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Report on the similarities and differences of views of producers, consumers and support organisations on the bottlenecks and success factors

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1. Introduction

The importance of traditional foods has significantly increased in the last couple of years.

Traditional foods play an important/impact role in maintaining diversity of foods, in serving the specific needs of the local consumers, in presentation of the local, national cultural heritage. They contribute to the sustainability of the food production activities of SMES and to the local labour retaining capabilities. To achieve more competitive and marketable products it is important to identify the weaknesses and strengths of the food chain, but it is also essential to listen to the chain members' and consumers' voice as well.

It is very difficult to find detailed definition of the traditional food in the literature, which is based on the food chain approach, but the different chain members mainly food manufacturers have their own expectations on the traditional foods. Generally they underline the importance of the specific production, the locality of the production, the specific quality control systems operating for the protection of the authenticity of their products.

Generally we could state that consumer attitudes and knowledge are affected by information received. Television, newspapers, magazines, the internet, books, family and friends are influential sources of information on food and health (American Dietetic Association 2000; Cogent 2006). Information from these sources in addition to traditional methods of communication like advertising and product labelling affect purchase decisions. Good flavour, convenience, and health enhancing properties are key consumer benefits in today's marketplace.

In the particular studies in the project Truefood the chain members' view on traditional food and 'consumers' attitude to traditional food were explored. Furthermore the research objectives concentrate on the better understanding on the innovation process from the chain members' view and consumers' view regarding traditional food, because the innovative processing technologies can help to realise some of the advantages these consumers seek, but at the traditional food products the way from introduction to acceptance is not always easy. Consumers consider particularly important the convenience aspect during the purchase related to the conventional product and the demand increases for the new packaging design, the products with extended shelf life e.g.: sliced sausages in MAP packaging.

Objectives

The aim of this report is to compare the result of the research work done in the frame of WP1 (Determination of consumer perception, expectations, and attitudes) and WP5 (Improved marketing and food supply chain organisation methods for traditional food products) of the TREUEFOOD related to the view of consumers versus producers and support organisations on:

- definition of traditional foods;
- acceptance of traditional food;
- attitude to innovation regarding traditional food products, and to those areas, where food SMEs can further develop their chain activities in such a way which will meet consumers' expectations.

Both WP 5 and WP 1 developed at first a definition of traditional food from consumer and chain viewpoints for its own research purposes. Furthermore the aim of the development of these definitions was to establish an appropriate tool for common view for the research and innovation activities related to traditional foods, mainly for our own work, but also for further studies with particular focus on food chains. The amalgamated definition, based on the consumers' and chain members' views, is prepared also for research purposes and it is not aimed to complete the current legislation with this definition.

This comparison is used to check whether the view, the innovation activities and the distribution strategies of the food businesses can be verified by the consumers' view and to identify whether there are such opportunities in the innovation and distribution activities of the traditional food chains which are not considered and exploited yet.

2. Methods used for the comparison

The method is a qualitative, information focused approach, in which knowledge and information collected from the different chain members (involved into qualitative methods: focus group discussions and brain storming sessions and into quantitative survey in WP 5), consumers (involved into qualitative method: focus group discussions and quantitative survey in WP 1), and support organisations (involved into quantitative survey in WP 5) were compared on certain topics related to traditional foods.

The deliverables used for the evaluation can be found in Annex. 1.

3. Comparative analysis of the findings received from research methods

3.1. Definition of traditional food

The definition of traditional foods from consumer perspective was compared to view of chain members.

This topic is very important because neither the consumers nor chain members can give a proper definition and explanation what traditional food is. In order to avoid ambiguity their opinions regarding traditional foods were collected and summarised in definitions for research purposes.

