

CAP: The reform of promotion policy for
agricultural products

Your ideas matter

A reinforced value-added European strategy for promoting the Tastes of Europe

Summary report of the Green paper consultation
November 2011



European Commission
Agriculture and
Rural Development



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1. Introduction



Dacian Cioloș, Commissioner for Agriculture and Rural Development

The year 2012 will be a milestone in the history of the CAP. For 50 years European agriculture policy has fed the European project. In parallel with negotiations on the CAP 2020 reform, we will also recast our rules on promotion policy in order to better promote the outstanding quality of our farm products.

In fact, in response to consumer concerns, farmers in Europe face stricter rules on food safety, environmental conditions and animal welfare than their competitors elsewhere in the world. European agriculture needs an effective promotion policy which highlights the added-value of the sector. It is also important for European jobs and growth that the EU agri-food sector can improve its position on traditional and emerging markets. We therefore need to consider how best to adapt our schemes to support this goal.

The EU needs a more ambitious promotion policy for its agricultural products in terms of content, budget and management structures. A modern agriculture and food sector calls for a modern promotion policy. We need new tools and political choices have to be made. With developments over the last 15-20 years, the instruments available to promote exports are no longer fit to meet the needs.

In the first half of next year, the European Commission will launch a Communication on the future of the promotion policy for EU farm products, to be followed by legislative proposals. The European Commission will aim to make clearer to consumers – both in the EU and beyond – the quality, traditions and added-value of European agricultural and food products.

All elements of the CAP need to connect more with European society and this is also valid for our promotion policy. This is why on 14 July the Commission launched a Green Paper and a public consultation on the future of the EU promotion policy of agri-food products inviting all stakeholders - consumers, producers, distributors and governments - to have their say on the added value for Europe of having its own promotion policy, the goals of this policy on internal and external markets and how this policy should be implemented.

We have received thoughtful and obviously sincere views from all around the EU. Most support the need to modernise our promotion policy, even if there are different views on how this should be done. Nonetheless the debate has been a useful exercise as it has given us an important indication of feelings

of many people. These contributions will now feed into our deliberations as we prepare for the next step in the reform, our Communication on future promotion policy.

A handwritten signature in blue ink, appearing to read 'Dacian Cioloș', with a stylized flourish at the end.

Dacian Cioloș, Commissioner for Agriculture and Rural Development

2. Executive Summary

The European Commission currently devotes about €50 million a year¹ to support campaigns to promote farm products on European and world markets and provide EU citizens with the information they need to make informed choices about the food they eat and other farm products. The Commission believes the time has come to improve and adapt its current information and promotion policy for agricultural products in line with changing circumstances and revised priorities. It plans to present the relevant new draft legislation before the end of 2012.

As a first step, the Commission published a Green Paper on 14 July 2011 (COM(2011)436), launching a debate on a new promotion and information strategy. This took the form of an online consultation process which ran from 14 July to 7 October 2011. It asked interested parties to submit their views on the subject online using a dedicated website.

The consultation process

Respondents had to identify themselves as belonging to one of three categories:

- The general public.
- Stakeholders (farmers, food producers and processors, professional organisations, promotional bodies, retailers, distributors, traders, consumer associations, interested non-governmental organisations).
- Public authorities.

They were invited to respond to 17 key questions. The present report summarises the responses.

The contributions of EU citizens, stakeholders and public authorities have been published on the dedicated website, except for the small minority of cases where the contributor wished data to be published anonymously, or not at all. A group of independent experts summarised the contributions received. This report is their summary of respondents' views. It has been the object of a peer review.

There were 173 responses in all. Of these, 130 were submitted by stakeholders, 23 by public authorities and 20 by individual citizens. They came from all Member States, except Bulgaria, Cyprus and Slovakia. France provided the biggest number of responses followed by Belgium, Italy, Germany, Spain, UK and Poland.

The low number of contributions from citizens no doubt reflects the relative technical nature of the consultation. The responses were therefore dominated by stakeholders whose contributions, while making suggestions for practical improvements and efficiency gains for EU information and promotion policy, also served as a platform to press their own specific interests. This is a legitimate approach.

But the quasi-absence of citizens (and consumers) compared with previous online consultations of this nature, meant that the balance provided by their usually broad range of counter-arguments, views and frank comments was largely non-existent this time.

As in previous consultations, there was clear evidence of cooperation and collusion among participants,

¹ Council Regulation 3/2008 on information provision and promotion measures for agricultural products on the internal market and in third countries

within countries and within sectors. These represented 10% to 15% of total submissions. This report recognises the predominance of stakeholder views and discounts the effect of the collusion among participants. On this basis, the spectrum of respondents was sufficient to provide a good cross-section of views on promotion and information measures.

The range of responses

The report presents the main points of view, identifying majority positions, where these emerge, and flagging divergent standpoints. On some issues, there is no dominant trend. The questionnaire covers a set of issues linked to the objectives of information and promotion policy: the best tools for promoting agricultural products in different markets, the priority products to promote, the identity and roles of players and beneficiaries, the most efficient methods and procedures.

The responses submitted do not provide clear answers to the Commission's questions. But summarising each one in turn consistently and regularly highlights the set of tensions which surround EU information and promotion policy-making and implementation. This is particularly the case as regards:

- Generic or product/sector-specific promotion.
- Promotion of the 'health' quality of food or the origin-related 'quality' of food.
- The involvement or not of private companies and commercial brands.

The Green Paper groups the consultation around four themes: the added value of EU action in the field of promotion; internal market objectives and actions; external market actions and goals; content and management method.

Added value of EU action

An effective EU co-funded information and promotion programme is one which promotes products the consumer will want to buy, and sends the messages the consumer wants to hear. There is among the responses to the questionnaire a considerable consensus on what these messages might be. They gravitate around issues of quality, health, sustainability, responsible consumption of resources, value for money, animal welfare – all areas where the EU can claim a comparative advantage. To these can be added the need to make EU farm products more competitive, to bolster farm incomes at a time when direct price support is being removed, and to expand sales in new markets, including in third countries.

Opinions differ on whether the EU should emphasise internal or external markets more. However, there is a measure of agreement on how to differentiate promotion programmes between local/regional markets and the EU internal market on one hand and external export markets on the other.

There was, however, strong support for the need for coherence between EU promotion policy and other policy areas: between EU promotion policy and the national promotion policies of Member States; between EU promotion policy on the one hand and other parts of the CAP as well as EU regional and trade policies on the other hand.

