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# Voice of the Nordic Wild Berry Industry

a Survey Among the Companies

UNIVERSITY of OULU  
OULUN YLIOPISTO



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norden  
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## LITERATURE

## ANNEXES

## PREFACE

Approximately 90–95 per cent of the whole wild berry crop yield is left unpicked in the Nordic forests every autumn. Wild berries are a rich and valuable natural resource that is yet to be exploited even on a satisfactory level. The problem has been brought up time and again in different contexts. If it was easy to solve the problem, would probably have been done already. The issue, however, consists of a number of intertwined challenges that are constantly tackled by a number of companies, entrepreneurs, non-profit organizations, universities and other interested parties. This paper represents that field and pursues to contribute to solving the challenges common to the Nordic wild berry sector.

In this paper we present the results of a survey among Nordic companies in the wild berry sector. The aim is first of all to generate an overall picture of the rather heterogeneous and large group of companies working with wild berries – especially bilberries (*Vaccinium myrtillus*). Another aim is to gather information on how the companies feel about certain issues related to the wild berry sector. A special emphasis is given to cooperative actions between the companies. To be more exact, we aim to find out whether, and to what extent, the companies are willing to cooperate in order to reach some of the common goals and what are the areas of business that they consider it worthwhile to cooperate in. The common goals include, for instance, wild berry supply, logistics, marketing or research and development.

The present study is a part of a Nordic research project called *Bilberry – Towards Functional Food Markets*. The project is coordinated by the Department of Biology at the University of Oulu. Cooperating partners in the project include the Arctic Flavours Association from Finland, the Swedish University of Agricultural Sciences, the Nordic Gene Bank, the University of Tromsø and Bioforsk from Norway and the Agricultural University of Iceland. The project is one of the six projects in the New Nordic Food programme by the Nordic Innovation Center that is funded by the Nordic Council of Ministers. Work on this study started in August 2007 and was concluded during the year 2008. The bilberry project will for its part go on until the end of 2009.

The results of the survey were published in the Nordic Wild Berry seminar held at Oulu, Finland on 6<sup>th</sup>–7<sup>th</sup> November 2008. The participants of the seminar were representatives of research institutes, wild berry companies and other related organizations from six different countries. The two days program consisted of presentations of the health and quality issues in addition to marketing and product development of Nordic wild berries. A panel discussion on the topic “Wild berry production in the northern areas – guidelines for the future” was held at the end of the

seminar. As conclusion, a general agreement for the need of increased cooperation at the Nordic level was highlighted. Joint Nordic meetings of the wild berry sector were also indicated to be necessary, and therefore, the next one was tentatively planned to be organized in Sweden 2010.

This paper is divided into four chapters. At first we will take a brief look at the background of the study in chapter 1. In chapter 2 we will present the methods used to conduct the survey. The results of the study will be presented in some detail in chapter 3, followed by a short summary of the whole paper in chapter 5.

**Oulu, 17<sup>th</sup> April 2009**

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# 1 BACKGROUND

In this chapter, we will take a glimpse at what is already known about the Nordic wild berry industry based on earlier studies and literature. The goal is to form an overall picture of the assumptions that the rest of the study will draw on. First we will describe the wild berry industry on a more general level, after which we will discuss some of the typical challenges that companies face working in the wild berry business. The chapter will conclude with an overview of the scientific discussions on the topic of intercompetitor cooperation, which forms a common thread for the whole study.

## 1.1 Wild berry business in the Nordic countries

As mentioned, only about 5–10 per cent of the annual wild berry crop of approximately a billion kilograms is currently picked for private or commercial consumption. Parts of the crop ripen in distant areas with difficult terrain where an attempt to intensify berry picking is probably not sensible. Nonetheless, it has been estimated that at least 20 per cent of the whole crop yield could be utilized if, for example, berry picking was organized more efficiently and the appreciation of berries and of everyman's rights effective in the area was enhanced. Assuming that households would increase their consumption of wild berries only moderately if at all. The 20 per cent would account for an increase of up to 100–150 million kilograms of wild berries for the industry. This type of development would not only give the industry easier and more reliable access to raw materials but would also enhance the development of more sophisticated wild berry products and, furthermore, the possibility to form tighter relationships with international customers.

There are hundreds of companies and entrepreneurs active in the wild berry sector in the Nordic countries. A vast majority of them are small-scale initiatives with one to five staff members. Many of the companies and entrepreneurs purchase wild berries straight from private pickers and then sell the berries either at the local marketplaces or to larger companies. A second group of companies includes ones that process berries into traditional berry products, such as jams and juices, and market the products either locally or even internationally. This group consists of both small- and large-scale companies. A third group is formed by companies that gather in large volumes of fresh berries, clean and freeze them, and then sell the frozen berries to national and international industrial customers. This group only includes a small number of companies, but a very large share of all the wild berries utilized commercially in the Nordic countries ends up flowing through their freeze houses. Below are three figures that convey the structure of the wild berry sector. The first one

is from a Swedish source and illustrates the flow of wild berries. Figure 2. puts more emphasis on small-scale processors. Figure 3. includes not only companies but also other parties concerned in the whole wild berry sector.

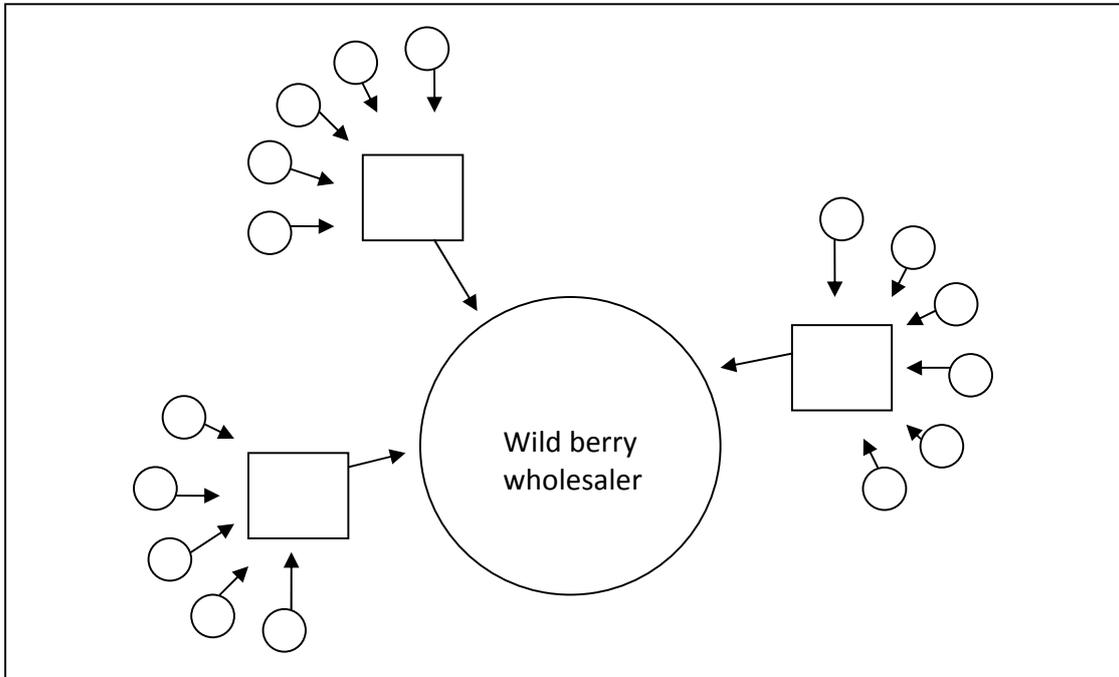


Figure 1. A sketch of the wild berry supply chain ( according to Jonsson & Uddstål 2002).

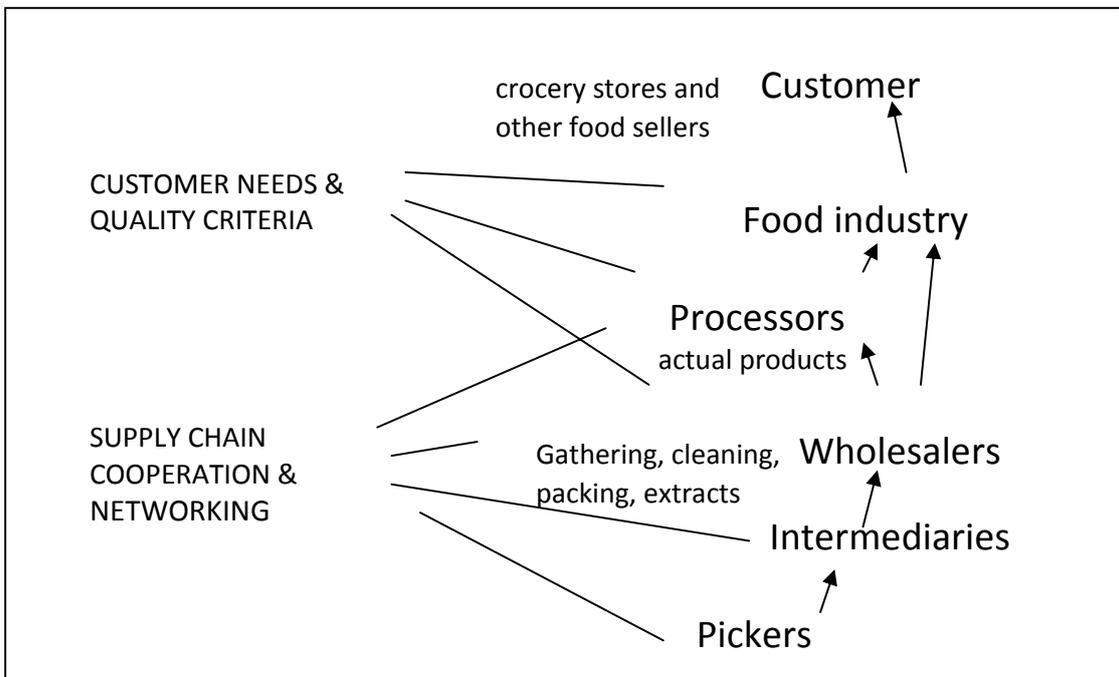


Figure 2. Different stages of processing wild berries in the Kainuu region in Finland (according to Perikangas, Lehtinen & Karjalainen 1997).

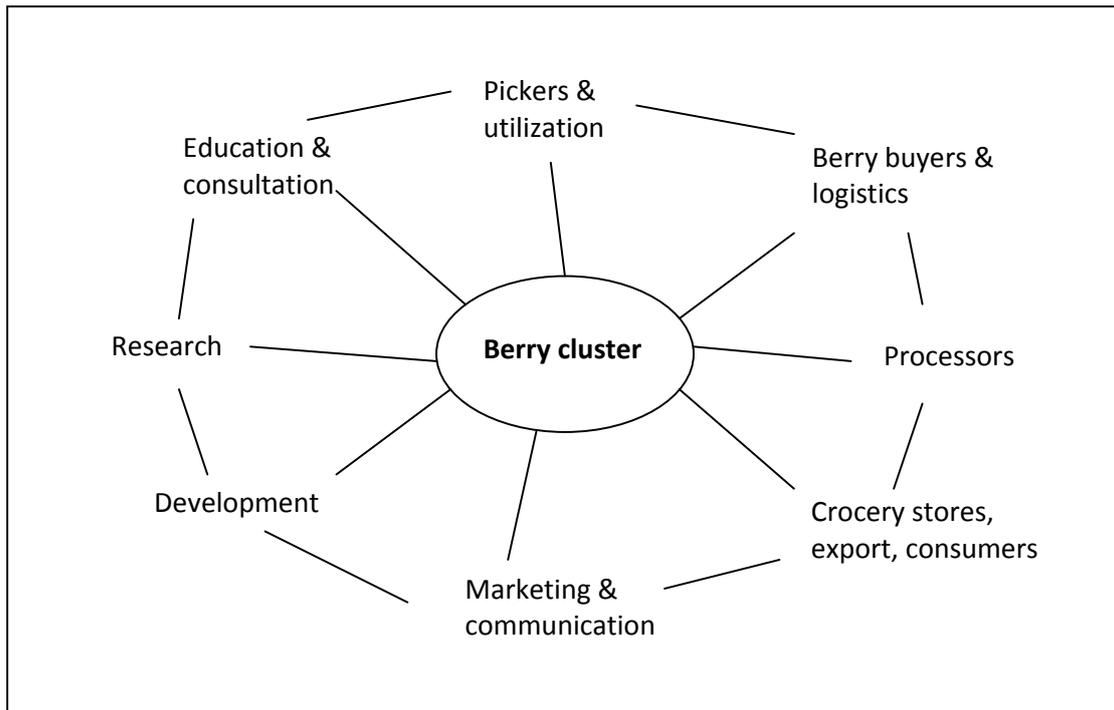


Figure 3. The structure of the Finnish berry cluster (according to Moisio 2006).

In addition to various companies, there are two active non-profit organizations working in the berry sector in Finland. One of them, the Wild Organic Product Industries' Association (Luonnontuoteteollisuus Ry), comprises representatives of Finnish berry companies and other companies with natural products. The other organization, the Arctic Flavours Association (Arktiset Aromit Ry), brings together a wider group of partners, from large companies to entrepreneurs and private persons. The two organizations have agreed upon a distribution of work. The Wild Organic Product Industries' Association strives to improve the working conditions of its members on a national level, whereas the Arctic Flavours Association concentrates on promoting issues of the utilization and quality of wild berries and other natural products.

The wild berry companies in Sweden have also formed a common organization. Founded in 2000, the Swedish Forestberry Association (Skogsbärbranschens Intresseförening) has set as its goal to communicate issues related to the Swedish wild berry sector and to influence common opinions in reference to these issues. The organization also participates in relevant research and development. The organization has about 50 member companies that are involved in the wild berry business and, for example, freeze and process wild berries. In recent years, the organization has contributed to issues related to the taxation of foreign berry pickers and of companies working with the pickers (Jonsson & Uddstål 2002 and <http://swedishwildberries.com>).

## 1.2 Bilberry export and import statistics

Sweden and Finland are the largest bilberry exporters in the Nordic countries. In the following we will take a look at some statistics on bilberry export and import in the countries. The figures are based on information from the customs in different countries. The figures do not necessarily include all of the actual bilberry flows between different areas, because the customs only keep record of the larger amounts, and smaller lots go through them without being written down in the official statistics. Nonetheless, the figures give at least a rough image of the amounts.

According to the statistics, Sweden exported about 8 000 tons of bilberries in 2007. In the record-breaking year of 2005, the Swedes exported up to 9 500 tons. The figures have risen quite steadily from the middle of the last decade, when the total export was 6 000 tons (in 1996). In the last few years, China has taken over the statistics as the number one target country for Swedish bilberry export before Italy and Japan. In both 2005 and 2006, the Chinese bought over 3 000 tons of Swedish bilberries, whereas the Japanese, for instance, were down to 700 tons. Other important target countries are Finland and Norway, both with 300–500 tons annually, as well as France, Belgium and Germany. All in all, about 40 per cent of commercially utilized bilberries in Sweden go straight to the East Asian market. What is more, a large share of berries exported to Italy, for example, actually ends up in Asia after being processed in Italy.

As is the case with the other Nordic countries, Sweden not only exports but also imports a lot of bilberries. During the last decade, the import figures have varied from 3 000 to 6 000 tons. In 2007 the amount was the smallest since 1996, about 2 700 tons, which was a major drop from 2006. The source countries include Lithuania, Poland and Finland, and, to a lesser extent, Russia, Ukraine, the Netherlands and Estonia. Table 1. presents the bilberry import and export figures for Sweden in the year 2007.

Table 1. The Swedish export and import of frozen bilberries in 2007.

<b>SWEDISH EXPORT</b>		<b>SWEDISH IMPORT</b>	
China	2386 tons	Lithuania	791 tons
Italy	1497 tons	Poland	728 tons
Finland	846 tons	Finland	459 tons
Japan	690 tons	Russia	190 tons
Belgium	659 tons	Ukraine	183 tons
Norway	556 tons	Estonia	115 tons
France	536 tons	Netherlands	112 tons
Germany	330 tons	Bosnia-Hertz.	40 tons
Poland	92 tons	Norway	36 tons
Switzerland	89 tons	France	20 tons
Luxemburg	80 tons	Denmark	19 tons
	...		...
<b>Total</b>	<b>8078 tons</b>	<b>Total</b>	<b>2698 tons</b>

In Finland the international berry business has evolved a bit later than in Sweden, and the country is behind its neighbour also in the export and import statistics. In the year 2007, Finland exported a little over 3 500 tons of bilberries. The drop from the record crop year of 2005 was about 400 tons. In 2007 the most important target country was, after years of a lower profile, Germany with 960 tons of Finnish bilberries. Germany outnumbered China, which a few years earlier bought up to 1 400 tons of bilberries from Finland but was now down to 785 tons. Also the Japanese now climbed over the Chinese with their 834 tons. Together, China and Japan add up to about 45 per cent of the Finnish bilberry export. The rest goes to Sweden, Italy, Norway, Austria, the Netherlands and Switzerland (Table 2.).

As business activities revolving around bilberries have increased, the import of bilberries has also increased year by year. In 2006 Finland already imported over 3 600 tons of bilberries. Over 80 per cent of the total amount came from Russia, where especially the berry-processing companies were active in the hope of lower prices for raw material. In 2007, however, the import was down to a half, now adding up to only 1 387 tons, most of which still came from Russia. Russian bilberries also end up being sold on the international market by Finnish companies because most of the wild berry wholesalers also acquire berries from Russia. Other important source countries are Ukraine, Poland and Belarus.

Table 2. The Finnish export and import of frozen bilberries in 2007.

<b>FINNISH EXPORT</b>		<b>FINNISH IMPORT</b>	
Germany	958 tons	Russia	1020 tons
Japan	834 tons	Spain	127 tons
China	785 tons	Estonia	56 tons
Sweden	347 tons	Sweden	54 tons
Austria	170 tons	Ukraine	40 tons
Denmark	155 tons	Belgium	28 tons
Norway	134 tons	Poland	23 tons
Holland	52 tons	Turkey	19 tons
Italy	41 tons	Netherlands	11 tons
Switzerland	34 tons	Latvia	8 tons
	...		...
Total	3532 tons	Total	1387 tons

In Norway, Denmark and Iceland, the crop yields are lower than in Finland or Sweden, and most of the berries that are gathered end up in household consumption or in the local industry. The countries also import a lot of bilberries. In the year 2006, for example, Norway exported a total of only 65 tons of bilberries, most of which were sold to Sweden. By contrast, the Norwegians imported, mainly from Sweden and Poland, over 1 260 tons of bilberries, which was almost two times the amount imported at the beginning of the decade. Other important source countries are Finland and the Netherlands.

### **1.3 Challenges facing wild berry companies**

Companies in the wild berry business face a set of common challenges. The challenges are partly due to the use of a natural renewable resource. International competition also sets its demands for some of the companies. In this section, we will discuss the challenges common to most wild berry companies. The discussion is mainly based on company interviews and other conversations with people active in the field (Paasilta 2007).

#### **Wild berry supply and logistics as bottlenecks**

In previous decades, the raw material needs of wild berry companies were satisfied by local berry pickers. In more recent years, this has changed, mostly due to people

moving away from the rural northern areas with the richest wild berry crops and the ageing of generations that were previously active in picking berries. In order to ease the situation, wild berry companies have started to invite foreign pickers to the area. In Sweden this has been the practice for quite a few years now, and the issue has been brought up in the media in both positive and negative light, the conversation even heating up from time to time. One of the main concerns has been whether foreign pickers and the companies that invite pickers from abroad should bear taxes and other fees for their income or be able to enjoy the same everyman's rights as local people. There have also been years when the home countries of foreign pickers have been unable to provide their citizens with necessary documentation because of the high number of people willing to travel to the Nordic countries to pick berries.

In addition to questions that concern pickers, the variation in annual crop yields causes challenges for commercial activities. For instance, in the year 2006, the summer was very hot and dry in Finland, and the unusual weather resulted in a poor berry crop. Especially the lack of bilberries raised prices in the international market, which in its turn caused confusion, for example, among the Japanese industrial customers. There were worries that the prices would remain high also the following years because of the great demand for berries. Most of the largest wild berry companies in the Nordic countries strive to dampen the negative effects of the yearly variations in crop yield by purchasing their raw material extensively from different geographic areas, also from abroad.

