

# EU BEEF, PURE QUALITY. DISCOVER THE EU LOCAL MOUNTAIN BREEDS

EUBPQ – 101250871

## OBJECTIVES AND PERFORMANCE MEASUREMENT

### 1. General objectives

The EUBPQ project, lasting 36 months (Jan 2026 – Dec 2028), is jointly promoted by **Consorzio Sigillo Italiano (ITA)**, **Groupe Gasconne des Pyrénées (FRA)** and **Interbev Occitanie (FRA)** and aims to promote, in Italy and France, two European cattle breeds with a long agricultural tradition and strong territorial roots in mountain areas. Their breeding methods have been perfected over time to achieve increasingly high-quality products, with a focus on animal welfare and sustainability. These breeds are the **Piemontese** and the **Gasconne des Pyrénées**, both of which have received various **quality recognitions**, such as the **Consorzio Sigillo Italiano logo** (which guarantees **compliance with SQNZ standards**), the **PGI (Protected Geographical Indication)**, and the **Label Rouge**. Therefore, these two breeds can be considered representative of the EU's agricultural methods (**traceability, authenticity, animal welfare, sustainability**) and of the characteristics of European agricultural products (**quality, taste, tradition**), thus complying with Topic AGRIP-MULTI-2025-IM of the Call for Proposals 2025.

In recent years, there has been a general decline in red meat consumption across Europe for various reasons, both health-related (risk of non-communicable diseases) and ethical-environmental (reducing ecological footprint, focusing on animal welfare). However, meat remains an important nutritional component that should be consumed **in the right amounts** (see *Europe's Beating Cancer Plan*). This project aims to encourage consumers to make informed purchasing decisions that prioritize quality. Specifically, the goal is to motivate consumers to:

1. **Seek quality certifications when purchasing meat (Objective 1).**
2. **Seek certifications that ensure animal welfare when purchasing meat (Objective 2).**

To achieve these objectives, this proposal will launch an extensive communication campaign targeting consumers through the project's website, social media, and advertisements (print, TV), supported by a press office that will recruit opinion leaders to create content for further dissemination in additional media outlets. Moreover, tasting events will be organized to allow consumers to experience the quality of the promoted meats firsthand. Lastly, educating industry professionals will be crucial, particularly through trade fairs and specialized advertising, which will serve as a means to further amplify the project's messages and achieve the campaign's goals.

### 2. Specific project objectives

This project campaign aims to encourage consumers to:

1. **Seek quality certifications when purchasing meat (Objective 1)**
2. **Seek certifications that guarantee animal welfare when purchasing meat (Objective 2)**

The project objectives are compliant with the general objectives of Reg. (EU) No 1144/2014 as they aim to increase awareness of the merits of Union agricultural products and of the high standards applicable to the production methods in the Union, as well as to increase the competitiveness and consumption of quality beef and to raise its profile within the Union. Moreover, the objectives are also in line with Topic AGRIP-MULTI-2025-IM of the Call for Proposal 2025 aimed at highlighting the specific features of agricultural methods in the Union and the characteristics of EU agri-food products, and quality schemes mentioned in Article 5(4)(d) of Reg. (EU) No 1144/2014. Finally, this project proposal will promote and inform consumers in the internal market about quality, certified products such as Piemontese and Gasconne des Pyrénées beef, in line with what stated in the Annual Work Programme.

The enhancement of competitiveness and the information process will have a positive impact not only on the consumption of these breeds' meat but more in general on the European meat sector, focusing the message of the campaign on the EU merits. Moreover, even though the programme does not focus on dietary practice, the campaign will be integrated by a clear message on consumption advises, leading consumers to prefer quality over quantity.

The objectives are horizontal to the target markets. The achievement of these objectives will be monitored periodically through a strong KPI structure. The proposal will mainly intercept consumers and, for a residual budget share, also trade operators to consolidate the image of the promoted product.

Well-defined actions stressing on some specific product features, which coincidentally are also the main beef purchase drivers, will be carried out. Reference will be made to: taste and quality; labelling and traceability; farming techniques and animal well-being, particularly stressing on transhumance; social and environmental sustainability.