Table 1. Comparison of the main aspects of the consumers and chain members

Consumer aspects	Chain members aspects
Findings of focus group discussions conducted in Belgium, Poland, Spain, Norway, France and Italy	Findings of focus group discussions conducted in Hungary, Belgium and Italy
Main properties: • product consumed from childhood, • product processed and prepared in a specified way and • connected to a certain region or country	Main properties: • local traditions, • well known flavour, • strong connection to the region (locality) of production, • authenticity of product and production method
Definition of traditional product: a product frequently (note that we indicated that frequent consumption is not necessary the case) consumed or associated to specific dates and celebrations, normally transmitted from one generation to another, made in a specific way according to the gastronomic heritage and accurately, with none or low processing/manipulation, that is distinguished and known because of its sensory properties and associated to a certain local area, region or country.	**Definition of traditional product**: Production: key steps must be made locally Authentic: • Authentic recipe and/or authentic origin of raw material and/or • Authentic production process Commercially available: for the public for at least 50 years in stores or restaurants Gastronomic heritage: has a story, which can be written 2-3 pages.

Based on the qualitative research results regarding the chain members and consumers aspects on traditional food criteria the **amalgamated criteria of the traditional food** can be developed on the following way:

- The product is **regularly consumed** or associated to specific celebrations and/or seasons – **consumers** (WP1)
- Time factor: usually 50 years – **commercial availability in stores and restaurants - chain members** (WP5)
- **Specific way of production** – according to the gastronomic heritage – authenticity (recipe, origin of raw material, production process)
- **Associated to a certain** area (local, regional, country)
- **Distinguished and known because it's sensory properties - consumers** (WP 1)
- **Gastronomic heritage**: has a story, which can be written down – **chain members (WP 5)**

Specific aspects are highlighted with bald letters.

Differences / Similarities related to definition by consumers and chain members:

1. Regularly consumed: The chain members highlighted the specific, distinctive sensory characteristic of the traditional foods. Opposite this view the consumers underlined that the traditional food are frequently used, but they have not mentioned the distinctive trait of traditional product e.g. beer in Belgium.
The chain members did not mention the importance of the regularity of consumption, and then a lot of consumers declared that the frequent consumption of traditional food is associated to specific dates, celebrations, seasons and/or occasions.
We consider important to explain the difference between the terms of frequently and regularly. The regular consumption means a frequent consumption and can include the seasonal consumption (like every Christmas) of a traditional food as well; therefore this term was used in the amalgamated definition of traditional food.

2.In the light of the results it is worth for mentioning how the chain members and consumer evaluated the consumption of the traditional foods.
The chain members found the market size of the traditional foods relatively small, but all agreed that this might offer breaking point in the future. The following weaknesses of the traditional foods were listed: not so well known, not widespread and the production of these items are not cost effective. In the opinion of the consumers the consumption of the traditional foods significantly decreased compared to their childhood. The decreasing consumption in Belgium was explained by the wider variety of new or innovative products, which really meet their needs, demands.

3. Time factors:
The chain members stated usually 50 years, and are also commercial availability in stores and restaurants, while the consumers' view was transmitting from one generation to another, something from their childhood. To sum up the consumers identified smaller period.
Regarding the time factor of traditional food products - 50 years and commercially availability - only few Belgian traditional cheese products can fulfil the requirement therefore 30 years would be more feasible for them.

4. Specific way of production - according to the gastronomic heritage – authenticity (recipe, origin of raw material, production process)
In the opinion of the chain members the specific nature of the production process is really important in order to guarantee the distinctive trait, speciality of the traditional foods. The food chain members have associated the traditional food products with a strong connection to the region of production, a long existence of the product together with a story or history, and the authenticity of product and production method (e.g.: Belgian food chain members). This can contribute to the differentiation of the traditional products and can ensure to develop a successful marketing strategy for these products. The chain members also mentioned that traditional foods have to be authentic from the recipe to production process and need gastronomic heritage -a written story behind-. The traditional foods have to be promoted and available as authentic product at national and international level as well.

