



Marketing of local agricultural food products – Objectives and preliminary results of a qualitative study

AMIES II – Midterm Meeting, May 18-20, 2016

Project Unit D1: Food provision and needs for agricultural products

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Funded by



Justus Liebig-
University



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Agenda

- Overview project unit D
- Regional and theoretical background
- Objective and methods
- The qualitative study and preliminary results
 - 2014: Exploratory pre-study
 - 2015: Focus group discussions (and interviews)
 - 2016: Expert interviews
- Intersection with other project units and outlook
- References

Overview project unit D: Socio economy

**Overall objective:
Development of a sustainable,
market-oriented supply system for
agricultural products**

D1

Need and demand for agricultural products of local households and tourists

Food production supply by households and market-oriented farmers

D2

Agricultural production potential and economic viability

Economic analysis of production alternatives



Quantitative study: Farmer survey

Qualitative study: Exploratory pre-study, focus group discussions, expert interviews

Tourists' demand for agricultural products

Master students Georgia

Regional background

- Main economic activity in the region: **Agriculture** (USAID 2012b, p.7)
 - Small scale income generation (PIN 2015a, p.7), 80% produce mainly for self-consumption (Heiny 2016)
 - Problems in agriculture: lack of finance, knowledge, input factors, low access to tourism service providers (food safety, quality & quantity) (PIN 2015a p.10,11)
- **Tourism** sector growth during the last years (PIN 2015b, USAID 2012a, p.6)
 - Problems in tourism: Lack of infrastructure, lack of dining facilities (PIN 2015 b, p.2,3)
- Strong **core-periphery structure** (PIN 2016, p.3,8)
 - Core (Stepantsminda/Gergeti): Tourism
 - Stepantsminda: Average monthly household income 436.47 GEL (Heiny 2016)
 - Periphery (Villages): Subsistence farming
 - Average monthly household income 237.86 GEL (Heiny 2016)
- (Seasonal) **migration** (PIN 2016, p.10; TJS 2010, p. 58)
- **Uncertainty of land ownership** (PIN 2016, p.18; TJS 2010, p. 28f.)

Theoretical background

The study is embedded in

- the broad concept of **Rural Development**
 - Focus on the development of value chains
- the model of **Short Food Supply Chains (SFSCs)** (Marsden, Banks, Bristow 2000; Renting, Marsden, Banks 2003)
 - 3 types of SFSCs:**
 - 1. Face-to-face SFSCs: e.g. direct sales at the farm gate**
 - 2. Proximate SFSCs: products are sold in the region, e.g. cooperation between producers, farm shop groups**
 - 3. Extended SFSCs: e.g. export of products to national markets**
 - Focus on 1. and 2.
- the concept of **Social Capital** (Granovetter 1985, Woolcock and Narayan 2000, World Bank 2011)

Objective and methods

Identification of local agricultural food products which are suitable for being marketed and efficient marketing mechanisms (also with regard to tourism)



- What are the bottlenecks in agricultural value chains, in particular at the stage of delivering products to the buyers?
- How can linkages between the agri-food value chains and the tourism sector be established?
- Do cooperatives provide an opportunity for establishing efficient marketing structures of local food products?

