

The perception of quality aspects for mountain products in long supply chains - Cases from Slovenia and Austria

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Abstract: Results of the European 6th framework project EUROpean Mountain Agrofood products, Retailing and Consumers (EuroMARC) suggest that most consumers expect mountain products to be from small scale farms produced under extensive farming conditions, but buy them in general in supermarket stores as part of their daily shopping routine. The paper assesses which aspects of quality are perceived important by actors on different levels of long supply chains from farmer to consumer. Two dairy supply chains in Austria and Slovenia are compared with the consumer expectations in the two countries. The results give hints how to communicate more consistently aspects of quality of mountain food products.

Keywords: Convention Theory, supply chain, quality aspects, mountain products, dairy products

Introduction

In general consumers expect mountain products to come from small scale farms produced under extensive farming conditions, but they want to find them in the general supermarket stores as part of their daily shopping routine, as the results of a large consumer study in the frame of the EU-funded project EuroMARC¹ suggest. While the communication of certain characteristics of quality between producer and consumer seems to be relatively easy in short chains like direct sales on farmers markets, the complexity increases obviously with the number of intermediaries. This increases the importance to communicate the specific quality aspects of mountain products along the supply chain. It is therefore of interest to see whether the notions of quality change along the different stages of the supply chain and who is determining the quality aspects communicated to the final consumer.

This contribution aims to shed light on characteristics of quality for different stakeholders along the supply chain, their formation and communication. In doing so two supply chains are compared, one in Slovenia the second one in Austria. Both supply chains selected are dealing with milk processing and market their products to a large proportion through supermarket channels.

A comparison of the two countries seems to be of special interest as both have a considerable part of the country in the alpine area. Their natural characteristics are similar. Both are alpine countries with a large proportion of less favoured mountainous area, a high share of permanent grassland and a small scale farm structure. However the historical and especially the political development in the past century have been quite different in the two countries. This has led to structural differences on the production and processing side and leads to the assumption that the quality perceptions of producers and consumers in the two countries differ as well.

The following sections describe the analytical and theoretical concept and data sets used for the comparison. This is followed by a short description of the two supply chains. Thereafter we focus on the quality perceptions of the consumers in Austria and Slovenia. A synthesis of the convergence of quality aspects as put forward by the supply chain stakeholders with the expectations of the consumers follows. Finally some conclusions are presented.

¹ For more information see: www.mountainproducts-europe.org.

Theoretical and analytical concept: Convention Theory

Convention theory is an innovative framework of analysis within “non-standard” economics, originated in the mid 1980s out of the collaborative work of sociologists and economists (Boltanski and Thévenot, 1991, 1999). This framework of analysis is used frequently for the analysis of “quality” especially in agro food studies (Allaire and Boyer, 1995).

Much of the current agro-food literature has drawn on Convention Theory to explain cognitive and evaluative processes about food quality. We use Convention Theory here to map the different perception of quality of stakeholders along the supply chain. The “regimes of justification” as developed by the Convention Theory (Boltanski and Thévenot, 1991) postulate that arguments for quality are based on distinct sets of justifications – “conventions of quality” (also called “worlds”). The views of different stakeholders along the supply chain thus can be categorized according to a certain set of criteria.

Originally Boltanski and Thévenot (1991, 1999) described six sets of conventions. They distinguished the categories “market”, “industrial”, “civic”, “domestic”, “emotion” and “opinion”. Later Thévenot, Moody and Lafaye (2000) extended the original set with another one, the “green” convention. We use this set of seven conventions for the analysis of our data. Table 1 gives a brief overview over the seven conventions adapted by us to the specific topic of food (see indicators).

Table 1. The seven worlds of the Convention Theory.

Worlds	Examples of indicators
Market	economy, price/cost, availability
Industrial	technical efficiency, professionalism, competence
Civic	collective welfare social justice, equity (e.g. a “fair price”) solidarity, rural development, urban rural relation
Domestic	tradition, familiarity, closeness, trust relations
Emotion/Inspiration	personal enrichment, fulfilment, wellbeing
Opinion	reputation, name, prestige
Green	preservation of environment ecological sustainability, environmentally friendly production

(Source: Own compilation after Thevenot, Moody and Lafaye 2000)

Boltansky and Thévenot (1991, 1999) describe conventions as worlds of argumentation in a broader sense. Product quality might be argued by stakeholders of the supply chain, for instance, in a very “domestic” world (e.g. traditional methods, regional origin), even if the processing in a larger dairy requires a certain standardisation of the process to allow the product to be sold in the supermarket.