The authenticity was very important factor for majority of consumers as we see from the three main consumer attitude profiles:
1. Convenience - oriented consumers (24% of the consumers)
2. Health - oriented consumers (26% of the consumers)
3. Authenticity oriented consumers (50% of the consumers)
For example in the opinion of the Italian food chain members the main features of traditional products (dry ham and cheese) are associated to a very specific area and very specific

production process. These products are PGO products e.g. Parmigiano Reggiano cheese, dried ham. In the case of dried ham the "regola d'arte" - a master's rule contributes to the higher quality.
Specific way of production according to the gastronomic heritage and accurately was defined by the consumers too. Contrary to the chain members the consumers claimed that traditional products have to be prepared by /made of a limited or without processing.
Based on the results we could state that the consumers were mainly interested in the sensory properties of the traditional foods, rather than the processing, manipulation.
However the above-mentioned contradictions both agreed that traditional product had a well known sensory properties, mainly flavour and that gave the distinguished characteristic of these products.

5. Associated to a certain area (local, region, country)
The chain members emphasized that the traditional product should strongly connected to a region, than the consumers implied the county as well.

The consumers stated that the traditional product must be prepared locally and they had concerns about importing and exporting traditional foods e.g.: an Italian traditional food can't be manufactured in another country and imported as Italian traditional food by Italy from abroad.
Contrary to this fact the chain member found /evaluated the exportation of these products as an extra business opportunity through which they could enlarge their market. Eg. Production of the traditional Hungarian dried salami in Hungary and selling in abroad.
The chain member also supported those innovative sales / distribution strategies which provide opportunities for promoting and selling traditional food products directly from the place of the manufacturing for the tourists e.g.: agro tourism or in particular places e.g.: the speciality shops on the airports or on international trains.

6. Distinguished and known because it's sensory properties
The consumers and the chain members agreed that the sensory properties and mainly the flavour are really important and give the distinctive, well-known characteristic of the traditional products.

3.2. Comparison of opinion of consumers, traditional supply chains and support organisations about innovation in traditional food products

The consumers' views about innovation in food - especially in traditional food – products were investigated by different methods. After application of a qualitative consumer research method (e.g. focus group discussions), their attitudes were measured in quantitative consumer surveys. The outcomes from the consumer tests were compared with the opinion of traditional food chain members and support organisations from the questionnaire survey.

3.2.1. Consumers' definition of innovation in traditional food products and innovation activities

3.2.1.1. Consumers' definition of innovation in traditional food product

The **focus group** discussions showed that the consumers relate the <u>innovation of food products</u> to modifications in the ingredients or preparation of the food by adding new / unusual ingredients or applying new recipes or technology. In the consumers' view the improvement of convenience, such as precooked, ready to eat, microwavable products, new packages, can be an element of the innovations too.

The consumers' attitudes towards innovations are different country by country. For example French and Belgian consumers seem to be more open to innovation in foods than Polish or the Norwegian consumers. Italian consumers accept innovations because of the modern way of living (something like resignation). French consumers also admitted that innovations are unavoidable due to modern way of life.

The idea of <u>innovation in traditional foods</u> was not well received in most of the countries, as the respondents showed contradiction between tradition and innovation. The results showed that the consumers' acceptance of the type of innovation applied in traditional food products was different. In general, the consumers are more likely to accept innovations if it results only small perceivable changes. Innovations that could increase the safety or add other relevant advantages (e.g.: health benefits) to the product were appreciated by the consumers. Traditional food companies also prefer innovations on safety and packaging but they have concerns about improving the health aspects by replacing ingredients or changing the recipe as it may compromise the authentic recipe or process.

The consumers' attitudes towards innovation in traditional food were investigated / measured in the **quantitative survey**. Consumers expressed their opinion about 12 types of innovation (Annex 2.). The traditional food manufacturers and the support organisations were asked about the average rate of introducing different types of innovation. The questions of consumer and food chain surveys were slightly different as shown Table 2.
An extended list of innovations in traditional food products was also provided for the consumers in the consumer survey to measure the degree to which an innovation is actually accepted (Annex 3.). The consumers rated their acceptance and feelings about the extent of the negative effect on the traditional character of the product for each particular innovation. The extended list of innovations helps to search for new market opportunities.