Variations between different years affect not only the crop yield but also the quality of berries. Wild berries are the result of a highly complex biological process that is affected by weather and other conditions during the whole growth season. Therefore, and also due to genetic differences there are significant variations between berries from different regions even in one year. The quality of berries is naturally of significance when dealing with international industrial producers. Industrial buyers have their specifications that are often derived from the needs of their own production processes and quality programmes. For example, the producers of health-promoting wild berry products in China or Japan expect to find high concentrations of certain compounds in the berries. On the other hand, the more traditional wild berry processors in the food industry also require high standards of berry quality. Consequently, a wild berry supplier has a whole range of quality specifications from different customers and companies, which the supplier needs to be aware of in order to satisfy their customers. This means that they need to be at the right locations at the right time during the berry-picking season.

Funding berry purchases is one of the challenges for companies in the wild berry business. What separates the business from most other industries is the short period of time in which the companies need to gather in enough raw material for the whole year's needs. To be able to do this, they need to have a lot of funds during the few intense months every autumn. There are some differences between the funding

practices in different Nordic countries. In Finland the companies can usually not find funding for raw material purchases based on their stocks of berries from the previous year, whereas Swedish funding agencies tend to accept raw material stocks as an assurance for granting funding for the companies.

Logistical issues also play a key role in running a successful wild berry business. Berries ripen in wide geographic areas, often far away from main roads. This, combined with the fact that wild berries are challenging to store as fresh, makes it important to transport and freeze the berries as quickly and efficiently as possible. In fact, a berry should be taken from the picker's bucket into a freeze house within 24 hours to prevent the berry quality from going down. Some of the companies have solved these issues by organizing the whole transport chain by themselves; some rely on outsourcing. In both cases, logistical issues demand their share of attention.

### **Towards the international market**

The amount of Nordic wild berries sold in the international market is quite small, compared with the berry flows coming from the US and Canada as well as from Eastern Europe, Russia and, in recent years, also from China. The North American industry is especially strong when it comes to cultivated berries, e.g. blueberries (*Vaccinium corymbosum*, *V. angustifolium*) and cranberries (*V. macrocarpon*). In Russia the domestic market for berries has increased rapidly at the same pace with other positive economic developments in the country, which has decreased the amount of Russian berries on the world market.

The two most important species of Nordic wild berries commercially, i.e. the bilberry and the lingonberry (*V. vitis-idaea*), face quite different situations on the international market. The northern bilberries have been phenomenally successful in East Asia during the past decade, boosted by the Japanese consumer market for health-promoting products. On this market, the North American blueberry industry has not been able to outcompete the Nordic companies, mostly due to the fact that the two species of blueberries contain different amounts of certain bioactive compounds, in favour of the northern bilberry especially from the Nordic countries.

A similar competitive edge has not yet been found for the lingonberry. At present most of the Nordic wild lingonberries end up as raw material for berry processors in the food industry in Central Europe where its demand has been quite stable for a longer period of time. The lingonberry has a lot of commercial potential although its positive health effects have so far been left behind of the bilberry and the North American cranberry. The lingonberry bears the richest crop of all the wild berries in the Nordic countries, and its crop yield seems to remain more stable from year to year than that of, for example, bilberries and crowberries (*Empetrum nigrum*). At present the market is very competitive and the price for lingonberry tends to be quite low in the traditional food industry sector.

Most of the Nordic wild berries are exported as frozen berries, instead of being first processed into more sophisticated products. Some representatives of the Nordic wild berry industry find this problematic. Similarly, some Japanese parties have expressed their confusion over the issue. By processing the products further, the industry would probably benefit and gain an increased profit even though selling raw material to foreign processors seems to be a profitable business at the present. Some countries, such as Germany, Switzerland and Italy, have a longer tradition in wild berry processing and are ahead of the Nordic countries, but the distance could be narrowed down through more active research and development. There are actually several promising initiatives in progress at the moment at least in Finland, Sweden and Norway. One of the most obvious possibilities includes the development of methods for extracting different bioactive compounds from the berries here in the Nordic countries, instead of letting foreign companies to take too much advantage of the valuable northern resources. Today a lot of processing work is done in China. There seems to be a chance for Nordic companies in this business since labour costs are not that eminent in the more technological extracting processes.

#### **1.4 Intercompetitor cooperation**

In this section, we will briefly explore scientific literature in the field of marketing. We will concentrate on research carried out on intercompany cooperation, which forms a common thread for the whole report. The aim is to form a picture of intercompany and intercompetitor cooperation on a more general level, regardless of the industry or area of business at hand.

In the 20<sup>th</sup> century, research on marketing originally focused on the relationship between a company and consumers. As industrial markets evolved, more and more emphasis was given to intercompany or business-to-business relationships. As recently as in the 1980's, these relationships were commonly discussed drawing on theories and models derived straight from consumer marketing. At that time, a group of European and especially Nordic researchers (e.g. Mattsson 1984, Håkansson & Johansson 1988) began to develop a different set of tools to analyze the relationships between companies. Today that discussion is mostly referred to as the *business network approach* or the *interaction approach*.

Most of the research done in the field of business networks and industrial marketing is about the relationship between a buying and a selling company or a wider network of such relationships. The discussion builds on concepts such as long-term customer relationship, interaction, cooperation, adaptation, social relations, shared resources, network position or network management. These concepts rely on the core notion that a relationship between two companies is best described in the long term, instead of on the level of an individual sale or purchase. Moreover, the interaction between

companies usually flows both ways, which is typically not the case on the consumer market.

One of the not-so-common issues that have been discussed in this field of research concerns cooperative relationships between two or more competing companies. The debate on such intercompetitor relationships was initiated in the early 1990's by, among others, Easton and Araujo (1990, 1992). In the ongoing decade, the field has been brought forward by Bengtsson and Kock (1999, 2000); Bengtsson, Hinttu and Kock (2003) and Tidström (2006). These studies have aimed to form an understanding of how intercompetitor cooperation is even possible, what it takes to manage such a relationship and what may be the rewards of such an effort.

Usually, a company faces several competitors, and it will have a unique relationship with each. On the one hand, a competing company can be run by a former colleague from a previous place of work or the companies may otherwise have made each other's acquaintance over the years. On the other hand, a competitor can be a total stranger, with no interaction having occurred between the two companies. This is often the case in international business. The companies will probably monitor each other's actions over a distance, e.g. through the media or through shared customers, but there is no direct contact between the two. Bengtsson and Kock (1999) divide intercompetitor relationships in four categories: Cooperation, co-opetition, co-existence and competition (Fig. 4).

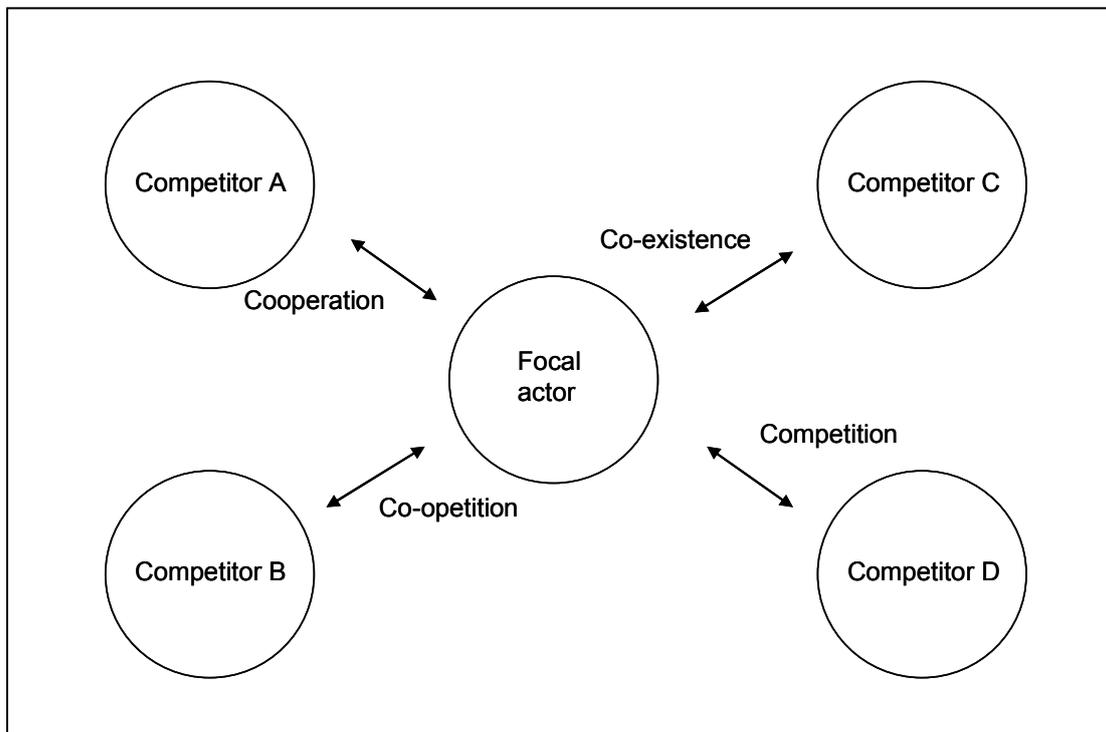


Figure 4. Intercompetitor relationships (according to Bengtsson & Kock 1999).

Intercompetitor cooperation can be analyzed through the goals of the two companies. Three kinds of goals can be distinguished in all their actions whether they refer to raw-material supply, research and development or marketing (Bonoma 1976). When it comes to the traditional competitive conditions, the competing companies are viewed as having a common goal that only one of them can achieve at a time, for instance, a desired customer for a certain product. The conflicting goals will lead to competition between the companies. However, the two companies can have less contradictory goals in another part of their operations. For example, a group of competing companies can have common plans with regard to the geographic area that they all work in. Such goals can lead to cooperation between the companies, regardless of the competition between them. Finally, the competing companies can have separate goals but achieving the goals can depend on the actions of the other companies. For example, the other company may have certain facilities or other resources that the focal company needs in order to satisfy a customer. If the facilities are not operating at full capacity, the companies may end up cooperating in terms of selling and buying services and products from each other. These three kinds of settings are illustrated in figure 5.

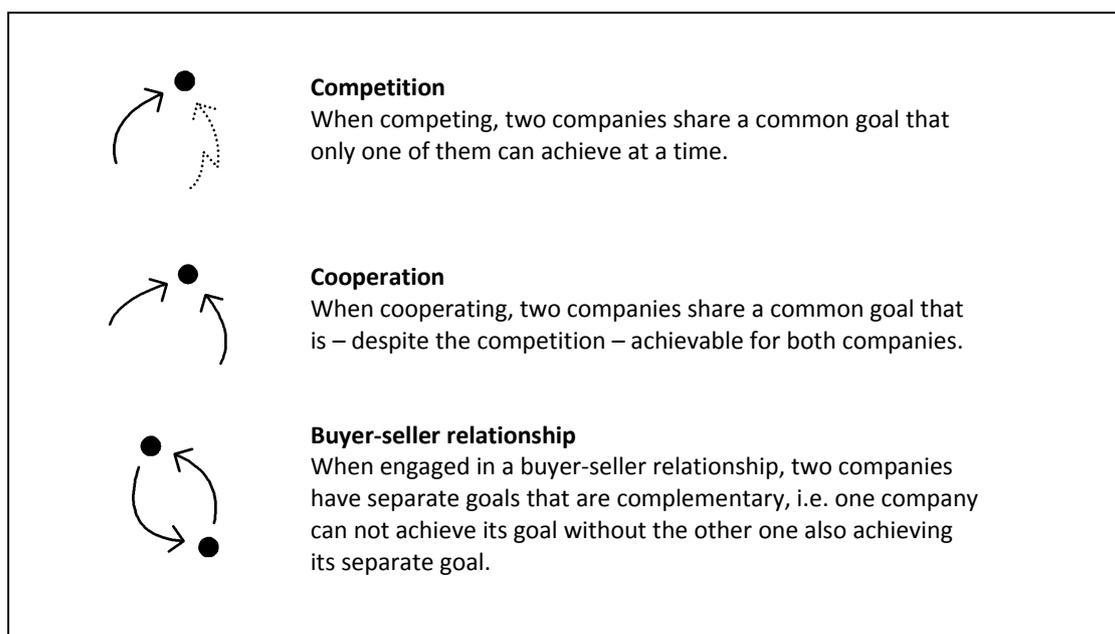


Figure 5. Goals and resulting settings between competitors (according to Paasilta 2007).

In short, there may be cooperative actions between competing companies. In fact, several studies have shown it to be a common routine between both large- and small-scale companies. Cooperation takes many forms, and it is often not recognized by the companies in question as intercompetitor cooperation. Easton (1990) has categorized intercompetitor cooperation by dividing the phenomenon into formal and informal cooperation. Formal cooperation is structured by contracts or other explicit agreements between the companies, whereas informal cooperation is based on more subtle means, such as social interaction or movement of employees between the

companies. Easton goes on to separate a group of concepts under both formal and informal cooperation, as seen in the figure 6.

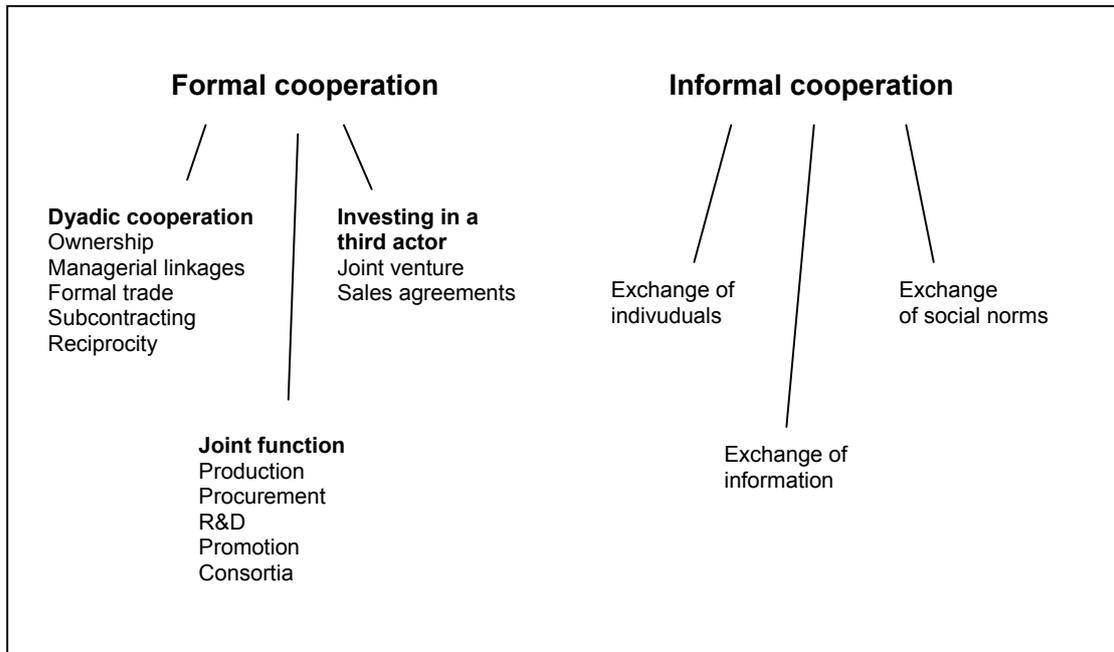


Figure 6. Forms of intercompetitor cooperation (according to Easton 1990)

All in all, both researchers and actual business representatives typically tend to address competition between companies in a rather one-sided manner. It seems, however, that the closer we look at intercompetitor relationships, the more complicated they begin to seem. Competitors trade products and services with each other, go into legal contracts with each other and exchange information and other resources with each other. Cooperation should certainly not be viewed as simple or easy because these relationships tend to cause more conflicts between the parties involved and it seems to be more difficult to manage such a relationship than, say, a relationship with a customer. Nonetheless, it is possible to form an extremely useful and functional relationship with a competitor. The competing companies usually have a lot in common, and they both know their way in their surroundings and the industry. The common issues between them make it easier for competitors to understand each other's position and goals, which in turn makes it easier for competitors to adapt to one another in a cooperative spirit.

One of the aims in this study is to find out whether there is willingness among companies in the Nordic wild berry industry to venture such cooperative arrangements. It is obvious that cooperation is not always possible or even desirable or sensible and that the potential positive outcomes may in some cases be overtaken by the fact that it takes a lot of time and effort to get such arrangements up and running. Nevertheless, it seems equally obvious that there are some aspects to the Nordic wild berry industry that would definitely benefit from joint efforts between the companies currently

competing in the field. Some of these issues have already been addressed, but there is still work to be done. In the next chapter, we will move on to discuss the methods we used to find out more about it.

## **2 METHODOLOGY**

In this chapter, the methods used in this study will be presented as well as the whole process from tracking down potential respondents to designing the actual questionnaire and to analyzing and reporting the results. At the end of the chapter, we will briefly discuss reliability of the results and factors that constrained the work.

### **2.1 Tracking down respondents**

In the initial stage of the study, we aimed to gather information about and contacts to as many of the wild berry companies in the Nordic countries as possible. As a starting point for the mapping we had the notion that there are hundreds of companies working with wild berries in the area and that most of the companies are small-scale. Furthermore, most of the companies were expected to operate in Finland and Sweden because it was known that less commercial activities revolve around wild berries in Norway and especially in Denmark and Iceland. Many of the sources of information used in the search were not that accurate on whether the companies listed in a business catalogue actually work with wild berries rather than with cultivated berries or vegetables, etc. For this reason, we were unable to provide a detailed list of all the wild berry companies in the Nordic countries.

In different countries, we used different sets of sources. The mapping succeeded best in Finland, where a lot of information on relevant companies was readily available. In Finland we managed to gather in a set of a little over 200 companies, out of which the vast majority actually works with wild berries. One of the most effective sources of information proved to be the Arctic Flavours Association, which has long gathered information on producers of natural products on their web pages. Another very good source was the Food Finland theme group that is represented in all regions of the country and is very knowledgeable on the small-scale food industry. Additionally, a lot of companies were found through different business catalogues, the Internet and even grocery stores.

In Sweden the most difficult task was to tell from a distance the difference between, for example, strawberry producers and companies with wild berries in their repertoire. We found the Statistics Sweden to be the most efficient source of information on Swedish companies. We picked six categories of companies from their catalogues, from berry picking to juice production and wine making and other processing of berries, fruits and vegetables. By doing this, we received contacts of about 700 Swedish companies. Another important source of information was the organization promoting

the Swedish wild berry industry, the Swedish Forestberry Association. We asked the association to deliver our questionnaire to its over 50 member companies all around Sweden. Additionally, we also found companies on the Internet and in other electronic databases, as we did in Finland.

As for the other Nordic countries, we also found a strong population of berry-related companies in Norway, although the sources of information were less established than those in Finland and Sweden. In Norway we were not able to find a lot of readily available data on the wild berry sector. Instead, we relied heavily on different databases and business catalogues, through which we gathered a list of about 350 Norwegian companies that seemed to represent the wild berry industry.

In Denmark and Iceland, we had some contacts to local organizations and ministries, for example, but only scarce wild berry activities could be found. In Denmark the berry business is naturally focused on producing cultivated berries, such as different currants. In Iceland the wild berry crop yield is not very high and no high-profile industry has developed in the field. Because of these reasons, we ended up leaving Denmark and Iceland outside the questionnaire and concentrating on Finland, Sweden and Norway.

## **2.2 Methods and the questionnaire**

As the above description implies, the group of potential respondents was wide and heterogenous. Because of this, the study was conducted by using a question form. Furthermore, because we did not expect to receive thousands or even hundreds of responses, we were able to include in the form open qualitative questions in addition to structured quantitative ones. In this way, the respondents were given the opportunity to elaborate on their answers instead of merely selecting the most appropriate ones from predetermined options. This made the responses from the companies far more informative and rich in opinions and viewpoints.

On the actual form, we aimed at a balance between the number of issues brought up in the questionnaire, how deep into the issues we would be able to go and the number of responses we expected to receive. In other words, we aimed to keep the form simple and compact so that a high number of companies would see it worthwhile to react to it, but still we did not want to compromise the amount of information received through the survey.

The booklet of questions ended up consisting of eight pages. The questions were based on a previous study in which we interviewed a small group of wild berry companies on the challenges they face in the business (Paassilta 2007) as well as on other conversations with different people in the wild berry sector. The questions were divided under seven topics: raw material supply, logistics, processing and R&D, traceability, joint wild berry brand, trade fair cooperation and cultivated bilberries.

Furthermore, we asked the companies to give us some basic details about their activities and products that helped us to categorize the heterogeneous group of companies. The basic information was also used to form a more comprehensive view of the Nordic wild berry industry.