This proposal complies with the SMART methodology since its objectives are:

- *Specific*: market characteristics, trends in beef consumption and product positioning are the three basic elements for defining the specific objectives of the programme. The aims and objectives of the project are well defined at point 3.1 and 3.2 and in line with the characteristics of the target markets.
- *Measurable*: objectives will be measured by the Evaluation Body at the end of each reporting period through a set of indicators, namely consumer surveys.
- *Achievable*: All planned activities aim to achieve these objectives within the duration of the project and with the resources allocated (see budget). The potential for growth in terms of knowledge of the characteristics of the product, the characteristics of the target groups and the relevance of the proposed theme, contribute to making the objectives concretely achievable. The strategies will be constantly evaluated and adapted during the implementation of the programme to ensure the highest impact.
- *Relevant*: The project is in line with Topic AGRIP-MULTI-2025-IM on information provision and promotion programmes highlighting the specific features of agricultural methods in the Union and the characteristics of UE agrifood products, and quality schemes mentioned in Article 5(4)(d) of Regulation (EU) No 1144/2014.
- *Time-bound*: The action will be carried out in 36 months (January 2026-December 2028), necessary time to monitor and ensure the impacts necessary to achieve the objectives.

**Additional secondary objectives** – In addition to these primary objectives, the following secondary objectives can also be pursued:

- Increase recognition of the quality logos: Consorzio Sigillo Italiano (SQNZ) and Label Rouge applied to the cattle breeds promoted.
- Increase knowledge of the individual cattle breeds, which is currently quite low (Piemontese 13%, Gasconne des Pyrénées 0%).
- Assess how much consumers are willing to spend on a quality product compared to a conventional product

### 3. Concept and action strategy

The project strategy results in an organic set of activities that act in a differentiated way on the specific needs of the target groups to ensure the optimal achievement of the project objectives defined above (see 2). The strategic proposal has been structured as follows: 1) overall strategy; 2) target groups; 3) themes and messages; 4) geographical areas; 5) timeline.

**Overall Strategy (What)** – As highlighted in the market analysis, it was observed that themes such as quality, animal welfare, and sustainability are already taken into consideration by consumers when purchasing beef. However, price sensitivity remains high and is at odds with the project's objectives.

To reverse this trend and in order to achieve the project's goals and ensure the dissemination of key European and institutional messages, a mix of activities is planned, focusing on the widespread dissemination of information aimed at consumers. These consumers need to be made more aware of responsible food purchasing, particularly when it comes to meat. This awareness can be strengthened by informing them about quality labels such as the *Consorzio Sigillo Italiano*, or *Label Rouge*; about farming methods that respect animal welfare and sustainability; and about traditional practices like transhumance, which creates a deep connection between people, animals, and the land. These are all characteristics well represented by the Piemontese and Gasconne des Pyrénées cattle breeds, which are differently recognised in the two target countries. While the Piemontese breed enjoys a certain degree of awareness, the Gasconne des Pyrénées remains largely unknown and very niche.

Consumers will therefore be the primary targets of digital communication activities (social media, website) and

more traditional channels such as print press and television. In both countries, they will partially be involved during trade fairs too, which in some cases combine B2B and B2C elements. Moreover, they will be invited to take part in tasting events specifically organised to promote high-quality beef, particularly from the Piemontese and Gasconne des Pyrénées breed.

To influence consumer habits, beef industry professionals will also play a key role. They will be reached through participation in the main trade fairs in both Italy and France, and to some extent through advertising in specialised print magazines and tasting events.

Lastly, to a lesser extent, opinion leaders will contribute to the dissemination of authoritative information aimed at influencing consumer choices. They will be engaged by the press office, which will carry out recruitment of journalists and bloggers to produce advertorials and interview the Proposing Organisations, either remotely or during major events.

Overall, communication content will be tailored to the target audience, using technical terms and concepts only when addressing beef industry professionals, and simplifying (without diluting) messages for a non-expert audience. Moreover, the promoted breeds will vary depending on the target country, as they are only present nationally and not abroad: Piemontese in Italy and Gasconne des Pyrénées in France.

Below is a summary table of the main proposed activities:

Activity		Target country		Description and objectives
		ITA	FRA	
WP2	2.1 – Continuous PR activity (press office)	X	X	Activation of press offices to disseminate authoritative information through press releases and to engage opinion leaders who can contribute to the promotion of conscious, high-quality beef consumption. <i>Differences between target countries:</i> it should be noted that press office costs are generally higher in France, and with an equal budget, a lower number of services is to be expected.
	3.1 - Website	X	X	Through a dedicated, authoritative platform, promote awareness of high-quality European beef by showcasing the two cattle breeds featured in the campaign, as well as traditional farming methods that are environmentally friendly and respectful of animal welfare. This approach allows for reaching a large number of people nationwide at any time. <i>Differences between target countries:</i> none.
WP3	3.2 – Social media	X	X	Disseminate the Union's messages through interactive communication channels such as social media (Facebook, Instagram), in order to also reach younger audiences and encourage more conscious beef consumption. The interactive nature of social platforms allows for the collection of feedback, which is useful for improving the programme's strategy. Engagement helps to consolidate the information acquired by the target audience and encourages trial purchases. Lastly, social media are also effective tools for promoting events. <i>Differences between target countries:</i> none.
	4.1 – Print advertising	X	X	Dissemination of project messages through printed advertising materials, both in specialised publications (e.g. <i>Eurocarni, La Boucherie Française</i> ) and in magazines aimed at food enthusiasts (e.g. <i>Gourmand, Cuisine et Vins de France, Les Pyrénées</i> ). Print advertising is a traditional method for reaching a large number of readers at national level. <i>Differences between target countries:</i> in Italy, print communication is targeted exclusively at B2B, as B2C advertising campaigns are planned for television. In France, on the other hand, the target audience is mixed.
WP4	4.2 – TV advertising	X	X	Dissemination of promotional messages through television channels (commercial advertising, participation in TV shows) aimed at increasing awareness of the B2C audience. Once again, it is possible to reach a large number of targets nationwide through major television networks (RAI, Mediaset, La7, M6). <i>Differences between target countries:</i> due to the high cost of TV advertising, in France this activity is planned in one year and is limited to only the participation in a TV shows. On the other hand, in Italy it is continuous throughout the project and involves both the participation in TV shows and commercial ads.
	5.1 – Visual Identity &	X	X	Create a unified visual identity for the project, easily and immediately recognisable, that will effectively, directly, and creatively convey the Union's

WP6	Communication Strategy			messages. In addition, organise a photo and video shoot to gather sufficient material to be used throughout all promotional activities. <i>Differences between target countries:</i> the main campaign image will be common to both target countries. However, it is possible to foresee secondary visuals specific to each promoted breed, to be used on special occasions (e.g. events).
	5.2 – Promotional materials	X	X	Promote awareness during offline activities by directly disseminating information through brochures and flyers designed according to the target group. Generate interest and engagement by distributing tailored promotional items during events (e.g. shopping bags, pens, other gadgets). Engagement helps to consolidate the information acquired by the target audience and encourages trial purchases. <i>Differences between target countries:</i> while some materials may be common to both countries (e.g. brochures), the campaign image and key information may vary on other materials (e.g. flyers). Additionally, the production of promotional items can be tailored based on the type of events and the needs of the target audience.
	5.3 – Promotional video	X	X	Increase awareness through engaging and evocative videos that will be shown during most of the online and offline activities. This allows reaching all types of targets, anywhere and at any time throughout the duration of the programme. <i>Differences between target countries:</i> none.
	6.1 – Stands at trade fairs	X	X	Engage with a wide audience of consumers and industry professionals in the shortest possible time and space. Face-to-face interaction has a greater influence on the behaviour of target groups. Dual purpose: to promote awareness of high-quality European beef and to establish and/or strengthen business relationships. <i>Differences between target countries:</i> none.
	6.2 – Tasting events	X	X	Organise tasting events in Italy and in France in collaboration with restaurants, chefs, and meat experts. The target audience is the end consumer, who will be able to personally verify the accuracy of the information received by participating in the tasting. <i>Differences between target countries:</i> tasting in France are organised in the frame of an initiative called “Fete du Boeuf Gascon des Pyrénées”

Lastly, in addition to these Work Packages that have a direct impact on the project’s objectives, it is proposed to include an additional activity, of operational nature – namely the presence of the Implementing Body at the Review Meetings of the projects organised annually by REA, which may take place at their headquarters in Brussels.

**Target Groups (Who)** – This project proposal is primarily addressed to consumers, who need to be educated towards a more conscious meat consumption, leading them to choose high-quality and sustainable products. The selected segment is quite broad and includes both women and men, with a predominance of the former as they are typically responsible for household purchases. The age range goes from 25 to 54 years: for younger people, who generally have less disposable income, the aim is to encourage consumption of higher-quality products, even if more expensive; for more mature age groups, communication will focus on raising awareness of the benefits of consuming high-quality meat, both in terms of economic and environmental sustainability.

However, sector professionals will not be overlooked – from farmers and technicians to butchers, buyers and restaurateurs. Their involvement is crucial in encouraging the purchase of high-quality meat and making the product recognisable to consumers.

Lastly, the outreach potential of opinion leaders will be leveraged to further disseminate the specific information of the promotional campaign – from its objectives to the distinctive features of high-quality beef (recognisable labels, farming methods), particularly those linked to the two promoted cattle breeds.

The following table provides a summary of the target groups and their relevance to the project.

