



Food and Agriculture
Organization of the
United Nations



Agrifood marketing and export promotion policies: case studies of Austria, Brazil, Chile, Estonia, Poland and Serbia

Synthesis report

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policies: case studies of Austria, Brazil, Chile,
Estonia, Poland and Serbia**

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Acknowledgements

This policy brief is based on the studies that were discussed by country experts and stakeholders during the FAO workshop “Best practices in export promotion: Experience in Latin America, Eastern Europe and Central Asia,” which was held in Halle, Germany, 24–25 May 2016, hosted by the Leibniz Institute of Agricultural Development in Transition Economies.¹

The following experts prepared the case studies:

- Piotr Kondraciuk (Agricultural Marketing Agency, Ministry of Agriculture in Poland): *Study on Food Promotion Policy in EU and Poland*
- Tiina Saron (Estonian Dairy Association): *Estonian experience in the formation of export strategy for dairy products in Estonia*
- Goran Zivkov (SEEDEV Consulting Firm in Serbia): *Experience of food export promotion in Serbia*
- Guillermo Donoso (Pontifical Catholic University of Chile): *Chilean agricultural export promotion experience to advance agricultural trade: legal, regulatory and operational frameworks and impact assessment*
- Rafael Guimaraes Requião (Ministry of Agriculture in Brazil): *Brazilian agricultural export promotion experience to advance agricultural trade: legal, regulatory and operational frameworks and impact assessment*
- Rainer Haas and Oliver Meixner (Institute of Marketing and Innovation, University of Natural Resources and Life Sciences of Vienna, Austria): *Food Promotion Policy for the Austrian Food Market: a best practice example*

The present policy brief is based on the abovementioned technical materials and case studies prepared by the involved experts, summarized by Dariusz Goszczynski (Agricultural Marketing Agency, Poland) and Liliana Cimpoiu (State Agrarian University, Republic of Moldova). The guidance on structure, report components and contents, policy recommendations, and paper quality review was provided by the State Agrarian University in Moldova and by FAO experts Ekaterina Krivonos (FAO, Economist), Iryna Kobuta (FAO, Economist), Mischa Tripoli (FAO, Economist), Kairat Nazhmidenov (FAO, Investments Officer), Dmitry Zvyagintsev (FAO, Policy Officer) and Dragos Cimpoiu (State Agrarian University, Republic of Moldova). This work was completed within FAO Strategic Objective 4 (Enable more inclusive and efficient agricultural and food systems) and supported by the Regional Initiative “Improving agrifood trade and market integration in Europe and Central Asia” of the FAO Regional Office for Europe and Central Asia. FAO Senior Policy Officer Ariella Glinni is the Regional Initiative’s delivery manager.

¹ The originals of the country studies are available at: <https://www.iamo.de/en/press/press-releases/article/experts-highlight-the-need-for-more-targeted-agricultural-export-promotion-practices/> or <http://www.fao.org/economic/est/international-trade/europe-and-central-asia/call/en/>.

Executive summary

Increasing exports is one of the most important priorities for governments and plays a prominent role in the development agenda in developing countries, high-income states and all countries between. On the other hand, pursuing the intensification of trade demands a deliberate policy framework tailored to country-specific needs and the interests of producers. In light of this, governments around the globe have developed various export promotion policies – some that share similar characteristics and others that are unique – that can serve as best practices to many.

The purpose of this paper is to identify the best promotional practices implemented in different countries and share them with governments planning to adopt or review trade promotion policies and with stakeholders. In light of this, the paper analyses these policies from several points of view, including (1) their institutional framework; (2) practical examples of export promotion measures (such as procedures, grants, and technical assistance to producers); (3) financing opportunities for exporters (such as credit, insurance, and factoring); (4) and measures specifically implemented on internal markets.

The paper is made up of the most relevant findings of case studies delivered by country experts from Poland, Austria, Estonia, Serbia, Chile and Brazil. The case studies were prepared under a project for the Republic of Moldova titled “Capacity Building for Agriculture Export Development” and discussed during the FAO workshop “Best practices in export promotion: Experience in Latin America, Eastern Europe and Central Asia,” which was held in Halle, Germany, 24–25 May 2016, hosted by the Leibniz Institute of Agricultural Development in Transition Economies. The most relevant findings of the workshops are included in this synthesis, which offers a review of important policy options for decision makers. These are as follows:

1. Establishing a designated national body that transparently carries out and coordinates export promotion with a clear mandate, responsibilities and budget;
2. Involving the private sector in a dialogue with relevant authorities to develop an export promotion plan abroad (e.g. chambers of commerce to be involved in developing trade promotion activities and providing expertise to guide public sector actions);
3. Applying a systematic approach, prioritizing agrifood products and markets based on their export potential;
4. Identifying high-value-added and/or niche markets for organic and traditional products derived from the geographical indication systems (GIs);
5. Developing quality standards to enhance competition among domestic producers and to increase confidence in their products;
6. Improving sanitary and phytosanitary (SPS) systems and implementing international standards, which are essential for accessing markets;
7. Identifying key issues and barriers and overcoming obstacles through the establishment of export promotion funds;

8. Encouraging and facilitating cooperation among producers;
9. Launching a country image/branding programme to enhance consumer appreciation and attract foreign investors;
10. Dismantling export restrictions and easing the regulatory environment and bureaucracy;
11. Supporting market research and the assessment of foreign markets, and providing access to market information;
12. Supporting producers' participation in fairs and exhibitions abroad;
13. Delegating agrifood trade attachés and representatives to key export countries;
14. Developing education and human resources for production and marketing in export sectors;
15. Promoting intergovernmental coordination in the fields of agriculture, economics and trade to streamline the efforts of export/investment promotion agencies and customs and SPS authorities;
16. Promoting transparency in government spending and frequently evaluating the effectiveness of export promotion programmes;
17. Promoting investments in trade infrastructure, logistics and transport;
18. Facilitating trade and simplifying import and export procedures; and
19. Dedicating more financial resources to agricultural and market research to develop the technological base and strategic vision for the sector (including export orientation).

Introduction

Increasing exports is a high priority for governments in both developed and developing countries, as it is a major source of growth. In light of this, tailoring suitable trade promotion policies plays a key role in supporting innovative development and sustainable growth within the agricultural sector and its sub-sectors. The importance of trade promotion policies is crucial for enhancing domestic production and for obtaining a comparative advantage on world markets.²

Despite the advantages, some governments are confronted by policy needs to put together proper toolkits to support international trade. These toolkits are occasionally influenced by multiple factors: disadvantageous geographical location, poor accessibility to export markets, macroeconomic turbulences in foreign markets, the volatile nature of consumer markets, trade conflicts with key export markets, trade restrictions, and the urgency of establishing harmonized and internationally recognized food safety standards.

These factors demonstrate the importance of developing a suitable framework for an adequate trade promotion policy, considering the relevant factors influencing domestic production and global competitiveness. A policy that will support new dynamics and induce diversification of products and export markets may yield positive results, including more efficient domestic value chains and improved sustainability of agrifood export dynamics in the long term.

Trade promotion policies of agrifood products can significantly differ in terms of goals, applied measures, institutional framework and mobilized resources. The scope of this paper is to analyse the international experience derived from both external and internal markets that could serve as best practices for other countries. The case studies, which are described in detail, include examples of success stories and lessons learned from policy decisions not well-suited to local conditions.

The policy descriptions are from Poland, Austria, Estonia, Serbia, Chile and Brazil. The sample selection method did not focus specifically on geographical coverage but on the key differences among the policy decisions applied in these countries so that the sample includes relevant, considerable aspects of trade promotion policies.

² Giles and Williams, 2000; and Harrison and Rodríguez-Clare, 2009; see also UNCTAD, 2008.

The scope of this paper is to present global practices, experiences and lessons learned on trade promotion policies for agricultural and food (agrifood) products distributed on both external and domestic markets. It summarizes several studies conducted by country experts in coordination and close cooperation with the Food and Agriculture Organization of the United Nations (FAO) in 2015.

The paper investigates key aspects of trade promotion policies and addresses the following issues:

- identifying key actors in the organization of agrifood export promotion;
- applied measures for export promotion;
- the financial framework of export promotion activities; and
- practices applied for trade promotion on domestic markets.

1. Main actors in the organization of export promotion and agrifood marketing

The first chapter describes the institutional setting of export promotion agencies and their operational context. The sample includes countries from different regions, bound by distinct international agreements and regulations. The first part of the chapter demonstrates three examples from the European Union: Austria, Poland and Estonia. This also applies to export promotion, as even though the EU provides a common policy framework for all of its Member States, states may implement them in a way that fits their country-specific needs. Serbia is included in the sample as a country neighbouring the EU with strong commercial ties to the community. The two case studies from Latin America (Chile and Brazil) provide a comparative approach in countries not directly influenced by EU policies but extensively channelled into international agrifood trade.