Table 2. Comparison of the questions of food chain and consumer survey

Consumers		Companies and support organisations

Improve nutritional value		Improving quality
Improve health		
Improve safety		
Convenience oriented		Improving convenience
Improve fitness for use		
Improve the usefulness		
New packaging		Improving packaging
New processing system		
Marketing oriented		Improving marketing
New origin / culture		Entering new geographical markets
New combination of products		
Addition of new / unusual ingredients		
		Improving management practice
		Improving management of R&D
		Networking

The generally low means scores of the consumer survey confirmed the consumers feel contradiction between innovation and the image of traditional food product.

In the consumer's opinion innovations, which are related to the intrinsic quality of the products (e.g.: safety, health and nutritional value), could be associated to the traditional food at the highest degree. Other innovations - e.g. improvement of the usefulness, the fitness for use or convenience – were evaluated positively. Innovations, which may cause changes in the authentic composition, (e.g.: for instance the addition of new ingredients or new combinations in products) were the least associated to traditional products.

3.2.1.2 Comparison of consumers' view on the innovation with the results of the food chain survey

If we compare the result of the consumer survey to the answers of the traditional food manufacturers (Annex 4.) we can conclude that the innovations, which are most frequently carried out by the manufacturers, are matching well the associations of the consumers. Improving quality was the most frequent type of innovation for the traditional food manufacturers as 86.7% of them introduced this type of innovation. The answers of the support organisations showed a similar pattern, although comparing the results with the answers of the focal companies we can establish that the support organisations underestimate the frequency of the projects carried out on the improvement of quality.

In the consumers' point of view the quality oriented innovations such as improving the healthiness (e.g. reducing fat, salt, sugar content, using organic raw materials) and safety of the products appear very acceptable and did not compromise the traditional character of the product. The food chain survey did not investigate the innovation activities on the health benefit of the traditional product.

The improvement of convenience, fitness-for-use and usefulness showed also positive association in the consumers' point of view, although only 50% of traditional food manufacturers carried out activities to improve the convenience of their products. The answers of the focal companies and support organisations show quite good match.

Individual portions and availability all over the year can be a market possibility as the consumers found these types of innovations quite acceptable. On the other hand the results of the consumer survey showed that frozen food, pre-cooked food or ready-to-eat dishes have a negative impact on the image of traditional foods, although the acceptance of this type of convenience oriented innovations was negative only in Belgium and Italy.

The majority of the consumers scored the improvement of the packaging in the mid-range of scale; they did not showed very positive or very negative attitudes towards this type of innovation. On the other hand most of the traditional food manufacturers (78.5%) improved the packaging of their traditional products in the last 3 years. The traditional food manufacturers more frequently improve the packaging and the quality than the support organisations think.

It is important to mention that when the consumers evaluated different aspects of innovation of the packaging, the improvements were welcomed by the consumers, especially which help to extend the shelf-life of the product or preserves sensory quality. This fact shows that the consumers are more likely to accept innovation of packaging if they understand its positive effect on product quality.

Other innovations – e.g. regarding to the marketing of the traditional products – was less well perceived by the consumers. The result of the survey on traditional food supply chain members showed that approximately 55,6% of the manufacturers and 62,2% of the customers introduced this type of innovation recently. The answers of the support organisations showed a similar pattern compared to the manufacturers. It is worth to mention that there is some type of market in innovations, which is not perceived by the consumers. (E.g.: Availability in the shops might be natural for the consumers, but there might be marketing efforts in the background.)

When the specific types of marketing efforts were investigated among consumers, the results showed that the label indicating the traditional character could clearly create market opportunities, as the consumers rated it very acceptable. Thus we can conclude that authenticity is very important for the consumers. On the other hand introduction under a strong brand name showed only moderate acceptance level. This can be explained with the fact that the strong brand name is usually associated with a global image, which contradicts the traditional and authentic food production and may results higher prices.

Consumers have a certain demand for expansion of the assortment but the type of the improvement needs to be selected carefully. New combination of ingredients and diversifications in shape and texture was considered as compromising the traditional character of the product but did not received negative acceptance level in any countries.

