

## Promoting rural competitiveness – How can “organic” and “regional” accelerate development in poorer areas?

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### Authors' Background

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### Summary

*As consumers' interest for quality food grows, new opportunities arise for both organic and regional products. This is especially appealing for rural areas with a strong agricultural tradition. Yet, to be successful, such initiatives require a sound methodological approach to analyse well the context and opportunities together with different stakeholders and develop a marketing strategy that overcomes both market- and supply-oriented constraints. This paper presents and discusses two different approaches to integrate farmers into value chains, both used as part of a development project in Albania. By comparing these two approaches, we argue that in most cases well-facilitated market oriented approaches (Demand Pull) are more efficient in enhancing the competitiveness of rural areas and thus create sustainable improvements especially for small-scale producers. Nevertheless, where farmer associations and small-scale processing structures are missing, complementary production oriented approaches (Production Push) are essential to create a solid organisational basis to aggregate produce and lower transaction costs for buying agents. This is especially relevant in an earlier stage of organic sector development, where both farmers and processors need to make additional investments to shift towards organic production. Where such shift towards organic is difficult, more simpler marketing schemes focusing on heritage might be a first interesting step into the direction to introduce product certification schemes. Independent if products are sold and promoted as “organic” or “regional”, the success of such initiatives crucially depends on two factors: (1) good process facilitation to optimally involve different sector stakeholders, and (2) the development of a sound marketing concept with excellent implemented visuals (i.e. logo, product labels, promotion material etc.).*

### Background

As globalization advances, rural areas increasingly face difficulties to remain competitive in creating job and income opportunities for its local population. As especially young people tend to migrate into the cities due to the limited working opportunities, essential resources are lost in the rural context. Consequently, agriculture remains often the main economic source of income, with limited possibilities for innovation. In this regard, organic and regional products are a promising concept to promote sustainable development especially in rural areas that have a strong agricultural tradition. Such initiatives not only provide access to interesting new markets that promise higher prices, but also create essential human and social capital to foster the region's further development. However, as new thinking and new partnerships are required to develop such opportunities – by overcoming both market- and production-oriented constraints – sound methodological approaches are required to guide such innovation processes, to also foster optimal empowerment among local stakeholders. This paper presents two concrete agricultural development projects from Albania to highlight relevant differences between two main market development approaches – *Production Push* and *Demand Pull* – in regard to their use and outcome. In particular, by illustrating what happened after these two projects stopped, we conclude how these two approaches relate to each other and tend to complement each other in rural areas with limited horizontal and vertical cooperation structures, i.e. among farmers and along value chains.

### Albania's agricultural sector and its relevance for rural development

50 years of communist regime have made Albania an isolated country. Until recently, very few people were aware of the natural diversity that Albania offers. With its predominantly mountainous surface of almost 70 percent and nearly 400 kilometers of Mediterranean coastline, Albania is a country with plenty of opportunities for agricultural production and the collection of a wide range of medicinal and aromatic plants. However, production structures for arable crop production are fragmented due to the land reform in the 1990s, when the agricultural land was privatized. Today, most agricultural fields relate to small plots, being smaller than one hectare. In such structures, commercial production is strongly challenged. Despite the favourable natural conditions to produce fruits and vegetables for the European market, especially in spring time, this land ownership structure implies that agricultural production is rather used for the cultivation of crops for self-consumption. In many cases, off-farm work together with remittances from abroad complement the income, not allowing mayor investments to improve production.

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Yet, since the late 1990s, international donors saw in the agricultural sector an interesting opportunity to promote the country's development – especially in rural areas, aiming to capitalize natural and human resources in the production of high quality produce. The Swiss Agency for Development and Cooperation (SDC) was among the first donors to start agricultural projects in Albania. After initial expert missions, two projects started around the millennium: the AGROPUKA project and the SASA project, which are now described in more detail to draw conclusions from their approach.

## **Main Chapter** **Two different SDC projects to foster rural development in Albania**

### *The AgroPuka Project*

The AgroPuka Project started in Summer 2000 and lasted until 2009, with the objective to support the economic development of the Puka district, a mountainous and poor area in the Northern Albania, involving a population of about 34'000 inhabitants, who are living in 76 villages and in two small towns, Puka and Fushë-Arrëz. The project's components were the same for all the project years: (1) to build-up and develop a producer organisation, (2) to process and sell local products, (3) to support small self-help projects of producer groups, and (4) to create know-how in market-oriented production. From a methodological perspective, AgroPuka relied to a clear *Supply-Push* strategy, with the primary focus to produce a range of locally adapted products that then would sold in the domestic market.

