

Fulfilment of consumer expectations and consumption behaviour with meat produced under agri-environmental schemes

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Summary

In Germany, sheep, cattle and goats are used for biotope conservation under agri-environmental schemes. These animals produce meat. The production yield of the animals is low and the meat quality lower than conventionally fattened animals. In the market it competes with the meat from intensively farmed animals. The marketing strategy and the promotion of meat produced in the process of biotope conservation is different to conventional marketing, even to organic farming. In the EU FAIR project, EQUFLA, the possibilities and limitations of meat produced under agri-environmental schemes to fulfil consumer expectations and the consideration of consumption behaviour are being examined. For the analysis, biotope grazing measures by animals have been chosen which use “added values” for the marketing strategy. These “added values” are biotope conservation, rare breeds, traditional farming and organic farming. The markets of lamb from Rhön sheep (“Rhön lamb”), beef from Fleckvieh steers sold under the label of “Rhöner Weideochsen” and kid meat are taken for the evaluation. The goal of this work is to analyse the target groups of consumers for the successful marketing of biotope conservation products with “added values” and to calculate the market potential for these products in the Biosphere Reserve Rhön.

The marketing of meat produced under agri-environmental schemes has a limited market potential. Nevertheless, the “Rhön lamb” shows that niche markets can be created. Emphasis in marketing of special products to special target groups can be profitable for the producer and the intermediate trade. Cooperation between them is valuable for the successful marketing of special products. The consumer must be convinced that he is having a valuable experience when he consumes the special dish and that the price is right for the offered product. Promotion must create a positive experience for the consumer to eat meat with “added values”. This is only possible when the producer and the intermediate trade are convinced themselves about the product.

Introduction

In Germany, sheep, cattle and goats are used for biotope conservation under agri-environmental schemes. These animals produce meat. The production yield of the animals is low, and the meat quality is worse than that from conventional fattening systems. In the market it competes with meat from intensive farming. The marketing strategy and the promotion of meat produced from biotope conservation is different to conventional marketing, even to that of organic farming. In the EQUFLA project¹, the possibilities and limitations of meat produced under agri-environmental schemes to fulfil consumer expectations and the consideration of consumption

behaviour are being examined. For the analysis, biotope grazing measures by animals have been chosen which use “added values” for the marketing strategy. “Added values” are biotope conservation, rare breeds, traditional farming and organic farming. The markets of lamb from Rhön sheep (“Rhön lamb”), beef from Fleckvieh steers sold under the label of “Rhöner Weideochsen” and kid meat are taken for the evaluation. The goal of this work was to analyse the target groups of consumers for the successful marketing of biotope conservation products with “added values” and to calculate the market potential for these products in the Biosphere Reserve Rhön.

Table 1. Meat consumption pattern in Germany (in kg/capita and year)

	meat total	pork	beef	poultry	lamb	kid
1992	93.7	54.5	19.2	12.5	0.7	< 0.01
1993	95.3	56.1	19.7	12.4	0.7	< 0.01
1994	93.0	55.5	17.5	12.8	0.7	< 0.01
1995	91.7	54.9	16.5	13.3	0.7	< 0.01
1996	90.5	54.0	13.0	13.9	0.8	< 0.01
1997	89.5	54.0	11.5	14.5	1.0	< 0.01

Source: compiled from the statistical data of ZMP, annual editions from 1993 to 1998, Agricultural Report of the Federal Government, 1998.

¹ The EQUFLA project is financed by the European Commission as a shared cost project under the FAIR programme. The title of the project is “Husbandry systems and sustainable social/environmental quality in less favoured areas.” It is being carried out from 1996 to 2000. The partners are Scotland, France, Italy, Greece and Germany.