1.1. The Institutional Framework of Export Promotion in the European Union

1.1.1. The European Union

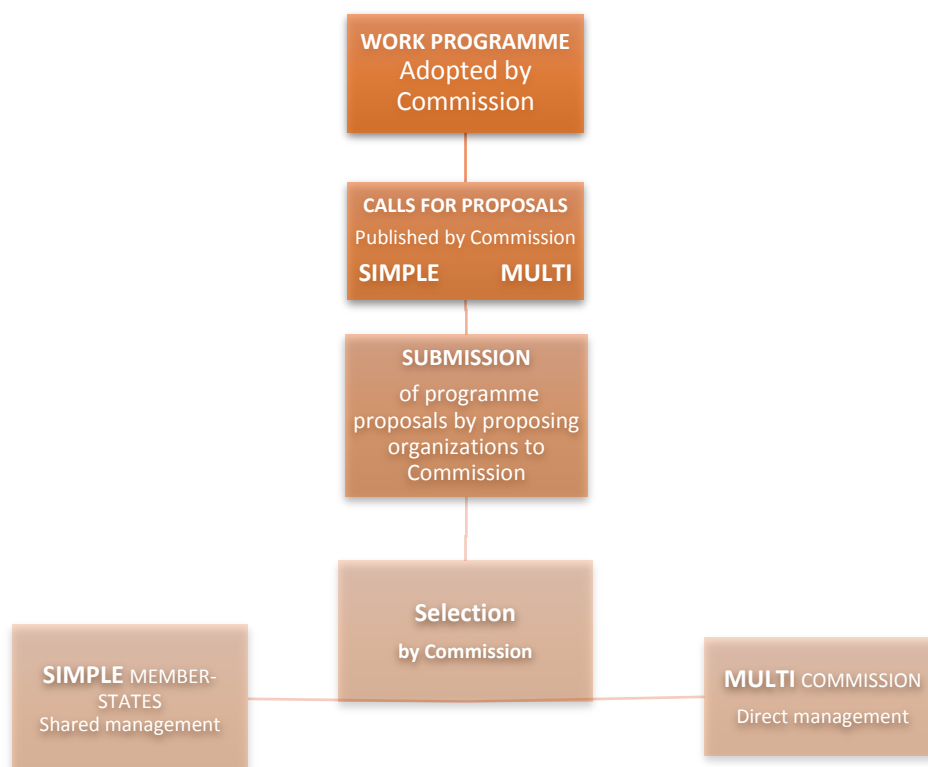
The European Union's trade promotion policy sets several regulations on promoting agrifood products on domestic markets, as well as on markets in third countries.³ The EU trade promotion policy of agrifood products is a part of the Common Agricultural Policy (CAP), under which it has evolved significantly since the 1980s. Its main goal is to increase the demand for agricultural products in order to benefit EU producers. Until 2008, the EU trade promotion policy was regulated separately for internal markets⁴ and for third countries.⁵

³ Regulation (EU) No 1144/2014 of the European Parliament and of the Council of 22 October 2014 on information provision and promotion measures concerning agricultural products implemented in the internal market and in third countries and repealing Council Regulation (EC) No 3/2008; Commission Delegated Regulation (EU) 2015/1829; Commission Implementing Regulation (EU) 2015/1831.

⁴ Council Regulation (EC) No 2826/2000

⁵ Council Regulation (EC) No 2702/1999

Figure 1: Institutional Model (EU)



Source: https://ec.europa.eu/agriculture/promotion_en

With the 2008 reform,⁶ these two regulations were incorporated into a single consolidated regulation. The aim was to improve the appreciation of agrifood products made in the EU and to raise awareness about the quality and specific production methods applied by EU agricultural producers. The expected results were to increase consumption, expand demand and provide access to new markets. According to the proposed programmes, agrifood quality, nutritional value and food safety have become more prominent compared to previous periods.⁷

⁶ Council Regulation (EC) No 3/2008 and No 501/2008. More information available at: <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=CONSLEG:2008R0003:20090303:EN:PDF>

⁷ According to Commission Regulation (EC) No 501/2008. Annex 1 of the Regulation presents the list of themes and products and, for each of them, the main goal, target groups, messages, main channels and duration of programmes aimed at internal market. Annex 2 of the Regulation includes the list of themes and products aimed at third countries and the list of countries in which promotional measures may be carried out. The budget per each product type is presented in Annex 3 of the Regulation.

The 2015 reform of trade promotion policy⁸ has introduced new regulations with the clear objective of increasing the efficiency of policy implementation in both external and internal markets. The new European trade promotion strategy aims to increase the number of programmes in third countries and to introduce additional multi-country programmes, offering attractive co-financing rates. EU Member States have also harmonized their national legislation with the strategic framework of the EU but have adopted different institutional models according to country-specific needs and to the specificities of their particular agrifood industries. This paper presents key elements of the institutional settings and policy frameworks, firstly in EU countries and then outside the EU in the European neighbourhood and in Latin America.

1.1.2. Poland

The agrifood promotion strategy in Poland is not articulated in a single piece of legislation but is rather determined in a pool of documents. Several strategic documents have been adopted, and action plans and programmes have been produced by various ministries and other governing bodies. The Council of Ministries has overall authority, approving all strategies elaborated by other ministries. The strategies are prepared by the Ministry of Agriculture and Rural Development and the Ministry of Economy.

The Ministry of Agriculture and Rural Development has established the “Try Fine Food” programme (Poznaj Dobrą Żywność Program⁹), which facilitates export promotion activities and allows the agency to promote products and companies, both in Poland and abroad. In support of the Ministry’s programme, in 2011 the Agricultural Market Agency also launched a yearly programme – financed from the central budget – to promote regional, traditional and organic food and focusing on the development of products produced in food quality systems. The programme targets “the production of high quality agriculture and food products which are safe for consumers,” “increasing producers’ and consumers’ knowledge and

⁸ On 13 October the following regulations, which create the basis for the new EU promotion policy, were published:

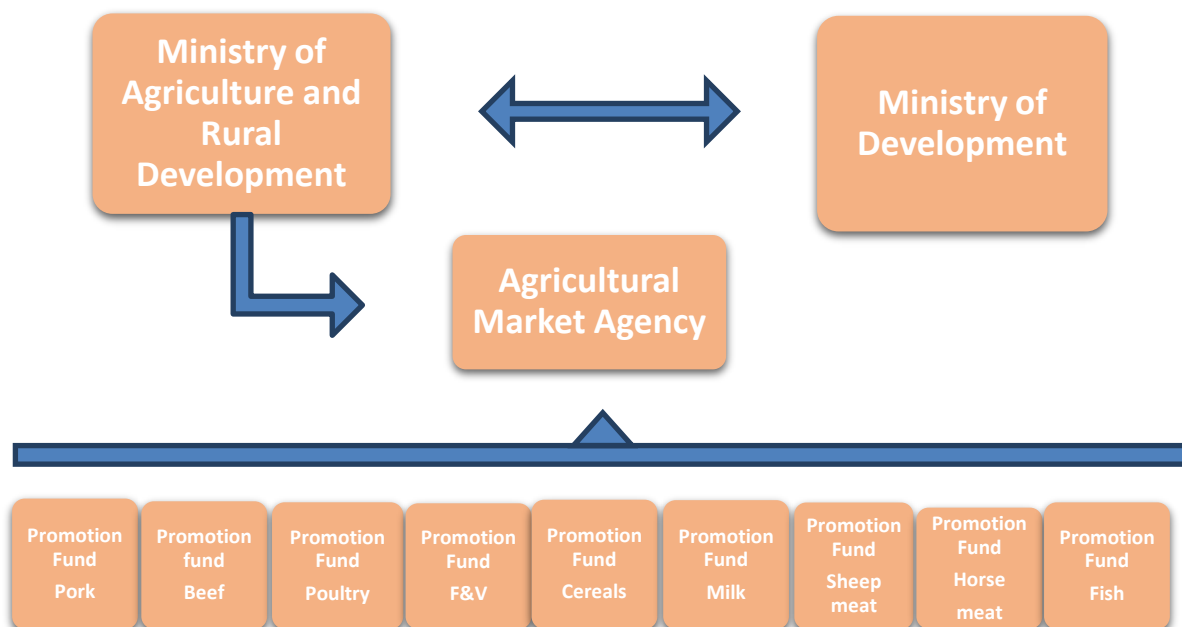
Commission Implementing Regulation (EU) 2015/1831 of 7 October 2015 laying down rules for application of Regulation (EU) No 1144/2014 of the European Parliament and of the Council on information provision and promotion measures concerning agricultural products implemented in the internal market and in the third countries (OJ L 266, 13.10.2015, p. 14) Commission Delegated Regulation (EU) 2015/1829 of 23 April 2015 supplementing Regulation (EU) No 1144/2014 of the European Parliament and of the Council on information provision and promotion measures concerning agricultural products implemented in the internal market and in third countries (OJ L 266, 13.10.2015, p. 3).