In 2001, as a first milestone, the AgroPuka producer association was funded, which developed steadily, having by 2008 more than 300 active members. The leading products were: honey, dried fruits, mushrooms and blended tea. Despite of the vision that AgroPuka would become a marketing enterprise to support its members and sustain its services through a certain percent of the sales turnover, until 2009, the sales volume and the gain margins lagged behind expectations. Consequently, experts had different opinions about the success of the project up to that stage. Some argued that the project was rather successful, as it generated essential production, processing, and marketing capacities in the region, which all contributed without any doubt to enhance the empowerment of the local population, especially women; others argued that the project failed for not being able to sustain its activities and services without further project funding. The fact was that in 2009, when the project stopped, different services of AgroPuka were abandoned, including marketing related services (fair participation, development of PR materials, market research activities, etc.); moreover, capacity building services relating to production, processing and marketing trainings to farmers were downsized together with the support for essential production inputs such as seeds, seedlings, and production equipment (e.g. soil cultivation and pruning tools). As a consequence of this reduced support, production and sales volume fell by 40% and the membership of the association was reduced to around 110 members.

### *The SASA project from 2001 to 2009*

Focusing at the national scale, starting in 2001, the project Sustainable Agriculture Support to Albania or SASA had the objective to improve the economic situation of the rural population through environmental-friendly production practices and market-oriented efforts. It implied somehow a quality strategy for producing and marketing Albanian agricultural products. The Swiss Research Institute of Organic Agriculture (FiBL) was selected by SDC to be the project implementer. In 2001, FiBL started off with a clear a *Supply-Push* strategy, aiming to build essential capacities in the field of organic production and marketing. Until 2009, SASA developed a wide range of services needed for a functional organic sector, including the setting in place of an organic national regulation, the development of a local organic certification body with international accreditation (Albinspekt), an extension service being part of the national organic farmer association BioAdria with 100 members. With additional support from the Swiss State Secretariat for Economic Affairs (SECO), since 2006, marketing support to farmers and organic processors was strengthened, and first relevant export ventures started for organic olive oil, dried organic herbs and spices deriving from wild collection.

In 2009, an external evaluation concluded that SASA's work to that point of time was highly successful, especially in regard to the development of the services and framework conditions for the organic sector. The only drawback were the limited organic sales in the domestic market, which put at risk the sustainability of most developed services by the project and the organisations that grew out of the project's activities: BioAdria and Albinspekt. This conclusion led to the explicit request to boost market development in a last project phase, from 2009-2011, which would broaden the focus to also include “typical products”, besides organic. The reasoning for this additional target related to the fact that different natural products – especially processed products like marmalade, juices, etc. – would be difficult to get organically certified, or then be too costly given the still low “organic awareness” and the reduced purchasing power among Albanian consumers.

### *The SASA project from 2009 to 2011*

In order to put more emphasis on market development in the last project phase, a new methodological approach was introduced in the SASA project: the Participatory Market Chain Approach or PMCA (see Figure 1). The introduction of this methodology – relating to a clear *Demand Pull* strategy – implied important structural changes at the level of the project. To focus more on consumer demand and market opportunities, SASA project staff were now placed outside of the BioAdria Association, to make this farmer organization more independent from the project and its staff. On the one hand, the staff previously responsible for providing technical support to organic farms formed the Institute of Organic Agriculture (IOA), which then was subcontracted for specific tasks in favour of the organic sector and its actors. On the other hand, the staff supporting marketing activities formed now the “PMCA Unit”, a new entity basically responsible to implement the PMCA methodology, a participatory process to define, analyse, and set in practice different market opportunities together with different sector stakeholders. Along this process, during its three phases, PMCA would effectively stimulate interest, trust, and collaboration among the involved actors (see Figure 1).