The material

The results presented in this paper are based on qualitative and quantitative data collected within the EU-funded project EuroMARC. Altogether 15 qualitative interviews were conducted with stakeholders of two supply chains, Mlekarna Planika (Slovenia) and Sennerei Zillertal (Austria), including farmers, processors, retailers and caterers. The interview guidelines dealt with a range of topics related to quality perception, communication and promotion of mountain products, the structure, agreements and relationships as well as the bottlenecks and constraints along the supply chain of mountain products. Basically the interviews focussed on one product, but many respondents answered general descriptions of quality relating to the entire product range of the respective dairy. For this paper, verbal quotes of the interview partners on their own quality perception of mountain food products were analysed.

Besides this qualitative survey a large quantitative investigation with 300 interviewed consumers in each country was carried out. Urban as well as rural people, living within and outside of mountain areas were included. For this paper we focus on the results of two questions, one on the importance of different attributes for the general purchase of dairy products and another one on attributes related to mountain products. In both cases the questionnaire allowed consumers only to consider a

range of pre-formulated attributes. There is obviously a limitation in the comparison of the answers from consumers with the direct quotes of supply chain stakeholders. But as the formulation of the statements was already build on conventions as categorised in Table 1, these conventions form the basis for the analysis of both sets of data.

The Case studies

The agricultural sector in Austria and Slovenia in brief

A quick comparison of agriculture in general and the dairy sector specifically reveals that although there are similarities in their basic characteristics, there are also important differences between the two countries.

A similar feature in Austria and Slovenia is that more than half of the country is covered by forests, and more than 50% of the agricultural area is permanent pasture. Farms in both countries are rather small. While in Austria about half of all farms are below 10 ha (being the average size 19.3 ha), in Slovenia more than 80% of the farms are below 10 ha (the average size is 6 ha) (BMLFUW, 2009).

A specific problem faced by Slovenian agriculture is the advanced age structure of farmers on family farms. The share of those younger than 45 years is only 18.8%, (in Austria about 40%) whereas 56.9% of farmers are above 55 years old (in Austria less than 30%).

In Austria the average number of cows per farm is 13 in Slovenia only six. In the pre-independence period, more than 90% of the utilisable agricultural area in Slovenia was in the hands of small independent farmers and about eight per cent was occupied by "socially owned" holdings, today known as "agricultural enterprises" (MOA, 2007). Thus, today only about seven per cent of all dairy farms hold more than 20 cows, but these account of more than 30% of the total dairy cows of Slovenia.

Another source of similarity between the countries is the high concentration of the milk processing sector. The largest dairy processes more than half of the total delivered milk, while the second and third largest companies hold about the same share of between 18% and 20% each. This suggests that the three largest companies in Slovenia hold a market share of about 80% whereas in Austria the three largest dairy enterprises together account for 50% of the total milk processed (BMLFUW, 2009).

These figures show that the Slovenian dairy sector is on the production side in general smaller structured than in Austria but also split into a smallholder sector and a commercial agro-industrial sector. On the processing side, the Slovenian dairy industry is far more concentrated than in Austria. These structural differences have implications on the processing of milk from mountainous areas and the quality notions attached to as we will see below.

Characteristics of two dairy supply chains in Austria and Slovenia

In order to assess the construction of quality we compared two specific supply chains: A and B. Both are long supply chains marketing substantial amounts of their products through big retail chains. Mlekarna Planika in Slovenia is the only dairy which markets milk (products) from mountain areas in supermarkets. The Sennerei Zillertal in Austria is one of the bigger private dairies in the mountain region and quite successful.

Supply chains are commonly defined as associated to a given producing enterprise. Thus, a supply chain is composed of the producing firm, its suppliers lying upstream, and its customers lying downstream via distributors and retailers to the final consumer. In our case the centre of the supply chain is the dairy. Therefore in the following section we focus on the description of the processing firms.

Both dairies have undergone major changes during the last decades. While in Slovenia the decay of Yugoslavia and independence of Slovenia resulted in a major shift of the system, in Austria at about the same time the strict market ordering regime was abolished in preparation of EU-accession. In both countries the new market liberalisation demanded a complete reorganisation of the dairy system. Especially relatively small dairies had to find their niche. It appears that both dairies focussed on the mountain origin and tried to develop this speciality further. This links very much into their construction of quality.

