

How can mountain quality food reduce the vulnerability of mountain farming systems?

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Abstract: *This essay is based on personal research such as talks with farmers and experts.*

The chief food products of mountain farms are dairy products and meat. The customers' purchasing decisions determine the development of mountain farming: if mountain quality food is appealing enough to the potential customer, it will be bought. If farm food fails, mountain farms will soon be abandoned with serious negative effects upon tourism and economy. Product quality and processing quality are defined in the food-code and are conditions "sine qua non", but whatever cannot be sold, will not be produced. The quality of services though, such as distribution and presentation, is sometimes regarded as secondary. Special efforts are therefore needed to co-operate in building networks and 'bottom up' growing trade structures as well as motivating a potential clientele. Thus some of direct marketing is converted in indirect marketing. The accurate analysis of the needs of gastronomy and individual customers is made on the spot: its results determine the kind of presentation. The motivation has to concentrate on the customers' needs, not on the farmers', because buying food is not an act of charity, but it has to suit the customers' wishes. The overall aim is - besides naturally produced sound and tasty food - to enable the farmers to live in their homes in the mountain regions. They are the ones to cultivate the land and make it interesting for tourism, an important factor of the country's welfare. Successful regionalization proves its chances within globalisation.

Keywords: *glocalisation, co-operation, certification, gastronomy, beef, clientele, indirect-marketing*

Introduction

Mountain farming systems have been established over the ages for the subsistence of the families. What makes them vulnerable right now is the commercialization of food production. Food supply and globalisation can only establish a limited partnership. So far without protective measures small and average sized farms of mountain regions can not survive the competition of the global, free trade. Foodstuffs in Austria's mountainous regions are produced with high costs and intensive labour, are therefore more expensive than conventional industrialised food and hard to sell, because the seemingly same basic food is offered cheaply on the world markets and thus weakens the home production. Global free markets, biotechnics and farm technology can make it possible to abandon mountain farming and still support a country's population. Where are bridges to make farm food competitive?

Tourism is an indispensable part of Austria's economy. To be attractive for guests a countryside has to offer highlights, accessibility, infrastructure. Run-down and forlorn farms as well as ruined abandoned roads are not an appealing sight, nor do primeval forests on end offer a worthwhile trip. Mountain farms guarantee a small scale interesting cultivated landscape by means of the farmers' care with little costs for tourism management. At the same time tourists are prospective customers for mountain food and farm lodging. Thus, besides economic arguments, reasons to maintain cultivated land in the mountains are social: to prevent rural exodus, and ecological: to preserve biodiversity. However, so far the availability of numerous subsidies was a precondition to keep up and develop the status quo. This is unsatisfactory, more measurements are necessary besides the subsidies to generate the growth of the value for mountain-farming. It needs to consider the utilisation of farmland for tourism as well as a sustainable, regional adapted production and processing of food.

The Alpine area covers a great part of Austria. In fact, the province of Salzburg is classified as region of mountain farming with the exception of only a comparatively small part in the north concerning 10 communities out of a 119. The operational size of farms in mountain areas is very small. Full time farms in grassland are supposed to have a minimum size of 48 hectares: 34 hectares of agricultural acreage and 14 hectares of woods (Grüner Bericht 2002, 135). The registered enterprises show an average size of about 18 hectares grassland per farm, which apparently makes it impossible to run them profitably. Therefore, without diversification, subsidies or additional dependent wage or salary-incomes, estimations are that every other farmer would be forced to give up. The structural preconditions in the western part of Austria really are not to be called optimal.

The possibility to sell quality mountain farm food is the base for the primary production on a small scale mountain farm. Whatever cannot be sold, will not be produced in the long run, and this is what 'sine qua non', but there are quite a lot of other variables determining the success of mountain farm food, especially skills and knowledge needed in processing and trade as well as the attitude towards customers. These aspects will be given special attention in this essay, so this is an attempt to deal with agricultural problems by focussing on the people involved and their handling of the matters – a true sociological objective.

