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EXAMPLES OF INTEGRATED FRUIT AND VEGETABLE PRODUCERS[1]

Summary: The aid of this article was to present the forms of cooperation established by groups / organizations of fruit and vegetable producers. On the basis of the literature and market observation, it was noted that groups / organizations of fruit and vegetable producers cooperate with each other to form associations, consortia or clusters. Cooperative activities are undertaken to increase the competitiveness of fruit and vegetable producer groups / organizations on a more demanding market. Some of them are supported by the policy of EU and national agendas. There were also not only horizontal but also vertical links between producers on the market. If they want to use their raw material to a greater extent and increase the range of products offered, the groups / organizations of fruit and vegetable growers expand their activity by cooperating with processors. Considering the change in shopping habits of consumers, it can be stated that this is one of the ways of development for the sector.

Key words: integration, clusters, consortia.

1. INTRODUCTION

For more than a decade Polish fruit and vegetable producers, using the Common Agricultural Policy measures, have been integrating into groups and organisations of producers. Increasing concentration and intensification of market power of buyers is motivating to develop integration processes on the side of suppliers. The distribution system in Poland has evolved and forced the supply side to change sales policy standards by pushing concentration on the side of producers. The development and concentration of customers call for changes

[1] Extracts of M. Bieniek-Majka, A. Matuszczak, *Horizontal integration on the fruit and vegetable market as illustrated in Kuyavian-Pomeranian Voivodeship,* KPSW University Press in Bydgoszcz, 2017, have been used in the article.

among producers therefore a significant role in the development of co-operation between supply chain entities should be played by groups and organisations of producers, their associations and inter-branch organisations. Considering the fact that halting the creation of new producer groups has been observed since 2012 it can be suggested that adopting an integration producer model characteristic in the northern Europe (closer in geographical terms) would be a good path of development for Polish producers, where a smaller number of producers' groups/organisations concentrate a larger number of members and due to economies of this scale they achieve much greater benefits.

W. Glabiszewski and A. Sudolska [2009, p. 20] emphasize that building various connections between the enterprise and other entities on the market has contributed to reinforce competitiveness while observed market trends have allowed to claim that a long-term strategic co-operation facilitates to create competitive advantage to a substantial degree.

Observing the integration activities focused on fruit and vegetable producers it can be noticed that in addition to associating into producer groups and organizations they have highlighted the following co-operation forms: associations, consortia, clusters and vertical integration, namely, fruit and vegetable processing.

Co-operation comprises an important factor influencing the development of the fruit and vegetable sector which allows building permanent competitive advantages. In the strategy of the Polish agriculture development, an essential place has been determined for the activities related with horizontal integration which includes groups and organizations of fruit and vegetable producers as well as with vertical integration resulting from the commitment of the sector participants and eagerness to meet common goals. Achieving the goal, especially facing very competitive environment, can only be possible with the potential of other enterprises within the framework of collaboration.

In the context of globalization, the concept of independent actions pursued by producers is undergoing a crisis. These days there are two ways of developing competitiveness – independent functioning or existing along with other producers. If a producer does not intend to be a small local supplier, only a co-operation path can be prospective. Building various connections between entities on the market causes the creation of competitive advantages and is a sign of aiming at enhancing their competitiveness [Glabiszewski, Sudolska 2009, p. 10].

2. RESEARCH OBJECTIVE AND METHODS

The objective of this article was to present selected forms of collaboration between integrated fruit and vegetable producers. Based on the relevant literature and market observations, there were characterized cooperative activities taken up by groups/organizations.

3. RESEARCH RESULTS

3.1. ASSOCIATIONS OF FRUIT AND VEGETABLE PRODUCERS

Associations of enterprises are a common form of collaboration in market economy. Enterprise association enhances competitiveness due to promotional activities during fairs and exhibitions, facilitates access to and exchange of information which influences production level and quality and improves the power of lobbying. Participation in associations gives the opportunity of becoming a partner and of co-operation with different institutions that have an impact on the development of sectors. Larger organisations have a chance of appointment and work in special sub-teams as illustrated in Germany or Holland (Marosz 2013, p. 9, 20]. In Poland there is a number of sector associations and societies such as The Society for Promotion of Dwarf Fruit Orchards, The National Association of the Cultivated Mushroom Industry, The Association of Polish Fruit Growers, The Association of Polish Fruit and Vegetable Distributors "The Fruit Union", The Association of Polish Nurserymen, The Association of Grójec Orchards, The Blueberry Growers Association, The National Council of Agricultural Chambers, The Polish Association of Juice Producers, The Polish Horticultural Association, The National Council of Fruit and Vegetable Processing and Refrigerated Storage, The Strawberry Growers Association, The Fruit and Vegetable Processors Association.