⁹ www.minrol.gov.pl. Information and application forms enabling a product to be submitted to the program can be found on the website of the Ministry of Agriculture and Rural Development under the Poznaj Dobrą Żywność tab.

awareness about agriculture and food production and nutrition rules” and the “promotion of export target markets for Polish products.”

The agency also implements a programme to develop external trade cooperation and a sector promotion programme for Polish food specialities. The latter is directly implemented by the agency listing target countries (namely China, France, Germany, the Russian Federation, Ukraine and the United Arab Emirates) and activities for a three-year period. It has an allocated budget for general activities and direct support to companies participating in those activities. Activities in this sector-promotion programme are co-financed from the EU budget.

Figure 2: Institutional Model (Poland)



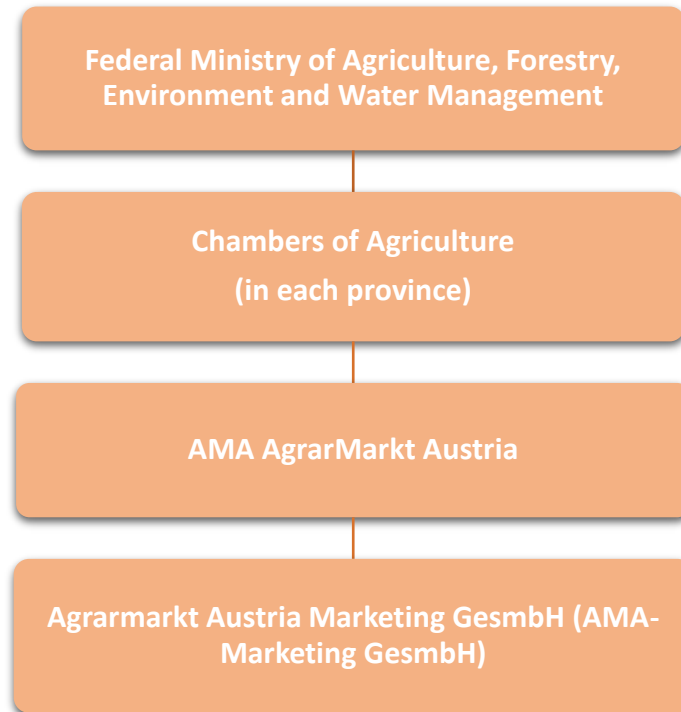
Source: Model drafted by authors based on Kondraciuk, 2016.

1.1.3. Austria

In Austria, food promotion is managed by AgrarMarkt Austria Marketing GesmbH (AMA-Markt GesmbH), a non-profit company owned by an SOE, AMA-AgrarMarkt Austria. AMA Marketing plays a crucial role in agrifood export promotion in the country, as it is responsible for conducting and monitoring quality assurance in the food sector. AMA Marketing supports trade promotion by developing specific regulations and product certification schemes in the form of

quality seals. AMA integrates the whole food supply chain, from agricultural production and food processing to the food trade sector.

Figure 3: Institutional Model (Austria)



Source: Model drafted by authors based on Haas and Meixner, 2016.

The Austrian Federal Ministry of Agriculture, Forestry, Environment and Water Management (BMLFUW), the Austrian Federal Economic Chamber (WKÖ) and AgrarMarkt Austria launched an export promotion programme in 2002 called “The Export Initiative.” During the first phase, the aim of the programme was to strengthen the exports of Austrian agrifood products to Central and Eastern Europe for the long term. In 2005, the initiative was extended to include environmental technologies. In the improved framework, activities were bundled, pursuing synergies and providing professional export know-how for Austrian enterprises to reach new target markets in the enlarged Union and on “far-away markets.”

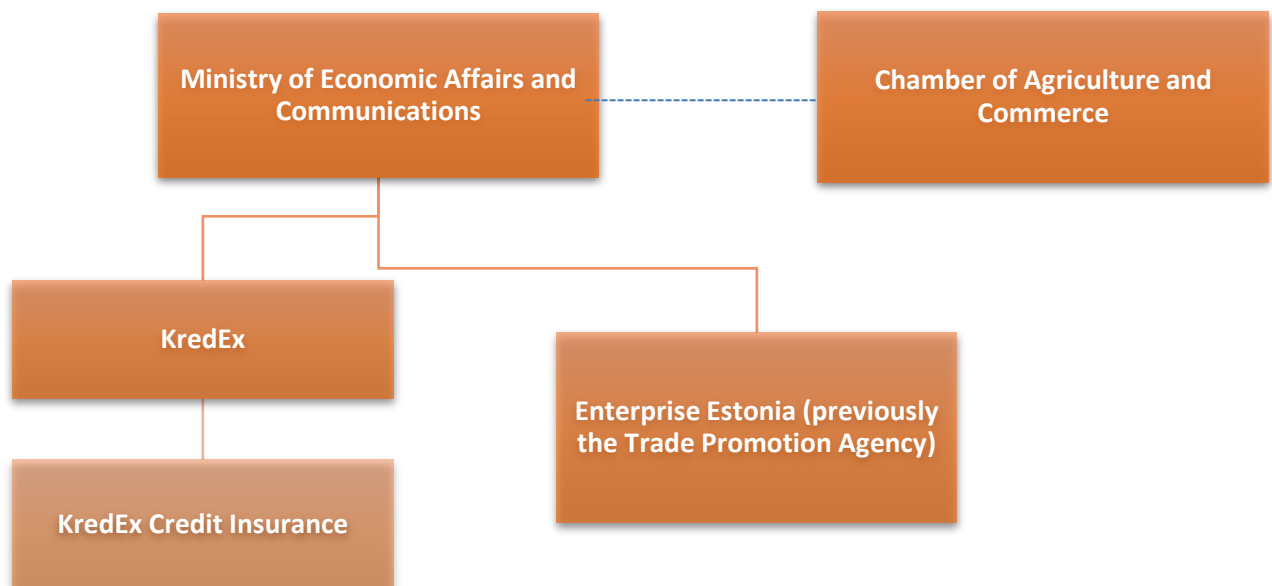
The first phase focused on Bulgaria, Croatia, the Czech Republic, Hungary, Poland, Romania, the Russian Federation, Serbia, Slovakia and Slovenia. In the second phase, the programme focused on China and the United Arab Emirates as the first steps towards reaching “far-away markets.” Shortly afterwards, as a result of the programme, Austrian Weeks – an event during which Austrian food companies offer their specialties for sale – took place in New York and in Japan in 2009. Also as a result of the programme, the Austrian Wine Marketing Board now

handles wine promotion, and in some provinces, regional marketing organizations also support the agri-business sector.

1.1.4. Estonia

Since the 1990s, Estonia has gone through three stages of policy development and implementation: (1) the transition stage, (2) the EU pre-accession stage, and (3) the EU post-accession stage. At each stage, different institutions have had specific roles in export promotion. In 1998, during the transition stage, the Estonian Trade Promotion Agency was established to promote exports under the authority of the Ministry of Economic Affairs and Communications. The Estonian Chamber of Agriculture and Commerce was established at the same time and still partners with various state institutions, such as Parliament, the Ministry of Rural Affairs, and the Ministry of Foreign Affairs. It promotes agrifood products and joint marketing activities in order to introduce products made in Estonia to both domestic and foreign markets.

Figure 4: Institutional model (Estonia)



Source: Model drafted by authors based on Saron, 2016.

In 2000, prior to EU accession, the work of Estonian agencies providing export support was reorganized into a new joint agency, Enterprise Estonia. This was a

fusion of the Tourism Agency, the Regional Development Agency, the Agency of Technology, the Estonian Transit and Infrastructure Development Agency, the Foreign Investment Agency and the Export Agency.

After EU accession, KredEx Credit Insurance was founded by KredEx and the Ministry of Economic Affairs and Communications in 2009. The main goal of KredEx Credit Insurance is to raise Estonian companies' awareness of credit management and to offer assistance in insurance solutions, thus helping to improve their financial stability, fostering the development of their international trade relations and helping them to extend their financing possibilities.