TARGET GROUP	PROFILE	WHY?
<b>Consumers (B2C)</b>	Predominantly women aged 25–54 (responsible for household)	As the beef from the two cattle breeds is a premium product with an average selling price above the market norm, the focus is on consumers with greater spending power who are also able to understand and absorb the messages conveyed by the promotional campaign. Women are particularly important, as

	purchases); women and men aged 25–34 on social media.	they are typically the main household purchasers and therefore determine the shopping basket. Men, on the other hand, may be more responsive to communication via social media.
<b>Beef industry operators (B2B)</b>	Breeders, technicians, butchers, wholesalers, restaurateurs, and buyers from small, medium, and large-scale retail.	Beef industry professionals help to open or strengthen the commercial network and are authoritative figures in the eyes of consumers. To be effective, training must cover every stage of the production chain: <ol style="list-style-type: none"> <li>1. Farming (farmers and technicians): information about the promotion programme and support in pursuing the project’s objectives;</li> <li>2. Processing (butchers): promotion of the value of cuts from the featured cattle breeds;</li> <li>3. Distribution/marketing (restaurateurs, buyers): increasing awareness of the breeds through various channels (including by promoting quality labels and certifications), with the aim of bringing the product to consumers.</li> </ol>
<b>Opinion leaders (B2B)</b>	Journalists from specialist meat and food magazines. Food bloggers.	They enable the large-scale dissemination of authoritative and reliable information. They can become important ambassadors and spokespeople for high-quality beef, helping to raise public awareness of its characteristics. Food sector opinion leaders may include: <ul style="list-style-type: none"> <li>• Journalists, to reach consumer segments that make little use of social media and the web;</li> <li>• Bloggers, to engage the widest possible audience on social media, particularly younger consumers.</li> </ul> In selecting them, the following criteria will be taken into account: <ul style="list-style-type: none"> <li>• their activity in the food &amp; beverage sector;</li> <li>• their social media reach, both in terms of number and type of followers;</li> <li>• whether they are active in Italy and/or France.</li> </ul>

In summary, the promotional activities described above will engage the target groups in the following way:

		<b>Consumers (B2C)</b>	<b>Beef industry operators (B2B)</b>	<b>Opinion leader (B2B)</b>
<b>WP 2</b>	2.1 – Continuous PR activities (press office)	X		X
<b>WP3</b>	3.1 - Website	X	X	X
	3.2 – Social media	X		
<b>WP4</b>	4.1 – Print Advertising	X	X	
	4.2 – TV Advertising	X		
<b>WP5</b>	5.1 – Visual Identity & Communication Strategy	X	X	X
	5.2 – Promotional Materials	X	X	X
	5.3 – Promotional Video	X	X	X
<b>WP6</b>	6.1 – Stands at Trade Fairs	X	X	X
	6.2 – Tasting events	X	X	

**Key Themes and Messages (how)** – The communication strategy will revolve around a selection of messages of European interest, aligned with the interests of the identified target groups. The main EU message, featured in the graphic proposals attached to this technical offer, may be articulated as follows:

- **BEEF OF EUROPE. TASTE WORTH DOUBLE:** This visual, focusing on the taste of the Piemontese and Gasconne des Pyrénées beef, will be better integrated with the quality logos which are applied to each cattle breed, i.e. Consorzio Sigillo Italiano umbrella logo (certifying cattle raised according to production regulations under SQNZ) and Label Rouge Gasconne des Pyrénées. In addition, a secondary message will be introduced such as “Discover local mountain breeds”, to stress on the rusticity of the cattle breeds promoted in the project.

In addition to this main visual identity, country-specific visuals may also be developed, highlighting only the breeds available in each target market (Piemontese in Italy, Gasconne des Pyrénées in France) and their respective quality logos. Additional secondary claims may also be drawn from the following themes, which will also be featured in various communication and content materials: *Traceability and labelling; Sustainability; Animal*

welfare; Tradition and territory; Taste and quality (see Union message for further details).

All messages can be adapted to the specific needs of the market, the product, and the language of the target country.

**Geographical Areas (where)** – To maximise investment, the majority of the promotional activities (website, social media, advertising) will have national coverage (Italy and France). In the case of events (see WP6), activities in Italy will focus mainly on the northern regions, while in France, they will be held in cities hosting major trade fairs (e.g. Lyon, Paris, Toulouse, Cournon, etc.).

**Timeline (when)** – The promotional campaign is expected to start on 1st January 2026 and will continue for 36 months, until 31st December 2028. Should the campaign begin at a later date for any reason, the timeline (see 7) will be adjusted accordingly, particularly in relation to participation in trade fairs.

#### 4. Project management, quality control and monitoring

The control mechanisms will consist of close monitoring and follow-up of each activity, checking a number of pre-defined KPIs related to the programme objectives and process.