We included a short introduction to each of the categories on the questionnaire to give the respondents a clearer idea of what we meant by the questions. This was done in order to make unambiguous questions leading to interpretations with as little variation as possible. Because there were a lot of different companies involved from a wide range of backgrounds, some of the issues were very familiar to some companies whereas others were not. The short introductions probably caused some distortion in the results because some of the respondents' views may have been affected by the opinions presented in the questionnaire itself. Nonetheless, we found this to be less of a distraction than a situation in which different respondents would have understood some of the questions very differently. Many of the respondents gave us positive feedback that the questionnaire was interesting and informative and that they found the short texts motivating. None of the respondents reported that they felt distracted or manipulated by the texts.

The questionnaire was originally composed in Finnish and then translated into Swedish and Norwegian so that language skills would not restrict the number of respondents. The translations seemed to be successful as we received no feedback on the language or terms used. Regarding the potential introduction of a common Nordic toll for keeping track of wild berry purchases, as many as 80 per cent of the Norwegian companies found it difficult to answer the question, which may be interpreted as a possible error in the translation. Respondents from other countries were able to give more informative answers on this specific question. The questionnaire is attached to this report in all three languages.

All the three language versions were also transformed to electronic format on the Internet. We hoped that this would increase the number of responses. Moreover, there were no costs from delivering the electronic form via e-mail, which saved us a lot of money. A third advantage with the electronic form was that the answers were automatically fed into the system, which made the job easier and also reduced the risk of errors in feeding them in manually. The electronic questionnaire was delivered via e-mail to all the companies whose e-mail address we managed to find. The rest of the companies received a paper version of the questionnaire.

Altogether, the questionnaire was delivered to 1 300 companies, 200 of which were Finnish, 750 Swedish and 350 Norwegian. The high number of companies is due to the fact that, as discussed above, there was practically no exhaustive way of knowing whether a company actually works with wild berries or something close enough. That is why we ended up delivering the questionnaire to all of them, to avoid excluding any relevant companies by mistake. Some of the Swedish companies also received the

questionnaire twice as both we and the Swedish Wild Berry Association delivered questionnaires to them. The paper version was only delivered one time due to financial reasons. The electronic form was delivered twice to companies that failed to react in the first round.

We received about a hundred responses, out of which we qualified 86 for the analysis. 52 of the responses were from Finnish companies, 29 from Swedish companies and 5 from Norwegian companies. In Finland about 25 per cent of the companies responded. In other countries, it is not relevant to estimate the figure because of the number of possibly irrelevant companies included in the mailings. About one third of all the responses came through regular mail and two thirds were received over the Internet.

### **3 RESULTS**

In this chapter, we will go through the results of the survey. The issues brought up in the study will be discussed in the same order as they were presented to the companies on the questionnaire. We will begin by presenting the group of companies that responded. After that we will move on to the actual opinions and viewpoints of the companies. The issues discussed are wild berry raw material supply, logistics, processing and R&D, traceability, joint wild berry brand, trade fair cooperation and cultivation of bilberries.

#### **3.1 The wild berry sector in the Nordic countries**

As we pointed out in chapter 2, there are hundreds of companies in the Nordic countries that use wild berry resources. Most of the companies are small-scale, both in the number of employees and in the annual turnover. Over a half of the companies that responded to the questionnaire employ one or two people all year round, and over 75 per cent of the companies employ five people or less. The remaining 25 per cent are larger companies, a third of which employ 6–20 people, another third 21–50 people and the remaining third over 50 people. During the berry season, many of the companies hire more people, with almost 40 per cent of the companies employing more than five people during the season.

About one fourth of the companies have an annual turnover of less than 50 000 euros. Another fourth exceeds a turnover of 1 000 000 euros. The rest of the companies are quite equally distributed between 50 000 and 1 000 000 euros. The number of employees and the annual turnovers are presented in more detail in figures 7 and 8.

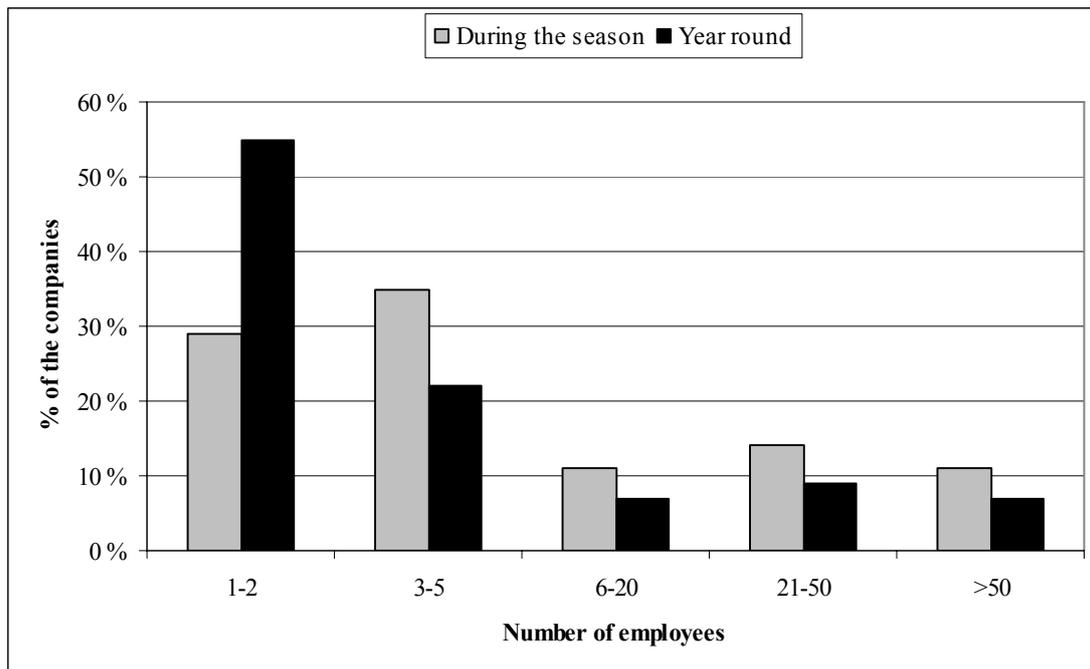


Figure 7. Number of people employed by the companies, year round and during the season.

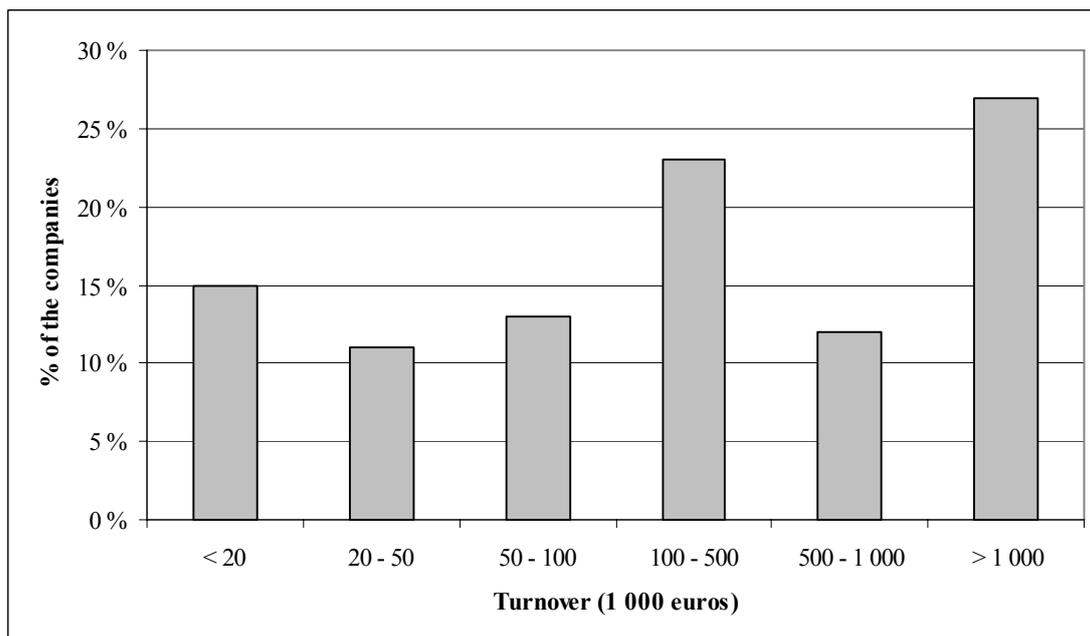


Figure 8. Annual turnover of the companies.

There is a wide range of companies in the Nordic countries using wild berries in their production, from large berry wholesalers, dairy companies and juice producers to small-scale agricultural entrepreneurs. We asked the companies to estimate how much of their income can be traced back to wild berries and products including wild berries. According to the answers, roughly a half of the companies get more than 50 per cent of

their income from the wild berry business, while for the other half the figure is less than 50 per cent. To be more exact, about a third of the whole group receives less than 20 per cent of their income from wild berries, and about a fourth receive more than 80 per cent. Figure 9 illustrates this division.

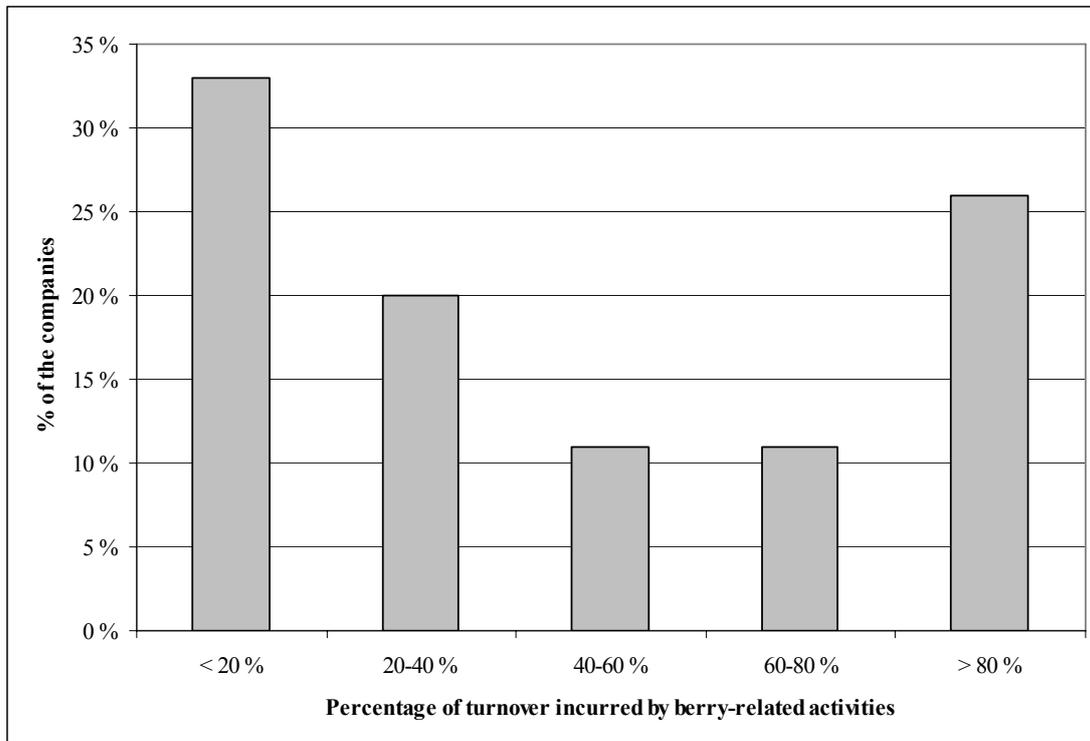


Figure 9. The importance of wild berry business to the companies.

### 15 000 000 kilograms of bilberries a year

In order to map the business activities in the wild berry industry, we asked the companies to describe how their work is related to bilberries, where they purchase their raw materials, what kinds of products they produce and who are their customers. According to the responses, over a half of the companies act as so-called first buyers, in other words they buy bilberries straight from pickers. About 50 per cent of these first buyers only purchase bilberries from pickers, whereas the remaining 50 per cent also purchase bilberries from other companies. Some of these companies go on to sell the berries further into the value chain without processing them, and some of them mainly process the berries into, for example, juices and jams. Leaving the first-buyer companies aside, the following half of all the companies can be divided into two groups. About 25 per cent of all the companies that responded do not purchase bilberries. Some of these companies are small enough to manage to pick all the berries they need by themselves; others deal with bilberries in other ways than buying and selling them. About 15 per cent of the companies report that they purchase bilberries from abroad.

Measured in the number of companies, the most popular concept of utilizing bilberries is the traditional one, which is to process the berries into food products and to sell the products on the domestic market. Almost 60 per cent of the companies do this. Additionally, about 25 per cent of the companies also sell their processed bilberry products abroad. About 30 per cent of the companies sell unprocessed bilberries on the domestic market, and 11 per cent export unprocessed bilberries abroad. To be clear, we did not consider cleaning and freezing berries to be processing here, even though these activities factually include processing the raw material.

To further track down the flows of wild berries in the Nordic countries, we asked the companies how much bilberries they purchase from different sources and how much bilberries they sell to each of their customer groups. Put together, the 86 companies that responded to our survey purchase about 15 000 000 kilograms of bilberries every year. Out of this total figure about 2 500 000 kilograms are purchased from private pickers and about 4 400 000 kilograms from abroad. The remaining 8 000 000 kilograms are evidently bought from other domestic companies, some of which also responded to this survey and some of which did not. 14 200 000 kilograms of the total figure of bilberries are sold as frozen berries either on the domestic market, where about 5 000 000 kilograms go, or on the international market, where about 9 200 000 kilograms end up. Comparing the 9 200 000 kilograms of exported bilberries with the export statistics discussed in section 2.2, it seems that the group of companies that responded to the survey make up about 80 per cent of the total export of bilberries from the Nordic countries. Furthermore, according to the company responses, it seems that only about 5 per cent of all the bilberries are processed further than mere cleaning and freezing. Neither the export statistics nor the survey results can be regarded as 100 per cent accurate, but they do give an idea of the relations between the figures.

### **3.2 Wild berry raw material supply**

As we pointed out at the beginning of this report, only a fraction of the whole annual wild berry crop yield is exploited. According to different estimates, over a billion kilograms of berries ripen in the Nordic forests annually, only 2–10 per cent of which is picked. In Finland and Sweden, about 30–35 million kilograms of wild berries end up in commercial use (Jonsson & Uddstål 2002, Moision 2006). The raw material supply is one of the main bottlenecks hindering the success of the Nordic wild berry industry. Lack of raw material makes it difficult, among other things, to create lasting and stable relationships with international industrial customers. Moreover, it slows down the development of new, more innovative wild berry products. As a result, almost all of the companies in this survey find it important to increase the amount of berries picked in the forests.

### Large companies facing trouble in gaining enough raw material

Almost half of the companies that took part in the study report difficulties in gaining enough wild berries to satisfy their needs. The challenge is common to Finnish, Swedish as well as Norwegian companies. In Finland about 47 per cent of the companies reply that they have had trouble in this area; in Sweden the figure is 55 per cent and in Norway 50 per cent. Smaller companies find it easier to get enough raw material. Of the companies with an annual turnover of less than a 100 000 euros, one fourth reports difficulties, whereas two thirds of the companies with a turnover of 100 000–500 000 euros and more than half of the largest companies are unsatisfied with their supply of wild berries.

The good reports from the smaller companies and entrepreneurs are mostly due to the fact that many of them actually pick their raw material themselves and the only limiting factors are the time available for berry picking, one's own hardiness and the annual crop yield. The larger companies need a very different quantity of berries: international industrial customers in particular order such large amounts of berries at a time that satisfying the demand becomes more difficult. At the same time, organizing and funding the procurements becomes a more complex process. In figure 10, the difficulties in gaining enough berries have been divided between companies of different sizes.

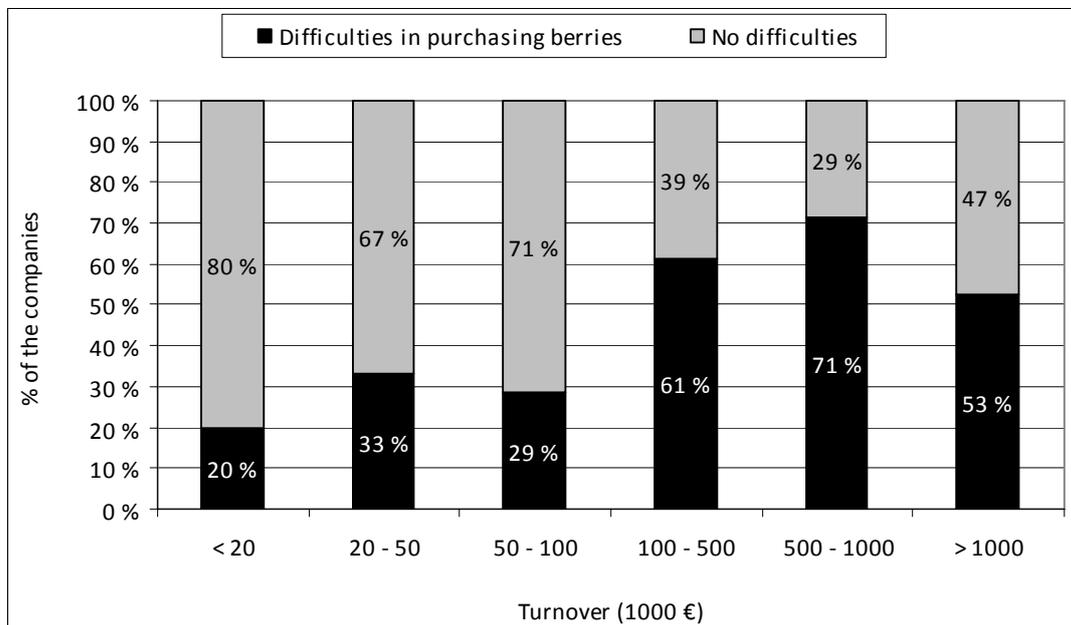


Figure 10. Difficulties in gaining enough wild berries in companies of different sizes.

### A demand for more foreign professional pickers

When asked about the factors that have caused difficulties, companies offer two more or less apparent reasons. Most commonly, the answers are about the picker situation. In Finland, Sweden as well as Norway, there has been a lot of talk about the active berry-picker generation getting older, about younger people not being very enthusiastic about carrying on the tradition and about people moving away from the areas where most wild berries grow. Inviting foreign professional pickers into the area has also evoked a lot of opinions, both positive and negative.

The companies involved in this study agree, with a few exceptions, that the number of foreign pickers should be increased either quickly or at least incrementally. Three out of four respondents are of this opinion, and most of the remaining fourth do not want to comment on the issue. Only five per cent of all the companies are willing to reduce the number. Out of the three nations, the Swedes were most patient on this issue. Whereas half of the Norwegian respondents and a third of the Finnish ones think that the number should be rapidly increased, only 17 per cent of the Swedish companies agree. One reason for this might be found in the fact that the Swedes have the longest experience in the business and have faced the down-sides of the issue more severely than their neighbours. Also in Sweden, about 40 per cent are willing to increase the number incrementally. The larger companies with the most trouble in gaining enough berries for their production seem most eager to welcome foreign pickers. In figure 11, the views of the companies in different countries are shown.

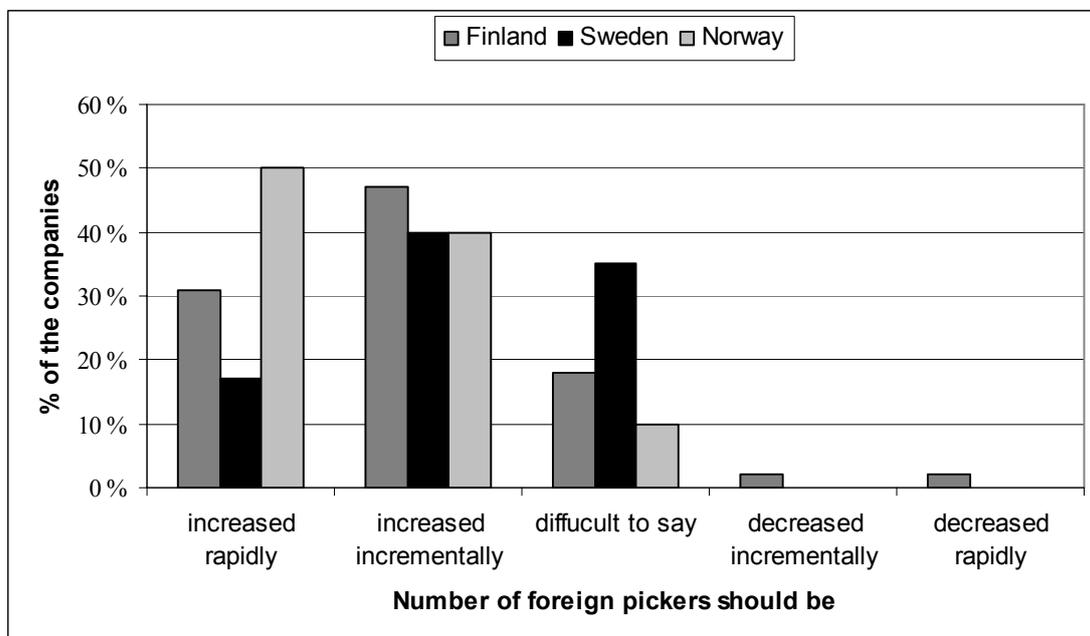


Figure 11. Opinions about the number of foreign pickers in different countries.