The internal market

The prime aim in internal market promotion is to put EU consumers in a position where they can make informed choices about the products they buy. Independent of the argument as to whether local markets should be part of promotion policy or not, the consultation identifies wide agreement around a set of key messages for them: freshness, direct sales, low transport costs and short supply chains, confidence in familiar and traditional products, and a positive contribution to the local rural economy.

The majority view is that promotion on the internal market should be primarily generic (EU quality, eco-friendly production methods, high safety standards, etc.) to strengthen the EU 'brand' and distinguish it from imports, often produced to lower standards. However, while the generic approach should come first many argue that exceptions should continue for PDOs/PGIs, and other origin products or specialties.

One recurrent suggestion, echoed by stakeholders and public authorities alike, is to use information and promotion policy to provide a rapid reaction mechanism to keep the public informed during food crises, raising visibility about the quality and hygienic standards of EU agri-food products.

The external market

Although the internal market is the biggest outlet for EU farm products, a number of respondents say external markets have a considerable potential which is currently under-exploited. Promotion here requires more work and incurs higher costs. Competitors are already active. Special efforts could be made to enable small companies/organisations to participate in external promotion programmes. There is a near-consensus that the cost of market research in third countries should be entirely borne by the Commission. There is much less opposition to using national origin as a promotion tool in external markets than on the internal market.

Tools could include media and hoarding advertising campaigns in target countries, participation in trade missions and trade fairs, linking promotion policy with trade policy, the removal of technical barriers to EU exports. The Commission should carry out market research and make the results available to all interested exporters. Despite their relative lack of success so far, multi-country programmes should be developed for external market promotion.

Content and management

There is a large measure of agreement on expanding the circle of beneficiaries (i.e. participants in promotion activities), products and markets. But there is little consensus on just how big this expansion should be, either as concerns products or beneficiaries. Most participants are against allowing brands to take part in external market promotions. But a significant minority could accept them under specific conditions (like brand-owners paying their own costs). There is a greater measure of agreement about keeping out individual companies and chambers of commerce.

Many reasons are given for the limited success of multi-country programmes. One is the high entry cost. A minority say multi-country programmes should be ended. But some participants argue that success will depend on a higher level of EU funding.

The exchange of best practice using different communications platforms (websites, seminars, etc.) should be part of the joint activities to promote products at local, national and EU level. The use of social media is advocated (which also reflects the desire to address younger people). There is considerable support for funding these exchanges.

A consensus exists on the need to simplify application, evaluation and implementation procedures to make programmes more attractive to potential beneficiaries, especially small-scale enterprises. The relationship and share-out of tasks between Member States and the Commission should be rationalised. Applicants should be given more scope to run their programmes. Member states should have more autonomy too. Duplication of EU-funded and national programmes is to be avoided.

The Commission is encouraged to present clearer and more flexible guidelines on several administrative aspects. The time taken for administrative procedures should be shortened. The Commission should organise two calls for projects per year, instead of just one.

Financial resources

Many stakeholders propose additional EU funding for certain information and promotion activities. They have vested interests in doing so. A few public authorities indicate a willingness to raise specific thresholds, but others, particularly in northern Member States, warn of the current context of austerity and the possible impact on promotion policy of the outcome of the negotiations on the EU financial framework for 2014-2020.

Other stakeholders and public authorities propose increased Commission co-financing on the internal market, so as to highlight EU production and quality standards compared with imports and for organic or certified products to promote generic information on quality labels.

Areas of convergence

Although the consultation highlights the traditional areas of difference among stakeholders, there are a number of issues where clear majority views emerge, which the Commission will no doubt want to consider. They are:

1. Reinforce the key promotion messages of quality, health, sustainability, responsible consumption of resources, value for money, animal welfare;
2. Maintain the generic promotion of the 'EU brand' as the primary tool on the internal market but with more flexibility for origin and products. There is no consensus on how far this flexibility should go;
3. Use freshness, direct sales, short supply chains, local products, contribution to rural economy as key messages in local/regional markets;
4. Involve promotion policy in crisis management via rapid response information campaigns in times of food crises: to be funded largely by the EU;
5. Widen the range of eligible products, particularly on external markets;
6. Make more use of national origin in external programmes;
7. Test the potential for allowing brands to participate in external promotions provided no EU money is involved and brands pay their own costs;
8. Facilitate participation in programmes (e.g. actions targeted at small companies/organisations or financing market studies);
9. Improve and streamline multi-country programmes, particularly as an important tool in external markets;
10. Simplify and/or shorten administrative procedures for application, evaluation and implementation of programmes;
11. Review the respective responsibilities of the Commission and Member States;
12. Enhance and finance the exchange of best practice using different communications platforms (websites, seminars, etc.)

3. Background, methodology and response

Background

The European Commission currently allocates approximately €50 million annually via a horizontal promotion scheme² in financial support for campaigns to promote farm products and inform consumers about how they were produced. The assistance is normally given to professional producer organisations representing specific agricultural products, or associations promoting particular approaches to agriculture, such as organic farming.

The campaigns can run inside or outside the EU, with the aim of opening up new markets. Promotional activities can include advertising campaigns in the press, on television, on radio or on the Internet; point-of-sale promotions; public relations campaigns; participation in exhibitions and fairs, and a range of other activities. EU financing can cover half of the cost of a campaign.

Priority is given to programmes proposed by organisations from several Member States, or providing for measures in several Member States or third countries. Products cannot be promoted primarily on the basis of their origin, unless they have been recognised through a scheme such as 'protected designation of origin' (PDO) or 'protected geographical indication' (PGI).

Green paper and consultation

The Commission believes the policy could be simplified and improved to address better the needs of European and world markets. The Commission thinks that a revised policy on promotion should help to make the assets of European agriculture better known on both internal and external markets.

On 14 July 2011, the Commission published a Green Paper, launching a debate on a new promotion and information strategy for agricultural products. Before proposing regulatory solutions, DG Agriculture wished to ask stakeholders to give their views. All organisations and citizens interested in information and promotion of agricultural products were invited to contribute to a public consultation.

A website was set up for contributions from all who wished to make them. Participants in this online consultation fall into one of three pre-defined categories:

- General public (individual EU citizens).
- Stakeholders (e.g. farmers, food producers and processors, professional organisations and professional bodies, promotional bodies, retailers, distributors, traders, consumers, other interested non-governmental organisations - NGOs).
- Public authorities.

The online consultation period ran from 14 July to 7 October 2011.

The Commission positioned the debate around 17 key questions, and invited participants to respond to each. The responses to these are examined in the following chapters. The present report summarises the contributions. The answers received will serve as input for a presentation of concrete options in a Communication planned for the first half of 2012, followed by legislative proposals by the end of 2012.