1.2. The Institutional Framework of Export Promotion in selected countries

1.2.1. Serbia

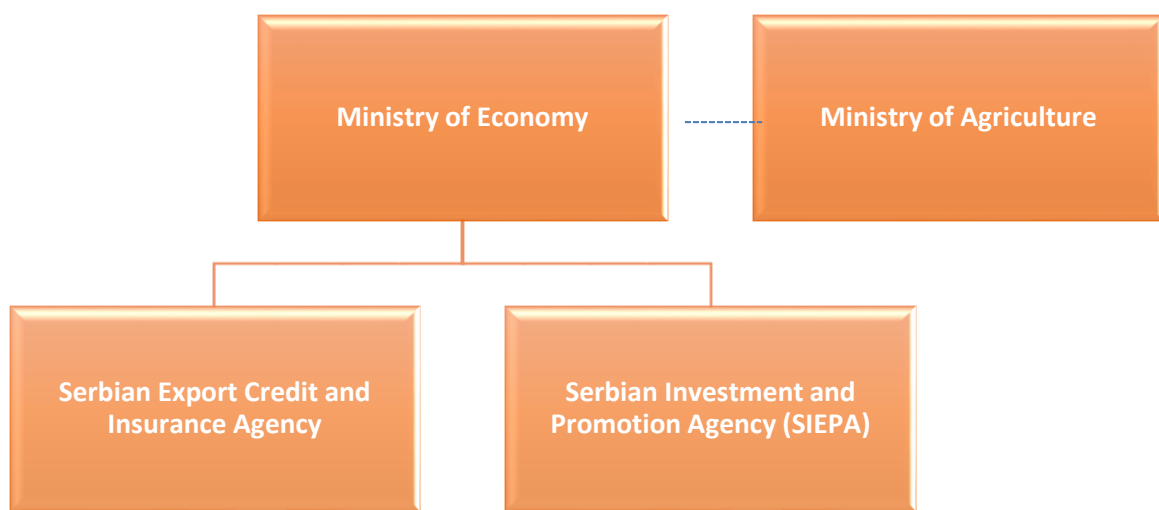
When looking at the export promotion policies in the direct neighbourhood of the European Union, it is noticeable that strong commercial ties may greatly influence country priorities. In Serbia, several institutions support producers and implement export promotion directly or indirectly. This is despite the fact that in the past, they lacked central coordination based on government policies, meaning that the implementation of export promotion frequently overlapped. In this context, legal uncertainty led to the possibility of double-funding, encouraging companies to use the same measures under the auspices of a number of different institutions, while synergies were not deliberately promoted at policy level. When the Government established the Serbian Investment and Export Promotion Agency (SIEPA), it integrated all governmental efforts for supporting and promoting exports. This has significantly decreased overlaps, but it has not fully streamlined efforts.

SIEPA was founded by the Government in 2001. Its primary tasks are to improve business conditions, attract foreign investors, and promote and enhance exports from Serbia. The agency facilitates export promotion by providing subsidies for exporters to visit international fairs. Over 1 700 exporters have been involved in the programme so far. They may also benefit from standardization, marketing, product design and promotional materials, training in business negotiation skills, familiarization with new technologies, and other similar measures provided by SIEPA. The agricultural sector was the most prominent beneficiary of this programme. The agency also arranges and hosts business meetings to allow

exporter and client meetings, which can be organized with minimal resources but can greatly benefit producers.

In the past decade, the agency was supported by professionals and government authorities, including its skilled and well-trained staff. But with the 2012 change of government, SIEPA became the subject of debates questioning its efficiency and purpose. The new, more turbulent political context undermined its operation, and although it officially continues to carry out its tasks, informally there were several retrenchments of its competences.

Figure 5: Institutional Model (Serbia)



Source: Model drafted by authors based on Zivkov, 2016.

The Serbian Export Credit and Insurance Agency has been operating as a classical export finance agency since 2005. It provides export insurance, short-term credit for exporters, and factoring (sale of receivables). In 2011 and 2012, debates surrounded the profitability of the agency coupled with unfavourable conditions, as with the reallocation of U.S. Steel it lost one of its major clients. On the other hand, the agribusiness sector frequently utilizes short-term credit (60 approved loans per year).

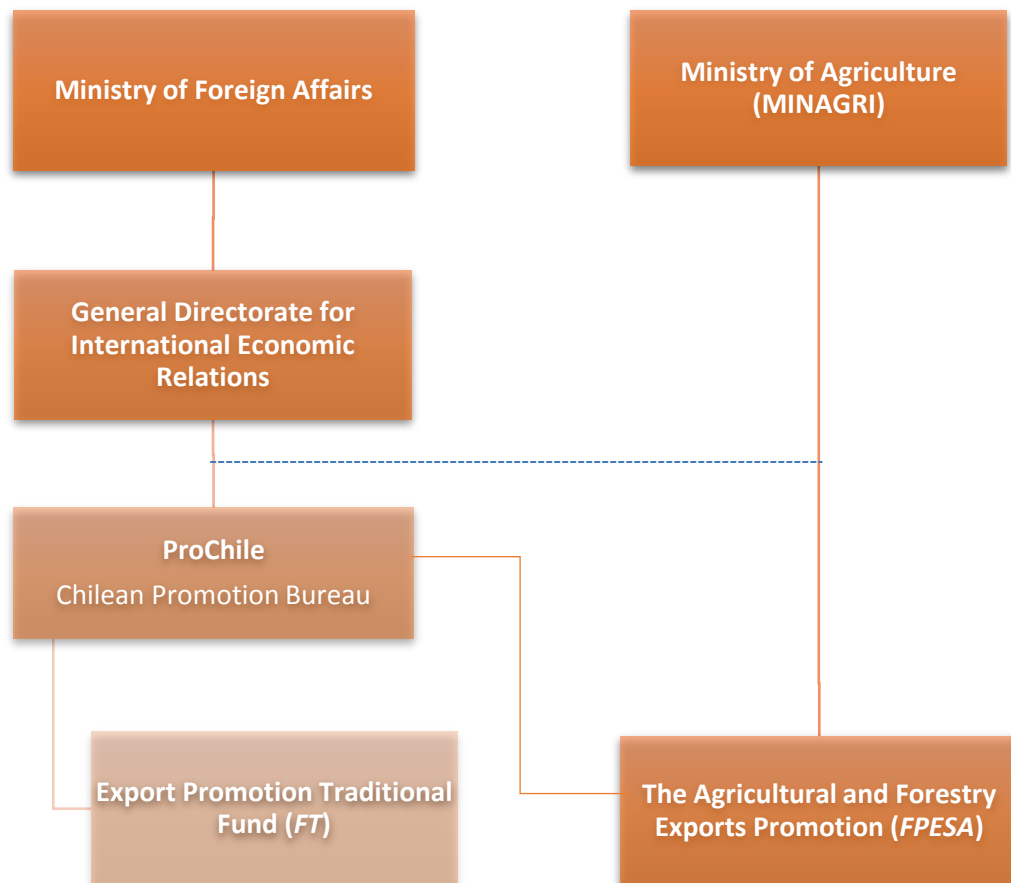
The main institutions involved in promoting exports, either directly or indirectly, include the Ministry of Agriculture; the Ministries of Agriculture and Trade; the Development Fund; the Chamber of Commerce of the Republic of Serbia; the Serbian Export Credit and Insurance Agency; and SIEPA, as well as many donors. The Ministry of Agriculture in particular has an important role in agrifood export

promotion. As with the EU examples, it focuses on the introduction of quality labels, and it implements measures to provide export subsidies and grants and to carry out market research and promotion activities.

1.2.2. Chile

In Chile, export promotion is mainly managed by the Export Promotion Traditional Fund (FT) and the Agricultural and Forestry Exports Promotion Fund (FPESA). The aim of Chile’s export promotion programme is to channel Chilean companies into international markets. In light of this, the relevant agencies promote the growth and diversification of non-traditional exports of products made by Chilean companies.

Figure 6: Institutional Model (Chile)



Source: Model drafted by authors based on Donoso, 2016.

The FT began its operations in 1987, under the supervision of the Chilean Trade Commission (ProChile) and Dirección General De Relaciones Económicas Internacionales (General Directorate for International Economic Relations),

within the Ministry of Foreign Affairs (Ministerio de Relaciones Exteriores). The export promotion programme FPESA, on the other hand, was established by the Ministry of Agriculture (MINAGRI) in 1995. Its budget comes from ministerial resources, and its operation specifically targets the agricultural, livestock, and forestry sectors. The goal of both export promotion funds is to provide a number of co-financing arrangements for exporters that lead to an increase and/or diversification of exports and that reduce current trade obstacles.

In particular, their mission is to support and promote Chilean business interests on global markets by helping to develop the export process. The agency is responsible for establishing international business relationships and for providing market research, international trade data, and sales leads for the export industry. It emphasizes the promotion of non-traditional products. ProChile has 14 offices in Chile and 59 trade offices or trade representative offices in 38 countries. Some are tied to diplomatic missions, and others are freestanding commercial offices. Chile's largest presence is in Latin America (16 offices), Europe (13), Asia (8) and the Australasian region (5). It has three offices in the United States and two in Canada.