Methods of research: Policy matters and theoretical aspects often prevail while at the same time the turnover is hampered by obstacles only noticeable by experience. Therefore actors and actresses are my partners in twelve expert in-depth interviews: farmers engaged in diversification, owners of hotels and restaurants, a cook, trade and tourism managers, a butcher, a veterinarian. They were all selected within the province of Salzburg, Austria, according either to the advice of Katharina Hutter, Chamber of Agriculture, Salzburg, or according to my own knowledge pertaining to previous contacts during research work concerning similar agricultural matters. After the purpose of the topic had been specified, the interview partners were asked to talk about their professional experience in this respect, the development of their enterprise, successes and problems. Ecological and practical validity were achieved by making these interviews right at the place of business. Reliability is insured by overlapping statements.

The main questions are therefore:

- What is to be considered as 'Mountain Food' in the area of research?
- Can the quality of mountain food alone secure its success without the quality of distribution?

Trying to find a solution to the problems, two important topics are taken into consideration: co-operation and analyzing customers' and guests' wishes.

What is to be considered as 'Mountain Food'?

Mountain food comes from mountain farms. These are holdings under the Mountain Farm Cadastre (MFC) assigned to three categories of handicaps as there are: slope of 25% and more, size of the area, animals." (CCI 2007 AT 06 RPO 001, M 211, top. 2.1.1) . Permanent grassland is dominant in Austria's mountain range, which is 84% of the 1,8 million hectares on the whole, extensive grassland with 97% laying almost entirely in the mountains (Österreichisches Programm für die Entwicklung des Ländlichen Raums 2007-2013, 3.1.3.2, p.31). As to grassland: there is a general interdiction in the national INVEKOS-Umsetzungs-Verordnung 2005 to till slopes of an inclination more than 15 % (ibid p.125). In Salzburg's mountain regions cattle breeding and dairy farming are prevailing. The most important farm products therefore are meat and milk, the chief products on the food sector are beef and dairy products. Sheep rearing is of some but less importance but has changed from wool production to meat, too.

In the supply chain we have to distinguish between primary production, processing and distribution of mountain quality food. The dominant dairy-product in direct marketing is cheese. Different methods of production determine different kinds of cheese, but most variations are due to the addition of spices and herbs. The quality of organic raw-milk-cheese (if no conserving additives are used) depends on the length of storage, it is supposed to be eaten within a week from its finish. Hay-

milk has preference especially in producing mountain cheese and Emmentaler. If silage is fed, chemicals have to be added to the milk, or the scent and flavour of the cheese would be spoiled by the ferments. (Interview: Farmer and professional Cheesemaker, 2004). Most mountain farmers are experts in making cheese and manage the marketing in a professional way, yet efforts and expenditures are far less compared to providing fresh meat. Direct marketing of cheese is well on its way, so this paper will concentrate on meat.

The supply of animals for meat production is limited. Most heifers are sold at auctions to farmers in the plains. The project of keeping mother-cows was created to retain milk from the market, thus influencing the trend of prices. This is the reason why subsidies for alpine pasturing for 80% of the cattle are available. Starting at the beginning of June the animals are walked up to the summer farms. One of the requirements for support is that they stay there for 60 days. So until the middle of July there is no meat from mountain farms to be expected (the exact date is depending on the altitude of the pastures in use). This way a 'summer hole' in meat provision arises. Animals due to be slaughtered generally will not be delivered before the end of summer season. The problems are the time limits given by the subsidies (Interview: Butcher of Vermarktungsverein, 2009). Subsidies for cattle on summer farms are the reason for a shortage of regional beef.

As to the quality of beef: animals on mountain farms are not fattened by any special feeds, all they get is water, grass and hay. If they get concentrate feed at all, then very little, but no corn-silage, which would have to be bought and make it too expensive, anyway. This way the animals put on weight very slowly. Not counting calves and cows of the mother-cow-program, only heifers not qualified for breeding go to the butcher. Their meat is more lush and tender than the one from the corn-fed cattle of the plains, even if those have more muscle-substance. The difference in the quality of meat shows during preparation and taste. Meat from turbo-cows can only be used for making sausages (Interviews: Butcher, Farmer, 2009).