The responses reveal some dissatisfaction towards the public politics concerning the foreign picker issue. Especially the Swedish companies criticize the (possible) taxation of pickers and companies inviting them and about one third of the Swedish respondents mention income taxes when asked for ideas that could enhance berry picking. In Sweden the practice has been to consider foreign pickers as employees of the companies that they sell their berries to, which has forced pickers to pay an income tax of 25 per cent for their revenue. Similarly, the companies have had to pay for the social contributions on behalf of their berry-picking “employees” (Skatteverket 2008). What is more, the respondents wish for a relief in allowing for pickers to move from one country to another more easily; for example, they suggest that visas would be made more easily available for international workers. One of the Swedish respondents also finds that the public authorities distort the competition in the field. Many smaller Swedish berry companies criticize the local industry and find that the large companies act in a monopolistic manner.

Bringing in more and more foreign pickers is not the only answer to the picker issue. Many of the companies are still optimistic and hopeful that more local people will become interested in berry picking in the future. Berry picking is seen as a national, socio-economical matter and a responsibility of the local people. The youth should, according to the respondents, be encouraged to find additional income in the forests and be introduced to recreation in the forests and to berry picking already at an early age at school so that the culture of berry picking could be passed on to future generations.

### **Other reasons for trouble in raw material supply**

The companies also give some reasons other than the picker situation or the variations in crop yield for the difficulties in getting their hands on enough berries. Many companies argue that the prices of wild berries have gone up in recent years, which is an obvious reason for trouble in procurement. Another reason, also related to funding the berry purchases, is the fact that a wild berry company needs to cover a great share of its annual expenses during a short period of time every autumn. Some companies find this a restriction on their business, which is particularly true in the case of the larger Finnish companies that are not able to use their existing stocks of berries as an assurance for getting more funding. In Sweden the companies do not have to face this situation.

Some of the respondents think that the professional wild berry picking is inadequately organised. They think that the number of places where pickers can sell their berries should be increased in order to make it easier to pick berries for sale. Furthermore, some of the respondents feel that companies organising professional picking should cooperate more to optimise the yield. Many respondents, although not all, are in favour of tightening cooperation between each other in this regard. The following quotes reflect this.

*It seems to me that there would be benefits in networking; you can't deal with everything just by yourself.*

*The pickers themselves often have narrow possibilities to transport the berries; it could help if buying companies would set up more places for them to empty their buckets.*

*The Swedish berry companies must work together, so that the valuable natural resource can be utilized. The same goes for succeeding on the international market.*

*I don't believe in cooperation in this area because of the harsh competition.*

As for some of the less common reasons for not getting enough berries, some companies state that they want to support the local market and are fundamentally reluctant towards buying berries from abroad. A large company can find it difficult to welcome very small shipments of berries. One detail brought up in the responses is the Finnish customs at the Russian border that can hold a batch of berries for up to several weeks in their test laboratories although the company might need the raw material immediately for delivering it further on to its customers.

### **3.3 Cooperation in logistics**

Transporting and storing berries are considered a challenge for the companies in the wild berry business due to fact that the berries ripen in wide areas, often far from proper roads, and they tend to spoil quite quickly. The companies need to invest heavily in logistics, which is problematic especially for the smaller companies. This hinders the development of the entire industry. This is another issue that could be facilitated by increasing the level of collaboration between the larger and the smaller companies. Alternatively, the smaller companies could work together to set up resources for transporting, freezing and stocking their raw material and products more efficiently.

#### **Freezing and stocking clear bottlenecks**

We asked the companies whether they could use more resources in logistics or would have some resources to spare. The aim was to find out if there was potential for some of the companies to utilize each other's resources and to find use for extra capacity. We also asked the companies if they would be willing to cooperate with each other in logistical issues. Many of the respondents report that they are satisfied with their capacity both in transporting, freezing and storing their berries and products. What is more, only a handful of companies seem to have any unused capacity in any of these functions. Instead, a number of companies report that they are in need for more

capacity in either freezing, storing or both. Figure 12 gives a closer view of the responses.

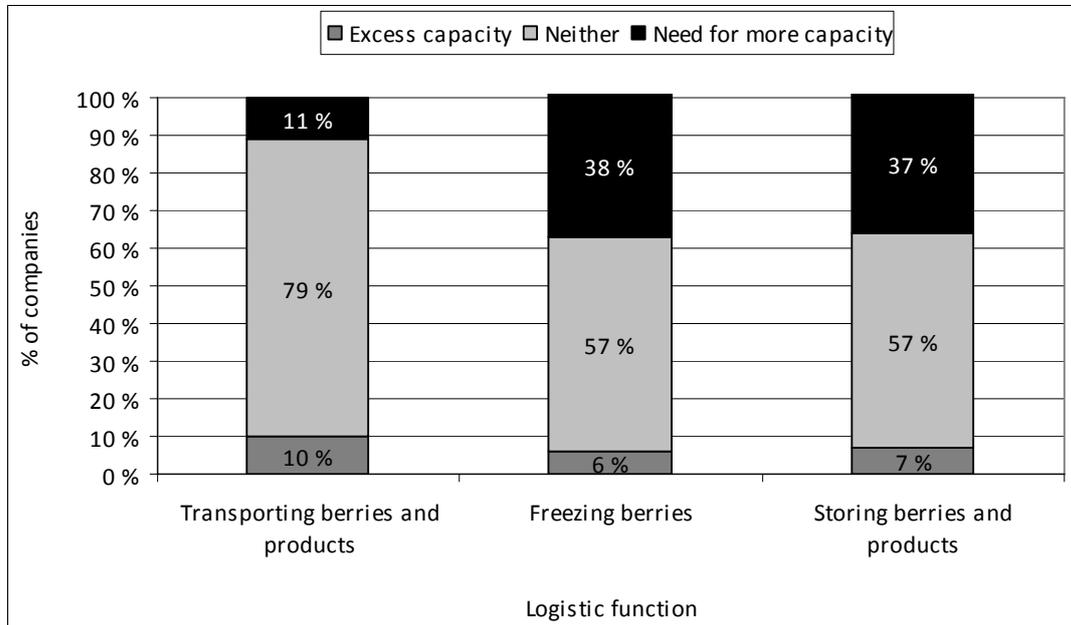


Figure 12. The companies' capacities in the three logistic functions.

Transporting berries and berry products does not seem to be a problem for the companies involved in this survey. Almost four out of five respondents state that they do not need more transportation capacity but that they do not have capacity to spare, either. In many cases, this can be interpreted so that the companies have outsourced the services to separate transportation companies, which usually makes up an appropriate level of capacity. About a tenth of the companies could transport more berries and products than they currently do, and about the same amount of companies could use more resources in this regard. Differences between the companies of different sizes are small; all of the three situations can be found in all categories.

Freezing and storing berries can be, based on the answers that we received, regarded as bottlenecks in the wild berry industry. Although over a half of the companies feel satisfied with their resources in these functions, a high number of companies – almost 40 per cent to be more exact – do not. There is a correlation between the size of a company and the company's need for more resources. The middle-sized companies seem to have both the least need for more resources and the least excess capacity. The smaller a berry company is, the more likely it is to have either a need for more or excess capacity.

There are also some differences between the three countries involved. The Norwegians seem to have the most excess capacity in all the three logistic categories. The Finns are

mostly satisfied, and the Swedes are in the need for more capacity. It should be noted, however, that all the options can still be found in all the countries.

### One out of three for more cooperation

We asked the respondents about their willingness to buy and sell services related to the three logistical issues discussed above, i.e. transportation, freezing and storing. A little over one third of them state that they are either very or fairly interested in cooperating on these issues with other berry companies. Almost another third of them are not at all interested, and the rest are fairly uninterested or found the question difficult to answer. The most enthusiastic about logistical cooperation are the Norwegians, out of whom a half was very or fairly interested. Out of the Swedish respondents, about 40 per cent and of the Finnish, a little less than 30 per cent are interested (Fig. 13).

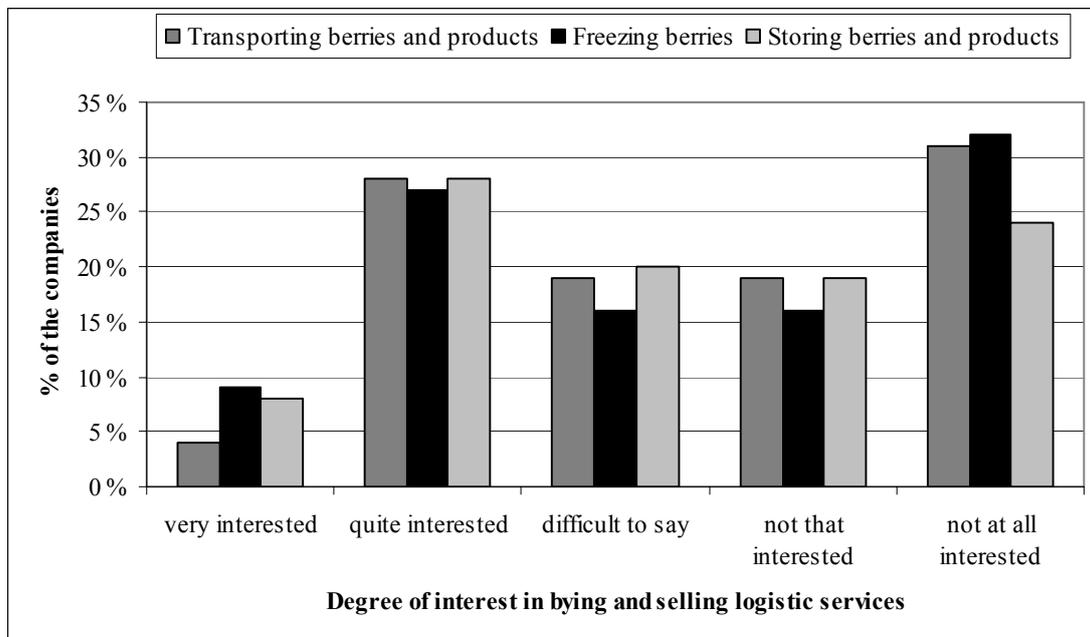


Figure 13. Companies' interest in logistical cooperation

In the open answers, the companies reveal a positive attitude towards cooperation. Over 70 per cent of the open answers could be regarded positive or even enthusiastic, whereas less than 25 per cent are clearly negative or skeptic. Interestingly, all of the skeptical views were received from Finnish companies. Nonetheless, even out them, the remaining two thirds have positive thoughts about the issues.

Many of the respondents who feel positively about the cooperation simply state that they are in general in favour of these types of arrangements or that they think it is a good idea. Many also think that such cooperation probably cuts costs when excess capacity is utilized by other companies. Some of the respondents think that

cooperation is even necessary in order for the smaller companies to be able to manage in the berry business. On the other hand, more than a few respondents view cooperation as a very nice thought, but only if the implementation is well organized and the benefits are made clear. Many of the more skeptical respondents point out that the idea may look appealing on paper but that it may be tricky to actually get it up and running. The following quotes give an idea of the open answers on this issue.

*It is vital for a small company, and when a bunch of small companies work together in facile manner, everyone will benefit from the arrangement, we will be able get more raw material and still keep the prices on a decent level.*

*In Finland we have traditionally had too little cooperation like this. We could lower the costs and gain more power on the market through this.*

*It will probably be difficult to find solutions suitable or reasonable for all the participants.*

*It is the only way to cut the fuel and personnel costs that are constantly going up.*

### **3.4 Processing berries and joint R&D**

The degree of processing bilberries and other wild berries is rather low in the Nordic countries. Instead of processed products, a vast majority of the commercially utilized berries end up exported as frozen raw material for the processing industry abroad. In the name of profitability, there should be more research and development work going on, but it is often perceived too expensive, time-consuming and risky. In addition to that, it is possible to create some profits on the international market just by selling raw material. In some industries, companies have designed novel products together and found that it can be a useful way of reducing both costs and risks involved in product development.

Almost 60 per cent of the berry companies involved in this study find it very important that the level of processing in the Nordic countries will be improved. Another 30 per cent find it at least rather important. Eight per cent do not provide an answer, and five per cent think that the issue is not that important. Out of the three countries involved, the Finnish companies are the most eager to process more berries, the Swedish come second and the Norwegian third. In figure 14, these numbers are presented in more detail.

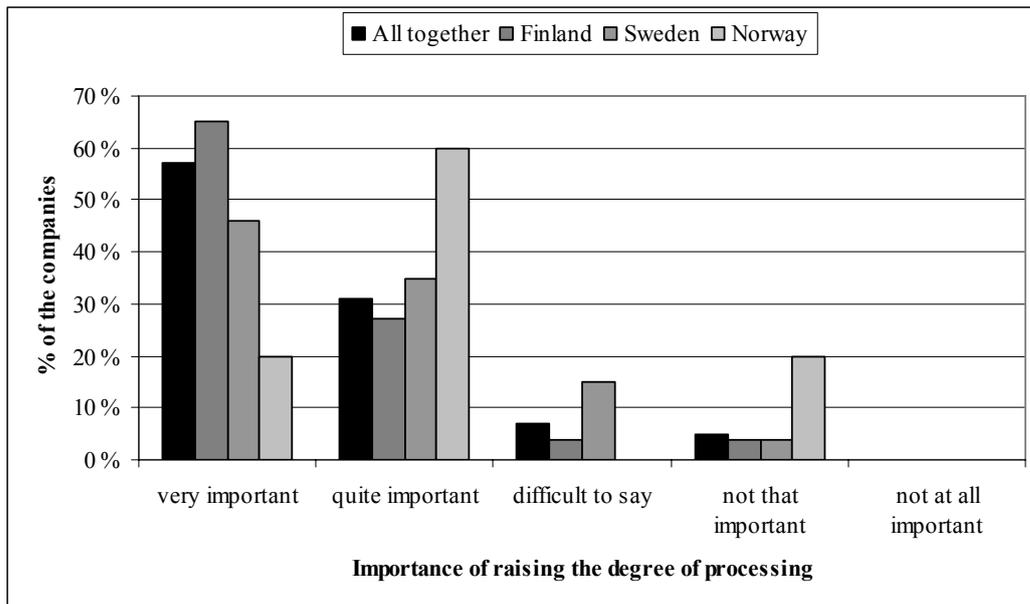


Figure 14. Views of companies on the importance of improving the level of processing.

### Most companies planning to process more berries

Regarding the degree of processing berries, we asked the companies to reveal whether they plan on processing wild berries more and, if yes, when they plan to do this. The answers were quite encouraging, with as many as 60 per cent of the companies intending to do more with berries. Furthermore, three quarters of these companies intend to do so within the coming year, that is to say, before the summer 2009. The actual numbers in different countries are presented in figure 15.

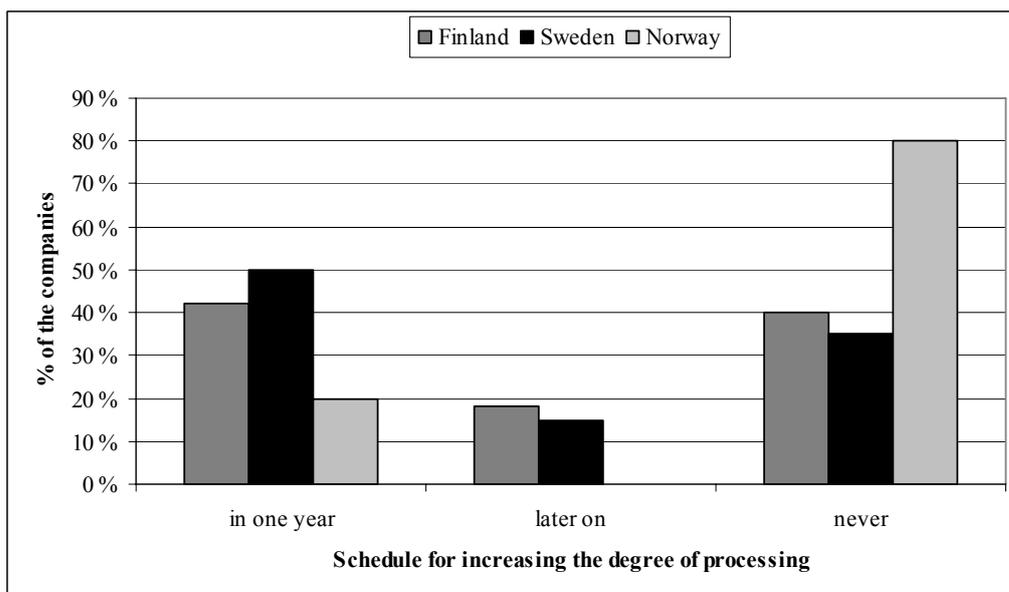


Figure 15. Intentions to increase the level of processing wild berries.

Companies of different sizes have slightly different views on berry processing. Both the largest and the smallest companies seem more satisfied with their repertoire than the middle-sized companies. Up to 80 per cent of the companies with a turnover of 50 000–500 000 euros intend to increase their berry processing, whereas the same can be said of about a half of both the larger and the smaller companies. Out of the three Nordic countries involved, the Swedish and Finnish companies plan to be more active in this regard than the Norwegian ones. Two thirds of the Swedish and about 60 per cent of the Finnish companies intend to process berries more in the future.

We also asked the respondents for ideas and suggestions on the possible ways of improving the degree of processing in the Nordic berry sector. The open answers can be divided roughly into three categories even though they are partly interrelated. The most common answer concerned the commercial use of the health-promoting effects of the berries as well as research results on a more general level. Especially in the case of the bilberry, it is the health effects that have contributed to the rapid growth of demand on the international market in the recent years, and the other berries certainly have the potential to follow. Increasing awareness of these effects also makes a difference on the national and local market levels. Below are some suggestions on what would encourage companies to process Nordic berries before exportation.

*More knowledge and competence on bilberry and crowberry. Their health effects and positive effects on our well-being should be promoted more efficiently.*

*Health-promoting products containing bilberry, lingonberry, cranberry, sea buckthorn, rosehip, etc.*

*Using the research results for marketing purposes.*

*Translating the research results into action.*

Partly intertwined with the promotion of the health effects, marketing actions receive a lot of attention from the respondents. They argue that being able to increase the demand on the international market would encourage companies to develop more berry products, which requires more emphasis on marketing. Especially the smaller companies feel that marketing receives too little attention because other activities take most of the time and effort available. The following quotes illustrate these concerns.

*Demand for the products. It is not a problem to produce juices, for example, but marketing will take a lot of effort, which is a challenge for the smaller companies.*

*At least making berry products more "hip" and desirable.*

*Improving marketing at the small-scale companies, and exporting.*

In addition to marketing of the products, the respondents feel that it is too difficult to find funding for development projects and for the needed investments. The smaller companies turn their eyes to the public authorities in the hope of financial support or tax reliefs to encourage product development. The companies also mention increased collaboration as one way of achieving more sophisticated berry products. We will discuss this collaboration next, but first let us quote the respondents regarding the ways of increasing the level of processing.

*We are not confident that there is any future for exporting, for example, jams and such. The same goes for yoghurts. It is best to produce them wherever they are consumed. In Sweden we have almost too much production around these types of products, with companies of all sizes competing with each other. If we were to increase the level of processing, we should develop new kinds of products. Dried berries to go with mueslies, flavoured desserts or something completely new.*

*Adequate support to entrepreneurs for developing new products. The Finnish authorities consider berry processing an agricultural function. This fact has hindered the chances for getting support for investments and export. This makes the berry companies unequal with the rest of the food industry.*

### **Joint product development a feasible opportunity?**

To warm up for the issue of joint product development, we asked the companies to tell us how important they think it is to increase such collaboration in the wild berry sector. The warm-up questions in this study are commonly received quite unanimously, but this one raises some more differences although there is still clear support for the concept. A little over a third of the respondents find this a very important thing and another third a reasonably important one. Quite a high percentage, about 25 per cent, find it difficult to take a stance on the matter, and about 10 per cent are quite skeptic. The Swedish companies seem to think the most of joint product development as almost half of them find it very important. The smaller companies find it a bit more important than the larger ones although the difference is not that significant. The responses from different countries are shown in the figure 16.