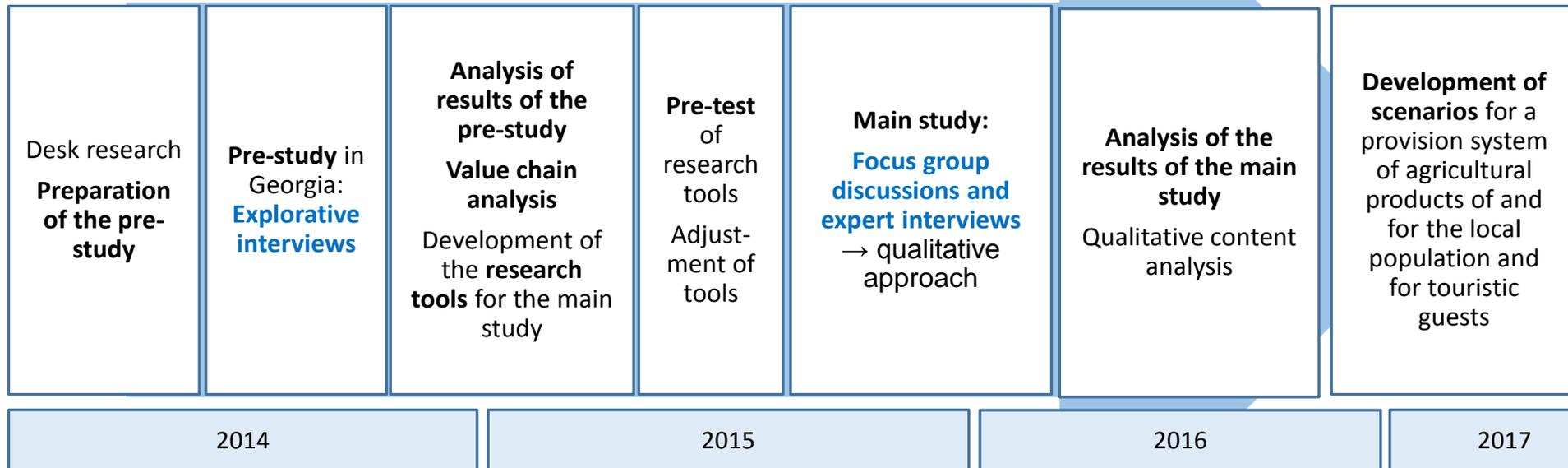
Qualitative methods: Open approach, development of research questions based on the pre-study

- Explorative face-to-face interviews – Pre-study
- Focus group discussions
- Expert interviews

→ Qualitative content analysis (Kuckartz 2014, Mayring 2010, Schreier 2012)

Research activities

Influence of other project units



Pre-study 2014

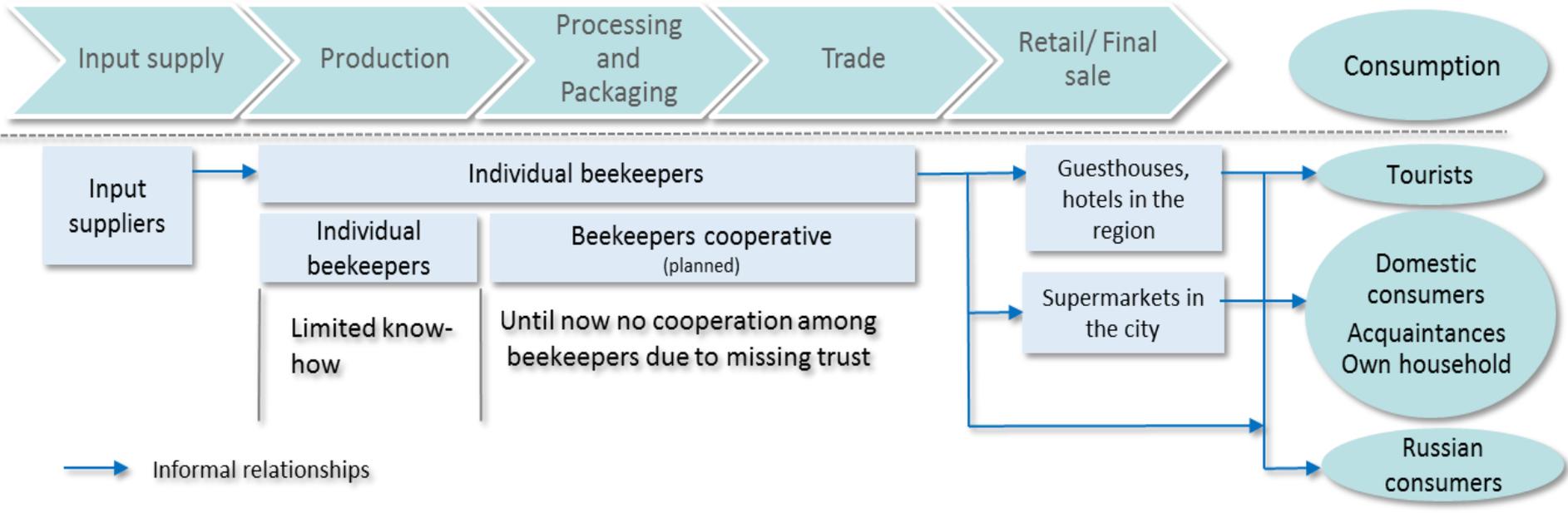
- Explorative face-to-face interviews
- Objective: Learn more about
 - the socioeconomic situation in the region
 - the demand and supply pattern of agricultural food products in the region
 - linkages of local agriculture producers with the growing tourism sector
- Identify interview partners for the focus group discussions
- Develop the research questions
- Interviewees:
 - Farmers, food-producing households – Stepantsminda District (N=20)
 - Retailers, tourism representatives, village heads – Stepantsminda District (N=17)
 - Experts from organizations and others – Tbilisi (N=15)