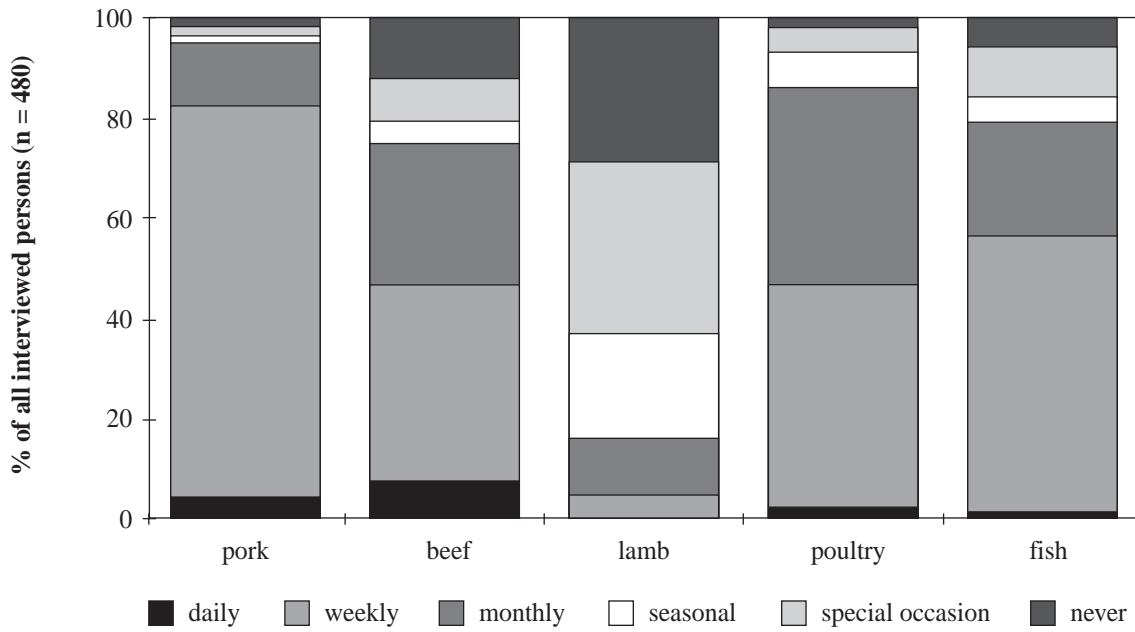


Figure 1. Average consumption pattern of meat from different animals.

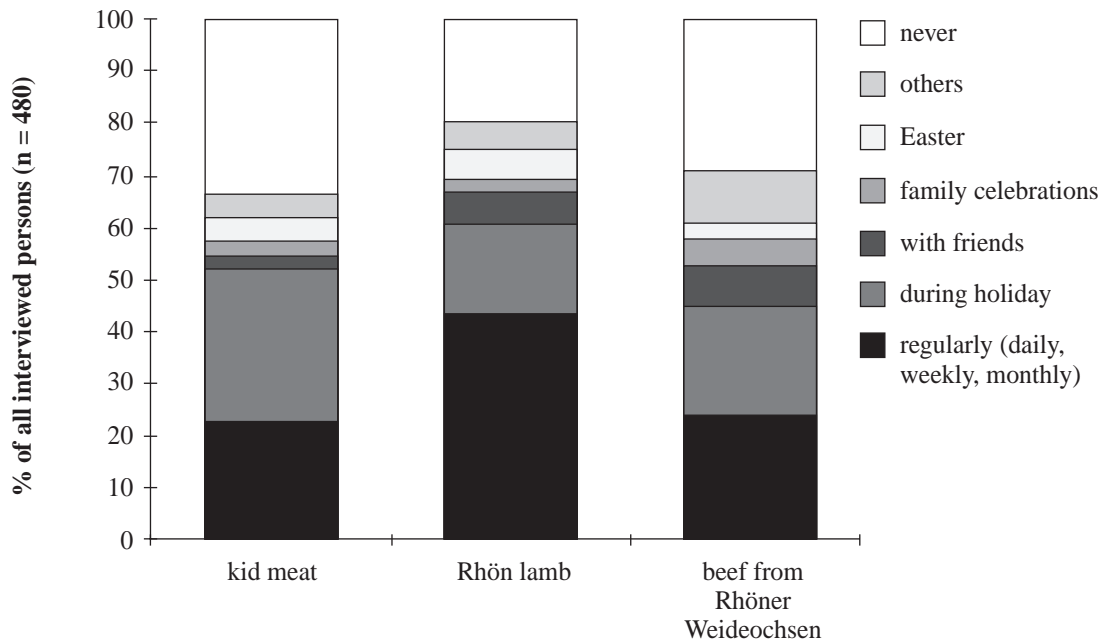


Figure 2. Occasions when meat produced under agri-environmental schemes is consumed.

Material and methods

Consumer expectations and their consumption behaviour were evaluated through a survey at chosen locations in and close to the Biosphere Reserve Rhön. Altogether, 480 people were interviewed using a common formal questionnaire in November and December 1997. Problems in distribution and marketing of meat produced under agri-environmental

schemes were analysed by product stream evaluations (PSE) of the chosen products: lamb from Rhön sheep, beef from “Rhöner Weideochsen” and kid meat. Additionally, about 52 of those who produce meat under agri-environmental schemes were interviewed. Their problems in fulfilling consumer expectations and meeting consumption behaviour were evaluated.