- *KPIs of Effectiveness* (programme-related) – number of direct contacts and conversion rate (redemption), number of impressions, articles, posts, level of awareness, number of events
- *KPIs of Efficiency* (process-related) – cost per contact, average number of people involved in each activity, average number of meetings to coordinate activities, number of nonconformities on Programme guideline procedures, number of days needed to issue and pay invoices and submit reports.

These process KPIs will be monitored through a series of tools such as the Programme's financial plan and budget, audits and coordination meetings. The monitoring mechanism will be articulated as follows:

- *Plan*: planning of activities through the financial plan and what is foreseen in the GA. The Proposing Organisations will ensure constant communication with the agency of reference (REA) in order to share the periodic plans of activities (annual and quarterly) and the production of visual material to be distributed or displayed.
- *Do / Check*: activity development and control implemented by the Management team to verify that activities are developed as planned, that any monitoring tools are correctly managed and that merchandising and promotional materials are used and distributed correctly.
- *Act*: in case of activities that do not meet expected performance, the POs will redefine the achievement of deliverables. If the deliverables are still not achieved, they will communicate the "non-compliance status" to the Implementing Body, requesting that the corrective actions comply with the provisions expressly set out in the Contract. In the event that the corrective actions proposed or implemented by the Implementing Body are not appropriate, the Proposing Organisations will notify the Implementing Body of the termination of the contract and launch a new call for tenders for a new selection.

The POs and sub-contractors work in synergy with each other, although the tasks assigned to each of them are different. More specifically, the POs coordinate the project as a whole through activities of:

- *Technical Coordination*: selection of project suppliers as defined by national regulations; ex-ante and ex-post checks on the activities carried out to verify their correct implementation; definition of the best project strategies through constant communication flows and positive confrontation between the subjects involved (collection of feedback); application of preventive measures to avoid the occurrence of significant problems, also related to the socio-economic context of the target markets.
- *Financial Coordination*: managing the budget and planning the use of resources, ensuring payments and financial reporting activities within the terms set out in the GA.
- *Institutional Coordination*: the Coordinator liaises with the competent national and European institutions and provides, without delay, the materials and/or documentation useful for prior verification or project reporting, in accordance with the GA; they actively participate in inception and review meetings scheduled by the competent agency.

The Implementing Body is directly responsible for the implementation of all the actions defined in the Programme by/through:

- organising the human, technical and financial resources needed to carry out the activities;
- managing the budget by planning financial and technical resources and proposing any necessary variations;

- drafting activity reports (technical and financial) necessary to support monitoring activities, support during all phases of reporting and audits;
- application of procedures defined by the POs and timely communication of noncompliance;
- archiving (digital and/or hard copy) of project material and sharing with the POs;
- participating in review meetings organised by REA and being available for all kinds of clarifications;
- observance of the provisions set out in their contract and the GA (relevant sections); ensuring that the Agency entrusted by the Commission with the disbursement of funds, the European Commission, the European Court of Auditors and the European Anti-Fraud Office can exercise their rights to carry out checks, reviews and audits on all documents, activities related to the Programme.

The Evaluation Body, on the other hand, is directly responsible for the following activities

- development of surveys to assess the baseline of the project's impact indicators;
- interviews and development of large-scale questionnaires aimed at Italian and French consumers;
- market research and data collection aimed at further evaluating project indicators;
- annual summary reports on the impact of the action in the target markets;

participating in review meetings organised by REA and being available for all kinds of clarifications.

## 5. Evaluation methods and project indicators

Based on the project objectives, the impact indicators will monitor progress against the expected information and economic return. The different impacts are measured on the basis of historical trends (structural baseline) to which the programme results are applied. The number of contacts reached and the degree to which they are persuaded are strategic elements for evaluating project impacts. In order to increase the efficiency of the project, impact indicators are measured annually and it is the task of the Evaluation Body to conduct a thorough survey to monitor the progress of the identified indicators. In addition to the primary objectives, the EB also monitors the secondary objectives through market surveys that will be drawn up at the beginning of the project.

The main objectives of this proposal (and thus the impact indicators of the project) are as follows:

- 1. To encourage consumers to seek quality certifications when purchasing meat (Objective 1)**
- 2. To encourage consumers to seek certifications that attest to animal welfare when purchasing meat (Objective 2)**

Indeed, according to recent research by Nomisma,<sup>1</sup> Italian and French consumers, when purchasing beef for themselves and their families, primarily choose based on...

	2023	
	ITA	FRA
1) Presence of quality certifications	4%	4%
2) Presence of certifications on animal welfare	4%	4%

Source: Consumer Survey Nomisma for the evaluation of results of the EUBLODAQ2 project

To reconstruct the historical trend of the importance of these factors in beef purchases, the data was cross-referenced with those collected by Eurobarometer (556, 520, 504, 473), specifically related to the question "What do you think should be the two main responsibilities of farmers in our society?", the results of which are summarised in the chart below for Italy, France, and the EU.