After an initial assessment involving 40 stakeholders (PMCA Phase 1), it was decided that three “Thematic Groups” were formed, focusing on opportunities relating to three areas: (a) organic exports, (b) typical products from Northern Albania, and (c) typical products from Southern Albania. These working groups were established in a first stakeholder event, when all assessment results were presented and discussed with around 100 stakeholders. In the following months, staff from the “PMCA Unit” implemented different follow-up meetings to then shape the different concrete (shared) business ideas, which then were supported partially through a project-internal small grant scheme. At the same time, project staff discussed and developed together with stakeholders a certification scheme for typical Albanian products. Based on these discussions, a new fairly simple technical standard was elaborated, describing minimal quality standards for a wide range of products linked to a geographically-reference label in each case (see Figure 2), which would stand for these quality standards and the origin of these products (i.e. Northern or Southern Albania). On top, shared public awareness activities were defined and implemented. For those products that met the standard, SASA supported the design of new product labels, 47 in total, to thus guarantee a better product presentation and market impact with the involved products. The final event of the PMCA process was then used to launch all these “new” (regional) products with a strong media involvement.

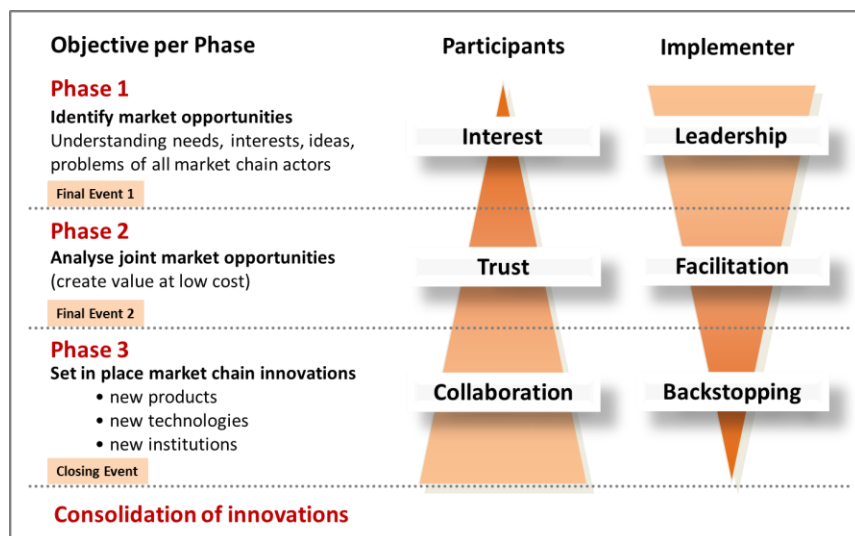





Figure 1. Generic structure of the PMCA methodology (Bernet et al. 2008)

The “Organic Export” group focused their discussion on ways to improve main organic business opportunities (through the project-internal small grant scheme) and implement effective shared promotion activities for organic Albanian produce especially in the context of Biofach. Moreover, a new product was innovated: an organic olive oil mixed with Hypericum Perforatum.

Overall, thanks to the PMCA methodology, the SASA project was able to involve altogether more than 200 actors in the three thematic groups, many different tangible commercial, technological, and institutional innovations grew out of this participatory process, as illustrated in Table 1.

Table 1: Main innovations achieved by SASA using the PMCA methodology

Type of innovation	„Organic Products“	„Typical Northern Products“	„Typical Southern Products“
Logo			
Commercial	<ul style="list-style-type: none"> <li>• 1 new product</li> <li>• Mobile food shop</li> </ul>	<ul style="list-style-type: none"> <li>• 4 product innovations</li> <li>• 19 new product labels</li> <li>• Mobile food shop</li> </ul>	<ul style="list-style-type: none"> <li>• 3 product innovations</li> <li>• 28 new product labels</li> <li>• Mobile food shop</li> </ul>
Institutional	<ul style="list-style-type: none"> <li>• N/A</li> </ul>	<ul style="list-style-type: none"> <li>• Albanian Association of Marketing</li> <li>• Registered brand</li> <li>• AG Standard and certification</li> </ul>	
Technological	<ul style="list-style-type: none"> <li>• Plastic tunnels</li> </ul>	<ul style="list-style-type: none"> <li>• Drying machine</li> <li>• Cooling tanks</li> </ul>	<ul style="list-style-type: none"> <li>• Plastic tunnels</li> <li>• Cooling tanks</li> </ul>