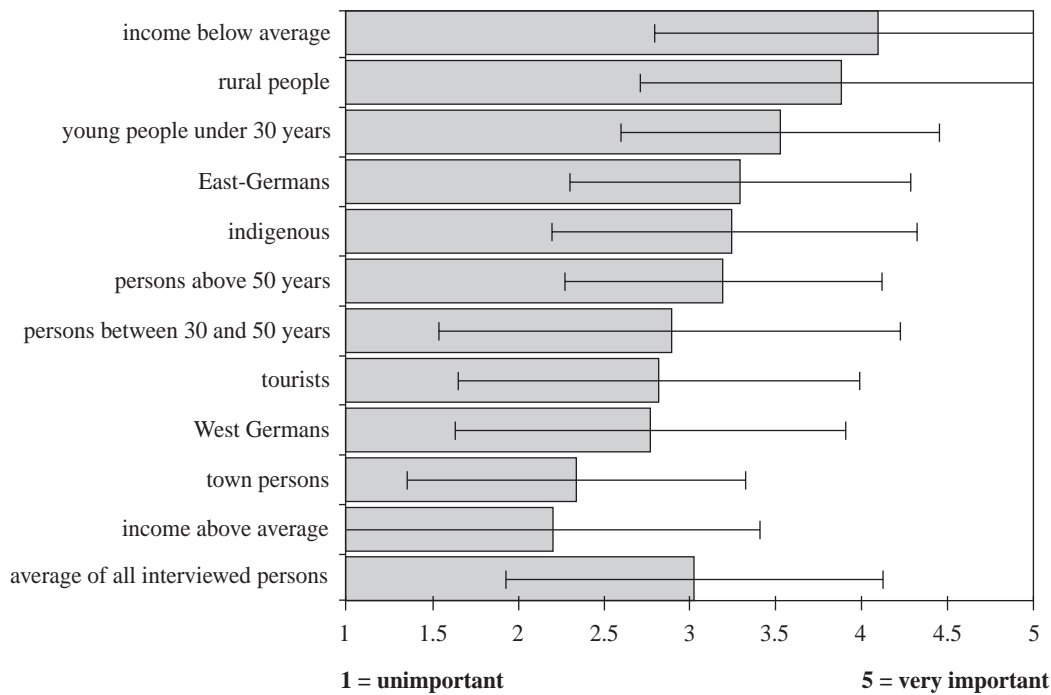


Figure 3. How important is the price, when meat is bought? (n=480).

Consumers expectations of meat produced under agri-environmental schemes

Consumption behaviour

The meat consumed in greatest quantity in Germany is pork, followed by beef and poultry. Lamb and kid meat has a low preference and is not consumed very often (1.2% of the total meat).

In the consumer survey, most people said that they consume pork weekly and beef monthly. Lamb and kid meat is not consumed regularly, but on special occasions like holidays, religious festivals (e.g. Easter) or family celebrations. They are seen as special dishes, as is all meat from the agri-environmental schemes. Kid meat is the least preferred meat. At Easter there is slightly more demand. About 35% of the interviewed people mentioned that they have never and would never eat kid meat. If it is eaten, it is recognised as a special dish.

Socio-economic differences are measurable for special dishes. For example, prosperous and/or urban people consume special dishes more often than less prosperous and/or people from rural areas. Men prefer beef more than women, women lamb more than men. West-Germans like lamb more than East-Germans. When special dishes are not consumed, it is because of the high price. Tourists are less reluctant than indigenous people. Because it is seen as more typical and special, lamb from Rhön sheep is preferred more by tourists than beef from "Rhöner Weideochsen". Beef from "Rhöner Weideochsen" is preferred more in the adjacent cities of the Biosphere Reserve Rhön. It is perceived as a healthy product of an environmentally and animal-friendly production system.

Consumer expectations

Tourists are the most important target group for marketing and promotion of meat from agri-environmental schemes in the Biosphere Reserve Rhön (Rahmann, 1997); they determine the expectations of these products. The "added values" of animal

systems on agri-environmental schemes for biotope conservation are very important for many tourists. The difference between the socio-economic groups are minor. It does not matter, if man or woman, urban or rural, West- or East-German, prosperous or less prosperous, all have high expectations on product quality and high demands on production pattern. The expectations for meat of high quality are, in the following order, production free of hormones and antibiotics, fresh and not frozen, tenderness, less fat and low cholesterol and good colour. The following "added values" are important for the consumers (in order of importance): animal welfare, environmentally-friendly production, regional distinctiveness, biotope conservation, rare breeds and, lastly, tradition. There were significant socio-economic differences in the importance of the price for purchasing meat (Figure 3).