Set aside these difficulties, climate conditions restrict the range of products of multifunctional mountain farming systems. For instance, with only few exceptions vegetable growing is confined to home-gardens. Grain- crops in the mountain region are reported, but nowadays it hardly pays to plant them. Though the main products are meat and milk, in some regions there are potatoes offered ('Lungauer Eachting') fruit (jams, juices, brandies and liqueurs) fish (smoked trout) honey and herbs (with much delight but little financial profit). No food, but still a by-product, wool is fighting its way back by means of traditional knitting-wear.

The difference between the costs of production and the sales proceeds - that means the payments for milk and meat - secure the safe base of production for the mountain farmers. The family income itself is completed by serving cabin-snacks on summer farms, rental or leasing of unused cabins (Almhütten), offering farm-holidays and the like – not counting dependent services like serving as skiing-lift-personnel in winter or offering sleigh- and carriage rides. Agriculture and tourism depend on each other and form networks - at least partly. In some regions the intention for fair co-operation is still an open question, in other parts of the country it is already working excellently.

Questions as to Quality

What is to be regarded as 'special quality of mountain food products'? Quality is a multidimensional construction, which should be defined minutely. We have to distinguish between primary production, processing and distribution of mountain quality food.

The requirements of the food-code define minimum criteria to be complied with by all food produced or distributed within Austria or the EU (quality of the product). Many of the regulations concern the processing of food (processing quality), especially the hygienic standards, which tend to cause problems in small scale farming areas. For example the necessity of certified slaughter houses implies not only higher costs, but requires long ways of transportation for the animals (which at the same time means stress for them and consequently a lower quality of meat) because the traditional home-slaughtering is not possible any more. From the farmers' point of view it is the singularity of

certain features, which result in quality: typical conditions of the region for production, green grass and herbs as forage, the possibility for the animals to move in fresh air on the summer farms and special recipes for processing the food accentuate the very product within the mass of comparable offers. From the customers' point of view quality is defined in a larger respect, because security of food is regarded to be a basic requirement and not as quality itself. Here quality mainly means taste, appearance and image (e.g. ecological or regional product, knowledge about conditions of production) which define quality and make feasible a higher price and higher increment.

Special emphasis though is put in this study upon the quality of services, like distribution and allocation. This concerns the so called 'direct marketing' as well as the way of presenting the products. These criteria are of vital importance for the success of mountain food. As it turned out the networks formed in order to successfully handle mountain quality food were caused by urgent needs, enforced by self-initiatives, restricted by certain EU-regulations and stimulated by subsidies as an instrument to bring into effect regional policies. Differing subsidies taking in account the different degrees of territorial difficulties try to compensate this to some extent. Organic production and traditional techniques (hay instead of grass-silage) add an extra quality to a good deal of mountain food.

Regionalization and Motivation

The ideological counterpart to global markets is localisation and regionalization. Some kind of a compromise hides in the word 'glocalization'. It marks the very situation: globalization is powerful and ubiquitous, there is no direct remedy against its social and environmental deficiencies, and yet we would not want to miss the advantages. But at the same time there is a persistent and self-reliant movement on a local and regional base, because "buying within the region not only maintains jobs of the firms involved, but as well in the preceding and following range. Even the volume of transportation will be cut down by purchases within the region. Moreover, to buy regional products safeguards cultivated land" (Interview: Chamber-official, 2009). The customers' purchasing decisions - either as dealers or as final consumers - have an enormous impact on the provision with sustainable food, on jobs, on rural settlements together with infrastructure and finally on tourism. These values are assets worth paying for. Correspondingly the expenses of the households for food of 13% at present will raise somewhat (ibidem).