Mlekarna Planika

History of the dairy

Mlekarna Planika is located in the Soča valley, allegedly one of the most beautiful valleys of Slovenia. The name “Planika” means “Edelweiß”, a flower commonly linked to mountains.

Already in 1957 in Kobarid, close to the Triglav massif, a dairy (processing cheese and yoghurts) had been established. After Slovenia’s independence in 1991, problems in this dairy accumulated and it went bankrupt in 1995. In the same year, the Agricultural Cooperative of Tolmin (Kmetijska Zadruga Tolmin) set up the dairy “Mlekarna Planika d.o.o. Kobarid” which integrated the milk production division of the bankrupt dairy, and employed their former 64 members of staff. Before the bankruptcy, 82% of the milk had been processed into powdered milk while 16 % had been sold as milk in plastic PVC bags, and 2% as yogurts and butter for the local market of Tolmin and the Goriška region. When the new enterprise was set up, important decisions were taken for the reorientation of the dairy. After a thorough market analysis, a new range of products were developed.

Production, processing and distribution in the case of the dairy Mlekarna Planika

The dairy owns a farm of 120 hectares with 130 cows producing 600.000 litres of milk. Milk is also collected from 250 farmers of the Upper Posočje valley. Since 2006, the dairy buys milk also from 68 farms of the Bohinj Valley. This increased the processing volume of the dairy by 30% to six million liters annually. The milk from Tolmin and Bohinj areas has similar characteristics: in both areas milk production is characterised by the mountainous environment with alpine climate. 75% of the mountain pastures used are located in the Triglav national park and the farmers use production methods with low intensity.

The milk is collected by the agricultural cooperatives of Bohinj and Tolmin. It is delivered to the dairy in Kobarid where it is pasteurised and then processed.

The dairy created a new brand “Bohinjka” to market fresh full fat and semi skimmed unhomogenized milk, butter and cottage cheeses made out of Bohinj’s milk separately. Under the brand name of Planika cottage cheese, yogurts, sweet cream, kefir, sour milk, and a variety of cheeses are produced. The cheeses include the half hard cheese types Tolminc, Planika and Kober. Some products are also processed for the Slovene food industry.

Altogether eight million litres of milk are processed annually. Planika is the fifth biggest dairy in Slovenia (but relatively small compared to others). Products are sold in the local mountain area as well as in the whole Slovenia through different retail chains.

Sennerei Zillertal

History of the dairy

The dairy is located in the Zillertal, a very touristic valley in the central Alps within the province of Tyrol. The dairy was founded in 1954 in the village of Mayrhofen by the father in law of the present owner who produced fresh milk, butter and cheese.

1974 a new processing plant was build in Mayrhofen where exclusively Emmental cheese was produced for export. This was due to the strict national marketing regime of that time which was

eventually abolished in preparation of the accession of Austria to the EU in 1995. Since then the number of farmers supplying the dairy rose to a total of 380 farmers and the amount of milk processed increased from 2.5 million litres per year to 15 million litres.

Differentiation from the product range of other dairies became of paramount importance to justify a higher product price. In the time of Emmentaler production the use of silage had been forbidden within the Zillertal. After EU accession the dairy succeeded to persuade the farmers to remain silage free and to feed only hay and concentrates. This allowed marketing the milk as “hay milk” which became a special feature nowadays.

In 1998 a new processing plant was erected just outside the village boundary of Mayrhofen to cope with the growing amount of milk delivered by the increasing number of farmers. The new dairy was built as a “demonstration-dairy” where it is possible for the visitor to see how cheese is produced. Since 2000 about 60.000 visitors per year follow the stages of milk processing in the Zillertal dairy on 6.000 m². Furthermore, there is a shop and a restaurant attached to the dairy.

The dairy is still a privately owned family business with about 70 employees. About 30 persons are employed in milk processing; others are working in the “demonstration-dairy”, gastronomy, direct sales, logistics and administration.

Production, processing and distribution in the case of the dairy Sennerei Zillertal

The milk is collected directly on the farms with lorries belonging to the dairy. The daily amount fluctuates seasonally between 30.000 and 60.000 litres with peak delivery during the summer months. These fluctuations are buffered by the cheese production to keep the amount of fresh milk constant. Milk for fresh products is collected daily, milk for cheese making partly only every two days.