Problems in fulfilling consumer expectations with meat produced under agri-environmental schemes

Lamb

In Germany, biotope conservation is mostly done by sheep grazing. Under agri-environmental schemes, shepherds are obliged to keep rare breeds. From birth in January/February till slaughtering in autumn, the lambs remain with the mother. Because no concentrates are fed, the daily liveweight gain of the lambs is low. Compared to ordinary sheep keeping, only 60% to 80% of potential liveweight gain is achieved when biotope grazing is carried out (approximately 250 to 300 g/day, Rahmann, 1998). Abattoirs generally want a lamb of about 45 kg, but during biotope grazing even high performance breeds reach only 35 kg by autumn. Rare breeds have even less growth performance than modern breeds and are assessed in EUROP-classification even lower (e.g. R to O). Shepherds complain about this, because 0.03 to 0.11 Euro (1 Euro = 1.96 DM) per lamb per grazing day is lost due to sub-optimal growth rates. This depends on breed, marketing pattern and season.

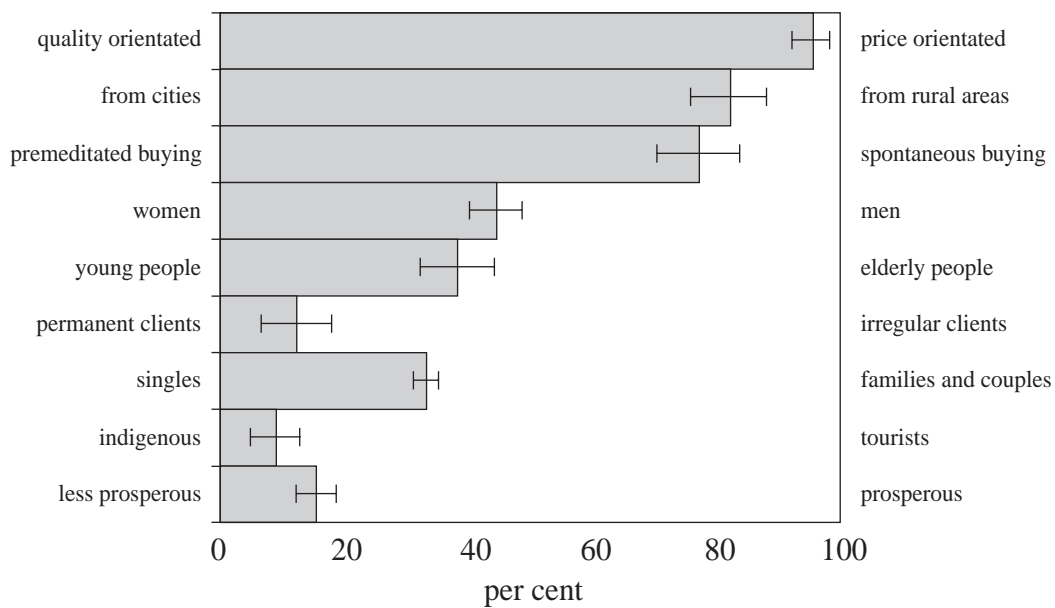


Figure 4. Clients in restaurants of the marketing co-operative “From the Rhön - For the Rhön” (perceptions of the restaurant owners 1997).

If seasonal breeds are used for the grazing of biotopes, it is difficult to supply lamb throughout the year. This can create marketing problems, particularly when a special target group of consumers demands the product out of season. For example, lambs are best when slaughtered in the autumn. Tourists, however, are an important consumer group visiting the Biosphere Reserve Rhön in the summer season (Figure 4).

Another problem occurs with the rare breed premium. If the numbers of animals of rare breeds increase above a specific number (10,000 ewes), they lose this premium. That was recently the case with Rhön sheep - the number of ewes increased from 3,000 ewes in 1986 to 13,000 in 1997.

In addition, lamb from New Zealand has a better conformation and is cheaper than German lamb. This means that lamb produced under agri-environmental schemes and particularly rare breeds have disadvantages in competition with concentrate-fed high performance breeds. Even the best German lambs of modern breeds have difficulties in being competitive with lamb from other countries. To be competitive, “added values” have to be used for successful marketing of lamb from rare breeds and extensively fattened animals.