Naturally it will not be enough to suggest to the head of a household to accept higher prices in return to all these common values. In the beginning of direct marketing misjudgements occurred of the sort, that in appealing to the customers the presented motivation to buy was connected with the needs of the farmers instead with those of the consumers: to tell the guests on the menu they should choose a certain dish because the 10% overpay goes to the poor farmer, is useless. The inclination to buy will develop itself by means of smell, taste, appearance, name and display of food and the connected service. This refers not only to gastronomy as purchasers of regional products for presenting them to their guests, but to the farm-shops, too. Big menus show the tendency to uniformity. To counter this, in Salzburg 'Served the Salzburg-way' was created, likewise in Tirol 'Tiroler Wirtshaus' adding 'From the region to the plate' (ibidem). Cute, innovative names and tableware are to be found in old recipes and newly written farm-cook-books (Hutter, 2009).

Brands are suitable for quick identification of certain qualities, they are marketing instruments. Besides EU-conform labelling, like for ecologic food, and labels according to national regulations, there are labels by various associations of differing strictness to be found, like 'demeter' and 'fair trade'. Moreover, big companies develop their own brands, like: 'Ja, natürlich!' or 'Natur pur'. Their great number counterchecks their original purpose: the quick identification of certain qualifications. The certified criterias are as well overestimated as underestimated. For instance the AMA-certification is very well introduced and known, but in fact only states the country of origin. Identification-numbers, as well, reveal their meaning only to the expert: the plain customer is at a loss (interview: Chamber-official, 2009). Especially for small scale farming it is difficult to produce for

a quality seal. The present intention is to hold on to the AMA-certification and specify certain characteristics by supplemental statements.

‘Regions of delicacy’ are the latest asset of marketing: Direkt marketing of high-quality farm-products means new experiences for the guests. This is where the ideas of ‘delicacy and ‘specialty’ are located. Together with the aim of regionalisation they sum up to ‘regions of delicacy’. They were created to make the clients aware of regional food and services:

“The GRM GenussRegionen Marketing GmbH was founded in 2008 to broaden this initiative. It is a platform of management and development with the goal of a common strategy of the Austrian ‘Regions of delicacy’. Actors of agriculture, food processing, gastronomy and tourism will be active partners. GRM plans common activities of the ‘Regions of delicacy’ in the home country and abroad to expand the popularity of the brand and increase the economic usefulness for the licence-partners (www.genussregionen.at)”.

“Regions of delicacy” are sure to set incentives, but the use of the title is exaggerated and therefore ought to be regarded ambiguously. They represent rather an irritating, excessive supply: right now we have 113 in Austria. Partly they don’t mean much anyway, like the ‘Region of apple-juice’. Apple-juice is available everywhere abundantly (interview: Chamber-official, 2009).

Co-operation as Quality of Distribution

EU-Regulations call for: "Multi-sectoral and integrated action on regional development concepts for further development. Activities need to be better networked, supporting the implementation of regional development strategies, and transnational and / or straddling cooperation projects (Regulation (EC) Nr.1698/2005 (Assignment 41) 3.2.2, p.67).

LEADER programs were meant to secure the development of rural districts. The draw-back of small enterprises are the fixed charges. Co-operations are the best way to allocate the costs of production and to minimize them. As this is valid for the marketing of farm products, too, financial supports in this respect are used by the EU as an instrument of encouragement.

There is a fundamental difference between co-operations: on the one hand working- and purchasing co-operations lower the production costs, on the other hand distribution- and marketing co-operations help to keep prices moderate. For instance one of the purposes of ‘Bio-Heuregion Trumer Seenland’ is to minimize the operating costs for the members by means of mutual purchase of farm supplies (interview: Executive, 2004), which saves up to 30% of the costs. “Maschinenringe” serve the same purpose. More interesting for our topic though are marketing co-operations, because direct marketing intends to exclude wholesale trade. Small scale marketing actually can do without it. But on a larger scale some of its functions are indispensable, and therefore marketing co-operations partly fill a ‘missing link’. The importance thereof is symbolized by the “chain perspective” (Brand, 2006, 11)