Although the dairy is comparatively small, the product range is quite broad. In total about 25 to 30 milk products are produced. The product range of the Sennerei Zillertal includes fresh milk, light milk, buttermilk, cream, yogurt, butter and up to 14 varieties of cheese (e.g., the traditional Graukäse, Bergkäse, Emmentaler) In addition to cow milk also cheese and yogurt from goat and sheep milk are produced.

Cheese is marketed directly by local shops, but also in long supply chains. 80% is sold in supermarket chains and 20% in three dairy owned shops, local shops and bakeries, as well as in the gastronomy. Fresh milk products are sold mainly within the province, cheeses nationwide. So far the products are not available in discounters due to their low-pricing policy.

The concept of quality

Quality perception along the supply chain Mlekarna Planika

The interviews conducted focussed especially on one typical mountain product produced in Planika dairy: the Tolminc cheese. Traditionally this cheese is produced on farm from raw milk, recently governed by a PDO designation. Mlekarna Planika is the only dairy which produces this type of cheese for wider distribution through supermarket chains. However they produce it from pasteurised milk and can therefore not use the PDO designation.

The following quality characteristics were mentioned by different stakeholders along the supply chain:

For the interviewed farmer the quality of a food product (i.e., Tolminc cheese) is a matter of soil, of grass composition characteristics. As the precipitation is higher, the climate colder and the vegetation growth period shorter, it is only possible to mow two to three times. These factors make better forage. The hygienic quality of silage is another factor of quality as otherwise the dairy has problems in cheese processing.

For the representative of one of the two agricultural cooperatives collecting the milk for Mlekarna Planika the quality of the product is based on the breed (Brown Swiss) and the fodder: less silage, less maize and more grazing. Milk is produced on high mountain farms with pasture land. He emphasises the microbiological quality of milk, hygiene, proper cooling and the absolute necessity to pasteurize milk for food security as very important quality attributes.

For the manager of the dairy the traditional processing technology of the Tolminc cheese is the core of the quality. The production in the dairy is close to the traditional processing in the mountain pastures, with the difference that the milk in the dairy has to be pasteurized. But they produce cheese with natural rind. Thus the taste and the shape of cheese Tolminc is very specific. The cheeses mature according to old technology several months on wooden shelves. Although the dairy produces Tolminc cheese in bigger volumes, she claims that it is not an industrial produce. The milk is not homogenised, the cheese is not plastic wrapped. She also focusses on the breed, which is thought to be appropriate to the mountain area and local feeding practices with a high proportion of hay and less silage.

Also the managers of three big retail chains were interviewed. They perceived the quality of Planika products as rooted in the traditional production methods which are characteristic for their region, especially the production in higher altitudes where farmers do not use chemicals. This results in small amounts of production which are considered specialities.

The saleswoman of a speciality shop says the products are special because cows pasture in high altitude where nature is almost intact.

Also the owner of a restaurant perceives the products as having a specific taste tracing this back to the peculiar plant composition in the mountains and the clean air.

Quality perception along the supply chain Sennerei Zillertal

The interviews focussed on the dairy product Bergkäse. This is a matured hard cheese which is produced throughout the mountainous area in the western part of Austria. As the name only indicates a specific way of production, this type of cheese is even produced by dairies outside the mountain area (although the name includes the term “mountain”) and also the denomination is not protected².

The quality characteristics were mentioned as follows by different stakeholders along the supply chain of the Sennerei Zillertal:

The farmer whom we interviewed said the aroma of the Bergkäse is special due to the period of maturity of at least 6 months. In contrast to Emmentaler, Bergkäse needs higher quality milk, which is a result of the fodder. In high altitudes the fodder is better as the intensity of farming declines. There is a contractual obligation with the owner of the dairy not to use silage and GMO-feed. Only hay and certain prescribed concentrates are fed. It isn't allowed to feed soybeans as it becomes increasingly difficult to make sure the soybeans are GMO-free. Furthermore the milk has only few food miles as distances between farmers and the dairy are short.

The owner and manager of the dairy attributes the main quality characteristics of his products to the soil structure, which results in the taste and the content of ingredients as well as in the colour (yellow butter and cheese). He argues the influence of the mountain provenance on quality aspects by scientific research results which prove that the taste is more intense and the content of Omega-3-fatty acids in the milk increases sharply above 1.000 m above sea level. Another important aspect is that the products are free of conserving additives. The main quality aspects promoted by the dairy are the feeding without silage and GMO-feed. The constant taste of Bergkäse is attributed to the fact that the milk is processed only in one dairy. Other influencing factors are the few food miles for the milk and the experience and knowledge of the engaged personnel.