In the marketing co-operative, “From the Rhön - For the Rhön”, the consumer perceptions of the Rhön sheep are used to create “added values”. Because German consumers like lamb as a special dish for special occasions, marketing channels for home consumption, like supermarkets and butchers, are not suitable for marketing “Rhön lamb” with “added values”. However, tourists are the group most willing to pay attention to “added values” for products with regional distinctiveness and are willing to pay extra (Rahmann, 1997). The implication of this is, therefore, that restaurants are the best marketing channel for successful marketing of lamb. In co-operation between restaurants and shepherds, the “added values” are based on: rare and indigenous breed (Rhön sheep), traditional husbandry (herding), landscape protection (biotope

grazing) and animal welfare. With this promotion, the “Rhön lamb” has become a special dish for tourists in the Biosphere Reserve Rhön. Despite the fact that it is about double the price of other lamb, the demand of 2,000 Rhön lambs per year cannot be fulfilled by the supply of 600 Rhön lambs p.a.² In the co-operative the intermediate trade is reduced to the minimum. The shepherds sell self-slaughtered “Rhön lamb” to restaurants, which serve them to final consumers.

Beef

Cattle grazing for biotope conservation is done with suckler cows, fattening bulls and the young stock of dairy cow herds. Dairy cows are not eligible for agri-environmental schemes. Calves from suckler cows are slaughtered at an age of 10 months and are marketed as “baby beef”, or are fattened like beef cattle to an age of 18 to 20 months. Young stock at an age of one and two years are kept for replacement of cows on dairy farms. For extensive grazing systems, slow and medium growing breeds are preferable, because they grow well even without concentrate feeds and/or they can spend much of the year outside. Particularly the hardy breeds, like Galloway and Highland, are good for extensive and low-input suckler cow keeping. Nevertheless, at 600 to 800 g, the daily liveweight gain of these British hardy cattle is low. Since the BSE-crisis, the consumer perception of “healthy meat” from these breeds is lost, and with that the possibility for using it as an “added value.” The consumption of beef has decreased in Germany because of this disease. After the BSE crisis, non-British or indigenous breeds are preferably used for extensive grazing. In the Rhön these are the dual purpose (milk and beef) Fleckvieh cattle. To prevent lower EUROP-classification when raised on extensive grazing, the bulls are castrated. The castration improves the EUROP classification compared to un-castrated bulls (e.g. from R₂ to U₂). While biotope grazing, the disadvantage of steers in having fodder needs per kg

² Altogether about 9,000 lambs are produced in the Rhön.

liveweight gain is less important than for intensive fattening systems, because roughage is cheap and does not determine the production costs. The marbling of the beef of steers under extensive grazing is better than uncastrated bulls. Therefore, steers have an advantage in beef quality and the fodder costs are not as important as for intensive beef cattle production.

An analysis of marketing channels for beef with “added values” was done with the LEADER II project “*Rhöner Weideochsen*”. The Fleckvieh-cattle (Simmental-cattle) breed is typical for the Rhön and they have a deep impact on the landscape of the Hessian and Bavarian Rhön. Historically, extensive steer fattening was carried out on the marginal lands for centuries. With structural changes in the beef cattle sector (today: intensive indoor fattening), steer fattening was abandoned. Many of the pastures became endangered biotopes due to disuse. The “*Rhöner Weideochsen*” project seeks to re-introduce steer fattening on marginal land.

In Germany, origin and transparency in production has become an important aspect in the marketing of beef. This is fulfilled in the “*Rhöner Weideochsen*” project. Additionally, environmentally-friendly production (organic farming under 2092/91 [only for crop production] and extensive grazing under 2078/92), animal welfare kept outdoors, regional distinctiveness (Rhön) and tradition are used as “added values” in marketing. Because beef is regularly consumed at home, marketing channels, such as butchers’ shops, are used for promotion and distribution, as well as restaurants in and outside the Rhön. On the behalf of the farmer and butcher, the steers are slaughtered at an age of 24 months at the abattoir in Fulda. The EUROP-classification of the carcass is done here. The butcher pays about 30% more than the normal price to the farmer, but he has the exclusive right of marketing with “*Rhöner Weideochsen*”, which is a registered and certified label. The carcass hangs for about 21 days and is processed as speciality products. The better parts are sold to restaurants. The butcher makes sausages from the unsold portion for his own butchers’ shop. All retailers use the mentioned “added values” for marketing.

Home consumption has the highest importance as a marketing channel, restaurants are second. For home consumption, sausages are favoured and in restaurants, special beef dishes. These products are available throughout the year, seasonality is minimal. Because it is sold for home consumption, the touristic season is less important for marketing compared to lamb. From the Biosphere Reserve Rhön it can be successfully sold with the use of the image of the Rhön as an “added value”.