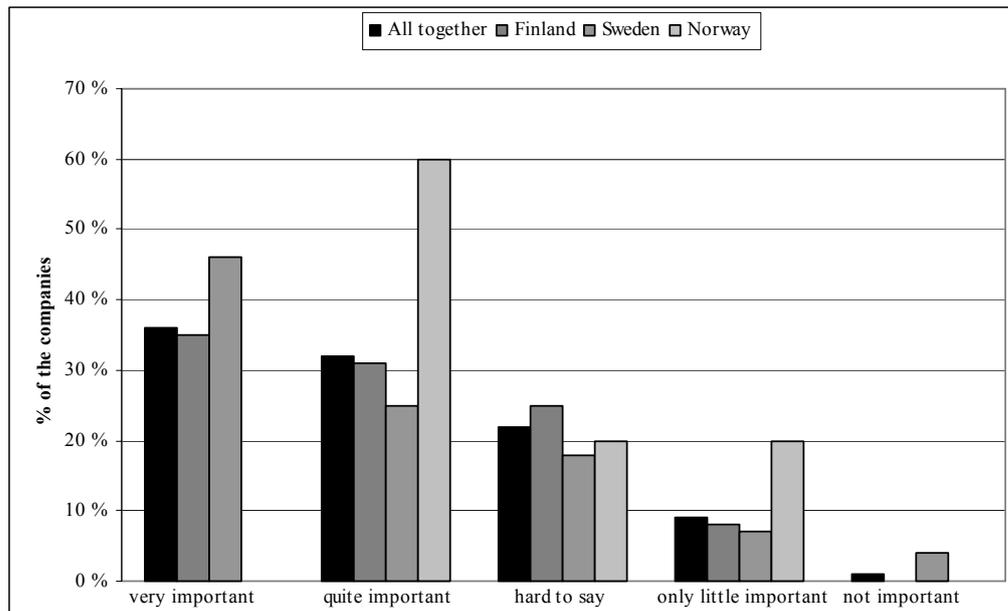


Figure 16. Companies' views on the importance of setting up joint product development.

We asked the respondents for views on how interested their companies would be to set up joint product development either with other local wild berry companies or with other Nordic wild berry companies. Such an intimate collaboration is not viewed all that appealing. Almost 25 per cent of the respondents make it clear that their company is not very or at all interested in this type of an arrangement even on a local level. Another 25 per cent of the respondents skip the question on Nordic collaboration. For example, the following arguments are used.

*Don't really care for this. We've been involved in different projects for years, and all we need now is more time to develop our own business.*

*There might be some issues with immaterial property rights here.*

*Basically a good idea, but not needed in our case.*

*Cautious thoughts, we've had some misfortune in the past.*

Nonetheless, a majority of a little over 60 per cent of the respondents report that their companies are very or at least somewhat interested in joining forces with other product-developing berry companies. About 40 per cent of them are also willing to collaborate with berry companies across the Nordic country borders. The most eager are the Swedes although the Finns do not fall far behind, either. 40 per cent of the Swedish berry companies are very willing to do joint product development with each other, and another 30 per cent are at least somewhat interested. For the Finnish companies, the corresponding figures are both at about 30 per cent. When moving on to the Nordic level of collaboration, about half of the Swedish and 40 per cent of the

Finnish companies are either very or at least somewhat interested. In Norway neither option is perceived very appealing. The exact figures can be found in figure 17.

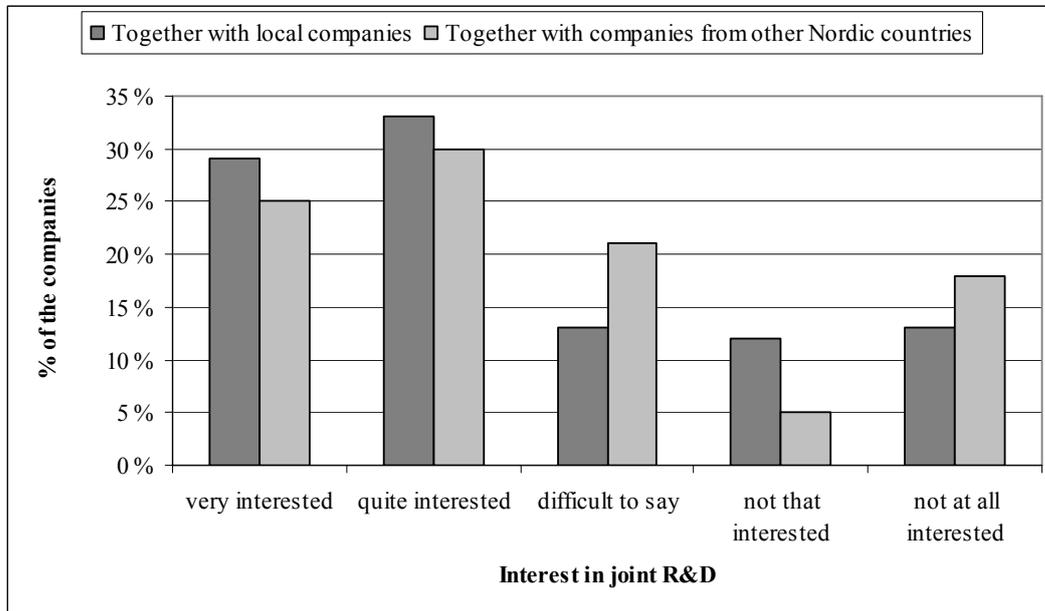


Figure 17. Companies' willingness to participate in joint product development.

On these issues, as on the ones before, we also asked the companies to justify their answers in a few words in order to get more specific information on their insights. The most common response is that the companies find the concept very useful on a general level but do not want to engage themselves in it. Some of the companies worry about confidentiality in such a close relationship. If companies established this form of cooperation, a very clear division of work and benefits should be agreed on beforehand. Many companies also report that they already work in these types of settings and find it very useful. Some quotes are listed below.

*I believe that the market is big enough for all partners to benefit from collaboration – exchange of knowledge and experiences and joint marketing and other resources.*

*Collaboration with researchers – better knowledge on the processes and methods. Collaboration with other companies - the investments are too big for individual small-scale companies.*

*Collaboration with raw-material suppliers and research institutes are potential and interesting concepts.*

*We are already engaged in it and will continue to put more effort into it.*

*Necessary to make it forward and build on a solid ground.*

### 3.5 Common practice for improving traceability

The Nordic bilberry industry competes on the international market with, for example, the cultivated North American blueberry industry, which puts forward several times higher volumes of berries. The two species resemble each other in some regards but when it comes to, for example, the health-promoting compounds, the wild European bilberry comes off as the stronger one. Considering the whole Nordic wild berry sector, it would make sense to highlight this difference more clearly. This would contribute to making the health effects visible also in the profits that the companies gain.

The first step would be to make sure that information about the origins of the berries is not lost along the processing chain. At the moment, there are a lot of different berry species on the world market sold under the name of the European bilberry. In China, for instance, it may be claimed on the packaging that a product contains bilberry (*Vaccinium myrtillus*) extract although that is in effect not the case. The scientific name of the wild forest species is also often falsely connected to pictures of cultivated berries. The introduction of a common document for professional berry purchasers and the industry in the Nordic countries has been proposed in order to improve the traceability of berries. This information could then be utilized in marketing.

We asked the wild berry companies for opinions on the issues related to the origins and traceability of berries as well as on the initiative to standardize the practices in the Nordic countries with regard to keeping track of traceability information. First we asked for views on the importance of improving traceability. About five per cent of the respondents think that the issue is not that important and about 15 per cent find it difficult to answer the question. About 25 per cent of the respondents feel that it is quite important, and the remaining 50 per cent find it very important (Fig. 18).

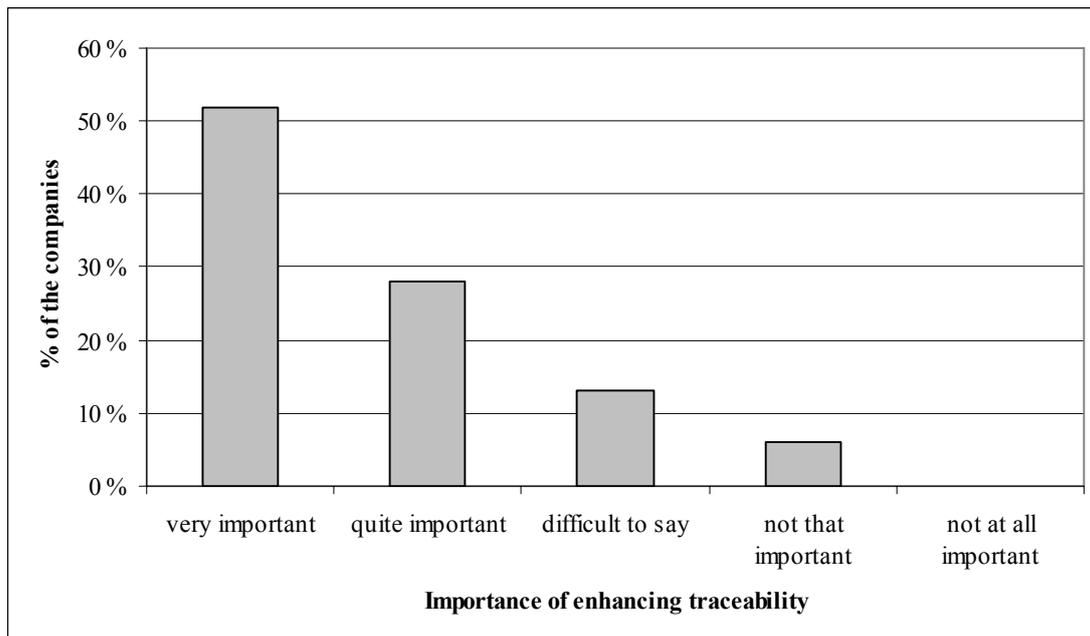


Figure 18. Companies' views on the importance of improving wild berry traceability.

### A wide range of different practices

We asked the companies to describe the ways in which they keep track of the origins of the wild berry raw material. The aim was to map some of the practices and see if there would be a need for a more standardized system. In different Nordic countries, the systems vary at the present. In Finland, for instance, the Arctic Flavours Association has worked together with the Finnish Food Safety Authority to prepare a document form for berry companies to use when purchasing berries. The purpose of the form is to standardize the practices of documenting the origins and improve wild berry traceability. We asked the Finnish companies for feedback on the purchase document form if they had used it.

Altogether, about 15 per cent of the companies report that they do not collect data on the origins of their wild berry raw material in a systematic way. Many of them argue that they can with some accuracy name the areas where the berries have probably been picked, but they do not have an actual traceability system. In this group of 15 per cent, there are companies of all sizes so the issue does not only concern, for example, the smallest of the companies. In fact, there are more large than small companies in this group.

The remaining 85 per cent of the companies report that they have a systematic way of keeping track of the information or at least that they will be able to track down the information through their suppliers if needed. The companies that are involved in international business are, not surprisingly, the most conscious about the traceability

issues, and all of these companies report that they have it covered. The number is also high for the companies that buy berries straight from pickers, as 92 per cent of them have access the information. Out of the companies who purchase their berries from other companies, 20 per cent admit that they are not actively recording this kind of information and that they do not have a systematic way of ensuring the origins of certain berry batches.

We also asked the companies to describe the methods they use for saving the information. Many of the smaller companies buy their berries straight from private pickers and get the information on the spot when the pickers hand in their berries. Many of the smallest companies also pick berries themselves, in which case they are well aware of the origins of their berries. It is very common for a berry company to have set up a documentation system of its own and use its own purchase documents which the company finds sufficient enough for the purpose. There are some quotes on the open answers from the respondents on this matter.

*We only purchase berries with a KRAV certification, which allows us to be fully aware of the origins of our berries. We also have a system in our production lines that guarantees full traceability for each jar or bottle.*

*We get picker-specific documents from the berry brokers.*

*We have a contract with a local supplier, where we have agreed upon the traceability issues.*

*We use our own buying documents.*

### **A standardised document a potential way of improving traceability**

The respondents were asked to think about a standardised purchase document for the Nordic countries and consider whether such a system would be useful in improving the traceability of wild berries. About 50 per cent of the respondents think that it might work. The issue is considered difficult, and we should perhaps have explained the suggestion in more detail because 40 per cent of the respondents found the question hard to answer. The remaining 10 per cent suspect that the document would not be effective. The exact numbers are given in figure 19.

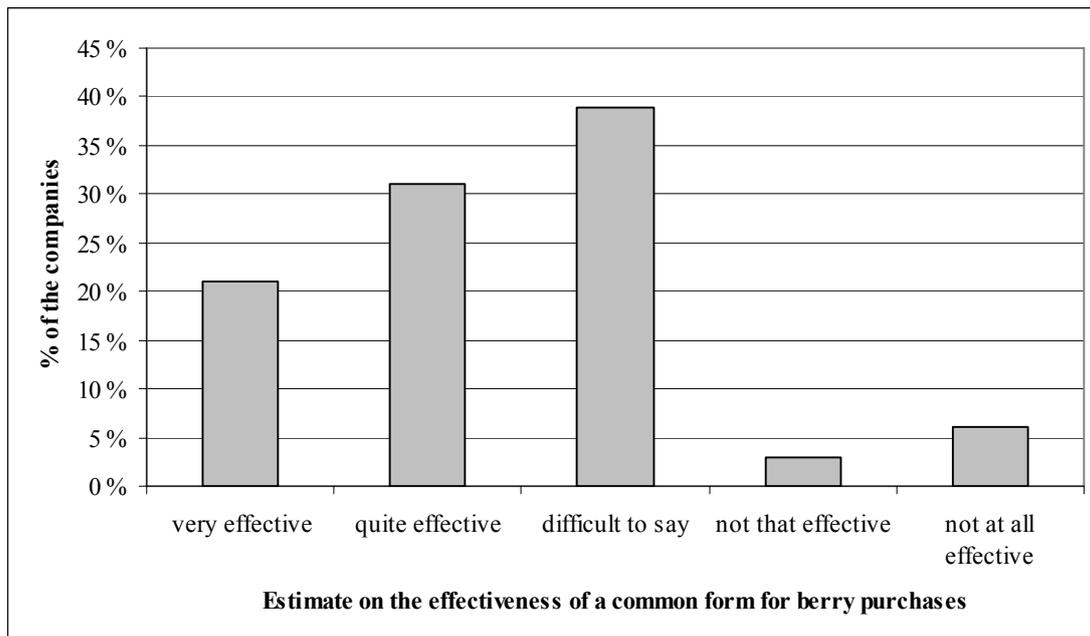


Figure 19. Estimates of companies on the effectiveness of a standardised document for purchases.

Out of the three countries involved, the Finnish and Swedish companies are pretty much in line here: the Swedes would find the system a bit more effective. As noted in section 2.2, as many as 80 per cent of the Norwegian respondents find this question too difficult to answer, which might have to do with some deviations in the translation of the questionnaire. The company size seems to play a role here because about 60 per cent of the largest companies and up to 90 per cent of the second largest companies suppose that the system might be effective.

The respondents were asked to justify their opinions briefly. The open answers given can be roughly divided into three categories: positive, confused and skeptical. Based on the answers we received, some respondents had interpreted the question to be about their own company and some had answered on behalf of the whole wild berry sector. There are some quotes below: first some positive and skeptical views and then some other issues that the respondents deliberated.

*Very interesting, this should be tested.*

*This would ease things up.*

*From the buyers' perspective a standard is always a good thing.*

*More paper work is not necessarily what we are looking for.*

*I hate documents.*

*A good initiative, if all the necessary aspects have been considered.  
Would this documentation make a valid proof for the origins?*

*All a buying document will do is show the time of the purchase. It should be able to track down the berry batches up until the processors, and the processor should keep track of them.*

*The anthocyanin contents vary a lot between different areas of origin. I think the berries should be labeled based on the latitude where they have been picked. We should benchmark the wine industry and set the prices according to the contents of the berries, not the same price to berries from any area.*

*I don't think this would be very effective. The biggest advantage would be from a joint wild berry logo that we could use for marketing the Nordic berries. Just look at the oranges from Florida, for example.*

### **3.6 Joint Nordic wild berry brand**

If an efficient system was set up for tracking down the origins of wild berries, it should be promoted. The most effective way to do this might be to print a logo on the berry sacks and product packages. Such a logo would underline the clean and natural origins of the berries and, in the case of bilberries, separate them from cultivated berries. The concept could help the Nordic wild berries to stand out in the competition both at the domestic and international markets.

#### **Brand considered important - especially larger companies interested**

We asked the companies for their opinion on the importance of the proposed Nordic wild berry brand. We kept the importance for the individual company and for the whole industry separate. When asked to assess the importance for the whole industry, 25 per cent of the respondents find it hard to take a stand. 30 per cent think that the concept is very important for the industry, and 40 per cent find it somewhat important. The rest argue that it is not very important. When thinking about their own business, the companies find the brand a little less important. Nevertheless, over 20 per cent think it would be very important, and over 40 per cent find it somewhat important. About 20 per cent think it is not important and the remaining 20 per cent cannot really say (Fig. 20).

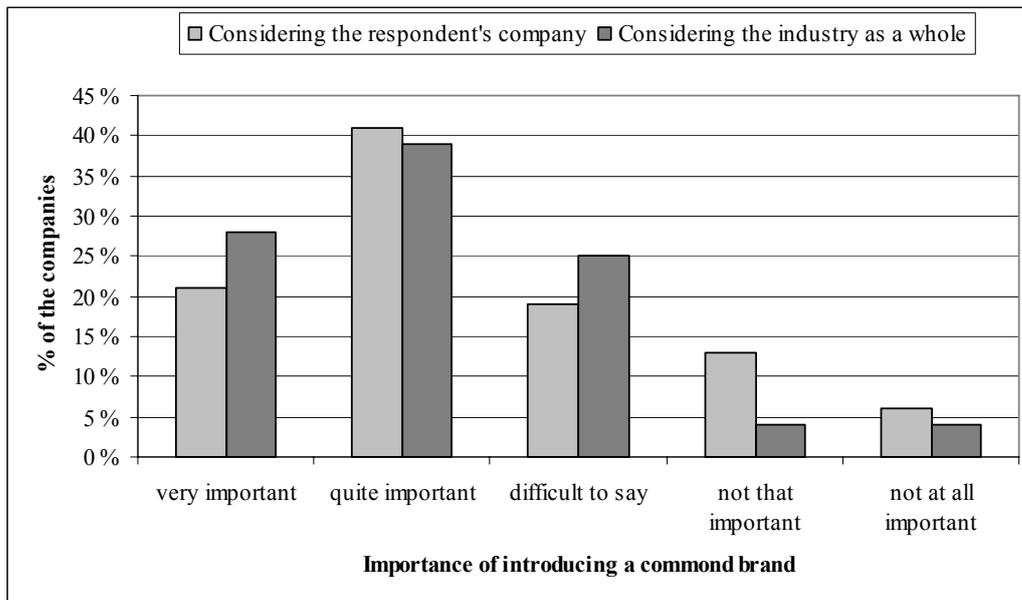


Figure 20. Companies' views on the importance of the proposed Nordic wild berry brand.

There are some differences between the respondents from the different countries. Out of the Swedish companies, 40 per cent think that the brand would be very important both for their own business and for the Nordic wild berry industry in general. Moreover, 30 per cent of them find it somewhat important. Out of the Norwegians, up to 80 per cent find the concept either very or at least quite important. For the Finnish companies, the per cent is 60 when considering the whole industry and 50 when considering their own business. Figure 21 illustrates the number of companies of different nationalities that find the concept either very or quite important.