² Council Regulation 3/2008 on information provision and promotion measures for agricultural products on the internal market and in third countries

Online consultation methodology

The contributions of EU citizens, stakeholders and public authorities have been published on the dedicated website, except for the small minority of cases where the contributor wished data to be published anonymously, or not at all.

An independent group summarised the contributions received. This report is their summary of respondents' views. The authors were assisted in reviewing and summarising the contributions by a panel of experts from several Member States with experience and knowledge across the agri-food sector, and with a range of language skills. All individual contributions were summarised by the authors, with the essential arguments put into a separate summary document for each one. The summary report synthesises these individual documents.

General response

There were 173 responses to the invitation for comments. Of these, 151 responded as requested, via the Commission website. The other 22 responded via other channels directly to DG Agriculture. Detailed figures for contributions are set out in the Annex to this report. Given the specialist nature of the consultation, the vast bulk of responses came from stakeholders and public authorities, with relatively little input from private citizens. This is in sharp contrast to the more general online consultation in 2010 on the reform of the CAP which provoked a strong response from the general public. The main headlines are:

- Contributions were received from all Member States except Bulgaria, Cyprus and Slovakia. France provided the largest number of responses, followed by Belgium (although the Belgian figure includes Brussels-based European stakeholder organisations), Italy, Germany, Spain, UK and Poland.
- Stakeholders were by far the biggest group with 130 contributions relatively evenly distributed among the different interested parties, though consumer organisations did not respond.
- A total of 23 responses were submitted by public authorities from 18 Member States.
- Individual citizens submitted 20 responses.

The spectrum of respondents was sufficient to provide a good cross-section of views on promotion and information measures. However, besides the small number of consumers/citizens who participated, there were also relatively few responses from national or regional public authorities, given the large number of them involved in promotion and information in the 27 Member States and their regions.

The consultation was extended, from its original end-date of 30 September 2011 to 7 October, to take account of a late flurry of responses.

Cautionary notes

This report is a summary of contributions, not a qualitative analysis. However, there are some points to note so that this report and its context are clearly understood. The main points are:

- Not surprisingly, there is clear evidence in a number of cases of cooperation and even collusion between respondents among national stakeholders within and across sectors. There are also indications, in a few cases, of cross-border collaboration within sectors. The authors do not believe that either of these instances affects the results presented in this report which discounts cases of identical submissions, partial overlaps and other clear cases of collusion among

respondents. These cases represent some 10%-15% of submissions.

- In a (very few) cases the same person responded under more than one guise.
- While presenting general suggestions for reform, many stakeholder organisations were also addressing their own special interests and priorities for future action.
- The relative absence of individual citizens among respondents means that few alternative views were presented to act as a general counterweight to the committed positions frequently (and legitimately) put forward by stakeholders in defence of their own interests.
- The task of summarising responses for the present report was rendered difficult at times because participants did not always distinguish between their views on internal and external promotion and information.
- Not all participants answered all questions. Question 16 (general comments) received fewest meaningful responses. On the other hand, virtually every respondent answered question 17 (action priorities). It was the only structured question. Many participants clearly used it to (re)state priorities and positions.

4. Responses to Questions

This chapter summarises the main messages that came from the answers to each individual question. It does not record every point of view expressed – it seeks to capture the main opinions expressed and the similarities and contrasts among them.

- i. **To meet the new challenges in local, European and global markets and ensure the greatest possible added value for Europe, what should the aims of the agricultural product information and promotion policy be? In addition to measures already taken by other players (e.g. the private sector), what contribution should this policy make?**

This question is wide in scope and elicited a great variety of responses. Some were general in nature; others were very specific. Some used the occasion already to differentiate between internal and external promotion activities. Many of the issues raised in this question were addressed by respondents in a more specific context in subsequent questions.

The responses highlight a problem of terminology as well as of approach to promotion and information activities. For some the word quality means the ‘health quality’ of a foodstuff; for others it means the ‘origin-related quality’ of a product of another characteristic. This goes some way to explaining the wide variation in responses on what messages the EU should impart about its food products.

Regarding the internal market there is a broad consensus that promoting consumption of EU products is the key aim, and that this can be achieved by improving the quality of information going to EU consumers about EU foodstuffs. Most agree that this information should be concentrated on highlighting the special characteristics of the EU’s agricultural and food products and how they are produced, underlining in particular: their wide diversity; their high quality; the traditions behind their production (on-farm as well as beyond the farm gate); the know-how and high standards of production involved (unrivalled outside the EU); the physical environment in which they are produced, which confers special qualities on them, and which meets sustainability and climate-change challenges; traceability measures (that improve food safety and consumer confidence in EU food); the link between quality food and the EU’s gastronomy. While there is widespread agreement on this, it should be underlined that the majority of respondents are from bodies that have an interest in promotion as opposed to consumers/citizens more generally.

On external promotion/information activities, most respondents agree that the overall aim should be to help EU agricultural products increase market share and gain new markets. Promoting the European agri-food model in third countries should help strengthen ‘Europe’ as a brand. Some suggestions for priority actions are made, such as: allowing national origins and/or commercial brands to be more involved in external promotion activities; providing information to highlight the EU’s high food safety and quality standards.

Overall, there is strong backing for the aims of promotion and information policy as set out by the Commission in the Green Paper. The most commonly repeated statements are that:

- * the policy helps to ensure that European agricultural products are recognised both in

Europe and the world over;

- * the policy should promote European agricultural products on the basis of their main characteristics;
- * the competitive position of EU agri-food producers has deteriorated in an increasingly competitive world. One reason for this is that EU foods have to compete against non-EU products that comply with much lower standards than EU producers;
- * promotion policy is a market-oriented mechanism which is WTO-compatible.

Less frequently expressed views, not in any order of priority, included:

- * younger generations should be targeted in the EU's promotion and information efforts; for example EU funding could be used in national education programmes;
- * consumers should be helped to understand EU quality labels better;
- * there is potential to promote extensive farming, organic products, and GM-free foods;
- * EU activities should not replace successful national promotional structures or measures. National specificities and goals should be respected. Where there could be synergies between national/regional activities and those at EU level, and where there could be conflicts, was not explored by respondents in detail. But the need for harmony was clearly underlined.

The four goals presented in the Green Paper are all deemed important, but some argue for wider involvement of the industrial processing sector to meet them. Some stress that the agricultural and processing sectors are interdependent, with 70% of EU production being processed.