		2017	2020	2022	2024
		1) To provide healthy, safe, sustainable, and high-quality agricultural products	ITA	55%	59%
	FRA	60%	57%	50%	52%
	EU	55%	54%	50%	47%

<sup>1</sup> *Blonde d'Aquitaine: quanto ne sanno italiani e francesi? – parte 2*, <https://www.blonde-aquitaine.com/blonde-daquitaine-quanto-ne-sanno-italiani-e-francesi-parte-2/> (12/03/2025)

Source: Eurobarometer 556, 520, 504, 473

2) To ensure the welfare of farm animals	<b>ITA</b>	30%	27%	29%	32%
	<b>FRA</b>	34%	44%	41%	32%
	<b>EU</b>	28%	30%	29%	26%

Source: Eurobarometer 556, 520, 504, 473

From here, the CAGR for each response to the Eurobarometer questions was calculated and applied to the percentage of consumers in the target countries (Italian, French) and the EU who, when purchasing meat, seek quality certifications and certifications attesting to animal welfare, respectively. This was done in order to reconstruct the historical trend starting from the baseline. The full analysis of the impact indicators is shown in the tables at paragraph 3.1 for Italy, France, and the EU; in the latter case, it was assumed that the same baseline (4% for both objectives) as the other two countries would be maintained. Please see the baselines and expected impact at the end of the programme in the table "Impact indicator description" down below.

<b>Output and results indicators</b>						
<b>WP</b>	<b>Output indicators</b>	<b>Result indicators</b>				
Work package 1	Report on subcontracting (IB and EB) / n. 3 reports on coordination activities / n. 3 reports on IPR / n. 36 internal meetings / n. 36 IB meetings / n. 4 EB meetings	Efficient operational, technical, administrative and financial management.				
Work package 2	N. 3 reports on WP2 / n. 2 press kits / n. 16 press releases / n. 12 press reviews / n. 6 semi-annual reports	1.200.000 contacts (ITA) + 1.000.000 contacts (FRA) = 2.200.000 contacts (TOT)				
Work package 3	N. 3 reports on WP3 / 1 website creation / 3 SEO / 9 news / 3 Google Ads campaigns / 11 quarterly reports (website) / 2 social media accounts opened / 424 posts / 33 monthly sponsorships / 11 quarterly reports (social media)	6.505.000 contacts (ITA) + 6.505.000 contacts (FRA) = 13.010.000 contacts (TOT)				
Work package 4	N. 3 reports on WP4 / 17 ads / 1 commercial video / 3 TV commercial campaigns / 3 participations in TV shows	32.108.000 contacts (ITA) + 4.413.200 contacts (FRA) = 36.521.200 contacts (TOT)				
Work package 5	N. 3 reports on WP5 / n. 1 visual identity + adaptations / 4.580 brochures / 4.580 flyers / 4.580 pens / 2.380 gadgets / 2.380 shoppers / 1 institutional video / 2 breed-specific videos / possible short video clips	Not applicable as communication tools support other WPs				
Work package 6	N. 3 reports on WP6 / n. 13 trade fairs / n. 13 reports on trade fairs / 11 tasting events / 11 reports on tasting events	180 contacts (ITA) + 250 contacts (FRA) = 430 contacts (TOT)				
Work package 7	N. 3 reports on evaluation of results	Not applicable				
<b>Impact indicators</b>						
<b>Impact indicator description</b>	<b>Baseline</b>			<b>End of programme</b>		
% of consumers to seek quality certifications when purchasing meat (Objective 1)	<b>ITA</b>	<b>FRA</b>	<b>EU</b>	<b>ITA</b>	<b>FRA</b>	<b>EU</b>
	4%	4%	4%	8,05%	5,89%	4,17%
% of consumers to seek certifications that attest to animal welfare when purchasing meat (Objective 2)	<b>ITA</b>	<b>FRA</b>	<b>EU</b>	<b>ITA</b>	<b>FRA</b>	<b>EU</b>
	4%	4%	4%	9,30%	5,30%	4,16%

## 6. Impact and expected return

The objectives of this proposal are as follows:

3. To encourage consumers to seek quality certifications when purchasing meat (Objective 1)
4. To encourage consumers to seek certifications that attest to animal welfare when purchasing meat (Objective 2)

Indeed, according to recent research by Nomisma,<sup>2</sup> Italian and French consumers, when purchasing beef for themselves and their families, primarily choose based on...