Kid meat

Usually, kid meat is a complementary product of goat milk production. When goats are used for biotope grazing, it becomes the main product, because milking is not appropriate due to a high labour input and the low milk yield of the animals. For biotope grazing, fences are used for keeping small flocks of goats and the production pattern is comparable to sheep management. Their browsing behaviour is used for shrub clearance. The kids are with their mother but are slaughtered at a young age of two to six months, because a carcass weight of about 5 to 15 kg is preferred. Therefore, low liveweight gain while biotope grazing is less of a problem than for lamb production. Nanny goats with a medium milk yield

are preferable for biotope grazing and early weaning of kids to avoid udder problems.

Kid meat has a low preference for German consumers. No regular market exists. The informal market channels are difficult for marketing. Many consumers have no access to kid meat. Moslems are the major consumer group but they do not pay attention to “added values”. There is only very little advertising and promotion of kid meat in Germany. Just a few butcher shops and restaurants - mainly located in big cities with Moslem population - offer kid meat. The production level in Germany is very low (estimated 5,000 tons) and about 50% of self-sufficiency. The imported kid meat comes from Greece, Spain, Italy and France. Therefore, kid meat is a product for occasional marketing. In the Biosphere Reserve Rhön there are just 500 nanny goats. They can deliver approximately three tons of kid meat per year. Added value can be used for marketing of goats as for lamb from Rhön sheep. In the past, there was a local breed of the Rhön goat, which is now extinct. In Thuringia there is still a small population of the endangered Thuringia Forest goat. Additional meat qualities like low fat, favourable composition of fatty acids, low cholesterol and probably the anti-carcinogenic properties of conjugated linoleic acid can be used for promoting kid meat. Last but not least, the environmentally-friendly production pattern is a potential for marketing which can be used as “added values”. This has so far not been achieved. A small consumer group is, however, already paying high prices for kid meat. About 16 DM per kg carcass is possible but rarely more than 10 kg is paid. With “added values” only a small amount of extra income can be achieved. The attraction of new consumer groups has to be the target for extending the marketing of kid meat.

Market potential for meat produced under agri-environmental schemes

It was found in the final consumer survey that many of the 480 interviewed persons would like to consume meat from agri-environmental schemes, and that many of them would pay an “added value” for this (Figure 5). In reality, the demand for meat from agri-environmental schemes is low, and the will to pay extra less, as market potential and maximum prices show. Many consumers argue that the access to the product must be easy and not take more time than ordinary shopping. They are willing to pay more, when they can trust the “added values” of the product and it must be attractive in presentation and preparation. Recently, this has been fulfilled in butcher shops and in restaurants. Supermarkets do not fulfil these expectations.

The consumption of special dishes is preferred in restaurants. They trust the product and the processing is done properly. Many consumers are not able to prepare good special dishes and they do not know what the products are nor what to do with them. Ready-to-cook meat as a pre-prepared food is becoming more interesting to consumers. Lack of experience in taste, processing and availability of products from agri-environmental schemes limits the demand. Butchers’ shops rarely offer these products and do not like advising consumers on preparing the product.

The fulfilment of consumer expectations, consumer behaviour and payment for “added values” are restricted by marketing channels. In the Rhön, these market channels are less developed, and consumer trust and product awareness is

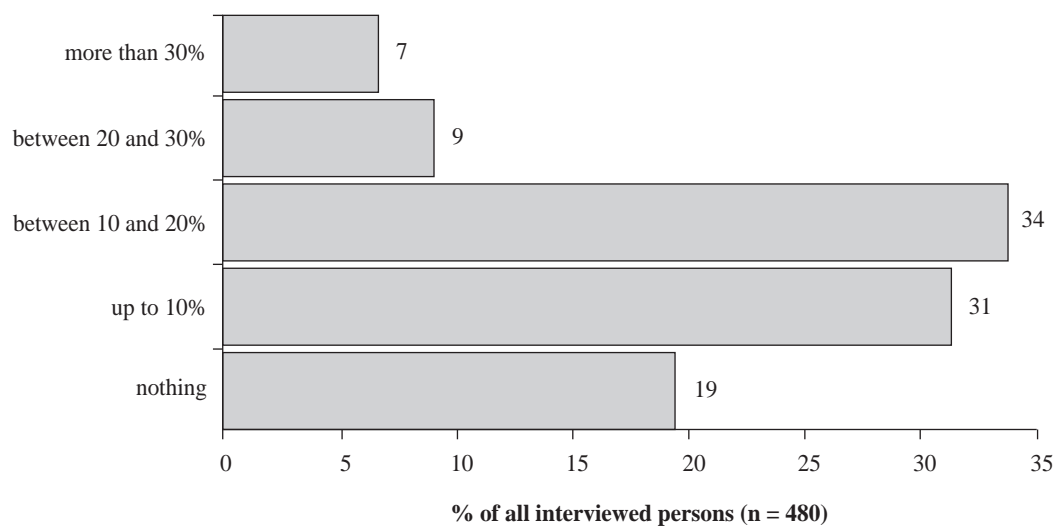


Figure 5. How much more would you pay for meat produced under an agri-environmental scheme?