The National Association of the Groups of Fruit and Vegetable Producers is an example of thriving association with not only regional importance. The key objective of this Association's activity is to ensure that affiliated entities are provided with assistance in their statutory activity and to organise and develop the fruit and vegetable market through developing and consolidating the position of groups and organisations of fruit and vegetable producers. These purposes are expected to be achieved by means of the following tasks:

- providing advisory, instructing, training, promotional, publishing, and cultural-educational activities to affiliated groups;
- representing the interests of affiliated groups before state government authorities and local public authorities;
- representing associated groups in foreign countries;
- initiating and developing collaboration between groups and supporting their economic initiatives;
- co-operation with agricultural organisations, scientific-research and advisory establishments;
- developing the organization of horticultural market and horticultural producers and expressing relevant opinion;
- activities supporting organizational and economic development and enhancing the market position of producer groups;
- promoting the generation of legal and organizational conditions conducive to running a business activity;

- shaping ethical principles and socially acceptable conduct standards in economic relations;
- stimulating development of fruit and vegetable producers' groups as the element of entrepreneurship in rural areas;
- stimulating the activity of producers and other residents of rural areas to promote multifunctional and balanced development of rural areas;
- gathering and disseminating information concerning the functioning of domestic and foreign economic entities and opportunities of supply, organizational and financial collaboration among inhabitants of rural areas.

Sometimes, only integrating of producers into sector organisations does not make it easier to satisfy market challenges, especially the export ones. Polish producers are increasingly aware of the need to collaborate. The market situation creates the requirement to undertake activities intended to gain new markets which is connected with bearing considerable marketing costs, ensuring regular and considerably larger deliveries to new remote customers that could not be supplied by each of producers organisations or groups [*Co-operation of producers groups within the framework of consortia – opportunities and challenges* www.sadyogrody.pl (downloaded on 10.03.2015)].

3.2. CONSORTIA

Consortia are an opportunity for the growth of competitiveness. A consortium is established as a result of concluding a consortium agreement between entrepreneurs under which they commit themselves to undertaking joint actions to pursue a particular enterprise [Chrząszcz 2013, p. 44]. The best example here may be the consortium of the company Stoczek Natura sp. z o. o. and the company MP Service sp. z o. o., established at the end of 2015, which invested in innovative fruit and vegetable drying facilities. The consortium is principally intended to deliver the investment (drying facilities) and conduct joint economic activity including the sales of dried fruit, vegetables and mushrooms. This consortium signed an agreement with the University of Life Sciences in Lublin under which it shall develop innovative solutions into new technologies of dried vegetables, fruit and mushrooms production [www.e-warzywnictwo.pl (downloaded on 17.02.2016)].

Groups of fruit and vegetable producers set up consortia which together deliver export contracts, mainly for apples, as nearly ¾ groups of fruit and vegetable producers in Poland are involved in the production and sales of fruit (mainly apples). Owing to investments, apples sales in foreign countries have increased. As W. Boguta points out, Poland exports apples to several dozens of countries all over the world, but in many cases the volume is not large. It seems that the main customers are the European Union countries, but also, in addition to Belarus, Polish producers sell to many other countries like Vietnam, Bangladesh, Central Asian states, Near East states, and African countries. [www.sadyogrody.pl *Western Europe is a natural customer of our apples. And a very demanding one at the same time* – downloaded on 30.06.2018]. However, producers claim there is a Polish-Polish competition on the market and to counteract and prevent it, producers are beginning to establish a wider co-operation in terms of distribution just by means of consortia. Several consortia of groups have already been set up to jointly deliver export contracts. One of them is the initiative LubApple which affiliates six producers' groups form the region of Lublin: ZPO Stryjno-Sad, Lubsad, Józefów Sad, Witabo, FruVitaLand and ZPO Sadpol. It is a trading enterprise which concentrates the interests of all these entities through joint participation at the trade fair, negotiation of joint contracts and joint price policy. This entity's sales potential is 100 K tons of apples whereas the potential of one of the biggest groups – Stryjno-Sad – 20 K tons. The Consortium delivers orders to such countries as Libya, Egypt, Saudi Arabia, the United Arab Emirates, Algeria, Israel or Great Britain, the Czech Republic, Sweden, Italy, Holland, Spain, Ukraine, Kazakhstan and Russia until embargo was imposed.