Pre-study – Results

Example: The value chain of honey

- | | | | | | |
|--|--|--|---|--|---|
| <ul style="list-style-type: none"> ▪ Lack of access to input factors ▪ Equipment is often obsolete | <ul style="list-style-type: none"> ▪ No constant quantity and quality ▪ No certification | <ul style="list-style-type: none"> ▪ No branding ▪ No professional packaging | <ul style="list-style-type: none"> ▪ Unprofessional organization ▪ Limited bargaining power | <ul style="list-style-type: none"> ▪ Market links not organized ▪ Only few links to tourism sector | <ul style="list-style-type: none"> ▪ Mainly own consumption ▪ Little additional income through sale |
|--|--|--|---|--|---|



Source: Own depiction based on Springer-Heinze 2007

Focus group discussions + further interviews

Main objective: Proposals of the local population on products which are suitable for being produced locally and marketed

- 3 groups in Kazbegi à 5-6 participants:
 - Market-oriented farmers
 - Smallholder farmers
 - Local hospitality representatives

- Method and implementation:
 - Purposive sampling
 - Interview guidelines, short questionnaire, postscript
 - Georgian moderation (R.S.), assistants

- Problems (challenges in empirical social research)
 - Some people did not show up
 - Other composition of groups as planned
 - Shorter as expected
 → not as much information as expected

- Other interviews with representatives of the value chain (Supermarkets, bazaar, distributor, organizations)



Focus group discussions – Results

	Example
Honey	<p>R: Honey is the most appropriate product.</p> <p>S: It's very good honey, of a high quality.</p>
Vegetables and potatoes	<p>K: Vegetables and honey. Vegetable-growing, viticulture and others are developing in our municipality.</p> <p>T: and potato growing.</p> <p>K: Potato growing more or less. Vegetable growing is rapidly developing. So, vegetable-growing is number one, then is honey.</p>
Berries, sea buckthorn	<p>T: Berries, it's a very interesting topic.</p> <p>M: T. for instance, packaged sea buckthorn. I sold it at my facilities. It is a medicinal plant as well. It does need hoeing or other special treatment; there are plenty of sea buckthorn here and you need some time to deal with it. And he managed to do it. It's very healthy and there is a great demand for it."</p>
Medical plants, tea	<p>M: There are various types of tea here. It should be mown down and packaged.</p> <p>T: There are a lot unique medicinal plants.</p> <p>M: You should have knowledge. Previously here used to come botanists that were well aware of this topic. You should know how to do it and you might have such "mixed" types of tea that you might drive mad; I would conduct tea tours in Jita and Zetar. They make tea from various herbs there; it's very tasty and they know how to make it."</p>
Dairy	<p>R: We need special equipment to produce cottage cheese, fermented milk (Matsoni), sour cream. For example, in order to produce sour cream you need mini plants and processing material – which we do not have. We make cheese, butter, etc. from the milk products. [...] The grass is constantly of high quality because new one grows till autumn and helps the earlier one. The percentage of fat content is very high as well, accordingly, the product is of high quality.</p>
Meat	<p>L: [...] It would be better if it were certified by a veterinarian. This is the problem we are mainly facing in our region."</p> <p>Me: Primary instructions are issued by the Food Safety Agency how to slaughter cattle; it's prohibited to slaughter them in your garden. You should get them there and slaughter. It's nonsense?!</p>

Expert interviews

- Systematizing expert interviews: **Fill information gaps** (Bogner, Littig, Menz 2014) and receive an **expert opinion on proposals of the local population**
- Purposive sampling: 10 actors of agri-food chains and the tourism sector, semi-structured interviews in English, based on interview guidelines
- Production and marketing of agricultural products – N=7 Representatives of organizations
 - Georgian Farmers Association
 - Agricultural Cooperatives Development Agency (ACDA)
 - Biological Farming Association Elkana
 - People in Need (PIN): Local action group Kazbegi, European Neighborhood Programme for Agriculture and Rural Development (ENPARD), FAO
- Consumption – N=3 Tourism and retail sector representatives
 - Rooms Hotel, Zeta Camp
 - Supermarket chain