² The term „Bergkäse“ itself is not protected by the EU, however some provenance of Bergkäse is protected as PDO like “Tiroler Bergkäse” and “Vorarlberger Bergkäse” in Austria.

The production and quality manager of the dairy claims the milk from mountain areas makes a difference in the quality of cheese. Even if a similar cheese could be produced outside the mountain area it would not be the same cheese. GMO-free and silage free feeding is the core of this special cheese quality. Furthermore the hay from mountain meadows is different. The botanical composition of mountain meadows and pastures brings a better quality. For the processing also low cell and bacterial counts of the milk are important. The figures of the Sennerei Zillertal are in this respect better than the regional average.

The cheese maker, employed by the dairy, perceives taste and texture of the cheese as primary quality aspects. Also the constantly same taste and the packaging according to consumer preferences is important. The mountain provenance of the product implies for him a natural production process without preservatives and stabilisers, which would be necessary if silage was fed by the farmers. He also mentioned the different composition of fatty acids due to the altitude and the botanical composition of alpine meadows due to lower cutting density (two to three times instead of up to 6 times in intensified farming).

The branch manager and saleswoman of a dairy owned shop argues the quality with GMO-free and silage free milk production. Also the hay quality is mentioned. This is associated with the natural production process as the meadows are “natural”. Also the small scale structure of the farm guarantees quality production. Consumers are said to associate mountain provenance with traditional production ways.

The purchasing manager of the retail chain sees the quality attributes of Bergkäse from the Sennerei Zillertal in the taste, the clear provenance and regionality. Then he mentions the “haymilk” (the term relates to the silage free feeding). Furthermore he mentions the particular taste of the raw milk due to the herbs and grasses of the alpine pastures and the healthy husbandry system due to alpine pasturing.

Comparison of quality perceptions of different stakeholders along the supply chains

In both supply chains a tension between tradition and modern industrial technology is apparent. Stakeholders of both supply chains argue mainly in a domestic and industrial convention. The way of feeding, the lower intensity of mountain farming and the high (microbiological) quality of the milk forms the basic argumentation. This is shared by most of the stakeholders throughout both supply chains.

There are however some differences in the weight stakeholders put on different attributes: In the Sennerei Zillertal the triad of GMO-free, silage free and hay fed appears like a mantra as a defence of traditional farming versus intensification mechanisms of industrial agriculture. On the other hand Slovenian stakeholders along the supply chain did not particularly mention GMO-free and silage free production, although other attributes like grass composition as well as the low intensity of forage and fodder are of great importance for them.

Industrial argumentations are used mainly in association to the processing stage. For Slovenian supply chain stakeholders hygiene is very important, as already mentioned this could be explained by transport problems of raw milk from the farmers to the dairy. In the Austrian supply chain low cell counts indicating hygienic conditions while milking are a precondition for making good cheese.

But whereas in the Mlekarna Planika supply chain the fact of milk pasteurisation is featured as a matter of necessary hygiene, in the Sennerei Zillertal supply chain the absence of additives and higher content of positive ingredients are featured. The stakeholders of the Sennerei Zillertal on the processing stage argue strongly with scientific evidence of the influence of altitude on the composition of fatty acids and botanical composition of meadows etc. while Mlekarna Planika tries to emphasise the traditional features of processing despite the use of pasteurised milk. Very important for Slovenian is also the domestic breed. This feature was not emphasized in the Austrian case. Small scale production as quality attribute is more important for Austrians than for Slovenian supply chain stakeholders.

There are some differences in the organisation of the two supply chains which have implications on the internal communication.

In the Mlekarna Planika case the farmers deal mainly with the cooperative collecting the milk and not with the dairy. Although the cooperative of Tolmin is at the same time the owner of the Mlekarna Planika dairy, the dairy and the milk collecting cooperative work separately. Although the supervisory committee of Mlekarna Planika is constituted by three farmers and two representatives of the cooperative, the dairy does not deal directly with the farmers. It can be assumed that this makes communication on quality aspects more difficult.

In the Sennerei Zillertal farmers have a very positive attitude towards the dairy, even if price negotiations are sometimes hard. It is striking that in the Sennerei Zillertal supply chain the three features silage free, GMO-free and hay feeding are so strongly present in the communication of the processor to the farmers (contractual obligations) and to the retailer. It appears that the processor is quite successful in his communication upstream as well as downstream the supply chain.