ProChile establishes priorities through a combination of market analysis and collaboration with industry associations. Market priorities are allocated to the sectors or products with the most potential for export growth, especially those for which free trade agreements are in effect. The most important markets are North America and the European Union. Additionally, sector priorities are set based on the best match of export firms' capabilities with targeted export-demand markets. Second-level priorities are determined through consultations with industry associations based on each sector's business needs and priorities.

1.2.3. Brazil

In Brazil, numerous actors within the federal government are involved in export promotion. These are as follows: the Ministry of Agriculture, Livestock and Food Supply (MAPA); the Ministry of External Relations (MRE); the Ministry of Agrarian Development (MDA); and the Brazilian Trade and Investment Promotion Agency (Apex-Brasil). The Ministry of Agriculture has established the Department of International Promotion within the Secretariat of Agribusiness International Relations, which is responsible for trade promotion through the organization of international trade missions.

Small-scale and family farms are also encouraged to become involved in international trade, supported by a sub-programme of the Office for International Affairs and Trade Promotion. This programme includes subsidising travel and

participation in international trade exhibitions and promoting Brazilian family farming worldwide. The main role in export promotion is played by Apex-Brasil, which works to promote Brazilian products and services abroad and to attract foreign investment to strategic sectors in the Brazilian economy.

Figure 7: Institutional Model (Brazil)



Source: Model drafted by authors based on Requiao, 2016.

Brazil has promising future prospects in generating an agrifood trade surplus.¹⁰ In light of this, the organization of the federal government’s international promotion system should be extended. If the export volume increases significantly, there will soon be demand for a central organization in charge of international promotion that can coordinate trade promotion activities. Brazil is already extensively active in international trade, although it still needs a comprehensive strategy on national branding. In theory, the authors argue that this role could be played by Apex-Brasil, but currently the agency lacks the authority to manage different ministries and to impose its decisions on them.

A closer relationship between Apex-Brasil and the ministries involved in international promotion may increase the legitimacy of the agency’s centralizing role within the Brazilian Government, mitigating this problem. Working more closely together, Apex-Brasil and the various ministries can merge their many

¹⁰ Ministry of Agriculture, Livestock and Food Supply. Agribusiness projections: Brazil 2014/15 to 2024/25. Brazil, 2015

concurrent programmes and pool their strengths, providing a more strategy-oriented and more effective service for the Brazilian business community.

The examples given above show that several policy agendas and principles may govern export promotion activities, but they also suggest that institutional-setting *per se* may not be a measurement of efficiency. However, coordinating export promotion policies and related activities is essential in streamlining efforts, promoting synergies and avoiding double-funding and leaky buckets. In this respect, a central agency should coordinate all related activities – with the tasks of different agents clearly determined and demarcated – while encouraging common efforts to increase impact and maximize the benefits for exporters.

2. Export promotion measures

2.1. The European Union

With regard to European Union policies, the principle of subsidiarity allows EU Member States to tailor their own export promotion policies to align with the Common Agricultural Policy (CAP). In particular, this means that the EU may define the main priorities on the supranational level to enhance cohesion among Member States' policies. The most recent adjustment to CAP in this regard has set a stronger course to promote quality food products both inside and outside the EU.

To identify the origin of the promoted products, the EU has introduced the “Enjoy it's from Europe” signature, which has been developed to benefit producers that distribute their products in the EU and in third countries (see *Annex 1*).¹¹ Although the implementation of trade promotion policies is based on the regulations mentioned above, the particular measures and their strategic setting may differ among Member States. For example, in Poland, the promotion measures are defined in strategic documents, plans and programmes developed by various state bodies. The Ministry of Agriculture and Rural Development has adopted the Strategy of Sustainable Rural Development, Agriculture and Fisheries for 2012–2020,¹² which declares the promotion of Polish products and the growth of export target markets. The ministry has also developed two action plans targeting activities related to food promotion. One of these is a framework plan for organic food and agriculture for 2014–2020,¹³ aiming to promote organic farming. The other is a plan for promotion activities by the Ministry of Agriculture and Rural Development focusing on quality agrifood products. The initiative remunerates products meeting quality standards with the seal of the “Try Fine Food” logo, shown in *Annex 2*. The Strategy for Innovation and Efficiency in the Economy “Dynamic Poland 2020” also presents key elements of trade promotion. This strategy – prepared by the Ministry of Economy in 2012 – aims to support

¹¹ More information available at http://ec.europa.eu/agriculture/promotion/procedure/enjoy-instructions_en.htm

¹² Ministry of Agriculture and Rural Development Poland n.d., The strategy of sustainable rural development, agriculture and fisheries for the years 2012–2020. Available from: <http://www.minrol.gov.pl/Informacje-branzowe/Strategia-zrownowazonego-rozwoju-wsi-rolnictwa-i-rybactwa-na-lata-2012-2020> [24 April 2017]

¹³ Document is available in Polish on the website of the Ministry of Agriculture and Rural Development: <http://www.minrol.gov.pl/Jakosc-zywnosci/Rolnictwo-ekologiczne/Ramowy-Plan-Dzialan-dla-Zywnosci-i-Rolnictwa-Ekologicznego-w-Polsce>

Polish export and foreign direct investment, enhance the country's image, and support innovative and responsible investments. At the same time, a special sector-promotion programme was initiated, targeting particular food production groups with promising export potential. The Polish Agricultural Market Agency has adopted a programme for the promotion of regional, traditional and organic agrifood products on external markets. Its aim is to promote and increase export to target markets. Since 2016, this has included a programme for the development of external trade cooperation.

2.2. Poland

In 2009, Poland established special instruments to provide funding opportunities for export promotion activities with a special emphasis on agrifood products. Poland has made a great deal of effort in food promotion, and currently nine funds are operating, targeting specific food products such as milk, pork meat, beef meat, horse meat, sheep meat, cereal grains and cereal products, fruit and vegetables, poultry meat, and fish. The Polish example is unique in the sense that the role of the state is limited to gathering funds and conducting financial settlements of expenditures. The coordination and management of these tasks are executed by the Agricultural Market Agency, with the active participation of producers and processors.

Each fund has management committees – involving most of the relevant stakeholders – for adopting strategies and plans. The funds may support the following activities to promote agrifood export: information on agrifood quality, promoting the consumption of Polish products, financing participation in exhibitions and fairs, market research, trainings for producers, and supporting producer organizations in actively participating in international forums.

Quality schemes promote food products with specific features and regional and traditional characteristics in each commodity group (see *Annex 3 and Annex 4*). The measures aim to raise consumer awareness of these products and to introduce quality labels. Agrifood quality assurance in Poland is based on EU and national legislation and is widely applied by local authorities and producers alike. The utilization of food quality schemes is important for local producers to extend their economic potential. The European logos are well-known and appreciated by consumers, as they indicate high quality, tradition and special taste. The following national quality schemes are applied: Try Fine Food, Integrated Production,

Quality and Tradition, Quality Meat Programme, Pork Quality System, and Quality Assurance for Food Products.

2.3. Austria

The Austrian trade promotion policy is implemented by AMA-Marketing GesmbH, mentioned above. The main activities carried out by the agency are market research; improving the distribution of agrifood products; promotion of measures to improve quality control; provision of information to consumers on quality control; consumer protection; animal welfare; and the promotion of product characteristics. However, the core task of AMA Marketing is to ensure food quality by developing specific regulations and product certification schemes, namely, quality seals.

The organization supports Austrian agrifood products by maintaining and promoting high quality standards. Producers whose products transcend national and EU food quality standards and meet the AMA superior standards may use the AMA seal, a registered trademark used for Austrian products and appreciated across Europe (see *Annex 5*). If the products meet the organic food standards, they may use the AMA organic seal (see *Annex 6*).

AMA Marketing information and advertising campaigns are built upon the reputation of Austrian food products. The unique quality is based on the freshness, authenticity and regional origin of products. They are produced by small-scale farmers, which means that promoting an internationally familiar image is key for Austrian food producers. AMA Marketing maintains and enhances this reputation and uses the slogan “The Taste of Nature” for export activities. All advertising materials aim to present the “beautiful nature of Austria” and the “authenticity of Austrian agrifood products” (see *Annex 7*).

As well as being responsible for food quality assurance at stages from production to marketing, AMA-Marketing GesmbH also conducts market analyses, both for internal markets (using households marketing surveys) and external markets (using foreign trade data). Based on this, an annual marketing plan is created that includes all objectives, strategies and activities of AMA Marketing divisions. For

example, wine promotion is handled by the Austrian Wine Marketing Board,¹⁴ which provides data on market development, an export guide for wine makers, and advertising materials. Its strategy aims to promote Austria as a successful wine-producing country with the three key characteristics of tradition, innovation and sustainability.

To strengthen Austrian exports of agrifood products to Central and Eastern European countries, a special long-term export promotion programme has been developed by the Austrian Federal Ministry of Agriculture, Forestry, Environment and Water Management. As part of this programme, Austrian enterprises receive expert consultation for new target markets.

