

# Saving rare breeds by eating them

## Preliminary Dutch Market Research Findings

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Commissioned by:  
Stichting Zeldzame Huisdierrassen (SZH)  
ZeldzaamLEKKER (ZL)

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# What is this about?

- ⊙ Market research on rare breed livestock products;
- ⊙ commissioned by SZH and ZeldzaamLEKKER;
- ⊙ done by a group of six students in the context of the Wageningen University course *Academic Consultancy Training* (ACT);
- ⊙ with a focus on the retail and catering sectors

# Context of our assignment

90% of Dutch populace purchases food in supermarkets; however:



Some trends predicted

- ⊙ more contact and transparency between producers and consumers,
- ⊙ less preference for cheap bulk goods; more need for producers to distinguish themselves,
- ⊙ higher demand for fresh produce

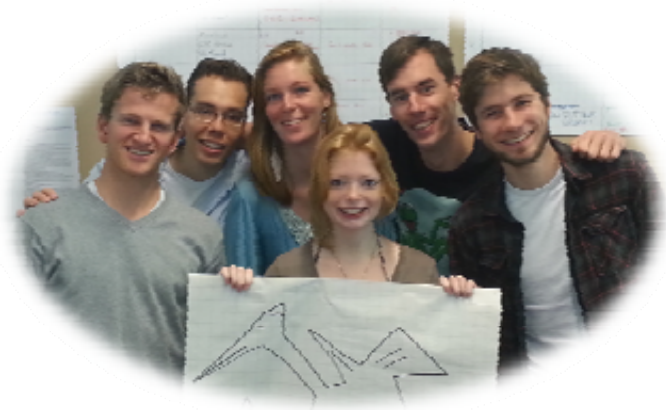
# What is ZeldzaamLEKKER?

- ⦿ Translates literally to “rare tasty”, but loosely to “extraordinarily good”
- ⦿ Is a **platform** and **quality label/certificate** set up in 2011 by SZH, aimed at commercially promoting rare breed livestock products (and services) with an emphasis on their unique quality, taste and **background** (the ‘ZL-story’).
- ⦿ So far quite small: 18 participating livestock farmers





# What is ACT?



- ⊙ Special course in the curriculum of *all* Master students at Wageningen University
- ⊙ Working in an interdisciplinary group of students, for a real commissioner, learning consultancy skills
- ⊙ 4 animal scientists,  
1 international development student,  
1 communication scientist

# Focus of our exploration



Producers



Processors



Retail



Wholesalers



Catering sector



Consumers

Introduction ♦ Methods ♦ Results ♦ Recommendations

# Methods used

- ⊙ Literature study to get started
- ⊙ Interviews to test theory against practice

Results of our research:

- ⊙ Strengths, Weaknesses, Opportunities, Threats (SWOT)-overview of our four research area's

# 1. Literature

<i>Strengths</i>	<i>Weaknesses</i>	<i>Opportunities</i>	<i>Threats</i>
<ol style="list-style-type: none"><li>1. Consumers hold a positive view of local products</li><li>2. Food professionals select their products on taste and production method</li><li>3. Story behind products can be interesting for marketing</li></ol>	<ol style="list-style-type: none"><li>1. Certificate of 'locally produced' does not legitimize a higher price</li><li>2. Small volume and variety of products</li><li>3. Logistically not competitively organized</li></ol>	<ol style="list-style-type: none"><li>1. Professionalization of the product chain possible with strategy integration</li><li>2. Collaboration with existing logistics</li><li>3. Demand for locally produced food is growing</li><li>4. Collaboration with organic food systems</li><li>5. Restaurants can use 'unique products' to distinguish themselves on the market</li></ol>	<ol style="list-style-type: none"><li>1. High costs for investments and distribution</li><li>2. Uneven division in food chain</li><li>3. 'Fake' products can cause loss of trust in certificate</li><li>4. Consumers experience barriers in buying local products</li></ol>



## 2. Catering (Restaurants)

<i>Strengths</i>	<i>Weaknesses</i>	<i>Opportunities</i>	<i>Threats</i>
<ol style="list-style-type: none"><li>1. Transparent and short product chain</li><li>2. Certificate ZL clear and recognizable</li></ol>	<ol style="list-style-type: none"><li>1. Higher price of ZL products</li><li>2. No marketing from ZL platform</li></ol>	<ol style="list-style-type: none"><li>1. Story of products gives explanation for variation in taste</li><li>2. Supply by wholesalers relative easy for small businesses</li><li>3. Platform useful for communication and marketing</li><li>4. ZL-story resonates with some restaurants</li></ol>	<ol style="list-style-type: none"><li>1. Demand for stable supply and quality of products</li><li>2. Restaurants have no use for cheaper cuts of animals</li><li>3. Collaboration within the short chain costs time and effort</li><li>4. Wrong interpretation of 'rare animals' possible</li><li>5. 'Fake' products can cause loss of trust in certificate</li></ol>