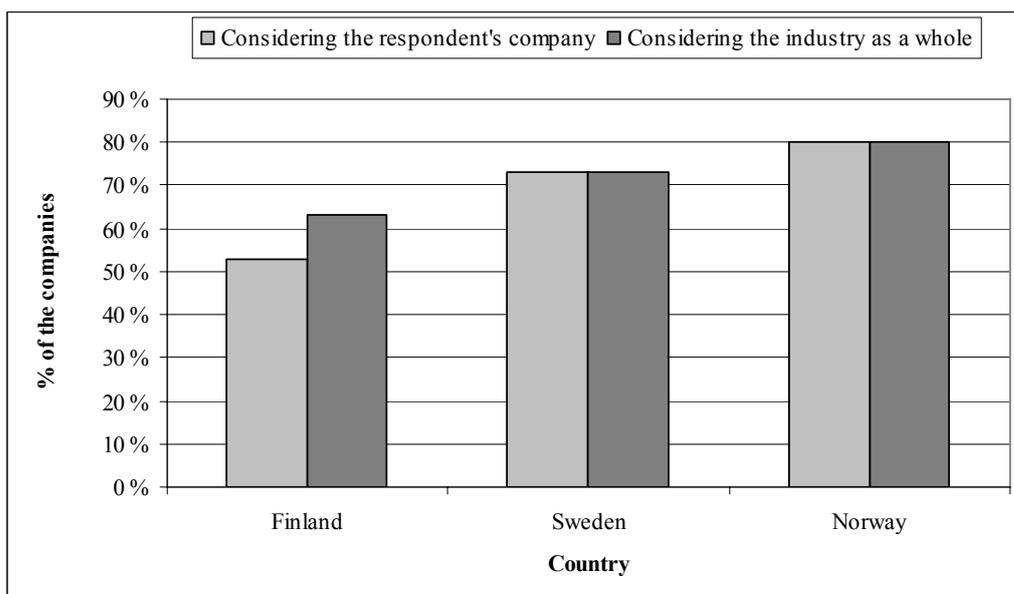


Figure 21. The number of companies that find the proposed Nordic wild berry brand important.

We then asked the respondents to consider whether their company would be interested in using the proposed brand as a part of their own marketing activities if the brand was to be introduced to the market. As a result, about half of the respondents state that they are interested. 20 per cent are not very or at all interested in using it, and about 30 per cent do not have an opinion on the matter. The concept receives the highest rating among the larger companies. Two thirds of the largest companies are either very interested or quite interested in using the brand in the future, whereas the figure for the smallest companies remains at 40 per cent (Fig. 22).

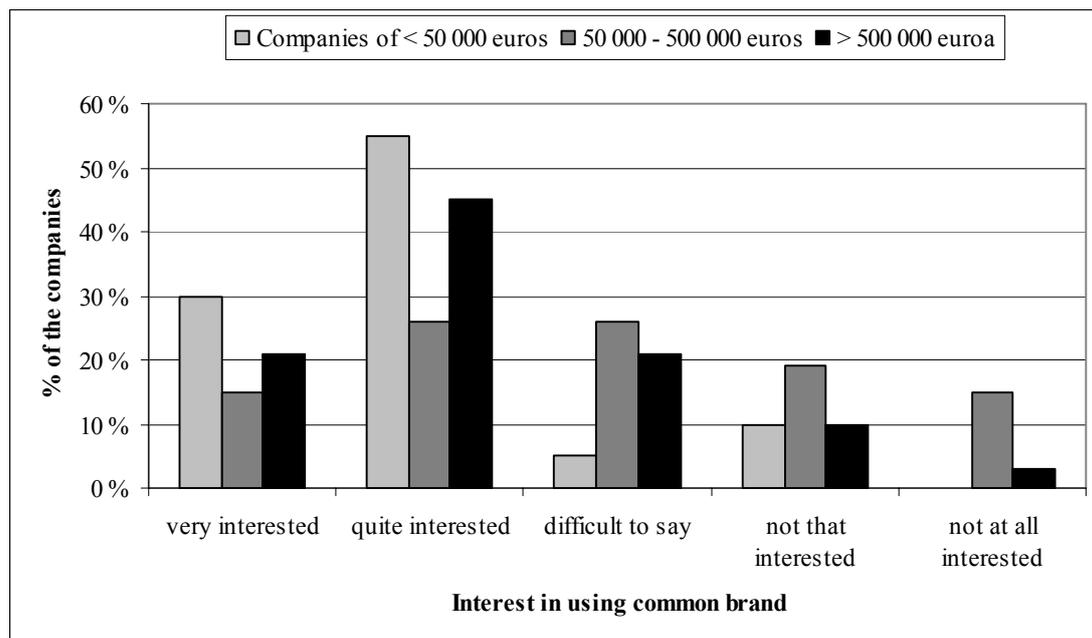


Figure 22. Companies' interest in using the proposed Nordic wild berry brand.

### Varying opinions about the possible benefits of branding

We asked the respondents to give their general opinion about the Nordic wild berry brand initiative and also about the things that should be considered when developing the concept. The open answers include both positive and skeptical views. Many companies wonder if there really is a need for this kind of branding. They argue that there are already a lot of different labels and that consumers especially do not necessarily see the difference anymore. Moreover, these sorts of joint labels can be overshadowed by actual product labels and strong brands. In Finland, for example, products made of domestic ingredients can apply for a special label that is already very well established among consumers, and many of the respondents think that the existing label will do. The following quotes reflect such opinions.

*What good would the brand do? We have to remember that we live in a world full of different labels that are not as strong from the consumer point of view as many of the company brands.*

*We already have the domestic label. The berry brand should not interfere with that.*

*We can already use the domestic label. And it is already a jungle with all the different labels - can the consumers keep up with them? Rules for using, auditing etc.*

The companies list a number of things to be considered when the concept is developed further. Some quotes are given below.

*Minimizing the chance of misuse.*

*I've come across some suspicion towards berries imported from Russia. The label should somehow deal with this issue.*

*The label should go with all the different packages (size, color, etc.)*

*Auditing and promoting.*

*EU laws, costs, promoting, the image, the brand should only be granted to 100 % Nordic products, applicability for different products.*

*Differences between the substances of the different species.*

*Find out whether the customer companies are interested in this.*

*How the berries have been picked, who picked them, no additives used.*

*The label is ok, if it is mainly a quality label. "The selected wild berries from the North".*

### **3.7 Joint exhibition stands**

Exhibitions are a good way of making new customer contacts and to strengthen existing ones. Cooperation with other companies may make the practical arrangements more convenient. For example, the Finnish wild berry companies have in recent years set up a joint Finnish stand at an international professional exhibition in Tokyo, Japan, and the concept has worked very well for the companies. Both small and large

companies have been involved. Similar cooperation could be worthwhile also closer to the home market.

About a half of the respondents of this study think that exhibitions in general are a very or quite important way of marketing their company products. The remaining half either find it not that important or consider the question difficult to answer. The smaller companies think the most of the exhibitions; about 40 per cent of the smallest companies find them a very important way of marketing. The corresponding figure for the largest companies is less than 10 per cent. Nonetheless, about 40 per cent of even the largest companies find exhibitions at least quite important.

We asked the respondents to estimate how interested their companies would be to participate in setting up a joint exhibition stand with other domestic wild berry companies, on the one hand, and with other Nordic companies, on the other hand. The results imply that there is potential for cooperation in both cases. As may have been expected, the willingness to cooperate with domestic companies is a bit higher than with companies from other Nordic countries. The domestic cooperation is of a lot of interest to 13 per cent of the companies and of some interest to 35 per cent, which add up to about half of the companies being interested. About 20 per cent are not especially interested, and about 16 per cent are not at all interested. As for Nordic cooperation on this issue, about one third of the companies are either very or quite interested, another third can either not comment or is not very interested and up to one third will have nothing to do with such arrangements. These results are illustrated in figure 23.

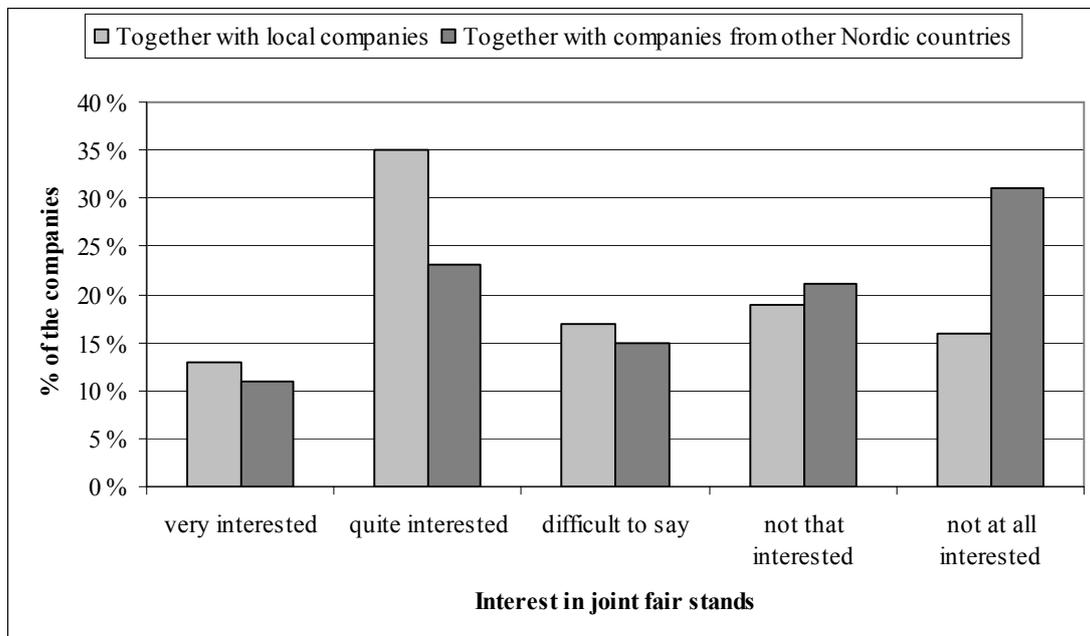


Figure 23. Companies' interest towards joint exhibition stands.

We also asked the companies for closer views on setting up joint exhibition stands or booths. The opinions and experiences seem to differ quite a lot between the companies. Some have already been involved in such cooperation and have been very pleased with the concept. Then again, some have had bad experiences and do not want to go for it again. Most of the companies seem to agree on one thing: especially for the smaller companies, participating in an exhibition is a lot of work and not very cheap, either, whether the event is held in their home country or in another part of the world. We have gathered some quotes of the answers below, both positive and negative.

*A joint stand will make a more credible impression. The companies will need to really work together, though, to make it happen.*

*This is good, and lowers the costs for an individual participant. The costs today are really high, and many pass on the events because of that.*

*Expensive and a huge amount of work, definitely together with others.*

*We've done this on several occasions. A good deal for small companies.*

*The stands are expensive for a small company, and the benefits often fall behind. There would be a lot of development work to be done here.*

*A joint stand is not necessarily the best way, with other similar companies marketing similar products at the same stand.*

When asked to mention some exhibitions and other events where the companies could consider joining together with others, the respondents name both Nordic and international events. There are some examples below.

*Japan, China, Gastro, etc.*

*Anuga, Sial*

*All the largest ones, both home and in Europe*

*Elma*

*Some international drink and beverage exhibitions would be nice*

*Food fairs? Christmas fairs? Archipelago fairs?*

*Asia, USA, etc.*

*VinoNordic*

### 3.8 Cultivating *Vaccinium myrtillus*

The cultivated blueberries have been a success story in North America where the industry has a long tradition in the field. There have been some experiments also in the Nordic countries to develop methods for cultivating wild bilberries. The potential advantages could include the convenience of harvesting berries and wider possibilities for controlling crops. Consequently, it has been considered one option in bringing relief to the raw material shortage and increasing volumes on the world market in the future.

As the last topic of our study, we wanted to seize the opportunity and ask the companies about cultivating bilberries. We asked the companies' opinions on the concept in general as well as on their interest in perhaps cultivating bilberries or utilizing them in their production in the future. The concept divides opinions. About 20 per cent think that it is not at all important or not very important to develop methods for cultivating wild bilberries, and about 30 per cent do not want to take a stand on the issue. Another 30 per cent, on the other hand, are somewhat in favour of the idea, and the remaining 20 per cent think it is very important to give it a go. The results are presented in figure 24.

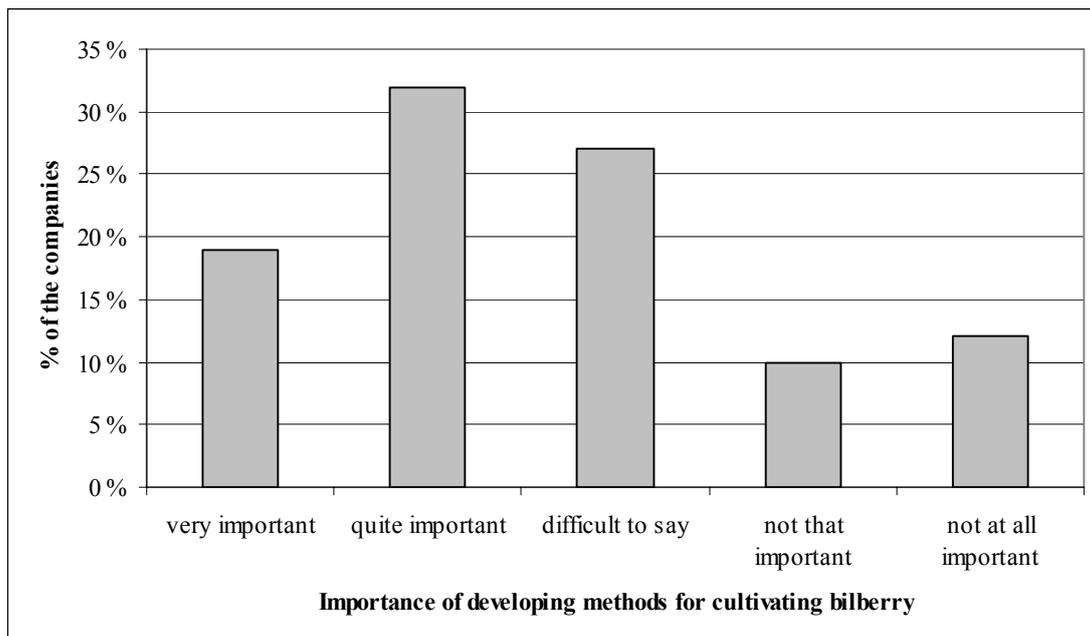


Figure 24. Views on the importance of developing cultivation methods for bilberry.

Some of the respondents are willing to cultivate bilberries themselves. About 15 per cent of them state that they are very interested in it, and another 10 per cent are quite interested. For most of the companies, the question is not even relevant. About 60 per cent are not very or at all interested, and the rest do not provide an answer. When it comes to buying cultivated bilberries for commercial purposes, over 40 per cent of the companies state their willingness to do so. About 25 per cent do not have an opinion,

and about 35 per cent are not very or at all interested. Some opinions about the concept are presented below.

*Important in the future, if wild bilberries keep flowing to other uses, the food industry will need a substitute at a reasonable price.*

*This should be worked on, the bilberries are very healthy and can be utilized for many purposes. There would be a solid demand for such a product.*

*Experience on, for example, raspberries shows that cultivated berries will often have a milder taste to them than wild ones. We believe the cultivated berries would be of lower quality than the wild berries. This would make it harder to speak for the Nordic quality compared with the North American berries.*

*Effects on the health compounds?*

*Will the quality be at the same level with the wild berries? Maybe this could make it easier and less expensive to get bilberries.*

*Most of the berries are already left behind in the forests. We are mainly interested in improving that.*

*The best quality berries are already there in the forests, without expenses for setting up huge systems. More pickers to the wilderness, that's where the real treasure is.*

*Forest berries should be picked in the forest.*

## 4 CONCLUSIONS

In this chapter, we will conclude the study by taking one more look at each of the issues discussed and by briefly raising some related issues. The main aim of the study was to explore the willingness among the wild berry companies in the Nordic countries to work more closely together on some of their common challenges. At the same time, we acquired a fairly comprehensive and realistic view of how much sense some of these initiatives would actually make for the people working with the issues every day. What is more, we shed some new light on the overall structure of the wild berry business in the area.

One of the starting points for this study was to find out how people in the wild berry industry feel about the proposed concept of the Nordic wild berry brand or label that might be useful for marketing purposes, especially on the international scene but also locally. We found out that most of the respondents are in favour of the concept and find it important both for themselves and for the industry at large. Especially the smallest and largest companies support the concept. For the smaller ones, the willingness probably originates in a desire to get a boost for marketing their own products with the support of a common quality label, possibly recognized by consumers. The large companies may have a similar desire but more on the international level. If introduced and cleverly promoted, the brand could give the Nordic industry a lift by sending a unified signal to customers. The brand would speak for clean, pure and high-quality products from the northern wilderness. The results of the present study show that Nordic representatives of the industry support the development of the brand. The companies brought up some valuable views on what should be considered when developing the concept. This is of course only one point of view. The opinions of customers - both private consumers and industrial customers - should also be heard.

Another issue that is actually intertwined with the proposed wild berry brand seems worth considering. That is the traceability and origins of Nordic wild berries. Previous surveys have revealed a need for more effort in this field. The results gained in this study similarly imply that the quality of different systems used for this purpose varies a lot and that not all companies pay much attention to the issue. It should be mentioned, however, that a majority of the companies take good care of this. The companies in general are in favour of creating a common traceability system for the Nordic countries, and a simple document form would perhaps suffice at the beginning.

The thought of joining forces with other wild berry companies in order to develop novel berry products also received support from the companies. It was considered

important and, especially for the smallest companies, beneficial for all the parties concerned. Other studies have shown that because the function of product development is rather far away from the end customer, competing companies can pursue it together and still be able make their own interpretations of the results and keep competing at the customer end. For example, companies can introduce different products to the market, aimed at different groups of customers, and no one will even notice that at some point on the way the companies have been working on the products together. As the respondents in this study also emphasized, such collaboration will require strong mutual trust and also well-defined contracts between the participants to avoid critical conflicts. Some minor conflicts will probably arise in any case due to the competitive setting. Many of the companies involved in this study are actually already engaged in some types of collaboration in this regard.

Another issue discussed in this study is the wild berry logistics, that is, the transportation, freezing and storing of berries and processed products. These things were approached in this study from two different angles. On the one hand, we tried to find possibilities for connecting companies with a need for more capacity to other companies with capacity to spare. On the other hand, we suggested the possibility for the companies to combine their resources in order to reach a common goal in this regard. The first angle seems, based on the results we reached, more difficult to implement. This is due to the fact that only a few of the respondents reported extra capacity in any of the three logistical functions. The need for more capacity is even greater than we expected. The latter angle looks more promising as many of the companies find the thought of joint resources a very appealing concept even though it may take some effort to get such an arrangement up and running.

Together with the proposed Nordic wild berry brand, another issue handled in this study that has to do with marketing was setting up joint exhibition stands together with fellow companies. Many of the respondents already had some good experiences on this, and the concept was believed to be of benefit especially for the smaller companies. What divided the respondents' opinions to a greater extent was whether different exhibitions in general are an efficient way of marketing one's products. This may not be the case for all of the different companies involved in this study, but the people who were in favour of representing at such events also found it a good idea to do so together with other companies in order to save time, effort and money.

The last issue discussed in this study was the potential concept of cultivating the wild bilberries for commercial purposes in the future. In the Nordic countries, there have been some initiatives on this, but the work is still in its infancy. In this regard, a tentative study on the relevance and market potential for the concept was conducted at an early stage. To sum it up, some companies thought it is a brilliant idea and that a lot effort should be put into it, whereas some thought it is nonsense with all the wild berries in the forests already.

All in all, the Nordic wild berry companies seem to be interested in cooperating with each other on several common issues. Also the discussions in the Nordic Wild Berry seminar held at Oulu, Finland in November 2008 lead to the same indication. However, the fact that a company shows green light to the concept of collaboration in survey may not necessarily result in setting up an actual joint effort with another company in the real world. Having said that, we would like to emphasize that there seems to be a lot of potential for tightening the Nordic wild berry network and for working together both within and across the country borders.

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**KYSELY MUSTIKKAA HYÖDYNTÄVILLE YRITYKSILLE**

Hyvä vastaanottaja,

Lähetämme teille ohessa kyselylomakkeen, joka on suunnattu mustikkaa hyödyntäville yrityksille ja yrittäjille. Tarkoituksemme on kerätä tietoa mustikan parissa toimivista yrityksistä sekä näiden mielipiteistä toimialan tulevaisuuden suuntiin liittyen. Tietojen avulla pyritään vahvistamaan pohjoisen marja-alan kilpailukykyä. Kysely on postitettu pohjoismaisille yrityksille, jotka esikartoituksemme perusteella ovat tekemisissä mustikoiden kanssa. Kyselyn vastaajajoukko on tarkasti rajattu, minkä vuoksi juuri teidän vastauksenne ovat tärkeitä.