Comparative results of consumer questionnaire

In each of the two countries 300 consumers were asked on the importance of different attributes for their purchasing decision when buying cheese resp. dairy products. As shown in table 2 a list of eight attributes was ranked from 1 “not important” to 5 “very important”. The graph shows the mean value for each attribute in the two countries.

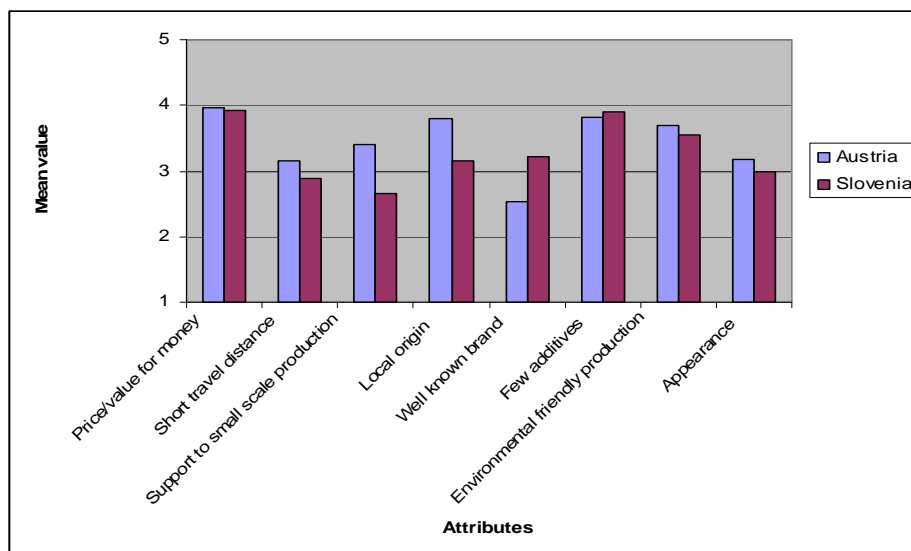


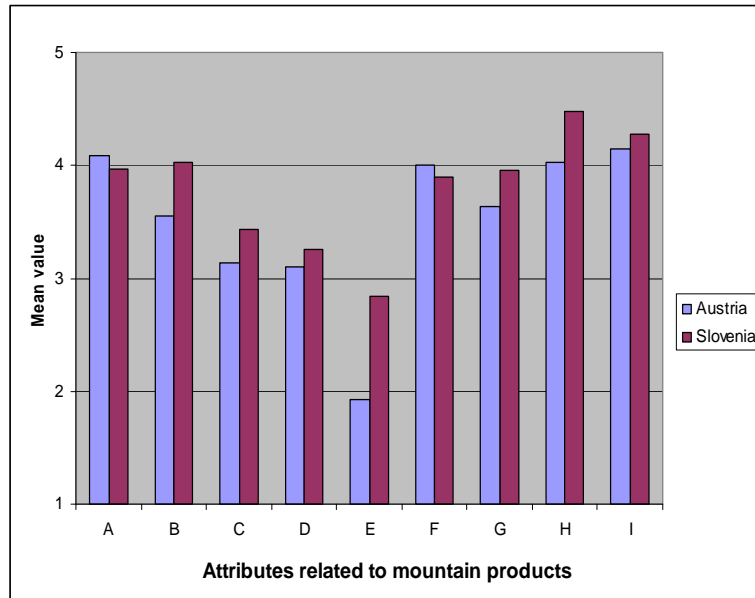
Figure 1. Importance of different attributes for buying cheese/dairy products (Source: Own table after Amilien, Schjøll and Tebby, 2008).

The basic attributes of price/value (market convention), few additives (industrial convention) and environmental friendly production (green convention) were ranked highest in both countries with very similar values. But while in Austria local origin (domestic convention) and support for small scale production (civic convention) is ranked higher than in Slovenia, Slovenes were focussing stronger on the brand (opinion convention). Of medium importance for both countries and at a similar level were short travel distance (green convention) and appearance (emotion/inspiration convention).

The answer concerning attributes consumers relate to mountain products were given on pre-formulated statements (see Figure2, mean values), whereas 1 meant “I strongly disagree” and 5 “I strongly agree”.