Affiliated producers perceive consolidation as an opportunity to reduce price competition on the market as they have become one of the largest companies in this sector [*Producers groups bet on collaboration within consortia* www.sadyogrody.pl (downloaded on 02.03.2015)]. Other examples of established consortia can be also mentioned here, namely, San-Export Group seated in Sandomierz, the second largest one in the orchard region that affiliates 5 producers groups/organisations and is also active in the export business. Another example is Appolonia which associates 22 entities from four voivodeships. Affiliated groups/organisations specialise in the production of apples, selling several hundred thousand tonnes of these fruits annually [www.appolonia.pl – downloaded on 30.06.2018]. The main objective of the consortium's activity is not only the creation of a trade company but also developing a brand of Polish apples. The consortium is also intended to provide a platform for exchanging information for its members and mutual legal and administrative assistance. The members jointly sell fruit and conduct purchases of e.g. packages. The concentration of supply allows them not only to deliver export orders but also orders from foreign and Polish supermarket chains.

In the opinion of experts, consolidation of producers' groups appears to be necessary if they want to conquer international markets. To illustrate, in China (pending works and talks about opening this market for Polish apples), a single contract is worth 50 K tonnes. No Polish company or group would be able to deliver such a contract on its own so collaboration between them seems to be indispensable. Creating export consortia is a market trend and, at the same time, future for Polish agriculture including horticulture [*Collaboration of producers' groups within consortia – opportunities and challenges* www.sadyogrody.pl (downloaded on 10.03.2015)].

3.3. CLUSTERS

Enterprises operating on the competitive market, on the one hand, compete with one another and on the other hand, undertake various forms of co-operation also with other institutions. One of the current signs of collaboration are clusters [Wierzejski, Nasalski 2014, p. 238], which are defined in the literature as companies, suppliers and research and development units which conduct their business activity in a similar sector and not only compete with one another but also co-operate. While working on specific projects or activities focussed on the implementation of the set objectives, clusters are strictly connected with institutions like universities, research associations or agencies. The functioning of clusters is conducive to the growth of competitiveness in a given area which in turn improves technologies applied in enterprises and the implementation of innovations [Mikołajczyk 2012, p. 417-426]. In accordance with the network approach, on the one hand, the enterprise can reap the benefits developed within the group of entities (clusters), for example, certain behaviour models, on the other hand, it can create the behaviours of other network members using economies of scale [Wierzejski, Nasalski 2014, p. 240].

A cluster within the framework of collaboration between enterprises and their connections with research and development institutions as a new structure, makes use of the knowledge and transfer of information to create competitive advantage to the greatest extent [Szczupska et al. 2012, p. 96]. As a source of competitive advantage, one may also consider the development of innovative integration structures which comprise a significant determinant of creating and developing clusters. Significant as it seems to be is the fact that the evolution of clusters can be a factor dynamizing business activity in rural areas and can ensure long-term advantages for the entities operating within these clusters thus increasing competitiveness and innovativeness of rural areas [Socińska 2012, p. 251-259].

Nevertheless, it is necessary to support the development of clusters based on the already existing potential and in spite of the fact that their development often requires expansive public-private partnership, according to T. Brodzicki and S. Szultka [2002], it is the private factor that should be the leader and the public factor should play the role of the development catalyser. As reported by T. Wierzejski and Z. Nasalski, an assessment carried out by *European Cluster Observatory*, recognised several Polish voivodeships in comparison to the EU countries in the field of food processing.