Kyselyyn vastaaminen vie arviolta 10–20 minuuttia. Toivomme, että vastaisitte kyselyyn kahden viikon kuluessa. Esittelemme kyselyn tulokset 6.–7. 11.2008 Oulussa järjestettävässä luonnonmarjojen hyödyntämistä edistävässä marjaseminaarissa sekä samaan aikaan julkaistavassa raportissa. Käsittelemme vastaukset ehdottoman luottamuksellisesti, eikä julkaistavista tuloksista voida erottaa yksittäisten yritysten vastauksia.

Kysely liittyy mustikan kaupallista hyödyntämistä käsittelevään tutkimushankkeeseen, jota koordinoi Oulun yliopiston Biologian laitos. Hankkeeseen osallistuu joukko pohjoismaisia korkeakouluja ja tutkimuslaitoksia. Hanketta rahoittaa Pohjoismaiden neuvoston alaisena toimiva Nordic Innovation Center, jonka New Nordic Food -ohjelmaan hanke kuuluu. Lisätietoa hankkeestamme löydätte verkkosivuiltamme osoitteesta <http://www.oulu.fi/nordicbilberry>.

**VASTAUSOHJEITA**

1. Koska kysely on postitettu suurelle joukolle yrityksiä, kaikki kysymykset eivät koske jokaista yritystä samalla tavalla. Jos joku kysymyksistä ei mielestänne koske yritystänne, voitte jättää vastaamatta siihen ja siirtyä seuraavaan.
2. Rastittakaa oikeaa vaihtoehtoa vastaava ruutu tai ympyröikää omaa näkemystänne parhaiten kuvaavan vaihtoehdon numero. Avoimissa kysymyksissä kirjoittakaa vastauksenne niille varatuille viivoille.
3. Voitte halutessanne vastata kyselyyn myös nimettömänä. Täyttäkää tällöin lomakkeen alussa kysytyt yrityksen taustatiedot, ja jättäkää vain lopussa kysytyt yhteystiedot täyttämättä, sillä tarvitsemme taustatiedot vastausten tilastollisen käsittelyn tueksi.
4. Yhteystietonsa jättäneille toimitamme jatkossa tietoa sekä tämän kyselyn että muiden mustikkahankkeeseen liittyvien tutkimusten tuloksista. Lisäksi tietoja voidaan halutessanne käyttää kontaktien luomiseen yhteistyöstä kiinnostuneiden yritysten välille. Kysymme suostumustanne näihin asioihin lomakkeen lopussa.
5. Täytetty lomake palautetaan oheisessa palautuskuoreessa. Postimaksu on maksettu puolestanne.
6. Voitte halutessanne vastata kyselyyn myös kätevästi verkossa osoitteessa <http://www.oulu.fi/nordicbilberry/kysely>

Kiitos vastauksistanne!

Ystävällisin terveisin,

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## Taustatietoja yrityksenne toiminnasta

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Yrityksenne päätoimiala

Mahdollisia muita toimialoja, joilla yrityksenne toimii

Yrityksenne henkilöstömäärä

ympäri vuoden

1 - 2

3 - 5

6 - 20

21 - 50

yli 50

sesonkiaikana

1 - 2

3 - 5

6 - 20

21 - 50

yli 50

Yrityksenne liikevaihto

alle 20 000 €

20 000 - 50 000 €

50 000 - 100 000 €

100 000 - 500 000 €

500 000 - 1 000 000 €

yli 1 000 000 €

Kuinka suuri osa liikevaihdosta liittyy marjoihin tai niitä sisältäviin tuotteisiin?

alle 20 prosenttia

20 - 40 prosenttia

40 - 60 prosenttia

60 - 80 prosenttia

yli 80 prosenttia

Mitä seuraavista toiminnoista yrityksenne harjoittaa? Valitkaa sopivat vaihtoehdot ja arvioikaa kilomäärät.

ostaa mustikkaa suoraan poimijoilta

n. .... kiloa vuodessa

hankkii mustikkaa kotimaisilta yrityksiltä

n. .... kiloa vuodessa

hankkii mustikkaa ulkomaisilta yrityksiltä

n. .... kiloa vuodessa

myy tuoretta tai pakastettua mustikkaa kotimaassa

n. .... kiloa vuodessa

vie tuoretta tai pakastettua mustikkaa ulkomaille

n. .... kiloa vuodessa

myy mustikasta jalostettuja tuotteita kotimaassa

vie mustikasta jalostettuja tuotteita ulkomaille

harjoittaa muuta marjoihin liittyvää toimintaa, mitä?

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Vapaamuotoinen kuvaus yrityksenne toiminnasta

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Millaisia tuotteita yrityksenne valmistaa mustikasta?

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Merkitkää yrityksellenne tärkein markkina-alue numerolla 1, toiseksi tärkein numerolla 2 jne. Jos yrityksenne ei toimi jollakin alueista, merkitkää numero 0.

..... maakunnalliset markkinat

..... kotimaanmarkkinat

..... pohjoismaiset markkinat

..... Euroopan markkinat

..... maailmanmarkkinat

Mitä muita marjoja ja luonnontuotteita yrityksenne hyödyntää mustikan ohella?

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# 1. Marjojen talteenotto

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Vaikka mustikkaa ja muita luonnonmarjoja hyödynnetään Pohjoismaissa kaupallisesti miljoonia kiloja, tulee arvioiden mukaan vain noin 2–5 prosenttia koko sadosta poimituksi talteen. Mustikan ja esimerkiksi variksenmarjan kohdalla marjaa ei nykyisellään saada talteen riittävästi, vaan kysyntä ylittää maailmalla tarjonnan. Marjojen talteenottoa on pyritty tehostamaan organisoimalla metsiin ulkomaisia marjanpoimijoita, mikä on aiheuttanut voimakasta keskustelua sekä puolesta että vastaan.

---

Onko yrityksellänne ollut vaikeuksia saada käyttöönsä riittävä määrä luonnonmarjoja?

- 1 kyllä
- 2 ei

Mistä mahdolliset vaikeudet ovat mielestänne johtuneet?

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Pidättekö luonnonmarjojen talteenoton lisäämistä Pohjoismaissa tärkeänä asiana?

- 1 hyvin tärkeänä
- 2 melko tärkeänä
- 3 vaikea sanoa
- 4 melko vähän tärkeänä
- 5 en ollenkaan tärkeänä

Tulisiko ulkomaisten marjanpoimijoiden määrää nähdäksenne lisätä vai vähentää?

- 1 lisätä nopeasti
  - 2 lisätä vähitellen
  - 3 vaikea sanoa
  - 4 vähentää vähitellen
  - 5 vähentää nopeasti
- 

Millaisin keinoin luonnonmarjojen talteenottoa voitaisiin mielestänne lisätä?

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Voitaisiinko marjojen talteenottoa mielestänne lisätä alan yritysten välisten yhteistyön avulla? Miten?

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### 3. Jalostusaste

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Mustikan ja muiden luonnonmarjojen jalostusaste on Suomessa ja muissa Pohjoismaissa keskimäärin varsin matala. Suuri osa arvokkaista marjoista poistuu maailmalle pakastettuna raaka-aineena ja pienellä katteella, ei pitkälle jalostettuina tuotteina. Tuotekehitystä tulisi kannattavuuden nimissä lisätä, mutta se koetaan usein kalliiksi, aikaavieväksi ja riskiseksi. Monella toimialalla yritykset ovat suunnitelleet uusia tuotteita yhdessä, jolloin käytettävissä on suuremmat resurssit ja riskit ovat pienemmät.

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Pidättekö luonnonmarjojen jalostusasteen nostamista Pohjoismaissa tärkeänä asiana?

- 1 hyvin tärkeänä
- 2 melko tärkeänä
- 3 vaikea sanoa
- 4 melko vähän tärkeänä
- 5 en ollenkaan tärkeänä

Onko yrityksenne aikeissa lisätä marjojen jalostusta?

- 1 kyllä
- 2 ei

Jos, niin millaisella aikataululla?

- 1 vuoden kuluessa
  - 2 myöhemmin
- 

Millaiset asiat voisivat mielestänne lisätä marjojen jatkojalostusta kotimaassa?

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Pidättekö metsämarja-alan yritysten välisen tuotekehitysyhteistyön lisäämistä tärkeänä asiana

- 1 hyvin tärkeänä
- 2 melko tärkeänä
- 3 vaikea sanoa
- 4 melko vähän tärkeänä
- 5 en ollenkaan tärkeänä

Onko yrityksenne kiinnostunut tällaisesta yhteistyöstä

- | a) kotimaassa?           | b) Pohjoismaissa?        |
|--------------------------|--------------------------|
| 1 hyvin kiinnostunut     | 1 hyvin kiinnostunut     |
| 2 melko kiinnostunut     | 2 melko kiinnostunut     |
| 3 vaikea sanoa           | 3 vaikea sanoa           |
| 4 melko vähän kiinnost.  | 4 melko vähän kiinnost.  |
| 5 ei ollenkaan kiinnost. | 5 ei ollenkaan kiinnost. |
- 

Mitä mieltä olette tuotekehitysyhteistyön tekemisestä muiden yritysten kanssa?

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## 4. Alkuperä ja jäljitettävyys

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Pohjoismainen mustikka kilpailee maailmalla muun muassa amerikkalaisen pensasmustikan kanssa, jota on markkinoilla tarjolla yli kymmenkertainen määrä kotoiseen mustikkaamme verrattuna. Eri mustikkalajit muistuttavat toisiaan, mutta mm. ravintoarvoiltaan metsissä kasvava mustikka peittoaa pensaissa viljeltävän serkkunsa. Koko toimialan kannalta olisi järkevää tuoda nämä erot selkeämmin esille. Näin saataisiin mustikkamme puhtaus, laatu ja terveysvaikutukset näkymään myös alan kotimaisten ja pohjoismaisten yritysten katteissa.

Ensimmäinen askel olisi varmistaa, että tieto marjojen alkuperästä ei katoa markkinoilla. Tällä hetkellä luonnonmustikan tai villin mustikan nimellä liikkuu maailmalla paljon muitakin marjoja, esimerkiksi juuri viljeltyä pensasmustikkaa. Lisäksi esimerkiksi Kiinassa valmistetaan jo selkeitä "piraattituotteita" luonnonmustikasta. Tällaisten tuotteiden pakkauksissa luonnonmustikan tieteellinen nimi *Vaccinium myrtillus* liitetään parempien tuotteiden toivossa muihin, vähemmän suosittuihin marjalajeihin. Jäljitettävyyttä voitaisiin parantaa ottamalla kaikissa Pohjoismaissa käyttöön yhteinen ostolomake, jonka avulla tieto marjojen alkuperästä kulkee yritykseltä toiselle läpi tuotantoketjun. Tietoa voitaisiin sitten hyödyntää tuotteiden markkinoinnissa.

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Millä tavoin yrityksessänne tällä hetkellä seurataan mustikan alkuperää?

- Eviran ja Arktisten Aromien laatiman ostolomakkeen avulla
- Ei seurata systemaattisesti
- Seurataan muulla tavoin. Miten?

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Pidätkö pohjoismaisen mustikan jäljitettävyysparantamista tärkeänä asiana?

- 1 hyvin tärkeänä
- 2 melko tärkeänä
- 3 vaikea sanoa
- 4 melko vähän tärkeänä
- 5 en ollenkaan tärkeänä

Olisiko yhtenäisen ostolomakkeen käyttöönotto mielestänne tehokas tapa parantaa jäljitettävyyttä?

- 1 hyvin tehokas
- 2 melko tehokas
- 3 vaikea sanoa
- 4 melko tehoton
- 5 täysin tehoton

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Mitä mieltä olette pohjoismaisille marjaa käsitteleville yrityksille yhteisen ostolomakkeen käyttöönotosta?

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Mitä mieltä olette Eviran ja Arktisten Aromien laatimasta ostolomakkeesta, mikäli olette sitä käyttäneet?



## 6. Yhteiset messuosastot

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Messut ovat tehokas tapa saada uusia kontakteja asiakkaisiin sekä vahvistaa jo olemassa olevia suhteita. Yhteistyö muiden yritysten kanssa saattaa helpottaa osallistumista käytännön järjestelyissä. Suomalaiset yritykset ovat viime vuosina pystyttäneet Japanissa järjestettävillä terveystuotteiden elintarvikkeiden messuille Suomi-osaston, josta on saatu kiitosta ja hyviä kokemuksia. Mukana on ollut sekä suurempia että pienempiä yrityksiä. Vastaava yhteistyö olisi mahdollista myös pienemmillä messuilla lähempänä kotimarkkinoita.

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Pidättekö messuedustamista tärkeänä markkinointikeinona?

- 1 hyvin tärkeänä
- 2 melko tärkeänä
- 3 vaikea sanoa
- 4 melko vähän tärkeänä
- 5 en ollenkaan tärkeänä

Onko yrityksenne kiinnostunut ottamaan osaa yhteisiin messuosastoihin muiden yritysten kanssa

- |                          |                           |
|--------------------------|---------------------------|
| a) kotimaisten kanssa?   | b) pohjoismaisten kanssa? |
| 1 hyvin kiinnostunut     | 1 hyvin kiinnostunut      |
| 2 melko kiinnostunut     | 2 melko kiinnostunut      |
| 3 vaikea sanoa           | 3 vaikea sanoa            |
| 4 melko vähän kiinnost.  | 4 melko vähän kiinnost.   |
| 5 ei ollenkaan kiinnost. | 5 ei ollenkaan kiinnost.  |

Onko tiettyjä messuja, joille yrityksenne olisi halukas osallistumaan yhdessä muiden yritysten kanssa?

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Mitä mieltä olette yhteisten messuosastojen pystyttämisestä ja muusta messuihin liittyvästä yhteistyöstä?

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## 7. Mustikan peltoviljely

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Mustikan peltoviljely on ollut menestystarina Pohjois-Amerikassa, jossa etenkin sikäläistä pensasmustikkaa on viljelty jo pitkään. Myös Pohjoismaissa on kehitetty menetelmiä kotoisen mustikkamme (*vaccinium myrtillus*) peltoviljelylle. Viljelyn marjan tärkeimpiä etuja luonnossa kasvavaan verrattuna on poiminnan vaivattomuus sekä mahdollisuudet kontrolloida saatavaa marjasatoa. Siksi sitä on pidetty yhtenä mahdollisista keinoista helpottaa yritysten marjansaantia ja kasvattaa pohjoismaisen mustikan volyymeja maailmanmarkkinoilla.

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Onko yrityksenne kiinnostunut viljelemään luonnossa esiintyvää mustikkaa tulevaisuudessa?

- 1 hyvin kiinnostunut
- 2 melko kiinnostunut
- 3 vaikea sanoa
- 4 melko vähän kiinnostunut
- 5 ei ollenkaan kiinnostunut

Onko yrityksenne kiinnostunut ostamaan kotimaista viljeltyä mustikkaa tulevaisuudessa?

- 1 hyvin kiinnostunut
- 2 melko kiinnostunut
- 3 vaikea sanoa
- 4 melko vähän kiinnostunut
- 5 ei ollenkaan kiinnostunut

Pidättekö mustikan peltoviljelyn kehittämistä tärkeänä?

- 1 hyvin tärkeänä
- 2 melko tärkeänä
- 3 vaikea sanoa
- 4 melko vähän tärkeänä
- 5 en ollenkaan tärkeänä

Mitä mieltä olette mustikan peltoviljelystä?

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**ENKÄT TILL FÖRETAG SOM UTNYTTJAR NORDISKA BLÅBÄR**

Bästa mottagare,

Bifogat tillsammans med detta introduktionsbrev finns ett frågeformulär. Formuläret är riktat till nordiska företag och företagare som utnyttjar vilda bär och speciellt blåbär i sin verksamhet. Syftet är att kartlägga den nordiska skogsbärbranschen och fråga efter åsikter angående branschens framtid. Informationen kommer att användas till att förbättra konkurrensförmågan hos den nordiska skogsbärbranschen. Formuläret har tillställts de nordiska företag som bedriver handel med skogsbär eller på annat sätt nyttjar skogsbär i sin verksamhet. Om det här stämmer in på ert företag, önskar vi svar från just er.

Det tar ungefär 15 minuter att svara på frågorna och vi hoppas att ni kan svara inom två veckor. Resultatet kommer att presenteras vid ett seminarium i Uleåborg den 6–7 november 2008 samt i en rapport som kommer att publiceras vid samma tillfälle. Svaren behandlas konfidentiellt och inget enskilt företag kommer att kunna identifieras bland resultaten.

Enkäten är en del av ett regionalt nordiskt projekt som handlar om blåbär ur ett kommersiellt och biologiskt perspektiv. Projektet koordineras av Uleåborgs universitet tillsammans med flera nordiska universitet och forskningsinstitutioner. Projektet finansieras av programmet New Nordic Food hos Nordisk Innovations Center, som i sin tur agerar under det Nordiska ministerrådet. Mer information hittar ni på projektets webbsidor i <http://www oulu.fi/nordicbilberry>.

**ANVISNINGAR**

1. Enkäten har tillställts ett stort antal företag, och till följd av detta gäller inte alla frågor alla företag på samma sätt. Känner ni att någon fråga inte gäller ert företag, kan ni låta bli den och gå vidare med formuläret.
2. Vid flervalfrågor, välj den rätta alternativ eller alternativet som bäst motsvarar er uppfattning. Vid öppna frågor, skriv era svar på linjerna.
3. Vill ni svara enkäten anonymt, kan ni göra det. I det här fallet låt bli den sista sidan av formuläret. Den första sidan med bakgrundsinformation om ert företag är i stället obligatorisk, eftersom informationen behövs för att kunna analysera resultatet.
4. Vi kommer att informera alla svarandena, som har lämnat sin kontaktinformation, om resultatet av både den här enkäten och andra forskning som ingår i projektet. Ytterligare kan kontakterna användas till att föra samman företag med gemensamma intressen. Vi frågar om ert samtycke till detta nätverksbyggande på sista sidan av formuläret.
5. Ni svarar portofritt med hjälp av bifogat returkuvertet.
6. Vill ni besvara enkäten på nätet, går det bra via <http://www oulu.fi/nordicbilberry/enkat>

Vi tackar er för era svar!

Med vänlig hälsning,

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[mika.paasilta@oulu.fi](mailto:mika.paasilta@oulu.fi)

## Bakgrundsinformation om ert företag

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Företagets huvudsakliga bransch

.....

Andra branscher

.....

.....

.....

Antal personal

Året om

1 - 2

3 - 5

6 - 20

21 - 50

över 50

Under säsongstid

1 - 2

3 - 5

6 - 20

21 - 50

över 50

Omsättning

under 200 000 kr

200 000 - 500 000 kr

500 000 - 1 000 000 kr

1 000 000 - 5 000 000 kr

5 000 000 - 10 000 000 kr

över 10 000 000 kr

Hur många procent av omsättningen kommer från skogsbär eller varor innehållandes skogsbär?

under 20 procent

20 - 40 procent

40 - 60 procent

60 - 80 procent

över 80 procent

---

Vilka av följande funktioner bedriver ert företag? Välj passande alternativ och ange mängden.

anskaffar blåbär från plockare

ca. .... kilo per år

anskaffar blåbär från andra inhemska företag

ca. .... kilo per år

anskaffar blåbär från utländska företag

ca. .... kilo per år

säljer färska eller frysta blåbär i hemlandet

ca. .... kilo per år

exporterar färska eller frysta blåbär

ca. .... kilo per år

säljer varor med blåbär i dem i hemlandet

exporterar varor med blåbär i dem

bedriver något annat som har med blåbär att göra. Vad?

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En fri beskrivning av företagets verksamhet:

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Vilka av era produkter innehåller blåbär?

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Markera det viktigaste marknadsområdet för ert företag med nummer 1, det näst viktigast med nummer 2 osv.

Om något alternativ inte gäller er, markera det med en 0.

..... landskapet

..... hemlandet

..... de nordiska länderna

..... Europa

..... världsmarknaden

Vilka andra bär och naturprodukter använder ni?

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# 1. Bärplockning

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Även om man plockar miljoner kilon av blåbär och andra skogsbär i de nordiska länderna varje år, motsvarar det endast 2–5 procent av den totala bärproduktionen på nordisk skogsmark. När det gäller till exempel blåbär och kråkbär, är efterfrågan större än tillgången på världsmarknaden. I Sverige och Finland har skogsbärbranschen blivit beroende av utländska plockare.