One widespread view, strongly articulated by some participants, is that information and promotion policy should focus on market differentiation, on the one hand noting that individual markets may need individual treatment, and on the other hand, illustrating the characteristics that make EU products more attractive and valuable than alternative products. Only in this way will consumers have a choice and farmers the possibility of creating value.

ii. What information and promotion measures should be put in place to develop stronger local and regional markets?

This question produced a clear difference of opinion between:

- * those who believe that producers wishing to sell their products on local and regional markets or develop direct sales face significant obstacles. EU promotion and information measures that encourage the development of short supply chains could therefore offer interesting new opportunities to farmers and cooperatives in rural areas. The EU promotion system could involve local sales promotions and small local shops and rural distribution networks. Information and promotion measures could help convince

consumers of the benefits and quality of locally produced food. Those holding this opinion came from all three groups participating in the consultation exercise;

- * those who oppose the use of EU funds to promote local/regional markets. Some respondents state, for example, that information and promotion policy should not be used to finance projects targeting local and regional markets, not least because efforts to promote these markets would be out of proportion to their overall market share. Others say promotion on local and regional markets should be the remit of EU regional policies and should not be treated in the present context. In addition, some point out that it would be paradoxical to use common EU funds to promote local, and therefore not common, goods. Policies targeting national markets should be maintained at national level, with national co-financing the rule.

A number of respondents argue in favour of an approach that contains elements of the different approaches. For example:

- * the Commission could develop specific guidelines, to regulate how to promote local/regional origin products;
- * the second pillar of the CAP (and specifically LEADER), and EU Regional Development Funds have done much to support local/regional markets. These efforts can be continued/augmented;
- * promotion of local food for local institutions: there could be support for effective information for schools, and businesses plus local and regional institutions to encourage and increase the amount of food bought from local sources;
- * establishment of a local products logo could help stimulate these markets.

iii. What are the specific needs in relation to information on and promotion of European products and what should the aims be in the internal market?

Again there are fundamental differences of opinion.

Some argue that the EU's activities should be generic, stressing the EU's production methods, using EU quality as a marketing tool, alongside food safety rules, nutritional values and environmentally sustainable production techniques. They say that no reference to Member State origin should be made. This view tended to come from the EU-level stakeholder organisations, but not exclusively so. One respondent argued in favour of the creation of an 'EU quality farm label' recognising overall high quality of EU production. Others echoed this while not using that specific terminology.

Others argue, equally strongly, that more focus should go to information about the quality of the products themselves, protected names, quality labels – and the maintenance of production at the local level, the importance of local products for the preservation of agriculture, safeguarding the diversity of production and manufacturing. Those involved in promotion at farm level tended to this view, along with several NGOs. Advocates of the GI system also supported this. One respondent argues that a European campaign should not promote the

health benefits of a product, but instead focus on the local characteristics.

There are, however, some questions on which both sides agree, for example that the EU needs a significant budget in order to be able to implement efficient generic communications programmes via advertising and promotional campaigns. Many respondents argue that EU producers face competition from an increasing number of products, ingredients and semi-processed products sold on the internal market coming from third countries that, in the main, do not have to respect equivalent production standards to the EU's.

These respondents argue that the EU should therefore reinforce efforts to ensure that European consumers are informed about the characteristics of the European products on the market. It is widely agreed that it is essential to raise awareness amongst consumers of the high standards of food safety, plant and animal health, animal welfare and environmental protection involved in EU agriculture. Many respondents also underline the importance of promoting a balanced and healthy diet, based on the regular consumption of fruit and vegetables (and other products). All agree on the need to allow the distinction between EU and non-EU products to be made.

iv. What measures should be developed to achieve the aims set and thus optimise the European Union's intervention in the internal market?

Many respondents state that the actions proposed in the Commission's Green Paper meet the EU's promotion requirements.

However, a number of suggestions are put forward to optimise the EU's interventions in the internal market. Those most often expressed are:

- * preference should be given to widening the scope of the programme with respect to both target markets and products;
- * promotion instruments should place greater emphasis on characteristics associated with production standards;
- * generic promotion allows agricultural products to be promoted with a focus on European production standards;
- * promotion measures should also be used as a stimulus for sectors during times of crises;
- * more market research needs to be done;
- * there is considerable support for the funding of exchanges of best practices in seminars and via websites to align private, local, national and EU promotion programmes and measures;
- * there is a need to harmonise origin and quality labels across throughout EU;
- * in answer to this question, but also to others, many respondents argue in favour of more support being given to Small and Medium Sized Enterprises (SMEs), especially in local markets.

Many argue that different tools work better for different products and countries. They suggest that the EU should therefore not favour particular products/groups of products to promote but should focus on European quality achievements. Others would like to see an information campaign about the advantages of a balanced diet. This could be targeted at children, young people and families. Teachers need also to be made aware. Support for the above alternatives is more-or-less evenly spread.

However, other respondents argue that only limited use should be made of generic advertising messages as they achieve little in their view.

Several respondents argue that the EU should promote European products in order to combat competition from third countries.

v. What are the specific needs in terms of information on and promotion of European products and what should the aims be in the external market?

Most respondents state that the main aim of promotion and information campaigns should be to maintain and increase the market share of European produce on global markets. As is the case for the internal market, promotion instruments are a way of increasing the visibility of EU products on the external market, by underlining the quality, diversity and traditions behind them. It is also argued that promotion campaigns on external markets are under-used compared to promotion campaigns on the internal market. Ways should be found to improve uptake. One aspect to examine is how to enable closer cooperation between EU actions and on-going national and sectoral activities.

On some issues, views diverge.

Several respondents, generally from the food industry rather than the farmer organisations/NGO groups, argue that future promotion policy should be primarily targeted at export markets with a true potential for EU products. Measures should concentrate on products/sectors able to access those markets and run effective programmes. The EU's high production standards should be promoted but no specific attention given to 'quality products' such as PDOs. The aim should be to increase consumption in countries where there is growing demand. The qualities specific to EU products (tradition and taste, high production, processing, animal welfare and environmental standards) should be put forward.

Others put the emphasis elsewhere. The EU should concentrate its efforts on promoting quality labels, particularly when undertaken by small organisations with few resources. Because there is too much counterfeiting and devaluation of EU quality products, the EU should communicate better about genuine European products, notably geographical designations. These participants say this can strengthen the position of small and medium sized farmers' products in export markets.

Regardless of these differences there is agreement that the EU should favour targeted actions to meet its main objective, to increase market shares across countries (not to stimulate general demand in a specific country). There is also support for the view that SMEs should be encouraged to access export markets.

vi. What measures should be developed to achieve the aims set and thus optimise the European Union's intervention in the external market?