2.4. Estonia

Before it joined the European Union, Estonia's measures to promote agrifood products were: signs of quality and origin, market research, contact events (such as fairs, exhibitions and product presentations), product development, public relations, and training. Because increasing exports was a major objective for Estonia, the Government supported small- and medium-sized businesses that aimed at developing exports. It provided help by encouraging market research, participation in international fairs, the production of promotional material, the engagement of consultants in identifying potential for exports and in the hiring of export managers, and applications for patents and registering trademarks (*Annex 8*).

During Estonia's EU pre-accession period, food safety became the main priority for government and food processing enterprises. In particular, an initiative to improve the standards of milk production and marketing was developed to promote milk as a healthy food and to exploit new export opportunities. In addition, the Enterprise Estonia policy aimed to provide support to enterprises with export potential that create added value.

Joining the EU offered Estonia new opportunities through a variety of programmes and projects – particularly in the milk and dairy sector, which is oriented toward the production of value-added milk for domestic and export

¹⁴ The organization was founded in 1986 with the aim to strategically support, coordinate and maintain quality and sales. Its main goal for the domestic market is to strive for an increased market share of quality wine, along with the export of bottled quality wine, with a particular focus on continued increases in value.

markets. The “Estonian Food” programme for 2015–2020 promotes the image of Estonian food to enhance the cooperation of food sector parties and to develop new export opportunities. This is often done by introducing Estonian food at international events, including cultural events and fairs. Other promotions have included the creation of the webpage www.estonianfood.eu, participation in the Green Week international fair in Berlin, and the organization of Estonian Food Month.

2.5. Serbia

Serbia has also implemented export promotion measures, but not all of them have had positive results. Although some institutions have similar aims (the Serbian Investment and Export Promotion Agency and the Chamber of Commerce) and approaches, the same measure implemented by both have had different results.

Among promotional measures in the area of marketing, the Government has provided the following: support for producers to visit trade fairs and set up stands at the fairs; support for improving packaging and advertising material; and adding value to products through patents, recognized quality standards and seals and geographical indications. In the area of finance, the Government has allocated and investment credit, provided export insurance, and organized trade meetings among suppliers, merchants and buyers. It has also created a supplier database that offers access to information for international buyers, opens new markets, and supports the coordination of common marketing strategies for shared markets or common production worldwide markets through articles in magazines and advertisements, among other things.

2.6. Chile

Chilean export promotion programmes are managed by two funds, the Export Promotion Traditional Fund (FT) and the Agricultural and Forestry Exports Promotion Fund (FPESA). These have the common goal of supporting Chile’s agrifood exports. As in other countries, their support includes export promotion initiatives through audio-visual materials such as advertisements and through engagement with journalists and potential investors, importers and buyers. They also conduct market research, undertake business and commercial prospecting missions and participate in international fairs and specialized export conferences. In addition, they actively support the development of new export products and

technologies with the greatest market potential and ensure that they are suited to the requirements of export markets. The activities of FT and FPESA are seen to benefit the entire Chilean export sector through the generation and dissemination of foreign commercial information, training, and the building of export capacity.

National export proposal tenders are an important promotion instrument in Chile. They are aimed at supporting international promotion strategies designed by individual or groups of exporters and companies with export potential. Funding of this measure is provided fully by FPESA and is allocated through public tenders. The main steps include a call for project proposals, evaluation of eligible proposals, approval, and establishment of the contract.

2.7. Brazil

In Brazil, several ministries are involved in export promotion, although they support different measures. The Ministry of Agriculture organizes the Agribusiness Seminar for Exporting (AgroEx), which is aimed at increasing public awareness of international market opportunities and is held in all regions of the country. It publishes an annual guide, *Agribusiness Commercial Exchange*, which includes analysis of Brazilian trade flows, including the most important markets for agrifood exports. The Ministry of Development, Industry and Foreign Trade (MDIC) manages the Greater Brazil Plan, which is aimed at diversifying exports, expanding participation in international trade by spreading export culture, and sharing knowledge with Brazilian producers on foreign trade and internationalization. Apex-Brasil organizes export innovation seminars to inform Brazilian companies about export promotion work and seminars to introduce selected target countries to producers. Apex-Brasil also has a targeted market-prioritization service that identifies international markets offering the best opportunities for the sectors that they support. These institutions collaborate via the National Network Project of Foreign Trade Agents, which is intended to develop export capabilities and advise small businesses on export-related procedures. It also offers free training to foreign trade agents, small-businesses owners and educators.

3. Financing export promotion activities

3.1. The European Union

European Union support for agrifood product promotion used to be mostly limited to activities organized by Member States. After the 2015 reform, the amount of aid allocated to information and promotion campaigns increased considerably, from EUR 61 million in 2013 to EUR 111 million in 2016, and is expected to reach EUR 200 million in 2019. The portion of EU co-financing for export promotions has been varied, from 70 percent to 85 percent, while national co-financing has tended to decline in favour of equal conditions for all Member States. The financial resources available to the European Commission were also increased. They are used to organize information campaigns and participation in exhibitions and trade missions.

3.2. Poland

Since 2009, functioning funds for the promotion of agrifood products have been managed in Poland by the Agricultural Market Agency. There are nine funds for the promotion of milk, meat, cereals, fruit and vegetables, poultry, and fish. The public-sector role is mostly limited to collecting money from agricultural producers and to conducting financial settlements of expenditures with beneficiaries.¹⁵

Information activities aimed at sharing the quality of Polish agrifood products, implemented by the Ministry of Agriculture and Rural Development and the Agricultural Market Agency, are financed from the national budget.

Another financial source of information activities on food quality schemes at the EU internal market is the Rural Development Programme 2014–2020. The support rules are described in the next chapter.

¹⁵ For each promotion fund, starting from its creation in 2009, an annual financial report is created and presented on the website of the Agricultural Market Agency (<http://www.arr.gov.pl/promocja-zywnosci/wyplaty-z-funduszy-promocji>). There you can find information about money allocated and spent either on promotion activities or administration.

3.3. Austria

Austria's AMA-Marketing GesmbH is 77-percent financed by producers with money collected through food promotion funds,¹⁶ 13-percent financed by levies paid by producers for participation in quality systems, and 10-percent financed through reimbursement of expenditures from the European Commission. From this amount, most is spent on the domestic market, and only 20 percent is spent on foreign activities. The Austrian Wine Marketing Board (AWMB) was initially financed by the Austrian Government (EUR 5.8 million per year). Currently, its funding comes from payments from federal states of EUR 3.2 million per year and contributions from the wine industry of around EUR 3.5 million per year. AWMB also receives payments from the Ministry of Agriculture of EUR 1.4 million per year. AWMB is currently participating in various EU programmes that allow for provision of extra money for its budget with co-financing rates.

3.4. Estonia

For Estonia, financial resources were very limited before joining the EU because of a lack of public funds. During the pre-accession period, the country started to invest in EU structural funds through Enterprise Estonia. Between 2007 and 2013, the amount obtained from the EU increased from EUR 784 million to EUR 3.4 billion. According to the 2014–2020 plan for structural funds, the budget is EUR 3.5 billion, of which EUR 588.1 million is implemented by Enterprise Estonia. For market development support, Estonia allocated about EUR 6.6 million through the Ministry of Rural Affairs from 2005 to 2016. Between 2005 and 2008, the total budget for supporting participation in international fairs was 12 to 20 percent. Last year, the share of promotion and introduction of agricultural and food products increased to 60 percent, and spending on international fairs decreased to 10 percent. In 2015, the Estonian milk promotion programme was part of the EU-funded promotional scheme, with a three-year budget of EUR 700 000, managed by the Chamber of Agriculture and Commerce.

3.5. Serbia

The Serbian Ministry of Agriculture manages about 4 percent of the total state budget and allocates subsidies for measures directed to export promotion. Among

¹⁶ Compulsory contributions made by producers of agrifood products.

these were export subsidies, which were terminated in 2011 as they violated World Trade Organization rules. Subsidies are still allocated for the introduction and certification of the system of food safety and quality organic products and products with geographical indication. The maximum amount per beneficiary is EUR 3 200, while individual measures are subsidized up to 40 percent of their total value, or up to 55 percent in the areas with poor working conditions. Other types of subsidies used are those for investment in processing capacity and marketing in meat, milk, and fruit and vegetable production. The total budget is EUR 750 000, while the maximum amount per beneficiary cannot exceed EUR 18 000.

Other support measures for Serbian producers include assistance for participating in international fairs (i.e. receiving funds for leasing exhibit space with accompanying technical services and construction or lease of stalls), with compensation of 100 percent of costs, value-added tax excluded, up to EUR 750 per participant. Subsidies and investment loans for export-oriented companies are provided with a 2-percent annual interest rate granted for ten years, with a grace period of up to two years. If the loan is given for permanent working capital, the repayment period is up to five years, with a grace period of up to one year. The minimum amount of a loan is EUR 18 000, with an upper limit of EUR 1 820 000.