---

Har det varit svårt för ert företag att anskaffa tillräckligt med skogsbär under de senaste åren?

- 1 Ja, det har det
- 2 Nej, det har det inte

Enligt er åsikt, vad är det som har orsakat de möjliga svårigheterna?

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Anser ni att det är viktigt att öka plockningen av skogsbär i de nordiska länderna?

- 1 mycket viktigt
- 2 ganska viktigt
- 3 svårt att säga
- 4 bara lite viktigt
- 5 inte alls viktigt

Borde man enligt er åsikt öka eller minska antalet utländska plockare i de nordiska länderna?

- 1 öka snabbt
  - 2 öka gradvis
  - 3 svårt att säga
  - 4 minska gradvis
  - 5 minska snabbt
- 

Hur skulle man enligt er åsikt kunna öka bärplockningen för att få in mer bär till företag?

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Skulle man enligt er åsikt kunna öka bärplockningen genom ett ökat samarbete mellan företag inom branschen? Hur?

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### 3. Förädlingsgrad

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Förädlingsgraden är relativt låg i skogsbranschen i de nordiska länderna. Största delen av våra värdefulla bär lämnar området som råvara för utländsk industri, inte som förädlade varor. För lönsamhetens skull borde man stegra produktutvecklingen och öka förädlingsgraden, men det anses ofta vara för kostsamt, riskabelt och långvarigt. I många branscher har företag utvecklat produkter och producerat dem i samarbete, vilket gör det lättare för ett enskilt företag att delta i sådana projekt.

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Anser ni att det är viktigt att öka förädlingsgraden i den nordiska skogsbranschen?

- 1 mycket viktigt
- 2 ganska viktigt
- 3 svårt att säga
- 4 bara lite viktigt
- 5 inte alls viktigt

Har ert företag som avsikt att öka förädlingen av bär?

- 1 Ja, det har vi
- 2 Nej, det har vi inte

När tänker ni göra det?

- 1 inom ett år
  - 2 senare
- 

Hurdana saker skulle enligt er åsikt kunna förbättra förädlingsgraden i Norden?

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Anser ni att det är viktigt för företag i skogsbranschen att samarbeta om produktutveckling?

- 1 mycket viktigt
- 2 ganska viktigt
- 3 svårt att säga
- 4 bara lite viktigt
- 5 inte alls viktigt

Intresserar ert företag sig i ett sådant samarbete

- |                         |                         |
|-------------------------|-------------------------|
| a) i hemlandet?         | b) samnordiskt?         |
| 1 mycket intresserad    | 1 mycket intresserad    |
| 2 ganska intresserad    | 2 ganska intresserad    |
| 3 svårt att säga        | 3 svårt att säga        |
| 4 bara lite intresserad | 4 bara lite intresserad |
| 5 inte alls intresserad | 5 inte alls intresserad |
- 

Vad tycker ni om samarbete när det gäller produktutveckling?

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## 4. Ursprung och spårbarhet

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Det nordiska blåbäret konkurrerar på världsmarknaden med bland annat det kultiverade amerikanska blåbäret. Det finns tio gånger mer av det amerikanska än det nordiska blåbäret på marknaden. De här olika arterna av blåbär liknar varandra till utseendet, men det finns många fördelar hos det vilda nordiska bäret, speciellt när det gäller näringsinnehåll. Det vore tillrådligt för den nordiska skogsbärbranschen och andra företag som utnyttjar bären att framhäva de här fördelarna för att kunna förbättra lönsamheten inom industrin.

Först och främst borde man försäkra sig om att informationen om bärens ursprung inte går vilse. För tillfället går en mängd olika bär under namnet vilda blåbär eller bilberry på marknaden, också kultiverade amerikanska blåbär. Spårbarheten skulle kunna förbättras genom att införa en inköpsblankett gemensam för alla nordiska företag i skogsbärbranschen. Med hjälp av inköpsblanketten skulle informationen om bärens ursprung följa med bären från ett företag till ett annat. Informationen kunde sedan utnyttjas i marknadsföringen av produkterna.

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På vilket sätt samlas information om blåbärs ursprung i ert företag?

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Anser ni att det är viktigt att förbättra spårbarheten av det nordiska blåbäret?

- 1 mycket viktigt
- 2 ganska viktigt
- 3 svårt att säga
- 4 bara lite viktigt
- 5 inte alls viktigt

Tror ni att en samnordisk inköpsblankett vore ett effektivt sätt att förbättra spårbarheten av blåbär?

- 1 mycket effektivt
- 2 ganska effektivt
- 3 svårt att säga
- 4 bara lite effektivt
- 5 inte alls effektivt

Är ert företag intresserat av att använda en samnordisk inköpsblankett för blåbär och andra skogsbär?

- 1 mycket intresserat
- 2 ganska intresserat
- 3 svårt att säga
- 4 bara lite intresserat
- 5 inte alls intresserat

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Vad tycker ni om idén att införa en samnordisk inköpsblankett?

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## 6. Gemensamma mässavdelningar

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Mässor är ett bra sätt att knyta nya kontakter med kunderna samt förstärka de nuvarande kontakterna. Att delta i mässor kan bli lättare när man gör det tillsammans med andra företag. Till exempel har några finska företag samarbetat för att bygga en gemensam avdelning på en stor mässa i Japan de senaste åren. Den finska avdelningen har varit mycket populär och företagen har varit nöjda med organiseringarna. Både större och mindre företag har varit med. Ett liknande samarbete skulle vara möjligt och nyttigt också på mindre mässor.

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Anser ni att det är viktigt att representera ert företag på olika mässor?

- 1 mycket viktigt
- 2 ganska viktigt
- 3 svårt att säga
- 4 bara lite viktigt
- 5 inte alls viktigt

Är ert företag intresserat av att delta i gemensamma mässavdelningar tillsammans med

- |                         |                         |
|-------------------------|-------------------------|
| a) svenska företag?     | b) nordiska företag?    |
| 1 mycket intresserat    | 1 mycket intresserat    |
| 2 ganska intresserat    | 2 ganska intresserat    |
| 3 svårt att säga        | 3 svårt att säga        |
| 4 bara lite intresserat | 4 bara lite intresserat |
| 5 inte alls intresserat | 5 inte alls intresserat |

Finns det några särskilda mässor ert företag skulle vilja samarbeta på?

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Vad tycker ni om att samarbeta på mässavdelningar och mässor överhuvudtaget?

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## 7. Kultivering av det vilda blåbäret

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Kultivering av blåbär har varit en succé i Nordamerika, där stora odlingar med amerikanska blåbärsbuskar har funnits redan länge. Även i Norden har man experimenterat med kultivering av det nordiska vilda blåbäret (*vaccinium myrtillus*) som normalt växer i skogarna. De kultiverade bären är lättare att plocka och det är lättare att kontrollera skörden. Det är ett alternativ när man överväger möjligheterna att hjälpa företag med att anskaffa mera bär och öka mängden av nordiska blåbär på världsmarknaden. I framtiden skulle den också kunna erbjuda extra näring för företagare.

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Är ert företag intresserat av att kultivera blåbär i framtiden?

- 1 mycket intresserat
- 2 ganska intresserat
- 3 svårt att säga
- 4 bara lite intresserat
- 5 inte alls intresserat

Är intresserat av att anskaffa kultiverade blåbär?

- 1 mycket intresserat
- 2 ganska intresserat
- 3 svårt att säga
- 4 bara lite intresserat
- 5 inte alls intresserat

Anser ni att det är viktigt att utveckla metoder i att kultivera det nordiska blåbäret?

- 1 mycket viktigt
- 2 ganska viktigt
- 3 svårt att säga
- 4 bara lite viktigt
- 5 inte alls viktigt

Vad tänker ni om kultiveringen av det nordiska blåbäret?

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**UNDERSØKELSE RETTET MOT BEDRIFTER SOM GJØR BRUK AV NORDISKE BLÅBÆR**

Vedlagt er et spørreskjema rettet mot nordiske bedrifter og bedriftsledere som bruker ville bær og spesielt blåbær i sin virksomhet. Formålet er å kartlegge den nordiske skogsbærbransjen og å få synspunkter på noen tema som berører bransjens framtid. Informasjonen skal brukes til å forbedre konkurranseevnen til den nordiske skogsbærbransjen. Spørreskjemaet er rettet mot nordiske bedrifter som driver handel med eller gjør bruk av skogsbær i Sverige, Finland, Norge, Danmark og på Island. Dersom dette gjelder din bedrift, ønsker vi å få svar fra deg.

Det tar ca 10-20 minutter å svare på spørsmålene. Vi håper du sender svarer i løpet av et par uker. Resultatet skal presenteres på et seminar i Oulu (Finland) 6-7/11 2008 samt i en rapport som publiseres på samme tid. Alle svar behandles konfidensielt og ingen enkeltbedrift vil kunne identifiseres blant svarene.

Undersøkelsen er en del av et fellesnordisk prosjekt om blåbær sett fra både en kommersiell og en biologisk synsvinkel. Prosjektet koordineres av universitetet i Oulu sammen med ei gruppe nordiske universiteter og forskningsinstitusjoner. Prosjektet finansieres av programmet New Nordic Food ved Nordisk InnovationsCenter, som i sin tur finansieres av Nordisk ministerråd. Mer informasjon kan du finne på prosjektets websider: <http://www oulu.fi/nordicbilberry>.

**RETTLEDNING**

1. Undersøkelsen blir sendt til et stort antall bedrifter og det er mulig at ikke alle spørsmål passer like bra til alle bedriftene. Dersom du synes noen av spørsmålene ikke passer for din bedrift, kan du hoppe over disse.
2. Ved flervalgsspørsmål ber vi deg om å velge det alternativet som etter din oppfatning passer best for din bedrift. Ved åpne spørsmål skrives svaret på linjene.
3. Dersom du ønsker å svare anonymt, kan du gjøre det ved å unnlate å svare på siste side av spørreskjemaet. Den første siden med bakgrunnsinformasjon om din bedrift, er det derimot viktig for oss å få besvart, fordi informasjonen er nødvendig for å kunne analysere resultatene.
4. Vi kommer til å informere alle innsenderne som fører på kontaktinformasjon, om resultatet av både denne undersøkelsen og annen forskning som inngår i prosjektet. I tillegg vil vi bruke kontaktinformasjonen til å opprette kontakt mellom berifter med felles interesser. Vi spør om ditt samtykke til dette på siste side av skjemaet.
5. Du kan sende skjemaet portofritt ved å bruke returkonvolutten som er vedlagt.
6. Dersom du ønsker å svare på undersøkelsen på nettet, kan du gå inn på: <http://www oulu.fi/nordicbilberry/undersokelse>

Tusen takk for ditt svar!

Med vennlig hilsen,

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## Bakgrunnsinformasjon om bedriften

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Bedriftens hovedbransje

Andre bransjer

Antall ansatte

Igjennom året

- 1 - 2
- 3 - 5
- 6 - 20
- 21 - 50
- over 50

I sesongen

- 1 - 2
- 3 - 5
- 6 - 20
- 21 - 50
- over 50

Omsetning

- Under 200 000 kr
- 200 000 - 500 000 kr
- 500 000 - 1 000 000 kr
- 1 000 000 - 5 000 000 kr
- 5 000 000 - 10 000 000 kr
- over 10 000 000 kr

Hvor mange prosent av omsetningen kommer fra skogsbær og produkter med skogsbær i?

- under 20 prosent
  - 20 - 40 prosent
  - 40 - 60 prosent
  - 60 - 80 prosent
  - over 80 prosent
- 

Hvilke av følgende gjør din bedrift? Velg passende alternativ og angi mengden.

- skaffer blåbær fra plukkere
- skaffer blåbær fra andre norske bedrifter
- skaffer blåbær fra utenlandske bedrifter
  
- selger ferske eller frosne blåbær i hjemlandet
- eksporterer ferske eller frosne blåbær
- selger varer med blåbær i dem i hjemlandet
- eksporterer varer med blåbær i
- gjør noe annet som har med blåbær å gjøre. Hva?

ca. .... kilo per år

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Fri beskrivelse av bedriftens virksomhet:

Marker det viktigste markedsområdet for din bedrift med 1, det nest viktigste med 2 osv. Om noe alternativ ikke er aktuelt, markeres det med 0.

- ..... Regionen
- ..... Hjemlandet
- ..... De nordiske landene
- ..... Europa
- ..... Verdensmarkedet

Hvilke av deres produkter inneholder blåbær?

Hvilke andre bær og naturprodukter bruker dere?

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# 1. Bærplukking

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Selv om det plukkes flere millioner kilo blåbær og andre skogsbær i de nordiske landene hvert år, tilsvarer det bare 2-5 prosent av den totale bærproduksjonen på nordisk skogsmark. Når det gjelder for eksempel blåbær og krøkebær, er etterspørselen større enn tilgangen på verdensmarkedet. I Sverige og Finland har skogsbærbransjen blitt avhengig av utenlandske plukkere.

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Har det vært vanskelig for din bedrift å skaffe tilstrekkelig med skogsbær de siste årene?

- 1 Ja, det har det
- 2 Nei, det har det ikke

Hva er det etter din mening som medfører vanskelighetene?

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Mener du det er viktig å øke plukking av skogsbær i de nordiske landene?

- 1 veldig viktig
- 2 ganske viktig
- 3 vanskelig å si
- 4 litt viktig
- 5 ikke viktig

Burde man etter din mening øke eller redusere antall utenlandske plukkere i de nordiske landene?

- 1 øke raskt
  - 2 øke gradvis
  - 3 vanskelig å si
  - 4 minske gradvis
  - 5 minske raskt
- 

Hvordan kan man etter din mening få til å øke bærplukkingen for å få mer bær til din bedrift?

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Kan man etter din mening klare å øke bærplukkingen gjennom å øke samarbeidet mellom bedrifter i bransjen? Hvordan?

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### 3. Videreforedling

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Graden av videreforedling er relativt lav i skogsbærbransjen i de nordiske landene. Mesteparten av våre verdifulle bær forlater området som råvarer for utenlandsk industri, ikke som videreforedelede produkter. For å øke lønnsomheten, burde man intensivere produktutviklingen og øke graden av videreforedling, men det anses ofte å være for kostbart, risikabelt og tidkrevende. I mange bransjer har bedrifter samarbeidet om utvikling og produksjon av produkter, noe som gjør det enklere for den enkelte bedrift å delta i slike prosjekter.

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Anser du det som viktig å øke graden av videreforedling i den nordiske skogsbærbransjen?

- 1 veldig viktig
- 2 ganske viktig
- 3 vanskelig å si
- 4 litt viktig
- 5 ikke viktig

Har din bedrift til hensikt å øke videreforedling av bær?

- 1 Ja, det har vi
- 2 Nei, det har vi ikke

Når tenker dere å gjøre det?

- 1 i løpet av ett år
  - 2 senere
- 

Hvordan kan man etter din mening øke graden av videreforedling in Norden?

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Mener du det er viktig for bedrifter i skogsbærbransjen å samarbeide om produktutvikling?

- 1 veldig viktig
- 2 ganske viktig
- 3 vanskelig å si
- 4 litt viktig
- 5 ikke viktig

Er din bedrift interessert i å delta i slikt samarbeid

- |                      |                      |
|----------------------|----------------------|
| a) i hjemlandet?     | b) samnordisk?       |
| 1 veldig interessert | 1 veldig interessert |
| 2 ganske interessert | 2 ganske interessert |
| 3 vanskelig å si     | 3 vanskelig å si     |
| 4 litt interessert   | 4 litt interessert   |
| 5 ikke interessert   | 5 ikke interessert   |
- 

Hva tenker du om samarbeid når det gjelder produktutvikling?

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## 4. Opprinnelse og sporbarhet

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Det nordiske blåbæret konkurrerer på verdensmarkedet med blant annet det kultiverte amerikanske blåbæret. Det finnes ti ganger mer av det amerikanske enn det nordiske blåbæret på markedet. Disse ulike sortene av blåbær ligner hverandre i utseende, men det finnes mange fordeler hos det ville nordiske bæret, spesielt når det gjelder næringsinnhold. Det foreslås overfor den nordiske skogsbærbransjen og andre bedrifter som gjør bruk av skogsbær, å fremheve disse fordelene for å kunne forbedre lønnsomheten i industrien.

Først og fremst burde man forsikre seg om at informasjon om bærenes opprinnelse kommer frem. I markedet finnes det for øyeblikket en rekke ulike bær med navnet blåbær eller bilberry, også kultiverte amerikanske blåbær. Sporbarheten burde kunne forbedres gjennom å innføre en felles innkjøpsblankett for alle nordiske bedrifter i skogsbærbransjen. Ved hjelp av innkjøpsblanketten kan informasjon om bærenes opprinnelse følge bærene fra en bedrift til den neste. Informasjonen kan så benyttes ved markedsføring av produktene.

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På hvilken måte samles informasjon om blåbærets opprinnelse i din bedrift?

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Anser du det som viktig å forbedre sporbarheten til det nordiske blåbæret?

- 1 veldig viktig
- 2 ganske viktig
- 3 vanskelig å si
- 4 litt viktig
- 5 ikke viktig

Tror du at en samnordisk innkjøpsblankett kan være en effektiv måte å forbedre sporbarheten av blåbær på?

- 1 veldig effektivt
- 2 ganske effektivt
- 3 vanskelig å si
- 4 bare litt effektivt
- 5 ikke effektivt

Er din bedrift interessert i å gjøre bruk av en samnordisk innkjøpsblankett for blåbær og andre skogsbær?

- 1 veldig interessert
- 2 ganske interessert
- 3 vanskelig å si
- 4 litt interessert
- 5 ikke interessert

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Hva tenker du om ideen om å innføre en samnordisk innkjøpsblankett?

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## 6. Felles deltagelse på messer

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Deltagelse på messer er en fin måte å skape nye kontakter på i tillegg til å styrke eksisterende kontakter. Å delta på messer kan bli lettere når man gjør det sammen med andre bedrifter. Noen finske bedrifter har for eksempel samarbeidet om å lage en felles stand på ei stor messe i Japan de siste årene. Den finske standen har vært veldig populær og bedriftene har vært fornøyd med organiseringen. Både store og små bedrifter har vært med. Denne typen samarbeid er mulig og nyttig også i forbindelse med mindre messer.

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Synes du det er viktig å presentere din bedrift på ulike messer?

- 1 veldig viktig
- 2 ganske viktig
- 3 vanskelig å si
- 4 litt viktig
- 5 ikke viktig

Er din bedrift interessert i å delta på messestander i samarbeid med

- |                      |                       |
|----------------------|-----------------------|
| a) norske bedrifter? | b) nordisk bedrifter? |
| 1 veldig interessert | 1 veldig interessert  |
| 2 ganske interessert | 2 ganske interessert  |
| 3 vanskelig å si     | 3 vanskelig å si      |
| 4 litt interessert   | 4 litt interessert    |
| 5 ikke interessert   | 5 ikke interessert    |

Finnes det noen bestemte messer der din bedrift ønsker å inngå slikt samarbeid?

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Hva tenker du om å samarbeide om messestander og messer i det store og det hele?

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## 7. Kultivering av det ville blåbæret

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Kultivering av blåbær har vært en suksess i Nord Amerika, der man lenge har kunnet høste gode avlinger fra store blåbærbusker. I Norden har man forsøkt å kultivere det nordiske ville blåbæret (*Vaccinium myrtillus*) som normalt vokser i skogen. De kultiverte bærene er lettere å plukke og det er lettere å kontrollere høstingen. Kultivering er ett alternativ når man vurderer muligheten for å hjelpe bedrifter med å skaffe mer bær og til øke mengden nordiske blåbær på verdensmarkedet. I fremtiden kan det også kanskje også bli ei tilleggsnæring for aktørene.

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Er din bedrift interessert i å kultivere bær i fremtiden?

- 1 veldig interessert
- 2 ganske interessert
- 3 vanskelig å si
- 4 litt interessert
- 5 ikke interessert

Er din bedrift interessert i å gjøre bruk av kultiverte bær?

- 1 veldig interessert
- 2 ganske interessert
- 3 vanskelig å si
- 4 litt interessert
- 5 ikke interessert

Synes du det er viktig å utvikle metoder for å kultivere det nordiske blåbæret?

- 1 veldig viktig
- 2 ganske viktig
- 3 vanskelig å si
- 4 litt viktig
- 5 ikke viktig

Hva tenker du om kultivering av det nordiske blåbæret?

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