Several respondents underline that EU promotion policy should be better aligned with trade policy to achieve greater synergies and offer new market opportunities for European products. Reference is often made to the need for increased access for EU agri-food products on third country markets. Many respondents, particularly those involved in exporting, or in export-oriented sectors, believe that the EU should target strategic markets and use promotion policy to accompany trade negotiations on market access.

One idea among respondents interested in external market promotion is to make more use of multi-country programmes. Another was to introduce flexibility on the use of origin as a promotion tool.

Many respondents say more use can be made of specific tools, for example:

- * market surveys should be carried out in third countries (100% funded by the EU with the results accessible to all Member States, producers, cooperatives and processors) prior to the putting together of programme proposals;
- * this could be followed by market research and trial campaigns;
- * encouragement should be given to SMEs and to newcomers to export marketing;
- * the EU should use more high-level trade missions to which promotion efforts could be linked;
- * these could include EU promotional events; participation at international trade fairs under a common EU pavilion; a platform/network system for interested organisations to exchange views, experiences and explore synergies;
- * technical assistance should be provided for EU farmers and cooperatives to develop their export strategies and capacities;
- * measures should be introduced to inform producers about trade and competition laws, the legal framework for the food chain, measures to inform consumers on the diversity and quality of EU products, labelling, traceability etc. in third countries.

Activities in third countries could include: TV spots, press adverts and hoardings; presentations at fairs, special events, etc. Again the focus should be on European diversity.

Others argue that the EU should not try to prescribe what promotion measures are used.

Multi-country projects need not be multi-product ones as well.

vii. Who should benefit? Should priority be given to certain beneficiaries?

Respondents fall into two broad camps. Beneficiaries should be:

- * all operators in the agri-food supply chain, with priority being given to pan-European initiatives. Support programmes could be put forward by sectors where they are representative at EU level and able to sustain and enhance generic products which meet EU regulatory criteria. Basically all farmers and food producers should qualify, with special priority for SMEs. Image building companies that promote EU exports should also be supported. All producers sell on the same market. It would be unfair – and distorting – to prefer some over others;
- * only certain stakeholders should be able to benefit. There was little support for allowing single companies and chambers of commerce to benefit. In fact there was no support for chambers of commerce save from the chambers who responded to the questionnaire. Only associations should qualify (recognized EU professional associations representing a product or sector). Companies can promote their own products.

For the most part, respondents believe that professional organisations, above all those closest to the production sector should be the main beneficiaries of promotion and information measures, as they require the most assistance.

Several respondents argue for other groups to be better represented, for example:

- * to help ‘niche’ sectors not represented by professional bodies, companies, national organisations, marketing and innovation centres could be added as beneficiaries. Consideration should also be given to producers without access to resources and funding, such as small family businesses;
- * new beneficiaries could include: social security organisations, consultancies, geographic associations, representatives from regional government;
- * more assistance could go to less experienced applicants, and to SMEs.

viii. In order to develop more effective and more ambitious strategies for accessing local, European and global markets, are there any conceivable synergies between the various promotion and information tools available to the EU?

Virtually all respondents argue in favour of more synergies. However, few concrete ideas for achieving these synergies are put forward. The following are suggested:

- * promotion and information instruments that have been put in place for certain sectors (such as wine and fruit and vegetables) should be run separately from measures taken under the promotion and information policy, as they have different objectives according to several respondents. However, there could be better cross-fertilisation of ideas and experiences between the two. Sectoral strategies could help develop such synergies thereby increasing the impact of promotion measures on consumers;

- * the school milk programme is a good example of how to find synergies between national and joint programmes. Experience under this programme should also be used for other products;
- * synergies are needed with quality, external trade and consumer policies. Promotion policy must be coherent with others (public health, sustainability, education, tourism, inclusive growth and the environment, active ageing etc.).

Many argue that the Commission should not be prescriptive on the means of promotion. The means will be influenced by the message being communicated, the target audience, and the budget available.

ix. Which agricultural and agri-food products should be eligible and what criteria should be used to decide?

Two schools of thought again emerge. Broadly speaking, they consist of those who benefit most from promotion policy as it stands and those who would like to be more involved.

The first group says that the list of products covered by the promotion regime should be limited to agricultural products ('Annex 1' under the EU Treaties), products covered by a Geographical Indication (PDO, PGI or TSG), organic products and voluntary schemes based on best practice guidelines for certification of agricultural products and foodstuffs.

The second group argues that all agricultural products should be eligible. Foods should be targeted at particular markets. Both Annex 1 and 2 products should be eligible. Others go further, saying that the simplest option is to rescind the positive list, and make all raw and processed agricultural products eligible. The eligibility criteria should be as flexible as possible to be able to respond to changing consumption trends and market needs.

However, among the supporters of the status quo, some argue that the lists of eligible products need to be updated to reflect the current and future needs of the different sectors.

In general, respondents who are closer to or represent the farming sector favour restricting promotion and information activities to a narrower set of products; those involved in food more generically, or in the export sectors, tend to want the list of eligible products made more flexible.

Respondents argue in favour of certain groups of products (often their own) to be eligible for promotion measures. Many - and not just the sectors involved - say that cereal and cereal-based products should be eligible on the internal as well as the external market, in line with promoting a healthy diet. Others argue for meat and dairy products. Some want non-food agricultural products to be eligible (e.g. flax).

Some say there is no need to distinguish between eligible and ineligible products and food. They want consumers to be informed about the properties of individual food categories according to the rules of healthy eating, prevention of obesity and risks of an unbalanced diet. In this way preference could be given to health/nutrition objectives such as whole grain foods, fruit and vegetables and low-fat food.

- x. **To be more incisive, which means of promotion should be used? Should the focus be on promoting key messages, such as ‘5 portions of fruit and vegetables a day’ or ‘the taste of Europe’, or on product ranges (such as cheese, wine, etc.)?**

Most agree that there is no golden rule. An overarching message could be useful, but EU products have many qualities and markets are diverse. Therefore effectiveness depends on product/country analysis. A sizeable minority say generic messages are weaker than key messages for specific foods and food categories. They do not convey essential regional and cultural diversity.

Many say that quality labels should be the subject of specific messages. Product and regional ranges should be promoted.

Thus answers to this question illustrate three main schools of thought, as follows. The differences often reflect a question of emphasis rather than opposing positions.