A regional character of food clusters may foster launching regional (traditional) products, whose specific nature includes both technological and cultural aspects of particular regions, on international markets. An early phase of developing clusters provides an opportunity for profiling their activities according to current market trends. A key role should be played by state institutions preparing a properly dedicated support for selected cluster initiatives [Wierzejski, Nasalski 2014, p. 243], namely, the activities aimed at creating or boosting the cluster power. The formation of a peculiar institution-organisation tissue, that is a cluster, makes possible achieving and maintaining dominance in modern knowledge-based economy [Chorób 2013, p. 37].

Establishing and supporting cluster structures participated by local suppliers from competitive, related sectors (e.g. fuels, plant protection products, energy, agricultural machinery), which perform complementary activities with regard to the operations of the companies in the sector, may be premises for the growth of competitiveness in the agri-food sector in Poland [Chorób 2013, p. 41].

Despite numerous advantages, the formalisation level of cluster initiatives remains low and a majority of activities focus on promoting the idea of clustering and on arranging trainings. Some cluster initiatives have already reduced their activities resigning from more complex integrating actions or formal and legal activities [Wierzejski, Nasalski 2014, p. 244]. This may result, on the one hand, from formal and legal difficulties, mental barriers, cluster members' fear of quitting the implementation of their priorities in favour of common sake and on the other hand from a lack of sufficient funds to achieve the intended objectives [Hołub-Iwan, Małachowska 2008, p. 47]. Yet, this issue has been decreased in part. The European Union funds for innovativeness in the budget perspective 2014-2020 have influenced the development of clusters [*Polish clusters see an opportunity of development in EU funds for innovativeness* www.portalspozywczy.pl (downloaded on 20.05.2014)]. One should bear in mind though that with regard to the organisational aspect of clusters, an ambiguous legal situation of agricultural producers appears under applicable laws which are a driving force of enhanced co-operation, that is, a financial support of the Polish Agency for Enterprise Development. Producers groups and organisations, due to the objectives which they achieve, the rules of functioning in economic turnover and the status of affiliated entities, are characterised by particular usefulness for co-operation within clusters [Jeżyńska 2011, p. 264-265].

As far as the *stricte* fruit and vegetables sector is concerned, an example of co-operative connections is the Łódź and Mazovia Fruit and Vegetable Cluster. It was set up in 2009, affiliates 16 entities and has been operating with the Skierniewice Economic Chamber that plays the role of a coordinator. The main objectives of this association include:

- ensuring that nutritional needs of European inhabitants are satisfied at an even higher level and to a greater extent, by means of modern and innovativeness-saturated production, processing and sales of fruit and vegetables;
- personal development of producers and entrepreneurs and developing the skills of joint activities to implement the objectives of the cluster;
- using know-how of research and development units and universities, and most importantly pursuing co-operation with the advanced technologies centre Agro-Tech in Skierniewice, the Institutes of Pomology, Floriculture and Vegetable Growing, Agricultural University and State Higher Vocational School in Skierniewice.
- promoting the latest methods of fruit and vegetable production, supporting the creation of producers' groups. Modernisation and development of processing industry, implementation of innovative technologies, the quantitative and qualitative growth of production of fruit and vegetable preserves and concentrates.

- enhancing competitiveness, gaining a significant and stable position on the European and global selling markets [*The Assessment of the functioning of clusters in Łódź Voivodeship* – case studies in the context of the implementation of RPO WŁ – *the Final Report*, the Marshal Office of Łódź Voivodeship, Łódź 2009, p. 13-14].

These activities aim at increasing competitiveness and gaining a significant and stable position on international selling markets, survey of eastern markets in terms of apple export, participating in trade fairs and exhibitions, sharing experience with the food cluster from the district of New Midland, England [Wierzejski, Nasalski 2014, p. 244].