# 3. Retail

<i>Strength</i>	<i>Weakness</i>	<i>Opportunity</i>	<i>Treat</i>
1. Transparent chain	1. Dutch consumer desires cheap meat 2. Dutch consumer desires lean meat 3. Low slaughter weight creates high costs	1. Retail businesses could be interested in ZL products if the 2. When ZL products are of extraordinary quality, they can compete with non-ZL products	1. Lack of logistical organisation 2. The story of retail businesses' own products might conflict with the story of ZL products

# 4. Wholesalers

<i>Strength</i>	<i>Weakness</i>	<i>Opportunity</i>	<i>Treat</i>
1. Wholesalers see ZL products as “Strong”(story/artisanal/animal welfare) 2. Transparent chain guaranteed by the label	1. Constant flavour and quality are a demand for wholesalers 2. Meat of dual-purpose cows of lower quality 3. Added value of just ZL-story is not enough (quality needs to be there) 4. ZL-certificate still unknown	1. Fatty meat not necessarily a problem for catering industry, Dutch origin is a plus 2. Small product range and temporal unavailability no problem 3. Wholesalers have some knowledge of meat production <i>due to their experience</i> 4. ZL products can be promoted by e.g. tastings	1. (Too) small production volume 2. Wholesalers only buy luxury cuts 3. Lots of regulations apply concerning delivery to wholesalers

# Recommendations

- Based on *Interactionmatrix*

## **Strength**

Businesses select products for their taste and production methods

## **Threat**

Story behind business' own product could conflict with story of ZL-product

## **Strategy**

ZL-products should be distinguished by emphasizing special taste and production method, because the ZL-story alone is not enough and has to compete with the other products of the approached business.

# 1. Product Distinction

*“Quality & Taste > Story”*

## Quality

- ⦿ Help producers with product-improvement

## Taste

- ⦿ Emphasize with what methods special taste of the products is achieved



## 2. ZL Certificate

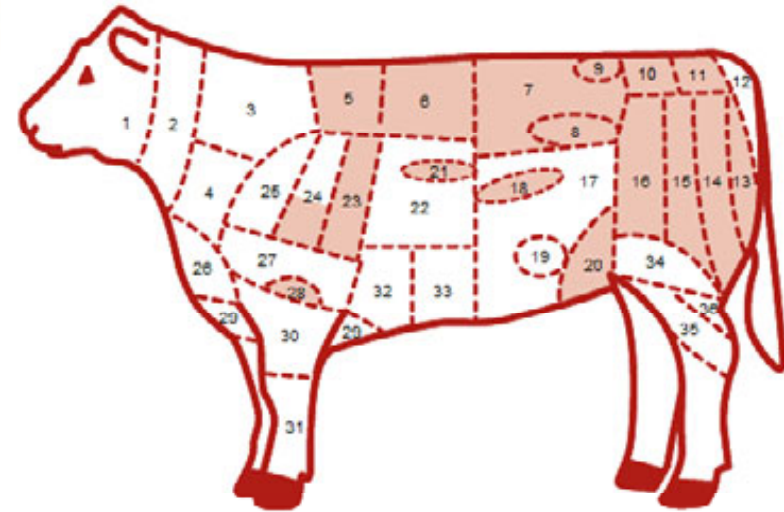
- ⦿ Toughen criteria for new producers (to maintain quality)
- ⦿ Create unified label design that indicates quality
- ⦿ Expectations of consumers should be met
- ⦿ Maintain credibility
  - ⦿ Purity of the rare livestock breed
  - ⦿ Chain transparency



# 3. Meat cuts

## Problem

- ⦿ Catering industry only wants luxury cuts

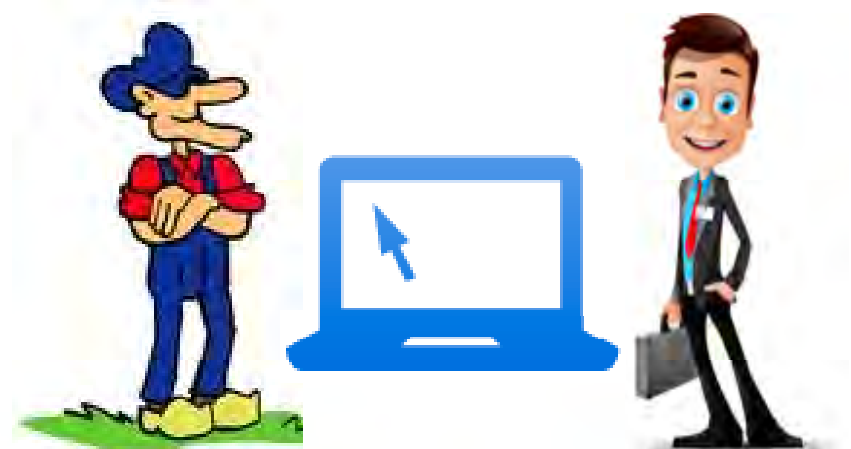


## Role of ZL-platform

- ⦿ Find market for secondary products
  - ⦿ Example: luxury line of meatballs, hamburgers, sausages

# 4. Approach food professionals!

- ⦿ Active approach towards businesses pays off!
  - ⦿ Some of our interviewees interested in cooperation
- ⦿ Turn enthusiastic restaurants into “Ambassadors”
- ⦿ Create a website that contains an overview of available products in a certain region



# Discussion / Questions