Expert interviews – Analysis

-  Codesystem
 - ▾  General characteristics of the agri-food chain in Kazbegi
 -  Bottlenecks
 -  Potentials
 -  Other general info on the agri-food chain
 - ▾  Marketing of agri-food products
 -  Hurdles and products with probably low potential
 -  Opportunities and products with probably high potential
 -  Other info marketing
 - ▾  Linkages of the agri-food sector and tourism
 -  Hurdles agri and tourism
 -  Opportunities agri and tourism
 -  Current ways of offering regional food to tourists
 -  Other info agri link tourism
 -  Unique regional products and dishes
 -  Importance of organic products in agri-tourism
 - ▾  Cooperation
 -  Willingness to cooperate
 -  Relation to former Kolkhoz system
 -  Role of trust
 -  Hurdles
 -  Opportunities cooperation (future)
 -  Other info cooperation and cooperatives (current situation)
 -  Other relevant information

- Category system
 - Development: mix of concept and data-driven (Schreier 2012)
 - Will be adjusted according to the interviewees and the respective interview guidelines
- →Qualitative content analysis (Kuckartz 2014, Mayring 2010, Schreier 2012)

Expert interviews – First results: Example PIN Interview

- General characteristics of the agri-food chain

Bottlenecks:

- VC is not organized at all, no professional processing
- Local production does not even cover local (hh) demand
- Lack of knowledge, resources, equipment, consultancy centers and market access

Potential:

- Later harvest allows later selling (compared to products from other regions)

- Marketing of agri-food products

Products with probably low potential:

- Dairy (low production of milk, food safety)
- Cattle, sheep (availability of grazing lands, no slaughterhouse, investment in slaughterhouse profitable?)
- Poultry, pigs, rabbits (what to feed them?)
- Broccoli and lettuce (rarely used by local population)

Products with probably high potential:

- Honey (Huge demand, good conditions for beekeeping)
- Herbal teas (take into account collecting regulations, introduce drying techniques etc.)
- Sea buckthorn (lots of wild plant, but collecting regulations)
- Vegetables (tomato, cucumber, cabbage): Huge demand, but not produced locally, maybe reactivate greenhouses

- Linkages of the agri-food sector and tourism

Hurdles:

- Food safety standards, documentation (invoices), tax issues
- Lack of knowledge on how to produce and sell local products to tourists
- Low variety of products and dishes

Opportunities:

- Tourists' demand for local products: Potential market
- Region could be active in tourism throughout the whole year, linking both activities could be profitable for the whole population

- Cooperation

- People have to be motivated to work together
- Mistrust and risk of working together with a person who is not hard-working
- No association with former Kolkhoz system
- Government supports cooperation (but so far wrong incentives to register a cooperative)

Preliminary common result for discussion

One possible recommendation:

Increase government investment in infrastructure

→ tourism ↑

→ local demand for local agricultural products ↑

→ local agricultural production ↑ (←Government investment in selected agri-food products/chains?)

→ marketing of local agricultural products to local tourism providers ↑

→ income of local population ↑

Based on preliminary results of own study and expert interview with PIN project

Intersection with other project units and outlook

- Economic actions vs. ecological sustainability: Land use, e.g. planned skiing areas, airport
- Identification of areas which are suitable for agricultural activities, like grazing, growing vegetables (soil data), beekeeping (flowermap) etc.
- Outlook: Complete analysis of interview-data and integration of results

[...] It would be amazing if throughout this project, if you could, whenever you have something, small analytical part produced already, just give it to the local population.

[...] people are lacking any kind of information right now. [...] we had a gathering of a youth group [...] and when we asked the orientation of the profession none of them mentioned agriculture, none. [...] They have never met successful farmers, they don't understand what type of business it could be [...]. So even if, from your side you could bring some information that some things are going on, this study is not only for our study purposes, but then you can use it and see that you can actually be a student somewhere and learn things, that would motivate people more, especially young people.

(Expert interview, PIN project Kazbegi)

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Thank you!