4. VERTICAL INTEGRATION – FRUIT AND VEGETABLE PROCESSING

Consolidation on the market is a response to the market situation and the need to enhance competitiveness. The point of creating groups relies in taking advantages such as cheaper purchases or higher prices as well as added value through the processing of products. The bigger part of the production chain can be managed by groups/organisations, the better. Therefore, investing in processing is a good direction for their development [*President of EFRWP: Processing as a good direction for the development of producers' groups,* www.sadyogrody.pl – downloaded on 27.03.2015]. It is not an easy task at all because processors are definitely better organised than the producers of raw materials, and they perceive producers' groups/organisations as their competitors. The argumentation concerning a higher risk from groups due to funds given to support investments is misleading as these funds were deliberately provided for picking, storing and preparing products for sales only for fresh market. Producers who used the financial support to reinvest the building of processing facilities, used the same measure which was available to processors too. This regarded the measure – "increasing the added value of the basic forest and agricultural production" from RDP 2007-2013. Processors who used this kind of support, extended their factories and increased their capacity. W. Boguta believes that the capacity of processing plants is larger than the capability of sourcing raw materials and monothematic in terms of product ranges.

In Poland, fruit and vegetables are most often processed into frozen products or juices, but also niche products can be made based on tradition or modern technologies [*Processing in groups is perceived as competition for processing plants,* www.sadyogrody.pl – downloaded on 14.08.2015]. Under RDP 2014-2020, it is possible to obtain support, for example, to invest into the possibility of processing products. Such an opportunity is provided by Priority 3 – promoting the organisation of the food chain, including processing and marketing agricultural products, animal welfare and agricultural risk management, and its sub-measure: processing and marketing of agricultural products. Support is provided for material or non-material investments concerning processing and marketing at wholesale level of agricultural products (i.e. products mentioned in Appendix 1 to the TFEU excluding fishery products. Natural and legal persons or organisational units without a legal status that have a registered business activity within processing or marketing of agricultural products and act as an entrepreneur conducting a micro, small or medium-sized enterprise, may be the beneficiaries of the programme. Additionally, the farmer, the household member, the spouse of the farmer who entitled to social insurance of farmers – applies to entities submitting applications in the thematic recruitment concerning support in scope of launching own economic activity within the processing of agricultural products.

A condition for allocating financial support is the applicant's ability to implement and maintain the planned undertaking. Providing support is possible only if an investment cannot be implemented without any contribution from public funds (avoiding the so-called *deadweight* effect). The applicant should acquire at least 50% of the total quantity of raw materials required for production under long-term contracts (at least 3 year-contracts) signed directly with: farmers, producers' groups or organisations, unions of groups or associations of producers' organisations or entities initially processing agricultural products.

Application selection criteria include, inter alia, preferences for producers' groups or organisations, unions of groups or associations of producers, co-operatives or applicants acquiring raw materials for production under long-term contracts. The maximum rate of aid under this measure is 50% of the investment cost. The maximum rate of aid for a beneficiary amounts to 3 million pln and for unions of agricultural producers' groups or associations of producers' organisations, it is 15 million pln. The minimum amount granted for the implementation of one operation is 100 k pln[2].

Mobilising the funds after 2015 provided individual producers, producers groups and organisations with an opportunity for using this sub-measure and obtaining added value generated from the processing of own products in the long term. On the one hand, it gives the producer competitive advantage increasing their market share, and on the other hand, benefits for the consumer.

Therefore, there has been a set of instruments that support producers. The initiative of co-operative connections depends on the interested parties. Numerous examples of capital relations between a producer, a group of producers and the processing sector can be observed in practice. Groups are willing to establish not only commercial companies but they also invest in the processing of raw materials manufactured by these groups. Several producers' groups, which have invested in NFC juices and apple products, are already operating on the market. These include e.g. Sad Sandomierski, Galster, and Korab

[2] The Ministry of Agriculture and Rural Development, Information about RDP 2014-2020 – material presented during the meeting of SGPOiW Cuiavia members, 08.05.2015, Popowo-Osada.

Garden. Interestingly enough, the group Janfruit from Błędowo has already launched portioned, packed and ozone-treated apples, Lubsad that produces NFC juices is also opening a soft fruit processing plant and the Group of Nowy Sącz Vegetable Producers "Owoc Łącki" has invested in the production plant of concentrated fruit juices. A conclusion can be drawn once again that the sales of processed products and promoting Polish raw materials by processed products can be the future of Polish horticulture [*Development of producers' groups – consortia and investments in processing* www.sadyogrody.pl (downloaded on 01.07.2015)].