lacking. Only restaurants and special shops are appreciated for special products, like meat produced under agri-environmental schemes. There is a willingness to pay more for “added values” but it is only done occasionally. A successful marketing of meat with “added values” must be done for special target groups as a niche market - mass consumption is not possible. Vertical co-operation between farmers and the intermediate trade is valuable for successful marketing with “added values”. Transparency of production pattern and connection between producer and consumer are most important for fulfilment of consumers’ expectations and exploiting the willingness to pay a premium price.

Even when there is a link between producer and consumer and all expectations are fulfilled, there are limits to market potential. For the farmers as producers of meat under agri-environmental schemes the limits are the production capacity, due to the numbers of animals (e.g. rare breeds) and restricted production pattern (low stocking density) and for the consumer the consumption capacity as a function of individual’s behaviour.

“Rhön lamb” is mainly marketed to tourists visiting the Biosphere Reserve Rhön. It is mostly offered in restaurants with high tourist interest. This is mainly in the summer season. The image as a special dish is specific for “Rhön lamb”. Other speciality meat products using the Biosphere Reserve Rhön for labelling have difficulty in competition with “Rhön lamb”, because they are not typical and not special enough. Beef of the “*Rhöner Weideochsen*” has no cultural obstacles nor reasons for rejection in the consumer’s mind. The marketing can be done in butchers’ shops, for home consumption (sausages) and external to the Biosphere Reserve Rhön in adjacent cities (in restaurants). The image of the Biosphere Reserve Rhön is used as a label. Competition with “Rhön lamb” is low.

The use of “added values” from the Biosphere Reserve Rhön faces the problem of “the competition of the regions”. For example, besides “*Rhöner Weideochsen*”, beef with regional distinctiveness from Vogelsberg, Knüll and Spessart is promoted and marketed in the city of Fulda.

There is no market for kid meat as there is for lamb or beef.

Table 2. Selling prices per kg lamb⁴ from Rhön sheep with and without “added values”

	without “added value” ³		with “added values”		additional turnover through “added values”	
	Euro	%	Euro	%	Euro	%
sheep keeper	2.68	100	4.50	100	+1.82	+68%
animal wholesaler	3.01	112	4.81 ¹	107	+1.79	+59%
abattoir	3.11	116	5.01 ¹	111	+1.89	+61%
supermarkets	3.07 ²	114	6.08 ¹	135	+5.02	+98%
butcher	4.60 ¹	171	7.46 ¹	166	+2.86	+62%
restaurants	4.04	150	7.77	173	+3.73	+92%

Remarks:

¹ rarely practised

² special offers from New Zealand

³ “Added values” are: rare breed “Rhönschaf”, traditional keeping (herding), landscape conservation (biotope grazing), animal welfare

⁴ For the calculations only best parts of the carcass (69% of the total carcass) are taken into consideration.

Table 3. Estimated production and consumption of meat in the Biosphere Reserve Rhön

	beef	lamb	kid
consumption			
indigenous consumption ⁶ (kg x 10 ³ /yr)	1,856	86	3.00
tourist consumption ¹ (kg x 10 ³ /yr) ¹	142	15	0.14
total consumption in the Rhön (kg x 10 ³ /yr)	1,998	101	3.14
production			
meat produced in the BR Rhön (kg x 10 ³ /yr)	8,182	217	5.00
production minus consumption (kg x 10 ³ /yr)	+6,193	+116	+1.86
surplus to local consumption (%)	75	53	37
numbers of animals ²	27,270 ³	10,870 ⁴	500 ⁵
animal numbers above local needs	20,613	5,800	186

Remarks:

¹ Tourist consumption: 2 m visitor-days per year. Consumption of tourists: average consumption per capita, divided by 365 days and multiplied by a special “holiday” factor: 2 for beef, 4 for lamb and 1 for kid meat. The consumption per tourist was multiplied by the total number of visitor-days.

² Sources for animal numbers: Hofmann (1994), Grebe/Bauernschmidt (1995) and statistical datas of the regional agricultural offices.

³ For beef are bulls, female fattening cattle and cow replacements are recognised. About 300 kg carcass weight was taken for production yield of beef.