Annex

Farmers, food-producing households – Kazbegi

1. Salad producer – Sioni
2. Commercial potato producer – Sno
3. Group of farmers (3-7) , mainly livestock–
Kanobi
4. Beekeeper – Kanobi
5. Livestock farmers and beekeeper – Juta
6. Livestock farmer – Akhaltsikhe
7. Potato producer – Achkhoti
8. Potato producers with donkey – Achkhoti
9. Group of farmers, mainly livestock (3-4) –
Tsd
10. Potato and livestock farmer – Gergeti
11. Livestock and vegetable producers (only
own consumption) – Gergeti
12. Salad and broccoli producers – Sioni
13. Tout producer – Sno
14. Strawberry producer – Sioni
15. Potato producers – Pkhelshe

Interviewees Pre-study



Retailers, tourism representatives, village heads – Kazbegi

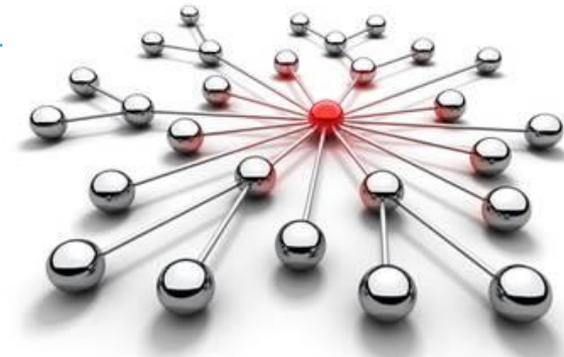


- | | | |
|---|--|---|
| 1. Retailer/market stand –Stepantsminda | 1. Owner of Restaurant Tsanareti – Arsha | 1. Head of village Kobi (in Café in Stepantsminda) |
| 2. Vegetable shop – Stepantsminda | 2. General Manager of Café 5047 – Stepantsminda | 2. Head of village Goritsikhe and head of village Pkheshe |
| 3. Meat retailer – Stepantsminda | 3. Owner of Mountain Travel Agency – Stepantsminda | 3. Head of village Sno and other villages |
| 4. Retail shop – Goristsikhe | 4. General Manager of Rooms Hotel – Stepantsminda | 4. Head of municipality Stepantsminda |
| | 5. Owner of Nunus guesthouse – Stepantsminda | |
| | 6. Owner Naazi guesthouse – Gergeti | |
| | 7. Hotel Maya (New hotel) – Stepantsminda | |
| | 8. Owner of guesthouse in Gergeti | |
| | 9. Owner of Zeta Camp – Juta | |

Experts from organizations and others – Tbilisi

- Consultant USAID NEO project (now EBRD): Irakli Toloraia
- Chief Veterinary Officer (CVO), National Food Agency (NFA), Ministry of Agriculture (MoA): Misha Sokhadze
- Food safety expert (in MoA): Matti Lampi
- KfW Director South Caucasus Regional Office: Lars Oermann
- TJS/KfW: Sector analyst biodiversity and environment and consultant: Marianna Nitusova and Tata Chochua
- Team Leader KfW/GFA: Ramaz Gokhelashvili (Elkana)
 - Agro tourism expert (consultant, formerly KfW): Lela Khartishvili
 - Elkana; Rural Tourism Coordinator: Nana Kartvelishvili
 - Agronomy Expert: Ilia Mchedlidze
 - Deputy Team Leader, EU/FAO ENPARD Project: Lasha Dolidze
 - Input Supply Cartlis Agrosystems Ltd, Director/ Agronomy Expert: Mr Robert Revia/ Mr Soso Meparishvili
 - District representatives of MoA
 - Professor of Economics at TSU: Gulnaz Erkomaishvili (article on food security)