There are those who believe that, given the extent of European agri-food product diversity, it is important to have a flexible scheme which covers the specific characteristics of markets as well as products. Promotional and informational messages should be tailored to the populations of individual states and markets. Messages of specific promotion campaigns should be decided by the organisations concerned, but based on EU guidelines.

However, there are others who argue in favour of messages like ‘five daily’, with priority given to product groups such as dairy and fresh fruits and vegetables. Information and promotion activities must be related to specific categories of products; but there should be broad key messages at EU level.

The third group says the EU needs to promote locally grown products to preserve the environment, local agricultural activity and the rural way of life in all our interests. It is important to remind consumers of the traceability, security, quality and variety of EU food. The messages should emphasize that a product is manufactured in Europe and in which region, focusing on products groups with origin indications. The EU could leave it to applicants when it comes to setting goals or key messages. There should be no overall EU key messages as there is no such thing as a ‘taste of Europe’. Consumers, it is asserted, want products from specific regions.

- xi. **Would it be appropriate to provide more space for the indication of origin of the product and what criteria should be used to decide?**

Under the current framework legislation, products cannot be promoted on the basis of their origin, unless they come from a specific area identified under EU rules, e.g. for PDOs or PGIs. Here again there are several schools of thought.

Some believe that there is no need to develop new systems. The GI system should be vigorously promoted.

A second group believes that the EU should promote products on the basis of their place of origin. Many, notably farmers' organisations, believe that it should be possible to promote the origin of products that are not covered by PDOs, PGIs or TSGs, in order to be able to illustrate the diversity of EU agricultural products. National origin labelling should be allowed (though without denigrating competitors). Any food and agricultural product that is sold at the EU level should indicate clearly the origin of both raw materials and the finished product - not just products protected by quality schemes. This should be included in promotional activities and information campaigns, to increase consumer trust in EU-grown food.

Others – a significant number – say that promoting specific origin is not the task of the EU. The only origin identification should be EU. Some argue that, in their view, designated origins serve no purpose.

xii. Would it be appropriate to use brands as a promotion tool in the external market and what criteria should be used to decide?

While most participants oppose allowing brands (especially commercial brands) to be included under EU promotion measures, others are more flexible. Within the current legislation, measures promoting branded products are not eligible for part-financing by the EU. Most argue that branded products do not need public funds – they can be marketed/promoted commercially.

Opponents of the use of brands argue that they are subject primarily to commercial criteria and therefore cannot be a promotional tool for origin, traceability, safety. Security and reliability have been established by EU rules while branding is a marketing device. They say that no private brands should be promoted with public money. Campaigns should be generic. But public brands like 'local', 'organic', or PDO/PGI could be promoted.

The minority view in favour of brands argues that the EU should harness, in one way or another, the advantages that well-known brands have. They believe that EU operators should be allowed to use branded products in EU-funded programmes. They point out that producers and cooperatives have themselves developed a number of brands to allow them to enhance the value of their production. Therefore, more flexibility in the use of brands should be considered, provided that the principal message focuses on the product's characteristics, qualities and EU origin.

A third way suggested by some is via mixed campaigns on the external market whereby promotion programmes could be divided into a generic section and a commercial section with commercial brands taking part in a collective campaign at their own cost but under a common banner. It is stated that this has been done successfully at national level. It can be argued that the use of brand names and a more accurate designation of origin can raise the European character of products. However, the message must clearly put a European face ahead of brand names or specific origins of products. The historical roots of products and brands must be one of the pillars for the origin of products based on traditional references and related promotional products marketing tools.

xiii. What is stopping the presentation and implementation of multi-country programmes? What would need to be done to encourage these programmes with a greater European dimension?

Multi-country programmes involve what is commonly agreed by participants to be a cumbersome application and approval process, which is complicated, time consuming and therefore costly. The cost can keep small organisations from applying. Practical difficulties encountered by implementing partners – clearly those who have been involved in programmes or the application process – concern national differences in language, culture and methods. These problems have limited the uptake of multi-country programmes.

Not all of those who complain put forward concrete suggestions for improvements. However, some are outlined, for example:

- * the Commission should develop specific guidelines (including good practice guides) for multi-country programmes;
- * in such programmes it would be helpful if one country could be designated the lead country or primary handler of administrative matters with the Commission;
- * it would be helpful if multi-country programmes could be devised and administered in a single language;
- * a higher rate of EU co-financing is also proposed (some say 100%).

One suggestion by several respondents is that, given the growth potential of the external market, a greater effort could be made to promote multi-country programmes as a tool on this market. At the same time, the Commission should raise the co-funding level to offset the extra costs involved. A smaller group of respondents argue that, given their disappointing track-record, multi-country projects should be discontinued. However, it is hard to say how much of this criticism is directed against external, as distinct from internal, market promotion since the questionnaire does not distinguish between the two.

It should be noted that among the responses to question 17, only a minority of participants rated the promotion of multi-country programmes in general as being in the ‘most important’ category for EU information and promotion policy (see below).

There is broad agreement that the Commission should decide on the selection of programmes and the budgets allocated to specific programmes. Member States should verify compliance, and check the effective implementation of programmes and their financial performance.

xiv. Do any other types of programmes and/or tools need to be developed?

The best-supported suggestions, in rough order of the frequency of mention, are for:

- * organisation of an annual EU meeting bringing together professional/inter-professional organisations with common interests. It is argued that this would be a good way of improving relationships, sharing initiatives, and inspiring common initiatives. For example, as one EU trade association puts it, these meetings may provide an

opportunity to improve contact between organisations with similar objectives which could then decide to carry out a joint promotion programme;

- * full EU financing of market research;
- * information programmes in times of crisis (requiring an emergency media strategy and immediate availability of funds). Such a mechanism needs to be co-managed by external experts. This would help mitigate long-term negative effects (see, for instance, this year's Egyptian e.coli food scare in Germany);
- * a regularly updated website to improve information and the sharing of best practices. An internet platform could be established for exchanges on potential projects. The use of social media should also be encouraged;
- * one-year pilot projects in new markets;
- * promotion programmes to operate up to four years – this would allow more advanced messages to consumers (e.g. on health and nutrition) to be developed;
- * support for professionals in trade negotiations, sharing of skills and knowledge, dietary education;
- * extension of the databank for origin protected products (the means to achieve this are not explained);
- * each association representing a product should have the possibility to have its own booth inside a European pavilion dedicated to PDO and PGI products;
- * special programmes/tools for younger generations.