Co-operations of caterers started as farm-shops. Before limited by EU-regulations handling meat consisted of individual initiatives: home slaughtering was very common, neighbours used to help. Large families in rural areas bought half a pig, the hind quarters of a cow, or a whole sheep, cut it up, packed it and put it into the deep freeze. Today paid slaughtering is in use, because slaughter-rooms which meet the legal requirements demand high investments. Some farmers built such a slaughter room for their own use and besides that either work for their colleagues, or rent the room for slaughtering. This thrives especially because of the mother-cow arrangement. The farmers have their animals slaughtered and sell them in 5 kilo, or 10 kilo packages with different quality pieces for a flat price to their customers (interview: Veterinarian, 2009). Singles, families in small flats or with both parents working prefer pieces of fresh meat or semi-processed food. Whole animals or parts of them are not very attractive for households any more, the same is true for many hotel-restaurants with international clientele. Yet a number of animals is sold directly to secure a better price for the farmer and guaranteed meat quality for the buyer.

Trade is a profession and an important factor in distributing goods. Multifunctionality aims at numerous professional activities taken over by farmers in their own range, with only little or occasional vocational training. Depending on the size of the business there are three types of the so-called direct marketing – which in fact means ‘farm products by farmers’. A) Single farmers sell their products to single customers. B) A few farmers co-operate, form an association and sell their products to their customers in common. C) Activities are split either within an association, or between two co-operating groups: one is in charge of the offers and matches them with the customers’ orders collected by the other group for common sale. Types A and B are well known. For type C examples of each version are available: Selling mountain farm products or organic food via retail chains will not be treated in this essay: it is a possibility to sell overproduction but no chance to get a fair price for quality as intended.

The firm ‘Tauernlamm’ was founded in 1976/77 by 15 farmers, who wanted to switch from cattle to sheep because all of their real estate was situated on more or less steep slopes. Today the company buys milk-calves and heifers from the ‘Erzeugergemeinschaft Salzburger Rind GmbH’, slaughters them, cuts them up and sells them vacuum-packed and ready to use in their own shop, by delivery-service or at different markets, as a dealer between farmers and gastronomy as well as between farmers and households. They even trade game the same way. About 600 producers equal 600 regular buyers, on average a 100 are being served per week” (Interview: Executive and Farmer, 2009). Their partner, the ‘Erzeugergemeinschaft Salzburger Rind GmbH’ consists of farmers, who abandon their claim of the “Alpungsprämie” with ordered animals, because in putting them on the market they miss the time-limits for keeping them on the summer farm. The animals either stay at the farm during summer or are brought back from the summer farm in advance and are sold for an extra charge of 30 cent per kilo. Gastronomers do not order them with the ‘Erzeugergemeinschaft’, but with ‘Tauernlamm’. The sales are good. (Interview: Official Of ‘Erzeugergemeinschaft Salzburger Rind GmbH’, 2009).

In the valley of the Saalach developed a somewhat differing solution. About 100 farmers, inn-keepers, and three butchers formed a common association: In this region cattle, calves and sheep are being slaughtered by local butchers again (pigs are seldom kept on mountain farms since food remnants may not be fed any more unless being heated before). The butchers buy the animals directly from the farmers, process and sell the parts to gastronomy (interview: Butcher of Vermarktungsverein, 2009). Direct contact between farmer and gastronomer works in only few cases like ‘Tannenhof’, usually some dealer is needed. The ‘Vermarktungsverein Saalachtaler Bauernprodukte’ now tried ever since it was founded in 1993 to connect farmers and restaurants by intermediate butchers. At that time one of the local butchers slaughtered only 15 cattle during a whole summer, 12 of them were cases of forced slaughtering (ibidem). Everything else needed was bought from the next slaughter-house. Today a farmer gets 10% more for cattle sold directly to the butcher, if it has the required quality. The butcher then charges a 15% for gastronomy, because not all parts of the meat are suitable for the customer. These 15% are passed on to the guest without any further additional charge (www.saalachtaler.bauernladen.at).