## What happened after the two projects ended?

### *AgroPuka (after 2009)*

The AgroPuka project ended in 2009. As the financial support from SDC stopped, AgroPuka was forced to cut back its expenditures. This resulted in important cut backs of marketing services including participation in different fairs and promotional activities, publication and improvement of PR materials, labels, etc., reduction of training and exchange of experience activities. Furthermore, no market researches were conducted to access new markets or improve current product image or market strategy. AgroPuka's financial contribution to transport costs was lowered and support for inputs and production equipments to farmers were totally cut down. This made farmers face new challenges, not only economically but also technically. At the level of the association, around 75% of the hired staff had to be dismissed, and due to this drastic cutback, the production and sales capacity was reduced by around 40%. As a result, members of the association were not anymore motivated to cooperate with the association. Most of them stopped production, collection and processing activities and few others found new contacts to market their products. All in all, AgroPuka's membership number dropping from 300 persons to 110. And the overall income of the people from the Puka region was lowered significantly, since AgroPuka represented one of the most active and successful associations of the region.

When the AgroPuka project stopped, in 2009, SASA just started its last project phase. This led to the situation that the executive director of AgroPuka got strongly involved in the participatory process that the PMCA Unit set in place to develop new business opportunities for organic and typical food products from Albania. Indeed, in this new project setup of SASA, AgroPuka with its interesting range of processed products (i.e. dried fruits and mushrooms, tea mixtures, honey, and jams) was a key participant in the Thematic Group relating to typical products from Northern Albania. For SASA, the experience of AgroPuka in regard to both production and marketing was highly valuable. And for AgroPuka, SASA's explicit focus on marketing opportunities was highly beneficial. For instance, a key experience for AgroPuka related to one of the focus group research activities implemented in the context of the SASA project, where AgroPuka's honey received absolutely best scores for taste and consistency, but its packaging and labelling was graded worst compared to competing products. This insight motivated AgroPuka to rethink the marketing concepts of its products with the support of SASA's PMCA Unit. Consequently, product packages and labels were upgraded together with a new AgroPuka logo (see Figure 3). All product labels also featured the Alpe Albania logo, which was developed in parallel as an “umbrella brand” for all typical products from Northern Albania (see Table 1).



**Figure 3. Basket of different dried AgroPuka products**

As product tasting activities in the context of different local and national fairs in Albania and within Merkator, one of the retail chains present in Albania, were very positive, AgroPuka's product sales developed very nicely. More and more distributors and retailers were interested to include AgroPuka products in product portfolio, including a Duty Free shop at Tirana Airport. All in all, the SASA project very much promoted AgroPuka and its products through its PR activities. But even when also the SASA project ended, in December 2011, sales continued to increase (see Table 4).

### SASA (after 2011)

As SDC announced early that its funding will stop end of 2011, the project staff anticipated this situation. Intrigued by the positive experience with the PMCA work and the different new business partnerships that developed out of it, the staff of the PMCA Unit were eager to continue this type of work through another entity, the Albanian Association of Marketing (AAM), an association gathering young professionals with the goal to promote Albania's competitiveness through market-oriented consultancy work. Together with stakeholders, they agreed that the inspection and certification work relating to the use of the two Albanian Guarantee labels – Alpe Albania and Prodjme Jugu – would be done by AAM, given the good collaboration and trust in place. In this regard, AAM became responsible to both safeguard and promote the two labels accordingly, work which could only partially be covered with the contributions of the 160 initial label users (see Table 2 and 3). Also benefiting from the (excellent and visible) work implemented during SASA, the new AAM staff was able to attract interest and funding from other donors (i.e. SNV, World Vision, UNDP etc). The gained marketing expertise and the extended partnership network that grew out of the “PMCA experience” were clear advantages to get new project assignments. Especially interesting were rural development projects aiming to improve market access of small-scale farmers. For such projects, AAM had not only the expertise to help develop solid marketing concepts for fresh and processed products, but also the whole network to place these products into different markets using the regional labels developed during SASA. From 2012 to 2014, AAM helped to expand the portfolio of Albanian Guarantee products up to 62 products; the turn-over continued to increase yearly by 30% (sales through AAM channels) being currently at around 542,300 Euro in total (including AAM channels and other actors channels) per year (see Table 2). Most of the products are commercialized through AAM channels including branded POS as Healthy Corners in supermarkets and other restaurants and outlets.