The central coordinating role of the Commission should be strengthened in planning, scheduling and implementation. Also, greater emphasis should be put on individual national programmes for disadvantaged geographic regions or areas with high local added-value. This would have a positive impact on local businesses and increase income-generating potential.

xv. How can the selection and implementation of programmes be simplified and improved?

The general view is that the administrative requirements involved in submitting programme proposals (and during the implementation of the programmes) are excessively complicated and time-consuming. Furthermore, the procedures lack flexibility for adjusting programmes to new circumstances between submission of the application and the moment when the programme is to be implemented. Clearer distribution of administrative tasks between the Commission and national authorities is also needed.

Procedures need to be less detailed and timescales shorter.

Reducing the time of the evaluation procedure will reduce the need for many changes in the project terms of reference. There should be more flexibility for making changes during the programmes, particularly simpler procedures for changes to programmes during implementation.

Tendering procedures could be simplified. More details of strategy and goals should be included in tender calls, while leaving flexibility for later changes.

The Commission needs to give clearer guidelines for applicants, including indications of evaluation criteria. The selection process needs a handbook. Impact assessments should concentrate on more than on financial performance (e.g. improved image).

Some suggest a two-stage evaluation procedure. The Commission could select programme proposals based on strategic plans (without detailed breakdown of costs of each action); detailed annual action plans/budgets could then be sent for approval by Member States at a later point. Selection should be done at EU level to guarantee uniform application of criteria and to avoid market fragmentation.

xvi. Participants are invited to raise any questions concerning the information and promotion policy for agricultural products that have not been covered in this document.

This question was the least productive in terms of generating constructive comments, or practical proposals/suggestions for improvements.

Given its wide scope the question did produce a wide diversity of responses. Some respondents re-state their general opinion on the overall policy, and repeat their criticisms. Others pick out more specific issues. However, a number of respondents make the point that, in order to ensure the programme reform is effective, the available financial means must match targeted political ambitions. They want more funding for promotion. Some argue that the Commission should consider increasing its budget share in cases where Member States will not co-finance schemes.

Some call for regions to be given the lead in programme implementation. Others argue for cross regional co-operation involving three or more regions for large scale campaigns.

It is important to note, say many, that the majority of European products are marketed internally. Producers are therefore very dependent on the internal EU market. Promotion and information policy should reflect this.

5. Responses to Question 17 – Ranking in order of importance of aspects of promotion of agricultural products on the EU level

This was the only multiple-choice question. Respondents were asked to state what level of importance they would attribute to the following aspects of the promotion of agricultural products:

- Support for regional and local markets
- Internal market promotion
- External market promotion
- Synergy between different CAP promotion instruments
- Eligibility of products
- Definition of eligible actions and messages
- Promotion of origin
- Brand promotion
- Priority for multi-country programmes
- Procedures for selection and implementation of co-financed programmes

Respondents could give one of the following ‘scores’ to each aspect:

- Most important
- Important
- Somewhat important
- Not important
- No opinion

On the basis of the designations by participants of the ‘most important’ categories, the top three are promotion of origin (76 responses), external market promotion (69), and support for regional/local markets (60). The bottom three on this basis are promoting multi-country programmes (14), brand promotion (29) and definitions of actions/messages (37). The full breakdown of responses to question 17 is given in the annex to this report.

6. Main themes to emerge from the on-line consultation

Many views were presented as to how to recast the present policy in light of current and future priorities and challenges. A good number reflect the established views of stakeholders. We look at the responses in the context of the four headings of the Green Paper: the added value of EU action; internal market objectives; external market action goals; and content and method management.

EU added value

An effective EU co-funded information and promotion programme is one which promotes products the consumer will want to buy, and sends the messages the consumer wants to hear. There is among the responses to the questionnaire a considerable consensus on what these messages might be. They gravitate around issues of quality, health, sustainability, responsible consumption of resources, value for money, animal welfare – all areas where the EU can claim a comparative advantage. To these can be added the need to make EU farm products more competitive, to bolster farm incomes at a time when direct price support is being removed, and to expand sales in new markets, including those outside the Union.

The internal market

There is also some agreement on how to differentiate promotion programmes between local/regional markets and the EU internal market on one hand and external export markets on the other. The prime aim in the former is to put EU consumers in a position where they can make informed choices about the products they buy. Independent of the argument as to whether local markets should be part of promotion policy or not, the key messages are clear: freshness, direct sales, low transport costs and short supply chains, confidence in familiar and traditional products, and a positive contribution to the local rural economy.

Promotion on the internal market is primarily based on generic promotion (EU quality, eco-friendly production methods, high safety standards, etc.) to strengthen the EU 'brand' and distinguish it from imports, often produced to lower standards. The majority view is that the generic approach should continue to come first with well-defined exceptions for PDOs/PGIs, and other origin products or specialties.

The idea of using national origin as a promotion tool has backers and detractors. The first group says, *inter alia*, that national origin could be used in cases where it could add value to the product(s) in question or underline the rich diversity of EU food. The second argues that national origin might be used to promote local products over those from other Member States, thereby undermining the principles of the internal market. There is little indication from the responses received about how the two sets of interests might be balanced.

The exchange of best practice using different communications platforms (websites, seminars, etc.) should be part of the joint activities to promote products on the EU internal market at local, national and EU level.

One recurrent suggestion, echoed by stakeholders and public authorities alike is to use information and promotion policy as a rapid reaction mechanism to keep the public informed during food crises, raising visibility about the quality and hygienic standards of EU agri-food products. Reference is made to the most recent such crisis, the e.coli food scare in Germany in summer 2011. Accelerated procedures

should be used to launch campaigns. The level of EU funding should be high.

The external market

While, the internal market is the biggest outlet for EU farm products, some argue that external markets have more growth potential to be exploited. Promotion programmes here often require more efforts, and more costs. A number of respondents say multi-country programmes are well-suited for external market campaigns and should be expanded despite the additional administrative work involved. The procedures involved in multi-country programmes, in particular, should be streamlined. Market research, trade delegations, fairs and shows should be important tools. There are few hesitations about using national origin as a promotion tool on external markets. Greater efforts are needed to involve small farmers and groups in external export promotion.

Other external promotion tools could be market intelligence (obtained by the Commission) and made available to interested parties, exploratory visits, test programmes, linking promotion policy more closely with trade policy, encouraging partnerships among exporters, creating EU quality labels for export, greater use of EU logo, and aligning EU and Member State promotion policies.

Contents and methods

There is a large measure of agreement on expanding the circle of beneficiaries, products and markets. But there is as yet little consensus on how great this expansion should be. For instance, some participants are more prudent than others on issues like allowing private companies to participate, or using brands in external market promotion. Targeting actions at small companies/organisations is a popular idea.