Not even one hotel of the lower part of the Saalachtal bought part of a cow during the past 20 years, only pieces ready to use in the kitchen. Internet sales keep expanding, the vacuum-packed meat being delivered directly. Nowadays customers like to buy within the region: up to that time there was no slaughtering by local butchers any more, except at the peak of the saison. This is done rarely now: today meat in the above mentioned areas is ordered from slaughter-houses only in cases of shortage. The services of the butchers are very important again (Interview: Butcher of Vermarktungsverein, 2009).

The ‘Vermarktungsverein Saalachtaler Bauernprodukte’ and the ‘Saalachtaler Bauernladen’ as well are very successful co-operations. Direct marketing is part of diversification and not only offers primary products, but processed goods like cheese, bread, juices, brandy and so on, regardless if sold in the farm-house, a farm-shop or at an open market. This way, and because a number of farmers sell their products side by side, a broad assortment is guaranteed. Various farm-specialties, like different

semi-finished products, Knödel (dumplings), Krapfen (doughnuts), Sauerkraut etc. meet the demands of modern households.

The financial success of such a farm-shop does not only depend on the number of attending customers, but on the number of presentig farmers, because the profit is divided accordingly.

Direct marketing does not simply mean to avoid wholesale trade and saving expenses. “Processing and marketing require time, investments, room for work and sale. Sanitary regulations set high standards, many rules and tests are valid regardless of the size of the enterprise, often a heavy burden for small farms” (interview: Chamber-official, 2009).

It is important for mountain farming to distinguish between primary production, processing and distribution of produced food. Since the quality of primary products is fairly secured by tests, controls, and certificates (e.g. cheese), the crucial point of the original question is, how presentation and distribution of mountain quality food “reduce the vulnerability of mountain farming systems”, because in a competitive marketing system chances for prevailance are small. The quality of foodstuffs and dishes is the basis, presentation and the whole marketing process are of the same importance.

Direct marketing does not only consist of different forms of co-operation. It is a conception, which needs to be revised: commerce is a special field of profession, and not something to be abandoned, because it is a factor of expenses. Marketing and trade require education and knowledge, organizing abilities and logistics. Moreover, it is necessary to invest much time and working power depending on the size of the business. Managing excessive supplies or deficits of demand sometime make it necessary to transit regional borderlines. For the purpose of the economic cycles mentioned in the beginning and the maintainance of rural settlements is justifiable to avoid existing large trade structures and use own bottom up growing institutions like marketing associations of farmers within the regions. Current EU-legislation enforces co-operation. The ‘Strategic guidelines’ state: “In a context of increased competition it is important to ensure that the agriculture and food sector ...can take advantage of market opportunities through widespread innovative approaches in developing new products, processes and technologies. For this purpose cooperation between farmers, the food and the raw materials processing industry and other parties should be encouraged (EC) No 1698/2005, 3.4 (iii))” Similar statements are made promoting cooperation and innovation in: 2006/144/EC Council Decision of 20 February 2006 on Community strategic guidelines for rural development (programming period 2007 to 2013). Networks ought to be improved, because of a weakness in “Multi-sectoral and integrated action on regional development concepts for further development”, therefore there are strategic needs “to promote the implementation of regional development strategies, and transnational and/or cooperation projects straddling (CCI 2007 AT 06 RPO 001. 3.2.2.4)” Knowing this weakness, Austria’s ‘Präsidentenkonferenz’ of the Chambers of Agriculture even set out the ‘Agrar-Projekt- Preis for innovation and co-operation’.