In regard to organic, AAM was assigned by the Swiss Importers Promotion Program (SIPPO) to help coordinate Albania's Biofach participation in 2012 and 2013. In regard to organic exports, we see a continuous business growth, relating mainly to those crops where Albania has competitive advantage: medicinal herbs and spices, mushrooms, chestnuts, olive oil. In the domestic market, the sales of certified organic products broke down when the Albanian government stopped the subsidies for certification. Under these circumstances, the mainly small-scale producers are unable to compensate these costs with higher market prices only from the side of consumers. The purchasing power and the interest in organic is still limited in Albania!

**Table 2: Products sales for Albanian Guarantee products**

Criteria	2011	2012	2013
# certified products	47	55	62
# inspected clients	160	182	210
producers	24	30	30
processors	136	150	177
others	0	2	3
# sales points	8	10	14
supermarket	1	2	4
outlets	4	5	6
restaurants	3	3	4
# Total turn-over (in Euro)	407,000	500,000	542,300

**Table 3: Development of Agropuka product sales**

Criteria	2009	2010	2011	2012	2013	Comment
Sales in Euro	30,000	38,000	48,700	59,800	65,400	Reason: higher sales volumes and higher prices (approx. 15% thanks to better packaging and labels)
Sales through AG in Euro	N/A	N/A	32,000	34,500	46,100	Sales generated through AAM and AG branded point of sales mainly in Tirana (supermarkets)
Main products	honey	honey, mushrooms	dried fruits, teas, jams and mushrooms	dried fruits, jams teas, honey	dried fruits, teas and mushrooms	Better labels since 2011 improved attractiveness also of other products: dried fruits, teas, jams
Most relevant sales points	N/A	Euromax supermarket	Mercator	Carrefour, POS in Shkodra, Durres, restaurants	carrefour, Ecomarket, Conad	Different supermarkets established "healthy corners", where also typical products are sold
Products categories	6	8	10	11	11	Products categories refer to different products with different flavour, i.e. jam with 7-8 types
Number of Clients	7	9	11	13	13	Referring to institutional (i.e. supermarkets) and individual agents-retailers
AgroPuka Membership	110	150	240	300	365	Variation explained by possibilities for sales



Figure 4. Development of product sales: AgroPuka products and Albanian Guarantee labelled products

### Core messages and conclusions

#### Discussion & conclusions – “Supply Push” versus “Demand Pull”

When comparing the experience of SASA's last project phase of 2.5 years – where a clear *Demand Pull* approach was used – with previous SASA's work plus the AgroPuka experience, both working with a clear *Supply Push* approach, we definitely must conclude that there are tangible differences in terms of outcome. It seems that the primary focus of each approach – to have the eye mainly on (a) producers with their opportunities to supply different products versus (b) consumers with their needs and interests to purchase certain products – does, indeed, make a fundamental difference in how successful project-supported market development activities are at the end. This is nicely illustrated by the AgroPuka (see Table 4).

There seem to be two main drivers that clearly favour a *Demand Pull* approach when aiming to improve market access of rural producers: (1) higher sensitivity for real market opportunities based on a better consumer and market understanding, and (2) a more functional involvement of market chain actors other than producers. Essentially, the use of a *Demand Pull* strategy forces its implementer to upgrade its intervention work to not only (or mainly) target producers but especially market chain actors closer to consumers (i.e. retailers, processors, traders) and get them involved such that they are ready to invest the needed resources (first of all time) to help define and implement new business ventures together with producers. The crux is that without a successful involvement of such “consumer near” actors, a project tends to create (subsidized) marketing structures that are little sustainable. In how many cases have projects made NGOs become processors, traders, and even retailers – and when project support was not available anymore, these structures broke down?