	2023	
	ITA	FRA
3) Presence of quality certifications	4%	4%
4) Presence of certifications on animal welfare	4%	4%

Source: Consumer Survey Nomisma for the evaluation of results of the EUBLODAQ2 project

To reconstruct the historical trend of the importance of these factors in beef purchases, the data was cross-referenced with those collected by Eurobarometer (556, 520, 504, 473), specifically related to the question "What do you think should be the two main responsibilities of farmers in our society?", the results of which are summarised in the chart below for Italy, France, and the EU.

		2017	2020	2022	2024
		3) To provide healthy, safe, sustainable, and high-quality agricultural products	ITA	55%	59%
	FRA	60%	57%	50%	52%
	EU	55%	54%	50%	47%
Source: Eurobarometer 556, 520, 504, 473					
4) To ensure the welfare of farm animals	ITA	30%	27%	29%	32%
	FRA	34%	44%	41%	32%
	EU	28%	30%	29%	26%
Source: Eurobarometer 556, 520, 504, 473					

From here, the CAGR for each response to the Eurobarometer questions was calculated and applied to the percentage of consumers (Italian, French, and EU) who, when purchasing meat, seek quality certifications and certifications attesting to animal welfare, respectively. This was done in order to reconstruct the historical trend starting from the baseline. The result is shown in the tables below for Italy, France, and the EU; in the latter case, it was assumed that the same baseline (4% for both objectives) as the other two countries would be maintained.

### Objective 1 - % of consumers who buy meat seeking quality labels

% of consumers who buy meat seeking quality labels - ITA								
	2022	2023	2024	2025	2026	2027	2028	CAGR
Population (25-54 yo) – ITA (.000)	22.911	22.665	22.415	22.205	21.997	21.792	21.588	-0,94%
% of population who buy quality branded products	4,25%	4,00%	3,75%	3,52%	3,31%	3,11%	2,92%	-6,13%
Consumers who buy quality branded products (.000)	973	907	842	783	728	677	629	

% of consumers who buy meat seeking quality labels – FRA								
	2022	2023	2024	2025	2026	2027	2028	CAGR
Population (25-54 yo) – FRA (.000)	24.300	24.276	24.195	24.154	24.113	24.072	24.031	-0,17%
% of population who buy quality branded products	4,09%	4,00%	3,91%	3,82%	3,73%	3,65%	3,57%	-2,27%

<sup>2</sup> *Blonde d'Aquitaine: quanto ne sanno italiani e francesi? – parte 2*, <https://www.blonde-aquitaine.com/blonde-daquitaine-quanto-ne-sanno-italiani-e-francesi-parte-2/> (12/03/2025)

Consumers who buy quality branded products (.000)	994	971	946	923	900	878	857	
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% of consumers who buy meat seeking quality labels - EU								
	2022	2023	2024	2025	2026	2027	2028	CAGR
Population (25-54 yo) – UE (.000)	302.739	273.859	297.616	295.754	293.904	292.065	290.238	-0,63%
% of population who buy quality branded products	4,14%	4,00%	3,86%	3,73%	3,60%	3,48%	3,36%	-3,41%
Consumers who buy quality branded products (.000)	12.523	10.954	11.499	11.037	10.594	10.168	9.760	

## Objective 2 - % of consumers purchasing while seeking animal welfare certifications

% of consumers purchasing while seeking animal welfare certifications – ITA								
	2022	2023	2024	2025	2026	2027	2028	CAGR
Population (25-54 yo) – ITA (.000)	22.911	22.665	22.415	22.205	21.997	21.792	21.588	-0,94%
% of population who buy products with animal welfare certifications	3,83%	4,00%	4,17%	4,35%	4,54%	4,74%	4,95%	4,34%
Consumers who buy products with animal welfare certifications (.000)	877	907	935	967	999	1.033	1.068	

% of consumers purchasing while seeking animal welfare certifications – FRA								
	2022	2023	2024	2025	2026	2027	2028	CAGR
Population (25-54 yo) – FRA (.000)	24.300	24.276	24.195	24.154	24.113	24.072	24.031	-0,17%
% of population who buy products with animal welfare certifications	4,31%	4,00%	3,69%	3,41%	3,15%	2,91%	2,69%	-7,65%
Consumers who buy products with animal welfare certifications (.000)	1.046	971	894	824	760	700	646	

% of consumers purchasing while seeking animal welfare certifications – EU								
	2022	2023	2024	2025	2026	2027	2028	CAGR
Population (25-54 yo) – UE (.000)	302.739	273.859	297.616	295.754	293.904	292.065	290.238	-0,63%
% of population who buy products with animal welfare certifications	4,14%	4,00%	3,86%	3,72%	3,59%	3,47%	3,34%	-3,51%
Consumers who buy products with animal welfare certifications (.000)	12.535	10.954	11.486	11.013	10.560	10.125	9.708	

To assess the impact of the project against the set objectives, the number of direct contacts generated during the implementation of relevant promotional activities in each target country has been calculated, as summarised in the tables below.