New distribution channels (vending machines, home delivery and take-away) were not well accepted by the consumers. The innovation that appeared as the one with lowest market possibilities was the possibility to be bought in a vending machine. Contrary there is a good chance for market success in case of buying food directly from the manufacturer as in the consumers' opinion it does not have a negative effect on the traditional character of the product. The reason why home delivery was less accepted by consumers could be that they might associate it with home delivery from supermarkets or restaurants, which seems to be rather a time –saving solution and does not fit to the traditional image of the food product. As the consumers accepted very well the concept of buying traditional food directly from the manufacturer, the "home delivery directly from the manufacturer" might be successful but it needs further investigations.

3.2.2. Comparison of consumers' acceptance of innovations in traditional food and food manufacturer's innovative distribution strategies

Brain storming sessions were carried out in 3 countries, Belgium, Hungary and Italy to collect ideas for the innovative distribution strategies of traditional foods. Traditional food manufacturers collected a wide range of ideas (Table 3.), which may help the traditional food products to keep / strengthen their position on the market.

Table 3.Innovative distribution strategies listed by the manufacturers

Topics for the ideas collected	**Idea selected for SWOT analysis , feasibility tests and review meeting**	**Idea registered but not selected**
Distribution	Regional corner Speciality shops Fast food chain Moving outlet Joint distribution	Home delivery service Vending machine
Marketing management, promotion	Agro-tourism Joint promotion Involvement of the consumer Small area territorial penetration	Surprise of the consumers Cross marketing
Innovation	E-commerce	
Package improvement	All in one packaging	Easier opening For easier transport
Creation facilities for networking	Network facilities	
Product improvement		Improved shelf-life Experimental cuisine Offering processed products prepared according to several specific traditional recipes in product assortment

Traditional food companies listed ideas connected to the marketing management of traditional food. For example one of the ideas was promoting agri-tourism / or to invite consumers into the farms or production places, so they become more aware of what quality means and implies and they could purchase traditional food products directly from the manufacturer. This kind of promotion might be a possibility, as the consumer survey showed that the option "buying from the manufacturer" was well accepted (it was not the most accepted probably due to the time and cost constrains of going there). Other ideas for increasing the publicity of the traditional food products were mentioned e.g.: surprise of the consumer, sale of traditional food products at unexpected places (train, ship, airport, and public sport or cultural events) or promotional centres with point-of-sales. The type of the innovative distribution method has to be chosen carefully and it is always worth to check if it fits to the image of traditional food, otherwise the consumers will not accept.

New way of promotion, like improving image of traditional food products (e.g.: Slowfood), promotion jointly with other manufacturers focusing on the complementary products like wine and cheese, sausage and pickled pepper products were also mentioned.
The combination of tourism, culture and food products that have been proven effective and therefore could work for the promotion of the traditional food products.

Other distribution / market innovations were mentioned by the traditional food manufacturers, e.g.: joint distribution, moving outlets, regional corner, speciality shops, fast food chain, and home delivery. Some of the market innovations, which are related to the distribution of the products, were evaluated by the consumers, such as home delivery, take – away and vending machines, but they did not find them acceptable. It is important to mention that the vending machine was identified as an acceptable innovative distribution strategy for the distribution of traditional products by the chain members in Belgium but the consumers involved into the research evaluated this as a less applicable way of innovation in distribution in traditional food.

Investigating new distribution strategies, the traditional food manufacturers mentioned packaging related innovations, such as improvement of convenience e.g. easier opening, package deal (all – in –one packaging), or individual portions . Consumers find these types of innovations quite acceptable as well.

Traditional food manufacturer mentioned in the brainstorming sessions that the certification of the websites of e-commerce can help the visibility and the level of trust consumers assign to producers.

3.3. Potential food chain solutions to meet consumer's need

The collaboration between the partners along the food chain and chain strategies provide opportunities for innovation of traditional products in order to adapt to the consumer expectations but without modification of ingredients. In this way the characteristics and main properties of traditional products can be conserved and the safety, quality of the traditional food can be ensured and guaranteed. The traceability system on a whole supply chain is a good solution for example in Hungary where the members of the Hungarian red pepper chain operate an Internet based traceability system, which ensures that all businesses access the information what is relevant for them and what they need for an efficient product recall/withdrawal. (See more details D 5.1.8 Inventory on best practices on reducing bottlenecks promoting success factors at traditional food supply chains).