Customers and Guests

Individuals as well as households can be important customers in direct marketing. It is part of the analysis by a successful enterprise to assess the potential buyers as well as to optimize the position of the business. An investigation of diversifying farm enterprises in 2005 (Meiberger 2008) shows, that farm-shops in touristic regions boom, just as they do in the vicinity to borders, because many customers like to do their shopping in the adjacent country. Two examples show the importance of the presentation of the goods as well as the outfit of the shop: 2004 ‘Rochushof’ in Salzburg opened in the modified former horse-farm of a well known brewery. It has the appearance of a noble, high-price specialty shop, the convenience of a supermarket, and is run by a farmer and professional cheese-maker, a vegetable farmer, a baker of organic bread variations and a butcher of regional meat. Rochushof’s clientele grew so fast, that further affiliated shops in other parts of town are planned to open soon. The farm-shop at Buchbichlhof near the cable-car station of Untersberg has a different structure. It is a family enterprise combined with a butcher’s and a restaurant meant for

rural clients and tourists as chance for customers dropping by. Here the ambiente is simple, the variety is great, the service is quick. The set-up corresponds with the customers.

In some parts of the country it is difficult for inn-keepers to obtain Alm-products to serve to their guests in summer, because this food either is consumed right on the Alm, or the tourists take it along home. There is a slight chance for milk, cheese and butter, but animals to be ready for slaughtering are rare. Meat available at the end of summer season is too late to be used (interview: Tourism chairman and Hotel owner, 2008).

Hotels and restaurants of some size used to have a kitchen-butcher and the necessary storage facilities. Today's cold storage rooms look different. No more hooks to hang up meat, but shelves to store vakuum packed pieces. The former way of working up meat is still in use at Tannenhof, the senior owner of the hotel being 'chef de cuisine'. Besides international dishes native specialties are to be found on the menu, the specialty of the house are different varieties of dumplings. Almost all the parts of meat are being used, not only the premium pieces. But this is an almost singular case and a dream for the future (interview: Hotel-owner, three stars, 2009).

Hotels and exclusive restaurants don't buy whole animals or parts of them, they only take premium meat or certain parts, but the animals have to be from certain farms and be processed by the local butcher. The argument for the refusal to cut up the meat in the kitchen is, that there is no advantage in price for the restaurant, only more work, because it is the farmer who saves the work and keeps the money. This statement corresponds with 'Vermarktungsverein Saalachtaler Bauernprodukte'. In addition today there are no more rooms to 'hang up' the animals, nor the machinery to make sausages from cut off meat. Many farmers sell premium pieces privately, the rest is of little interest for a restaurant. Yet there are quite a few restaurants with emphasis on the skiing season with clients who like short and inexpensive snacks like pasta or meatloaf. These enterprises favour animals from farmers. The problem for the others are the cheap parts of meat and their comparatively high price (interview: Chef cook, 2009).

The most effective combination is farmer and at the same time inn-keeper or owner of a restaurant. Production, processing and the contact to the ultimate consumer are concentrated in a personal union, and it is of no consequence whether it concerns an inn right in the center of a village, or a restaurant with cookery display at the end of a deep valley, or an 'Almhütte' high up in the mountains serving snacks. These are the very ones, which became more and more important during the last few years. New roads to the Almen were built as the most important requirements for tourism as well as for agricultural use. Bonus systems, supports and investment subsidies by the EU as well as exemptions from legal restrictions of retail licences stopped the decay of the Alm-huts, which were either restored, rebuilt or enlarged, sometimes erected anew. The extra-income of farmers owning such a snack-cabin often amounts as high as 50% of the total farm-income. At the same time it covers a central task of tourism: it keeps open the pastures below the woodline, it takes care of the surrounding landscape, keeps up roads and paths and building-assets.

The summer-season used to be the best time for beef: May until August/September, as well as Christmas and Easter-time. During the past 20 to 30 years less beef was consumed in summer because of 'Grillmania': Everything is regarded to be fine that can be put on a spit. There are more examples for fashion in 'dining': On Palm-Sunday children used to get a pair of sausages for carrying a 'Palm-tree'. Today they want potatoes instead – in the shape of pommes frites (interview: Butcher 2009). Of course Chicken Wings and Spareribs do not harmonize with a four-star hotel kitchen, but very often it is the method of price-calculation which favors the premium pieces of meat: regardless of the free market the basic food-calculation in gastronomy still is doubling the price of the ingredients, instead of adding the costs of the labor to the costs of ingredients. This is in strong contrast with the rural specialties: they originated from the need to feed many mostly hard working people on very poor supplies.

