promotion campaign "Food from Aragón with Designation of Origin and Certificated Quality"). Documento de Trabajo (Working Paper) 98/3. SIA-DGA.

Briz, J. ; Felipe I.

Characterization and marketing strategies on agrofood local products in Spain.

In: The European food consumer: consumer attitudes towards typical foods. AIR-CAT meeting reports. AAIR3 Concerted Action, 1994-1998, supported by CEC, DGXII, 20-28.

Pérez-Bustamante, G.

La denominación geográfica: su aplicación en la industria agroalimentaria tradicional española (Geographic Denomination: its application in the Spanish traditional agrofood industry).

Boletín Económico de ICE, 2563, 17-27.

1997

Mesías, F.J. ; Martínez Carrasco, F. ; Albisu, L.M.

Análisis de las preferencias de los detallistas de jamón curado mediante el análisis conjunto (Analysis of retailers' preferences for cured ham using conjoint analysis).

ITEA Producción Animal 93 (1), 41-55.

Sanz Cañada, J.

El sistema agroalimentario español. Cambio estructural, poder de decisión y organización de la cadena alimentaria (The Spanish agrofood system. Structural changes, decision power and organization of the food chain).

In: Gómez C., González Rodríguez (ed). *Agricultura y sociedad en la España contemporánea*. CSIC y MAPA, 355-396.

1996

Caldentey, A. ; Muñoz, A.

Productos típicos, territorio y competitividad (Typical products, territory and competitiveness).

Agricultura y Sociedad, 80-81, 57-82.

López Benítez, M., 1996.

Las Denominaciones de Origen (Denominations of Origin).

Barcelona. Cedes E, 670 p.

1995

Albisu, L. M. ; Meza, L.

La relevancia socioeconómica de la producción de alimentos con calidad certificada en Aragón (Socioeconomic relevance of certificated food quality in Aragón).

Serie de Estudios Regionales, Banco Bilbao Vizcaya (BBV), 277-291.

1994

Elorz, M.

Análisis de la información proporcionada por la marca: una aplicación a la Denominación de Origen (Análisis of the information provided by the brand: an application to the Designation of Origin).

In: VI Encuentro de Profesores de Marketing, San Sebastián, 341-353.

1989

CEPFAR

Informe final del Seminario Europeo "La agricultura de calidad, aspectos, condiciones y problemas".

(Final report of the European Seminar "Quality agriculture, aspects, conditions and problems). Faro, Portugal, 18-20 de octubre.

1988

Sanz Cañada, J.

Agricultura contractual y coordinación vertical en el sector agrario: áreas de investigación y análisis bibliográfico (Contractual agriculture and vertical coordination in the agricultural sector: research areas and bibliographic analysis).

MAPA.

Discussion report

Very little work has been done in Spain. Most of the analyses dealing with Origin Labelled Products are either related to rules, definitions and consumers' behaviour. Economic analyses of production, transformation and distribution are lacking or they are highly descriptive. There are a limited number of papers that try to make connections along the food chain.

Marketing activities are not well defined for most DO since a considerable difference could exist between firms and their DO representatives. Collective actions are taken without strategic plans but as a result of a constant bargaining among DO members and the administration. Usually there is not an evaluation procedure to know the impact of any collective investment. Producers' organizations do not adapt fast enough to marketing activities and consumers' requirements. Research should be undertaken to better know how to implement the best organization procedure among producers to reach productive efficiency and how to deal with the distribution system. Marketing activities need different organizations and members of cooperatives are not able to understand markets changes.

Most DO enterprises are of small and medium size and some of their problems are not particularly related to their products but could be interpreted because their business size. Research has been undertaken for small and medium enterprises in the agrofood system, which could be applied to DO enterprises. In particular most DO enterprises are located in rural areas where they find extra difficulties to develop because of the lack of services and professionals willingness to live in far away places. So, technical efficiencies and socio-economic constraints should be investigated.

Chain distributors are gaining a lot of power and they put their conditions to agrofood industries. Small and medium enterprises find difficulties to deal with distributors. DO producers have opportunities to be introduced on distribution chains but their strategies have to be analysed. Public institutions could have an important role to help them.

Little market research is usually undertaken and poorly transmitted to DO agrofood industries and raw materials producers. Especially jumping from local to national and international markets stresses the need of market information and their transmission along the food chain.

Total quality is usually implemented in firms but it is more complicated on food chains. Nevertheless, the same concept should apply from the beginning until the end of the chain. Its application is another area of research.

Consumers value products attending to many different attributes. Many of them are not tangible and not closely related to their physical characteristics. A new product concept emerges and it might be crucial to be successful in the markets. The entire DO food chain should know and understand this new situation. The information chain should be carefully monitored.

DO products rely on typicity but this word is understood on different ways along the food chain. Knowledge transmission and appreciation should be investigated to know if this word means the same at producing concerns or consumers behaviour.

Vertical coordination is a fashionable topic of research and industrial organization provides quite a few answers. DO food chains should take advantage of the considerable amount of research undertaken in the last few years.

There is a wide assortment of theories to analyse vertical coordination. Some work should be undertaken to specify the most appropriate ones that could apply to OLP products and their organizations.

The Agenda 2000 introduces and enhances quality policies that have to be monitored carefully and see their implications for OLP products. The same applies with the EU position in front of the WTO organization.

Labelling is one of the most mentioned items, at international negotiations, used to protect consumers against fraud. The kind of information that should be provided and transmission mechanisms need to be analysed.