A consensus exists on the need to simplify application, evaluation and implementation procedures for information and promotion programmes and campaigns to make them more attractive to potential beneficiaries, especially smaller organisations. The relationship and share-out of tasks between Member States and the Commission should be rationalised. Applicants should be given more scope to run their programmes. Member states should have more autonomy too. As one public authority put it, 'project aims are more important than project procedures'. The system of ex-post controls can monitor whether EU funds have been spent correctly.

Many argue that flexibility needs to be built into projects to cope with changes during the implementation period. The Commission should present guidelines concerning reporting procedures and the nature of reimbursable costs. The time taken for administrative procedures should be shortened. The Commission should organise two calls for projects per year, instead of just one.

Financial resources

Many stakeholders propose, most explicitly but others implicitly, additional EU funding for at least certain components of the EU's information and promotion activities. This is particularly the case for what are considered more difficult and/or more complex programmes – but which have considerable potential to exploit. These are external promotion activities and multi-country campaigns which involve several Member States on the internal market or multi-country or multi-product campaigns on external markets. The Commission needs to provide a higher level of co-financing to support these programmes which require greater effort to prepare, implement and manage than single country promotions. There is a near-consensus that the cost of market research and market studies in third countries should be entirely borne by the Commission. Some want the Commission to pay the full costs for exploratory visits.

Other stakeholders and public authorities propose increased Commission co-financing on the internal market, so as to highlight EU production and quality standard compared with imports and for organic or certified products to promote generic information on quality labels.

There is considerable support for the funding of exchanges of best practices in seminars and via websites to align private, local, national and EU promotion programmes and measures. Furthermore, the use of social media is advocated (which also reflects the desire to better address younger people).

Some suggest the Commission could increase its funding share in cases where Member State contributions fall short.

A few voices are raised on the part of public authorities, principally in some northern Member States, warning that the present update of information and promotion policy is taking place at a time when the EU and member governments are under severe cost pressures. Available funds will therefore be limited. The actual outcome will be influenced by the results of negotiations on the EU financial framework for 2014-2020.

Annex

The annex contains tables providing detailed data concerning participants in the consultation process and their responses. The first two tables have been adapted to take account of responses not submitted via the EU website and therefore not subject to the website's automated identification and selection process. Readers will see that the statistical base for tables 1 & 2 is 173 responses while it is 151 responses for the other tables.

Response statistics for 'Green paper on promotion measures and information provision for agricultural products'

TABLE 1 : COUNTRY OF RESIDENCE

	Number of requested records	Requested records 173
France	34	19.65%
Belgium	30	17.34%
Italy	21	12.14%
Germany	15	8.67%
Spain	11	6.36%
United Kingdom	11	6.36%
Poland	9	5.20%
Austria	7	4.05%
Finland	5	2.89%
Luxembourg	5	2.89%
Slovenia	3	1.73%
Netherlands	3	1.73%
Czech Republic	2	1.16%
Denmark	2	1.16%
Greece	2	1.16%
Ireland	2	1.16%
Portugal	2	1.16%
Sweden	2	1.16%
Hungary	2	1.16%
Latvia	1	0.58%
Lithuania	1	0.58%
Malta	1	0.58%
Romania	1	0.58%
Estonia	1	0.58%
Bulgaria	0	0.00%
Cyprus	0	0.00%

Slovakia	0	0.00%
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TABLE 2 : I reply on behalf of :

	Number of requested records	Requested records 173
My company or organisation (other than public authority)	130	75.14%
A public authority	23	13.29%
Myself	20	11.56%

TABLE 3 : My sector of interest is :

	Number of requested records	Requested records 151
All	61	40.40%
Meat	36	23.80%
Products carrying geographical indications	33	21.90%
Processed agricultural products	29	19.20%
Dairy	26	17.20%
Organic farming	26	17.20%
Cereals and milling products	25	16.60%
Fruit and vegetables	22	14.60%
Wine	18	11.90%
Other vegetable products	17	11.30%
Animal or vegetable fats and oils	13	8.60%
Spirits	11	7.30%
Live plants, ornamental horticulture	4	2.60%

17. From your point of view, what is the importance of the following aspects of promotion of agricultural products on the EU level?

Support for regional and local markets

	Number of requested records	Requested records 151
1 - most important	60	39.70%
2 - important	38	25.20%
3 - somewhat important	20	13.20%
4 - not important	21	13.90%
5 - no opinion	12	7.90%

Internal market promotion

	Number of requested records	Requested records 151
1 - most important	61	40.40%
2 - important	74	49%
3 - somewhat important	9	6%
4 - not important	5	3.30%
5 - no opinion	2	1.30%

External market promotion

	Number of requested records	Requested records 151
1 - most important	69	45.70%
2 - important	49	32.50%
3 - somewhat important	22	14.60%
4 - not important	7	4.60%

5 - no opinion	4	2.60%
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Synergy between different CAP promotion instruments

	Number of requested records	Requested records 151
1 - most important	42	27.80%
2 - important	46	30.50%
3 - somewhat important	38	25.20%
4 - not important	6	4%
5 - no opinion	19	12.60%

Eligibility of products

	Number of requested records	Requested records 151
1 - most important	45	29.80%
2 - important	76	50.30%
3 - somewhat important	18	11.90%
4 - not important	5	3.30%
5 - no opinion	7	4.60%

Definition of eligible actions and messages

	Number of requested records	Requested records 151
1 - most important	37	24.50%
2 - important	78	51.70%
3 - somewhat important	23	15.20%
4 - not important	7	4.60%
5 - no opinion	6	4%

Promotion of origin

	Number of requested records	Requested records 151
1 - most important	76	50.30%
2 - important	43	28.50%
3 - somewhat important	20	13.20%
4 - not important	9	6%
5 - no opinion	3	2%

Brand promotion

	Number of requested records	Requested records 151
1 - most important	29	19.20%
2 - important	46	30.50%
3 - somewhat important	38	25.20%
4 - not important	29	19.20%
5 - no opinion	9	6%

Priority for multi country programmes

	Number of requested records	Requested records 151
1 - most important	14	9.30%
2 - important	35	23.20%
3 - somewhat important	63	41.70%
4 - not important	30	19.90%
5 - no opinion	9	6%

Procedures for selection and implementation of co-financed programmes

	Number of requested records	Requested records 151
1 - most important	51	33.80%
2 - important	59	39.10%
3 - somewhat important	23	15.20%
4 - not important	4	2.60%
5 - no opinion	14	9.30%