Another good example can be mentioned for the integrated full chain safety / quality management systems as the Assured British Beef, Quality British Turkey, provide consumers and retailers with better confidence about product safety along the whole chain. The requirements are beyond the legal minimum, thus they provide additional value to the clients and the consumers. (See more details D 5.1.8 Inventory on best practices on reducing bottlenecks promoting success factors at traditional food supply chains.).

There is another good solution for ensuring the quality of the draught beer and the better hygiene of the taps installed in the catering due to the collaboration of the breweries and their clients. In this case the beer manufacturers provide the catering units with instruction for use of the taps and work instructions for the cleaning. In this way the better hygiene contributes to better taste, as such to better drinkability of beers, thus increase consumers preference and loyalty. (See more details D 5.1.8 Inventory on best practices on reducing bottlenecks promoting success factors at traditional food supply chains.)

For improving the nutritional properties (reduction of fat content or increase the sugar content) and health aspect of the traditional food products without modification of the ingredients there are some solutions e.g.:

- In the processing a boning-salting-binding (BSB) methodology was developed to elaborate restructured dry-cured boned hams with a reduced salt content (see more details in WP 4.)
- the collaboration between plant growers and food manufacturers for growing a fruit variety with a higher sugar content (e.g.: strawberry for marmalade production ;)

4. Conclusions, recommendations

In the light of the results we can state that the chain members' view and consumers ' view on the traditional food criteria show a quite good match, there are only some differences (like the importance and level of the processing of the traditional food products).

It is important to mention that the opinion of the support organisations matched moderately the view of manufacturers on the innovation of traditional products, but it should be underlined that the support organisations have limited information about the chain management and chain approach. It is recommended for the support organisations to deal with the chain management for exploiting better the opportunities for innovation of the traditional food based on the collaboration of the chain members.

Regarding innovation of traditional food it can be stated that there are some chain solutions, which contribute to the safety and quality of traditional food and provide good opportunities for meeting the consumers' need.

The results showed that innovation in traditional food product is acceptable for the consumers as long as it does not change the main characteristic - especially sensory properties - of the product and keeps the authenticity of the traditional product. It is important to emphasize from the traditional food chain point of view that that the chain approach can help to maintain the authenticity of the product.

Innovations which are carried out by the traditional food companies most frequently, such as innovation of quality and packaging, are welcomed by consumers.

Improvement of convenience may provide a market opportunity but it is not properly exploited by the traditional food manufacturers. On contrary the consumers find some of these types on innovations quite acceptable. However it needs to be emphasised that such innovations that has a negative effect on the image of the traditional character – e.g. ready meals, diversification in shape or texture – may not lead to market success.

The surveys revealed that some of the innovations related to new distribution strategies, which seemed appealing to the companies, such as takeaways, vending machines, home delivery, do not match the image of the traditional product, thus they are less accepted.

To sum up the chain members have to emphasis those characteristics of the product, which are obvious for the consumers' e.g. unique sensory properties, authentic, gastronomic heritage, rather than put emphasis on processing, to make the traditional products more attractive for them. Besides the innovations visible for the consumer, the chains need also invest into market and organisational innovation to make their TFPs better known and better accessible responding to the needs of the global market.

Annex

Annex 1. Deliverables used in the evaluation

WP.1 . Determination of consumer perception, expectations, and attitudes	**WP.5. Improved marketing and food supply chain organisation methods for traditional food products**
D. 1.1.5. Final reports on Definition of ‘traditional products’ and ‘innovation’ related to traditional products	Deliverable D 5.1.3 Summary report on Focus Groups
D1.2.1.3 National and Cross-National reports of the consumer survey	D.5.1.10. Summary report on support organisations
	D.5.1.12. Summary report on the quantification of the determinants of bottlenecks and success factors
	D 5.4.6 Summary report on results of brainstorm sessions