Tourists as a rule want to eat something special, something they don't get at home. This also applies to inland-guests who dine out. In today's economically difficult times guests cut down their expenses in summer. The frequency ceases, even in Tannenhof, which is located at a main road. Around skiing

centers hotels and restaurants are booked better in winter than in summer. This of course has effects on gastronomy. Guests chiefly come from Germany and the Netherlands and like to visit restaurants as well as local visitors do. In hotels and restaurants with international guests the taste and favored dishes of their home-country is responsible for the menu. Danes must not be offered dumplings or anything too rich, but they like steaks, Schnitzel and mashed potatoes. Therefore, the purchase at the farmers' is difficult for many hotel-mangers with international visitors, it is more interesting for innkeepers with middle-class clientele: a biker hardly will sleep and eat in a four-star-hotel, he will prefer simpler dishes, even if bikers are a group in which all social layers are represented. This gap is closed by houses like the different middle-class establishments like the Kirchenwirte or Postwirte. This is a way to combine mass tourism and special offers. There are local combinations, too, like Dutch people in Tirol or Viennese in Burgenland. The range of dishes varies as to age as well: children will not be offered an expensive dessert which is not interesting for them at all, but they love and should be offered ice-cream (interview: Hotel-owner, four stars, 2009).

Resumee and prospect

Co-operation is part of the EU-policy to enforce the competitiveness of small and middle sized farm holdings. Traditional farming used to cultivate good neighbourhood, but anything beyond it was regarded suspicious. But the rural society has changed. Due to the development of infrastructure in the mountain region farmers and their families are mobile, well educated, flexible and innovative. This shows especially the two examples of supply chains: Tauernlamm and the Saalachtaler Vermarktungsverein. They were not constructed according to grand theories, but by private initiative, long before Austria's EU-membership. Tauernlamm was founded in 1976, Vermarktungsverein in 1993. They created a new form of diversification pursuing pragmatic solutions. Spiller/Gerlach (2006) ascertained the theoretical foundation of the supply chain management to be significantly heterogenous. Tauernlamm started off with direct marketing of their own sheep. Then the flow of goods widened, processing was added and different types of distribution. The Vermarktungsverein on the contrary is organised in concentric circles instead as a chain. Still, it is possible to clearly differentiate the steps of production, processing and distribution. As to the question of quality theory and experience prove, a chain is only as strong as each weakest link. Direct Marketing means 'bottom up' growing regional distributor-organisations. The better name would be 'distribution of farm products in farmers' hands'. The accurate analysis of the needs of individual customers and gastronomy has to be made locally: its results determine the kind of presentation and service and the variety of products.

Besides meat, the chief foodstuffs of mountain farms are dairy products. They and other by-products can be sold in farm shops (which actually deserve the name of direct marketing), but more value is created by diversifying enterprises such as 'Farm Holidays, rural restaurants, or Alm-catering, where they can be produced, processed and sold at their place of origin. Starting here more social change is to be expected: the old sectoral classification will increasingly fade. Frame conditions like tax-legislation push successfully diversifying farmers from an all-inclusive lump tax into bookkeeping and normal taxation as soon as their enterprise makes more than 50% profits out of non-farm business. This way the small scale mountain farmer gradually will turn out to be a well-to-do middle-class businessman or businesswoman, well groomed and educated – if this has not happened in many cases already.

The customers' purchasing decisions determine the development of mountain farming: if mountain quality food is appealing enough to the potential customers, they will buy it and enable the farmers to stay. If farm food fails, because for whatever reason it is not attractive enough, mountain farms will soon be abandoned. This would be a 'lose/lose' situation for both sides, because the farmers are the ones to cultivate the land and make it interesting for tourism, an important factor of welfare.

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CCI 2007 AT 06 RPO 001, M 211. Österreichisches Programm für die Entwicklung des Ländlichen Raums 2007-2013

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