Network mapping – pre-test

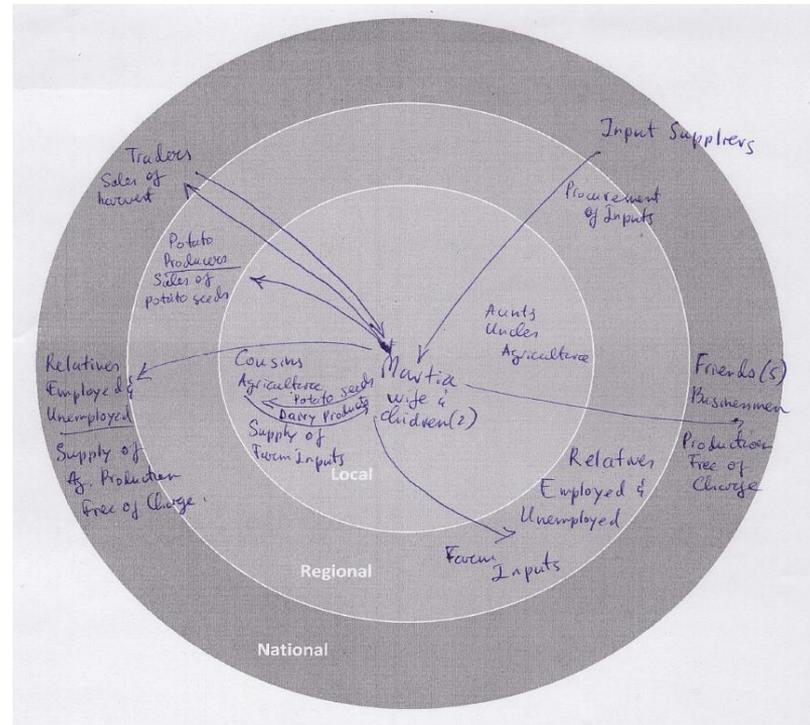


- Network map: personal (e.g. friendship and family relationships) and business linkages
- Does economic exchange mainly take place between friends and family (formal vs. informal flows)?

Source: <http://commons.wikimedia.org/wiki/File:Egonetzwerke.jpg>

- The interviewee did not feel comfortable with the approach
- Complicated to explain (even in Georgian)
- Results were not as valuable as expected.

→ approach is not suitable



FG: Local hospitality industry representatives



- [Video](#)

Interviews in Tbilisi: Information on value chain relationships

- Tbilisi Bazaar – Partner of the owner of the whole **bazaar**
- Goodwill (first Georgian **hypermarket chain**) – Levan Chiteishvili, Head of Quality department
- Marshe Marshe (affiliated to Goodwill, **production enterprise** producing semi-finished products, eg. fish, meat, confectionery) – Nanicko Papashvili, Procurement Manager
- Ecofarm, **Distribution and farmer support** – Gigi Mikabadze, Managing Partner
- **Supermarket 2Steps**, Retail Company, General Manager
- Association for Rural Development of Future Georgia (RFDG) – Vano Grigolashvili



Source: <http://www.ecofarm.ge/>

Documents

Discussion guideline focus group discussions :

Discussion guideline

Group 1: Market oriented farmers who mainly sell their products

Potential participants

- Potato (and salad) producer from [Sno](#) ([Martia Papishvili](#))
- Livestock farmer from [Abkhazikhe](#)
- Saled producers from [Sion](#)
- Strawberry producer [Sion](#)
- Trout producer from [Sno](#)
- Contact persons Rati

Step 1: Introduction:

- Welcome
- Introduction of Moderator
- Introduction of assistants/other persons
- We invited you to learn more about the opportunities and hurdles to produce and sell agricultural products in [Kazbegi](#). To this end we have prepared some questions that we would like to discuss with you.
- We will use the results for our research project AMIES which is focusing on different types of land use in [Kazbegi](#). It is a collaboration of the University of Giessen in Germany and three Georgian universities.
- Administrative details, duration, breaks, food and drinks
- Before starting the discussion, we would like to know from you if it is ok for you if we film the discussion? The filmed data will only be used to write down the answers of the interviews and identify who is speaking, the videos will not be published. Furthermore, no names will be published, all results will be used without referring to a name/anonymously.
- Do you agree on this? (Declaration of the moderator/Rati)
- Guidelines/"rules" for the discussion:



Step 2: Warm-up:

Short introduction of the participants (first name, village, type of occupation)

Step 3: Start of discussion

1) Provision of food products

Please describe how you provide yourself with agricultural food products	
Content/Main questions	Follow up
Description of origin of agricultural food products: Where do you get your food products from?	Which products do you buy? What do you produce yourself for your own consumption? Do you get products from neighbors and friends (barter, for free)?
Restrictions regarding the satisfaction of needs, wants and demand: Which restrictions do you face with regard to your food provision?	Which products are missing? (Seasonal shortages, not enough variety offered?) Access to markets and shops? financial restrictions?

2) Marketing of products and vertical cooperation

What are the main hurdles and opportunities of marketing regional agricultural products?	
Content/Main questions	Follow up
Description of marketing of agricultural food products: How do you currently market your products?	Which products are sold? Where? How are the products brought to the market place? Is a processor or trader involved? Which role does barter play? What is the percentage of products sold and used for own consumption?
Where do you see opportunities for better marketing your products?	In your opinion, which products have potential for marketing? What do you think about the relation of marketing agricultural products and the growing tourism sector?