Annex 2. Consumers' association of the respective innovation with traditional foods (WP1 - D1.2.1.3)

Belgium	Belgium (mean)	France	France (mean)	Italy	Italy (mean)	Norway	Norway (mean)	Poland	Poland (mean)	Spain	Spain (mean)
Improve nutritional value	4.4.7	Improve health	4.39	Improve safety	4.97	Improve safety	3.8	Improve safety	4.55	Improve safety	4.8
Improve health	4.46	Improve safety	4.84	Improve health	4.75	Improve the usefulness	3.77	Improve health	4.55	Improve the usefulness	4.67
Improve fitness for use	4.41	Improve nutritional value	4.81	Improve nutritional value	4.7	Convenience oriented	3.71	Improve nutritional value	4.46	Improve nutritional value	4.66
Improve safety	4.41	Improve fitness for use	4.69	Improve the usefulness	4.67	Improve nutritional value	3.68	Convenience oriented	4.46	Improve health	4.66
Improve the usefulness	4.35	Convenience oriented	4.63	Improve fitness for use	4.65	Marketing oriented	3.65	Improve the usefulness	4.36	Convenience oriented	4.56
Convenience oriented	4.28	Improve the usefulness	4.49	Convenience oriented	4.58	Improve fitness for use	3.63	Improve fitness for use	4.27	Improve fitness for use	4.44
New packaging	4.07	New packaging	4.43	New packaging	4.27	New packaging	3.63	Marketing oriented	4.23	New packaging	4.39
New processing system	3.69	New origin / culture	4.07	Marketing oriented	4.22	Improve health	3.39	New packaging	3.98	Marketing oriented	4.27
Marketing oriented	3.59	New combination of products	4.01	New processing system	4.08	New processing system	3.35	New origin / culture	3.67	New processing system	4.04
New origin / culture	3.53	New processing system	4.01	New origin / culture	3.9	New origin / culture	3.12	New combination of products	3.56	New origin / culture	3.94
New combination of products	3.47	Marketing oriented	3.74	New combination of products	3.68	New combination of products	2.88	New processing system	3.49	New combination of products	3.66
Addition of new / unusual ingredients	3.17	Addition of new / unusual ingredients	3.7	Addition of new / unusual ingredients	3.36	Addition of new / unusual ingredients	2.5	Addition of new / unusual ingredients	3.13	Addition of new / unusual ingredients	3.13

Annex 3. Extended list of innovation (WP1 - D1.2.1.3)

1	Label that guaranties the origin of the raw materials and the authentic recipe
2	Using organic raw materials
3	New process improving safety
4	Reduction of fat content
5	Packaging preserving sensory quality
6	Recloseable packaging
7	Reduction of sugar content
8	Reduction of salt content
9	Individual portions
10	Availability all over the year
11	More variety in the offer for a type of food
12	Packaging that can be use in the oven or microwave
13	Frozen food
14	New combination of ingredients to create a new flavour
15	Pre-cooked food, ready to eat dishes
16	Diversification of shape or texture
17	Can be bought in vending machines
18	Can be obtained via home delivery
19	Introduction on them market under a strong existing brand name
20	Addition of ingredients providing additional health benefits
21	Can be bought for take-away from speciality shops
22	Package deal
23	Can be bought from the manufacturer

Annex 4. Innovation activities of focal companies and support organisations (WP5, D.5.1.10., D.5.1.12)

	Support organisations				Focal companies
Support org.	Non, sporadic	A few	Some-Majority	I do not know	Total
packaging	8.5%	25.5%	51.1%	14.9%	78.9%
quality	2.1%	12.8%	70.2%	14.9%	86.7%
convenience	8.5%	27.7%	44.7%	19.1%	50.0%
new geographic markets	8.5%	21.3%	53.2%	17.0%	57.8%
marketing	6.4%	25.5%	53.2%	14.9%	55.6%
management practice	14.9%	38.3%	21.3%	25.5%	37.1%
management for R&D	17.0%	42.6%	12.8%	27.7%	37.1%
networking	17.0%	34.0%	29.8%	19.1%	44.9%