3.6. Chile

The Chilean Ministry of Agriculture allocated USD 18.3 million to the Agricultural and Forestry Exports Promotion Fund (FPESA) in 2015, an increase of 11 percent from its level in 2011. The FPESA budget is divided according to its three main components: trade information generated and disseminated to the export sector, which receives 3 percent; export training and capacity building, which receives 8 percent; and export promotion strategies and actions, which receives 89 percent.

3.7. Brazil

In Brazil, most of the financial support is allocated by the Government through the responsible ministries (Agriculture, Livestock and Food Supply; Agrarian Development; External Relations; and Development, Industry and Foreign Trade), as well as those bodies supported by joint collaborations. In the case of the measures promoted by Apex, initiatives such as seminars and extension projects for industrial exports are supported by public funds, while others are financed

through public-private partnerships. In this case, companies pay directly to Apex-Brasil to participate in trade shows, business rounds, and similar events.

4. Promotion policies and practices for the domestic market

4.1. The European Union internal market support programmes

According to the EU promotion strategy, measures targeted at the internal market aim to overcome consumers' lack of awareness about the merits of European agricultural products in general and specifically products endorsed by European quality systems. Knowledge of the directions of information and promotion activities carried out in the EU internal market can be useful for exporters to tailor their product range (e.g. organic or geographical indication products) to consumer trends arising from the implementation of these activities.

4.1.1. Rural Development Programme 2014–2020

Regardless of the EU support mechanism for promotion measures described in the previous chapter, producers of products participating in food quality schemes may be supported under the Rural Development Programme 2014–2020. The implementation of this action is decided by the individual Member States. Actions eligible for support have to be designed to induce consumers to buy the products covered by a quality scheme and to draw attention to the specific features or advantages of the products concerned (notably, the quality, specific production methods, high animal-welfare standards, and respect for the environment), linked to the quality scheme concerned. Eligible actions must not incite consumers to buy a product due to its particular origin, except for products covered by the Protected Designation of Origin and Protected Geographical Indication quality schemes.¹⁷ The origin of the product may be indicated provided that the mention of the origin is subordinate to the main message.

¹⁷ Quality schemes introduced by Title II of Regulation (EU) No 1151/2012 of the European Parliament and of the Council (1), by Chapter III of Regulation (EC) No 110/2008 of the European Parliament and of the Council (2), by Chapter III of Regulation (EU) No 251/2014 of the European Parliament and of the Council (3), and by Section 2 of Chapter I of Title II of Part II of Regulation (EU) No 1308/2013 of the European Parliament and of the Council (4) with respect to wine.

Those eligible for support (reimbursement of 70 percent of costs incurred) are groups of producers, irrespective of their legal form, that bring together operators participating in a quality scheme for agricultural products or foodstuffs, carrying out promotional activities.

4.1.2. EU School Fruit, Vegetable and Milk Scheme

One of the measures implemented on the internal market that has had an impact – on shaping dietary habits, on the transfer of knowledge about EU quality food products and on future consumer behaviour – is the programme "Fruits, vegetables and milk in school." The main target of this programme is to permanently change the eating habits of children by increasing the share of fruits, vegetables and milk in their daily diets and promoting healthy eating through accompanying educational activities.

From 1 August 2017, the two current schemes – the School Fruit and Vegetables Scheme and the School Milk Scheme – will be merged into one programme. The new rules aim at greater efficiency, more focused support and an enhanced educational dimension.

Target group

The aid scheme intended to improve the distribution of agricultural products and to improve children's eating habits is aimed at children who regularly attend nurseries, pre-schools or primary- or secondary-level educational establishments administered or recognised by the competent authorities of Member States.

Community support may be provided for the supply and distribution of products, accompanying educational measures, and to cover certain related costs linked to equipment, publicity, monitoring and evaluation. Member States wishing to participate in the aid scheme have to take into account national circumstances and prioritize the distribution of products of either or both of the following groups:

- fruit and vegetables and fresh products of the banana sector; and
- milk for drinking.

Notwithstanding the above, in order to promote the consumption of specific products or to respond to particular nutritional needs of children in their territory, Member States may provide for the distribution of products of either or both of the following groups:

- processed fruit and vegetable products; and

- cheese, curd, yogurt and other fermented or acidified milk products without added flavouring, fruit, nuts or cocoa.

Fruit, vegetables and juices must not contain added fat, salt, sugar or sweeteners. The quality of fruit and vegetables delivered to primary schools is the responsibility of the approved supplier or school.

As a condition for its participation in the school scheme, a Member State shall draw up at the national or regional level, prior to its participation in the school scheme and subsequently every six years, a strategy for the implementation of the scheme. The strategy shall identify the needs to be met, the ranking of the needs in terms of priorities, the target group, the results expected to be achieved and, if available, the quantified targets to be attained in relation to the initial situation. The strategy also shall lay down the most appropriate instruments and actions for attaining those objectives.

Member States shall choose the products to be featured in distribution or to be included in accompanying educational measures on the basis of objective criteria, which shall include one or more of the following: health and environmental considerations, seasonality, variety, and the availability of local or regional produce, giving priority whenever possible to products originating in the European Union. Member States may encourage local or regional purchasing, organic products, short supply chains or environmental benefits and, if appropriate, products recognized under the quality schemes established by Regulation (EU) No 1151/2012.

Financial conditions

The total EU budget under the school scheme allocated for the distribution of products, the accompanying educational measures, and the related costs shall not exceed EUR 250 million per school year.

Within that overall limit, the support should not exceed:

- for school fruit and vegetables: EUR 150 million per school year; and
- for school milk: EUR 100 million per school year.

Member States wishing to participate in the school scheme must submit their request every year, specifying the amount they wish to distribute for school fruit and vegetables and for school milk. Member States may, in addition to EU aid, grant national aid for financing the school scheme. Member States may finance

that aid by means of a levy on the sector concerned or by means of any other contribution from the private sector.

The EU may also finance information, publicity, monitoring and evaluation measures relating to the school scheme, including measures to raise public awareness of the scheme's objectives and related networking measures aimed at exchanging experience and best practices in order to facilitate the implementation and management of the scheme.

4.2. Poland

In Poland, the documents that describe the agrifood product promotion strategy are not separated for external and internal markets. Promotion activities in Poland are financed through funds for the promotion of agricultural and food products. The institution responsible for this fund is the Agricultural Market Agency. Nevertheless, the public sector only collects money from agricultural producers and conducts financial settlements of expenditures with beneficiaries. All decisions regarding the strategy and plans, and their execution, are conducted by representatives of producers and processors. Each promotion fund¹⁸ has separately appointed management committees (consisting of representatives of food processors, producers and agricultural chambers) responsible for decisions about strategies and plans. Promotion funds finance up to 500 activities annually, oriented towards both the internal and external market. The ratio between activities conducted on the internal and external market varies according to the situation in the sector.

4.3. Austria

In Austria, there are four main governmental institutions dealing with agriculture. These are the Federal Ministry for Agriculture, Forestry, Environment and Water Management; the Chamber of Agriculture and Forestry; AMA-AgrarMarkt Austria; and AMA Marketing Limited Liability Company. The main institution responsible for the promotion and consumption of food is AMA Marketing, a daughter organization of AMA-AgrarMarkt Austria. Its main tasks include improving agrifood product quality by developing and applying quality

¹⁸ More information about food promotion funds, including plans for each promotion fund, are available in Polish on the website of the Agricultural Market Agency: <http://www.arr.gov.pl/promocja-zywnosci/wyplaty-z-funduszy-promocji> and <http://www.arr.gov.pl/promocja-zywnosci/wplaty-na-fundusze-promocji>.

guidelines for agricultural products and foodstuffs and the promotion of agricultural marketing. The activity of AMA Marketing is oriented towards:

- promoting sales of Austrian agricultural and forestry products, both on the internal and foreign market;
- taking measures for quality assurance of agricultural and forestry products; and
- providing information to consumers about quality, aspects of consumer protection, animal welfare and other relevant aspects of these products.

Austrian promotion policies and procedures are based on objective information exchanged with specific target groups such as consumers, farmers, food processing companies and governmental institutions. To reach each targeted group, different types of communication tools (both below and above the line) are used, including radio, TV, public relations, sales promotions, sponsorships, events and fairs, product placement, direct mailing and social media.

Austrian AMA Marketing's financing depends on three different sources. One of them is the agricultural marketing fee, which is paid by Austrian farmers. The second is subsidization from the European Commission for co-financing, while the third source is revenue from licenses and control costs. About 72 percent of all revenue is spent on marketing and food-promotion activities, while 17 percent is spent on staff salaries. Other running costs account for the remainder.