What are the main problems and hurdles with regard to marketing your products?	
What kind of restrictions do you face (Financial restrictions, manpower, access to land and market, absence of processing units, bargaining power of traders, seasonality, etc.)? What should be improved?	

How would you describe the cooperation/business relation with input suppliers, processors and traders?	
Content/Main questions	Follow up
Description of the business relation with input suppliers: How is the cooperation with input suppliers?	Where do input factors for the production come from? How are the relations, conditions (informal, contracts, bargaining power)?
Description of the business relation with processors: How is the cooperation with	Are there any processors involved in the value chain, in bringing your product to the market?

Interview guideline expert interviews:

Interview guideline

A) Introduction:

- Hello, thank you for your time and for this interview
- Introduction of interviewer/myself (exchange of business cards)
- Introduction of AMIES II project (Project: "AMIES II - Scenario development for sustainable land use in the Greater Caucasus, Georgia", Unit D1)
- Iliu State University, Tbilisi State University and the Agricultural University of Georgia together with Justus Liebig University Giessen and the Center for International Development and Environmental Research (ZEU). The overall objective of is to foster sustainable land use and improve socio-economic conditions of the population of the [Stepantsminda](#) Region. Project unit D1 analyzes bottlenecks in agri-food value chains and aims at identifying efficient marketing structures of local food products, also with regard to tourism. In the project unit that I am involved in, we would like to learn more about agriculture and tourism, and potential linkages of both sectors, in particular with regard to regional food. Our geographical focus is on the [Kazbegi](#) region.
- I have already conducted some explorative interviews and focus group discussions with local farmers and guesthouse owners, but now I would like to get some more detailed background information.
- As you are involved in the PIN project in [Kazbegi](#), I am sure that your knowledge will be very valuable for our project.

Before starting, I would like to know from you if it is ok for you if we record the interview? This is only for research purposes, if you prefer, no names will be published, all results will be used without referring to a name/anonymously. Do you agree on this? (Handing out the declaration of consent, signature (one for the interviewee, one for the interviewer))

B) Warm-up:

Let us start with a short introduction of yourself and your occupation

- What is your professional background?
- What is your current occupation?
- What are the main objectives/activities of the project/company you currently work for?

C) Thematic Blocks

1) Agri-food chains – bottlenecks and potentials

How does the agri-food chain in Kazbegi look like?	
Content/Main questions	Follow up
	Input supply (finance, technical equipment...), production, processing, marketing (in general and to tourists), relations between value chain actors, market conditions (hurdles and potentials)

2) Marketing of agri-food products

What are the main hurdles and opportunities of marketing regional agricultural products?	

What are the main problems and hurdles with regard to marketing your products?	
	What kind of restrictions do you face (Financial restrictions, manpower, access to land and market, absence of processing units, bargaining power of traders, seasonality, etc.)? What should be improved?

How would you describe the cooperation/business relation with input suppliers, processors and traders?

Content/Main questions	
Description of the business relation with input suppliers: How is the cooperation with input suppliers?	Follow up: Where do input factors for the production come from? How are the relations, conditions (informal, contracts, bargaining power)?
Description of the business relation with processors: How is the cooperation with processors?	Are there any processors involved in the value chain, in bringing your product to the market? If yes, please describe how
Description of the business relation with traders: How is the cooperation with traders?	Is a trader involved in selling the products? How are the relations, conditions (informal, contracts, trust, dependence, bargaining power)?

3) Horizontal cooperation and trust

What is your opinion on cooperation with other producers?	
Content/Main questions	Follow up
Description of cooperation among producers: Is there any cooperation with regard to production or marketing the products? If yes, please describe	How exactly is that organized (formal, informal)? For which products? If not, why not?
Which opportunities do you see with regard to cooperation with other producers?	For which products? Would you be willing to cooperate? Under which circumstances?
Which problems do you see with regard to cooperation with other producers?	What is your opinion on institutionalized/organized cooperatives? What are the restrictions (financial, management skills, willingness, etc.)? What do you think about the importance of mutual trust with regard to cooperation between producers?

4) Ending Questions:

- "All things considered question"
 - This question asks participants to reflect on the entire discussion and then offer their positions or opinions on topics of central importance to the research.
 - Examples: "Suppose that you had one minute to talk to the governor on merit pay, the topic of today's discussion. What would you say?" or "Of all the things we discussed, what to you is the most important?"
- Summary question: After the brief oral summary the question asked is: "Is this an adequate summary?"