Despite the clear advantage of a *Demand Pull* approach to focus and orient market development interventions, a potential shortcoming of this approach when used in the context of rural development is to develop the strength to get farmers organized, so they are able to respond to market needs in terms of product quality and quantity. The problem is that creating a solid production base in small-scale structures does not only need special efforts, but also takes time – more than establishing new business partnerships along the value chain! In ideal situations, there are bigger (social) producers that have the capacity to integrate other smaller producers without big outside efforts; yet, such integration is still not able to speed up the process to consolidate organic production, as organic certification applies to all farms that participate in such new business venture, implying commonly a conversion period of 1 to 3 years. In this regard, a simpler “regional” certification is much more interesting, also because established small-scale processors are prone to play an efficient aggregation and integration function at the regional level. Indeed, for small-scale processors, a project can create essential leverage by helping to identify new marketing opportunities and providing support to upgrade product quality and marketing concepts while facilitating contacts to new buyers. The experience of SASA clearly shows that improved product packaging and labelling has a strong impact on sales and income, as improved product presentation increase not only absolute sales but products can also be better priced. Overall, these higher net incomes of rural processors and producers create optimal conditions to further enhance the competitiveness of these rural areas through additional investments and further integration of new farmers.

Nevertheless, when integrating actors are missing, a *Demand Pull* approach alone will most likely not be able to create the needed organizational structures at the local level. Therefore, a complementary *Production Push* approach is many times essential to set in place such “aggregating structures” at the local level (i.e. farmer associations that organize marketing together or development of small processing plant etc.). The fact is that a big share of the success of the last years of SASA, using the PMCA methodology as a *Demand Pull* methodology, related to the fact that different “aggregating structures” were already in place, many developed through project funded work using a *Production Push* approach!

**Table 4: Qualitative comparison between *Supply Push* and *Demand Pull* approaches**

Differences	Supply Push	Demand Pull
<b>Primary focus</b>	Producers with their production possibilities	Consumers with their interests and needs
<b>Role of project staff</b>	Help producers to get organized to produce and market, mainly related to existing production opportunities	Structure and facilitate a process to functionally link market chain actors, mainly based on existing or new market opportunities
<b>Main partners</b>	Producers	All market chain actors, including producers and supporting entities
<b>Geographical scope</b>	Mainly local, relying on efficient links to regional or national structures	Regional or national, relying on efficient links to local structures
<b>Main success factors</b>	Interest and capacity of producers to organize themselves and integrate together into the value chain	Interest and capacity of key market chain actors to collaborate for new business opportunities and link up with (organized) producers
<b>Risk factors</b>	Creating unsustainable production and marketing structures	Suboptimal process facilitation not leading to sustainable partnerships

### Core insight and recommendations for organic sector development

The project experiences from Albania provide only limited picture about the overall potential and risks of the two approaches presented. Nevertheless, the insight we derive from this context is consistent with what project donors and practitioners have proclaimed in recent years in regard to enhance impact and sustainability of project outcomes by shifting away from production-oriented development approaches towards more systemic facilitation approaches that focus more on business development.

However, in the context of organic market development, the effectiveness of *Demand Pull* approaches alone might not be sufficient – especially if organic market development is at an initial stage. In this situation, often first essential investments are needed to enable actors to start an organic business. Nevertheless, to ensure that such investments respond to clear market opportunities, a *Demand Pull* approach should still provide overall guidance for such production-related investments.

Also, the experience of Albania reveals that in countries with limited purchasing power such investments should rather target the export market to be successful; or investments focus on the development of a more simpler and less costly inspection and certification scheme targeting traditional or typical products. The fact is that in many countries, such products are highly appreciated by consumers, who are ready to pay a higher price if they are not only of good quality but also nicely packaged and labelled. In such countries, such strategy is not only highly interesting to promote rural development, but can be a first interesting step towards introducing the concept of “domestic quality labelled products”, which then might be certified organically further on, when awareness creation for organic is more advanced. In regard to awareness creation – independent if focusing on organic or typical products – a clear *Demand Pull* approach is essential. The experience from Albania clearly shows the excellent leverage can achieve with sound marketing concepts, branding, and PR work, which attracts not only the attention of consumers, but also retailers (including restaurant owners), the media, and politicians.

All in all, given the impact potential of different methodological approaches, we must conclude that practitioners involved in organic market and sector development require strong methodological and technical skills to be successful in their work. A crucial expertise relates to the sound facilitation of market oriented participatory processes to optimally involve different sectors stakeholders and create efficient partnerships to take advantage of new business opportunities. May the here presented example from Albania inspire to gain more sensitivity about “good practices” in organic market development work relating to both *Supply Push* and *Demand Pull* approaches, which definitely need to be adapted to the specific context of intervention to be successful.

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