4.4. Estonia

To promote sales of locally produced food within Estonia and to sell it abroad, a food development programme has been implemented. This programme is intended to enhance cooperation in the food sector and also promote healthy eating habits among pre-school and school-enrolled children. On the Estonian market, the programme includes the active introduction and promotion of local food at cultural events, the development of Estonian regional cuisine and food culture, and the development of institutional catering by encouraging closer cooperation among caterers and food producers. A particular aim is to raise awareness among consumers about food labelling. The programme Milk, launched under an EU promotion scheme, is aimed at the internal EU market. The aim of this campaign is to get children and young people to eat and drink milk products daily (with the general market as a secondary aim).

4.5. Serbia

Support for the promotion of Serbian agrifood products on the local market is provided through some donor projects – such as from the United States Agency for International Development – that are intended to help agribusiness improve its marketing capacities and ability to take advantage of both domestic and international markets.

Conclusions

The export promotion strategies implemented in the analysed countries vary substantially, even among those that are geographically close. Nevertheless, all of them provide valuable experiences that can be used in other countries.

From the experience of Poland and Austria, for a successful promotion strategy it is recommended that regular analysis of the market situation be carried out, to identify general trends and allow the formulation of strategies and working plans and then to evaluate the effectiveness of policies as implemented.

Based on the Estonian experience, essential elements for the successful development of exports are reliable state institutions, a proper legislative and institutional framework, and governmental support for producers.

The history of Serbian export promotions has produced both positive and negative results. The problems and their solutions have shown in recent years that in order to succeed on foreign markets, a specialized agency for export promotions should be established to assess domestic competitiveness and potential markets. There should also be a clear state strategy ensuring that products are of high quality, that producers are fit to compete on the market rather than relying on state support, that employees are appropriately and adequately trained, and that there is transparency to allow fair competition among domestic companies.

Chile's experience shows that a successful export promotion strategy depends on a number of key elements. These are: clearly defined and communicated programme/instrument; allocation of funds through a transparent tender system; wide attention to markets and sectors (rather than a narrow focus); and an emphasis on the development of export capacities. As the strategy is implemented, specific programmes, means and objectives should be continually updated to respond to changing conditions using an impact assessment programme.

In Brazil, many actions have been undertaken in export promotion through seminars aimed at raising awareness about the opportunities of international markets, sharing information, sending specialist delegations to foreign seminars, and so on. Various public institutions support aspects of export promotion. To be more successful in international promotions, there should be better coordination or centralization of the efforts to support different aspects of the international promotion of agrifood products. This role could be played by Apex-Brasil in closer collaboration with different agencies and ministries.

Considering the above and taking into account the experiences presented during the expert round table on export promotion, the following conclusions can be drawn:

COORDINATION A designated national body responsible for promotion activities of food products

Many countries' experiences show that promotional activities are usually carried out by a number of state institutions and producer organizations. Well-coordinated promotion policy allows the efficiency of activities to be increased while avoiding overlap. There should be a clear assignment of tasks and competencies resulting from the adopted strategy or other strategic documents to facilitate the cooperation of all stakeholders. Coordination of promotion policy should also concern the diplomatic service and its representatives on the strategic export markets.

POSITIVE IMAGE Implementation of promotional activities emphasizing distinctive features of food products

The positive image of food plays an important role in consumer decision-making. Confidence in quality is also helpful in opening new markets. When food is presented as high quality, deeply rooted in tradition, or using organic production methods, consumers are willing to pay higher prices. The creation and maintenance of such an image in the long term would require the introduction of the rules by which it would be possible to maintain high quality products. Food quality systems and marketing standards would be helpful in this respect.

DIALOGUE Regular communication between the public administration representatives and stakeholders through the creation of an advisory body

The effective implementation of promotional policy requires the involvement of many stakeholders. Producer organizations and chambers of commerce provide guidance to decision makers on the directions of development, on one hand, while on the other hand performing tasks in the adopted strategies.

QUALITY POLICY Implementation of actions aimed at developing the market for added value products (organic, traditional and regional products)

Food quality policy is one of the most important factors in the sustainable development of rural areas. It contributes to the diversification of employment in

rural areas and increases the incomes of agricultural producers. One of the essential ways of implementing the policy is through the development of systems that assure, through the use of a specific logo, the quality of agrifood products originating from specific regions and characterized by traditional or organic production methods and quality features.

FINANCIAL RECOURSES The creation of a promotion fund

The creation of a statutory solution for the collection of funds allows for the securing of necessary contributions for the implementation of the adopted promotional policy. Funds should be raised from all producers of agrifood products, and only they should have the right to decide how those funds are distributed. This would help to achieve sustainable markets through permanent support for competitiveness, including exports, while meeting the long-term goal of improving the quality of manufactured products. It would also support horizontal and vertical industry integration, which would lead to the creation of powerful groups focused on particular products.

MARKETING RESEARCH Promotional policy should be formulated on the basis of available research and analysis

Research and analysis are important elements in the process of creating and evaluating promotional policies. Their scope should include the analysis of key global markets in terms of access barriers, formal requirements for individual products (certificates), product competitiveness, and consumer trends. Proposed actions should be formulated based on the results. Relevant actions should be taken, as the proper use of funds depends on the quality of the data provided.

SPS MEASURES Achieving international sanitary and phytosanitary standards is a key element in the export growth of agrifood products. Approximation of veterinary and phytosanitary regulations to European Union requirements will allow access to the community market and will enable cooperation in opening other strategic export markets.

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Annexes

Annex 1. Enjoy it's from Europe logo

Source: https://ec.europa.eu/info/promotion-eu-farm-products_en

Annex 2. “Try fine food” logo

Source: <https://www.gov.pl/web/rolnictwo/poznaj-dobra-zywnosc>

Annex 3. Promotion of traditional quality products in Poland

Source: <http://www.trzyznakismaku.pl/>

Annex 4. Stamps used for food promotion in Poland

Source: <http://www.poczta-polska.pl/znaczki-2016/>

Annex 5. AMA quality seal for Austrian and European products

Source: <https://www.bmnt.gv.at/english/agriculture/food/AMA-Quality-Label--When-andwhy-.html>

Annex 6. AMA Quality seal for organic food (with and without origin related information)

Source: <https://www.bmnt.gv.at/english/agriculture/food/AMA-Quality-Label--When-andwhy-.html>

Annex 7. Austrian advertising (AMA milk slogan Crowning Delight)

Source: <http://www.milchkrone.at/>

Annex 8. Quality labels in Estonia (approved taste and approved Estonian taste)

Source: <http://epkk.ee/toidumargid/tunnustatud-maitse/tutvustus/>

Annex 9. Round table “Best practices in export promotion: Experience in Latin America, Europe and Central Asia”

FAO organized the round table on the issues of agrifood export promotion “Best practices in export promotion: Experience in Latin America, Europe and Central Asia” held between 21 and 23 May 2016 at IAMO in Halle, Germany. The participants of the round table were:

- Iryna Kobuta (FAO): *Improving Agrifood Trade and Market Integration*
- Dmitry Zvyagintsev (FAO): *Capacity Development for the Ministry of Agriculture of Moldova to improve export-promotion and export diversification policy*
- Andriy Yarmak (FAO): *Experience of food export promotion in developing countries*
- Dariusz Goszczyński (Poland): *Export promotion policies and programmes in Poland*
- Ruve Schank (Estonia): *Estonian experience in the formation of export strategy for dairy products*
- Alexandru Stratan (Republic of Moldova): *Design of the National Programme for the Agrifood Export Promotion in the Republic of Moldova*
- Goran Zivkov (Serbia): *Experience of food export promotion in Serbia*
- Francisca Silva (Chile): *Export promotion policies and programmes in Chile*
- Anna Yeritsyan (Armenia): *Agribusiness Export Policies in Armenia*
- Elchin Atababayev (Azerbaijan): *Aspects of agro-products export promotion in Azerbaijan*
- Imomov Imomnazar (Tajikistan): *Export promotion in Tajikistan*
- Dmitry Bulatov (Russian Federation): *Russia - Export strategy for agricultural products*
- Dauren Oshakbayev (Kazakhstan): *Export promotion policies and programmes in Kazakhstan*
- Ketevan Gachechiladze (Georgia): *Export promotion policies in Georgia*
- Volodymyr Pugachov (Ukraine): *Government policy in the field of agricultural export promotion in Ukraine*
- Meerim Momunzhanova (Kyrgyzstan): *Export Development Plan for 2015-17 in Kyrgyzstan*
- Nurlan Aripov (Kyrgyzstan): *State Enterprise Single Window Centre for Foreign Trade under the Ministry of Economy of the Kyrgyz Republic*

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