⁴ For the numbers of sheep in Thuringia the numbers of ewes receiving premium from 1995/96 have been considered. About 20 kg lamb (carcass) per ewe and year have been considered.

⁵ Goats are estimated by the EQUFLFA project. 10 kg kid meat per nanny per year was estimated.

⁶ About 122,000 people live in the Rhön. Average rural consumption in Germany: beef 13.00, lamb 0.70 and kid meat 0.025 kg/capita/year.

Only a few consumers choose kid meat, and butcher shops and restaurants reject marketing and promotion of kid meat. Kid meat is mostly sold on-farm to final consumers, as there is only a small market. Like the promotion of lamb from the Rhön sheep, “added values” could be used to improve marketing image. The marketing of meat with “added values” has not only an advantage for the farmers but also for the intermediate trade. In the market channel analysis the average prices of best parts of lamb have been compared between marketing with and without “added values” (Table 2).

Estimates of the amounts of beef, lamb and kid meat consumed in the Biosphere Reserve Rhön are shown in Table 3. Though tourists are important consumers in the Biosphere Reserve Rhön, their contribution to the total consumption is just 7.1% for beef, 14.9 for lamb and 4.5% for kid. Tourists are a group of consumers for special dishes, but there are limits on their purchasing capacities. Recently, 600 “Rhön lambs” were marketed with “added values”, the demand was estimated at 2,000. If all lambs reared in the Biosphere Reserve (estimated 9,000 per year) were to be marketed with “added values”, other target groups of consumers would have to be found.

Table 3 shows that for all meat, production in the Biosphere Reserve Rhön exceeds demand within the reserve, and it is necessary to export some of the produce from the region. This has to be done to more urban areas, where there is underproduction. For this reason, there is a strong link between urban and rural (particularly less favoured areas), in terms of production and consumption. This link has the effect that regional rural development is highly dependant on the

markets in (adjacent) urban areas.

Conclusions

Special target groups pay attention to meat produced in an environmentally friendly way, like biotope management within agri-environmental schemes. The marketing of these products needs special emphasis to obtain a comparable income like ordinary farming. In the marketing strategy adopted in the Biosphere Reserve Rhön, “added values” are used to attract these consumers and show differences to intensively fattened or imported meat. The following “added values” are used for marketing of meat produced under agri-environmental schemes:

- high animal welfare,
- protection of rare breeds (if used),
- environmentally friendly production,
- biotope maintenance,
- traditional husbandry pattern, and
- regional distinctiveness.

Which “added values” are used for marketing depends on the target consumer groups. The perceptions and conceptions of consumers are widespread. It is necessary to evaluate the target groups of consumers, who pay the most attention to the offered products, and who are willing to pay more for “added values”. In the Biosphere Reserve Rhön these are mostly German tourists. Particularly the more prosperous people, of an age between 30 and 60, who live in cities of West-Germany, pay the most attention to “added values”. They have

less reluctance to pay more for a special dish. Animal welfare, production free of antibiotics and additives in feed, environmentally friendly production pattern, particularly with the use of rare breeds, are expected as “added values”. Surprisingly, there was little consumer interest recorded in traditional farming systems. The additional payment for a good mixture of these “added values” is up to 30%. Only 19% are not willing to pay more.

The fulfilment of such tourist perceptions and expectations can create technical difficulties. Although a premium price is achieved, the production pattern restricts the quantity and quality of meat produced while biotope grazing. Problems of fulfilment of consumer expectations with meat produced while biotope grazing are:

- a) carcass quality can be lower (EUROP classification) and “added values” have to be taken as a marketing instrument,
- b) meat quantity is low (e.g. restricted stocking rate and no concentrate feeding and only a few farmers are in agri-environmental schemes),
- c) seasonality of production differs from the season of demand, and permanent market supply is difficult,
- d) there is limited production potential for rare breeds. (If a specific number of these breeds is exceeded, the important rare breed premium and the added value as a rare breed is lost), and
- e) “Added values” are often only successful on a regional level (transparency of production) and the co-operation between farmers and intermediate traders is important.

All these limitations in marketing of meat produced under agri-environmental schemes shows the limited market potential. Nevertheless, the “Rhön lamb” shows that niche markets can be created. Emphasis in marketing of special products to special target groups is even profitable for producer and the intermediate trade. Co-operation between them is valuable for successful marketing of special products. The consumer must be convinced that he is having a valuable experience when he consumes the special dish and that the price is right for the offered product. Promotion must create a positive experience for the consumer to eat meat with “added values”. This is only possible when the producer and the intermediate trade are convinced themselves about the quality of the products.

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