On the one hand, reducing the distribution chain means achieving a competitive pricing advantage, better utilisation of the production potential of producers' group/organisation through the processing of noncalibrated products, and on the other one, the utilisation of the current distribution channels. Much lower transaction cost is borne by a processor or a group/organisation if it is expected to provide the current customer with a wider product offer from a virtually one location. Needless to say, demand for processed products has been increasing year after year. This can be illustrated by a positive foreign trade balance of processed fruit and vegetables as well as a change of buying habits of Poles who are consuming more and more semi-finished products and processed (finished) products and are more eager to use catering services [Gałązka 2013, p. 85-102]. This results in moving the significance of food production from private households to enterprises. Processing, production of semi-finished goods and finished products for individual customers and providing services to the HoReCa sector can be seen as a peculiar opportunity for development.

5. SUMMARY

When summarising co-operative initiatives, the following points should be considered:

- the study of S. Jarzębowski [2013, p. 159-168] who demonstrates that the average degree of integration with suppliers and customers in the fruit and vegetable sector is low or medium (it should be emphasised that with the growth of the business size the obtained integration rate increases as well), that is why the importance of developing both horizontal and vertical integration should be stressed. The main priority for the authorities and agricultural consulting centres should be encouraging producers' groups/organisations to grow and join into stronger entities that will be able to enhance their bargaining power using economies of scale [Chlebicka 2013, p. 36];
- different forms of co-operation can detect the flow of technology, skills, marketing, information and customer needs exceeding the limits of independent enterprises [Leśniewski 2012, p. 75]. Producers groups and

organisations, due to the objectives they achieve, the rules of functioning in economic turnover and the status of affiliated entities, are characterised by particular usefulness for co-operation within clusters [Jeżyńska 2011, p. 265] or other forms of co-operation;

- market situations exert the onset of collaboration on producers. For example, when facing the Russian embargo, the possibility of delivering fruit and vegetables, especially apples[3], to distant new markets initiated setting up consortia by producers. Polish producers, even the integrated ones, possess insufficient capacity to efficiently compete on foreign markets;
- owing to the increasing domestic and foreign demand for processed fruit and vegetables and in order to effectively exploit raw materials, fruit and vegetable producers should rely on processing. Vertical integration is one of possible developments for this sector;
- the European Union or state legislative measures facilitating the processing of fruit and vegetables for producers' groups/organisations would allow to increase producers' income through more effective use of these raw materials and benefitting from added value by reducing the supply chain;
- co-operative actions allow to achieve competitive advantage, but to maintain it active participation in the actions of associations, clusters or consortia is required. Innovative solutions and synergy effects enhance competitiveness of producers.

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[3] The most forms of co-operation in Poland were established by apple producers.

PRZYKŁADY KOOPERACJI ZINTEGROWANYCH PRODUCENTÓW OWOCÓWI WARZYW

Streszczenie: celem niniejszego artykułu było przedstawienie form nawiązywanej współpracy przez grupy/organizacje producentów owoców i warzyw. Na podstawie literatury przedmiotu oraz obserwacji rynku zauważono, że grupy/organizacje producentów owoców i warzyw kooperują ze sobą tworząc zrzeszenia, konsorcja czy klastry. Działania kooperacyjne są podejmowane w celu zwiększenia konkurencyjności grup/organizacji producentów owoców i warzyw na co raz to bardziej wymagającym rynku. Część z nich jest wspierana prowadzoną polityką agend unijnych i krajowych. Na rynku zaobserwowano także powiązania nie tylko poziome, ale i pionowe pomiędzy producentami. Chcąc w większym stopniu wykorzystać posiadany surowiec i zwiększyć asortyment oferowanych produktów grupy/organizacje producentów owoców i warzyw poszerzają swoją działalność kooperując z przetwórcami. Biorąc pod uwagę zmianę nawyków zakupowych konsumentów można stwierdzić, że jest to jedna z dróg rozwoju dla sektora.

Słowa kluczowe: integracja, klastry, konsorcja.

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