Here Austrian consumers rank the effect of mountain quality production for the cultural landscape (statement A) slightly higher, while Slovenian consumers focus more on traditional production structures (statement B). Both statements relate to a domestic convention). Slovenians emphasise

more the hygienic conditions of production (statement H, industrial convention) than Austrian consumers. Both countries rank the importance of mountain products as part of the cultural identity of local communities (statement I) very high. Moreover consumers in both countries are in the opinion that mountain products support local employment (statement F, civic convention) and are produced and processed in an environmental friendly way (statement G, green convention).



A: Mountain Products are connected to specific cultural areas
 B: Mountain products are produced in a traditional way by small scale producers
 C: Raw materials from mountain areas can be processed to mountain products also outside the mountain area
 D: Mountain products are not required to be healthy products
 E: The main raw material for mountain products does not necessarily need to come from a mountain area
 F: Mountain products support local employment
 G: Mountain products are produced and processed in an environmental friendly way
 H: Mountain products have to comply with industrial standards of hygiene
 I: Mountain products are part of the cultural identity of local communities

Figure 2. Attributes related to mountain products (Source: Own table after Amilien, Schjøll and Tebby, 2008).

While there is some acceptance that raw materials can be processed outside mountain areas to mountain products, the possibility of the raw materials coming from outside the mountain area obtains little approval. In both cases Slovenians seem to be more open than Austrian consumers.

The correspondence of quality aspects between production and consumption

The intention of this article was to shed light on the quality characteristics of mountain products from the perspective of stakeholders along the supply chain as well as consumers and on how these characteristics are formed and communicated along the supply chain in order to meet consumers' expectations.

In the Slovenian case quality attributes raised by the supply chain stakeholders interviewed and consumers seem to coincide. Especially Slovenian processors and retailers emphasize the traditional production process, recipe etc. of the investigated mountain product (domestic convention). In comparison Slovenian consumers assume that mountain products are produced in a traditional way by small scale producers. Besides the domestic convention also one aspect related to the industrial convention plays an important role for Slovenians: high hygienic quality of the products is expected by stakeholders along the supply chain as well as consumers.

Also in the case of the Austrian supply chain the domestic and industrial conventions play the most important role for stakeholders. Although Austrian stakeholders argue in the same conventions as their Slovenian colleagues, they bring forward different quality aspects, like the use of GMO-free, silage free and hay feeding (domestic convention). On the other hand the range of aspects related to the industrial convention like abandonment of artificial additives or low cell and bacteria counts differs again. This corresponds to the attributes raised by consumers regarding the quality of cheese. Likewise it is expected that mountain products comply with industrial standards of hygiene.

Compared to Austria, Slovenian consumers emphasize more a well known brand as an important quality attribute for dairy products which is important when selling in supermarkets. This suggests that there is a big potential for the investigated case study firm, which is so far the only one to market mountain dairy products to supermarket chains. For the Austrian consumers a well known brand seems to be less important when buying cheese. This may reflect consumers' views about food safety. If they do not trust in standard quality control systems, they might focus more on well known brands. Here the history of the country and trust in institutions might play a role.

The environmental friendly cheese production seems to be more important for Austrian than for Slovenian consumers. In contrast to that rather Slovenian than Austrian consumers are of the opinion that mountain products in general are environmental friendly produced and processed (green convention).

Austrian and Slovenian consumers as well as Austrian supply chain stakeholders agree that mountain products support the local employment (civic convention), while the interviewed Slovenian supply chain stakeholders do not comment on this aspect. The higher importance of support for small scale production and local origin, which Austrian consumers attribute to buying cheese might relate to the availability of such products in supermarkets and to the current political debate on the abandonment of the milk quota system.

In general, it is to say that the market convention was not at all mentioned and civic, emotion/inspiration, opinion and green conventions were hardly addressed by the Slovenian and Austrian supply chain stakeholders. This seems to be problematic as price/value for money (market convention) is one of the most important attributes for Austrian and Slovenian consumers when buying dairy products. Moreover Slovenian consumers give a relatively high importance to brand recognition (opinion convention).

Indirect sales channels e.g. like supermarkets are gaining importance in both countries as direct sales in Austria decline (Schermer, 2007) and in Slovenia direct selling producers apparently cannot increase their quantity. As communication of a certain image is more difficult in indirect sales channels a coherent picture is of paramount importance. In the observed case studies in addition to that a tension between communicating quality aspects of different conventions increases the challenge. The results indicate that there is still scope for improvement.

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