		Direct contacts generated								
		ITA			FRA			ITA+FRA		
		2026	2027	2028	2026	2027	2028	2026	2027	2028
WP2	PR activities (press office)	300.000	450.000	450.000	250.000	375.000	375.000	550.000	825.000	825.000
WP3	Website	1.000	2.000	2.000	1.000	2.000	2.000	2.000	4.000	4.000
	Social media	1.300.000	2.600.000	2.600.000	1.300.000	2.600.000	2.600.000	2.600.000	5.200.000	5.200.000
WP4	Print advertising	36.000	36.000	36.000	1.236.600	540.000	1.236.600	1.272.600	576.000	1.272.600
	TV advertising	10.000.000	11.000.000	11.000.000	-	-	1.400.000	10.000.000	11.000.000	12.400.000
WP6	Stands at trade fairs	8.300	6.927	38.300	71.500	96.800	73.300	79.800	103.727	111.600
	Tasting events	60	60	60	50	100	100	110	160	160
<b>Total</b>		<b>11.645.360</b>	<b>14.094.987</b>	<b>14.126.360</b>	<b>2.859.150</b>	<b>3.613.900</b>	<b>5.687.000</b>	<b>14.504.510</b>	<b>17.708.887</b>	<b>19.813.360</b>
% di redemption		2%	2,5%	3%	3%	4%	5%	2%	3%	4%

<b>Grand Total Contacts</b>	<b>232.907</b>	<b>352.375</b>	<b>423.791</b>	<b>85.775</b>	<b>144.556</b>	<b>284.350</b>	<b>318.682</b>	<b>496.931</b>	<b>708.141</b>
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To obtain a more accurate estimate of the impact and determine the number of people who will be informed and persuaded as part of the programme, a redemption rate (%) has been applied to each baseline/trend. The result is the number of individuals who will recall the programme's key messages, the specific characteristics of the products, and who will be persuaded to purchase meat bearing quality labels and/or animal welfare certifications. It should be noted that the redemption rate is a coefficient estimated on the basis of the likelihood that people directly reached by the project will have changed their consumption habits, and it depends on the nature of the promotional activities. As this project proposal is based on mass communication (social media, advertising), a relatively low redemption rate is estimated for Year 1 in the two target countries (ITA 2% and FRA 3%), which gradually increases in Year 2 (2,5% and 4%) and Year 3 (3% and 5%) due to the repeated exposure to the campaign and the higher probability of being reached by its messages. Furthermore, it should be pointed out that in Italy the initial redemption rate is lower, since TV advertising—despite generating a large number of direct contacts—tends to reach the same individuals multiple times, thereby reducing the percentage of people who have effectively absorbed the promotional messages.

The tables below present the estimated impact of the programme in the target countries and, where possible, at EU level, in relation to the objectives set, as well as the expected ROI. The methodology used to calculate the impact is mainly based on the definition of the baseline and trends, to which the programme results (see Grand Total Contacts) are added to determine the variation between historical trends and the results achieved.

### Objective 1 – % of consumers who purchase meat seeking quality labels

According to the study conducted by Nomisma, in 2023, 4% of consumers in both Italy and France looked for quality labels when purchasing meat. By applying the CAGR (calculated based on the trend of responses to the Eurobarometer survey), the structural trend over the next four years has been reconstructed.

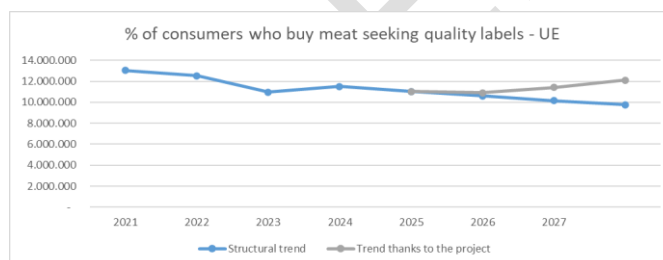
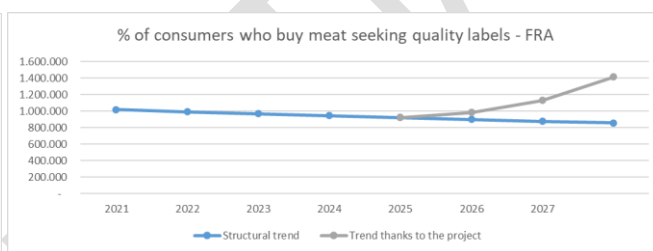
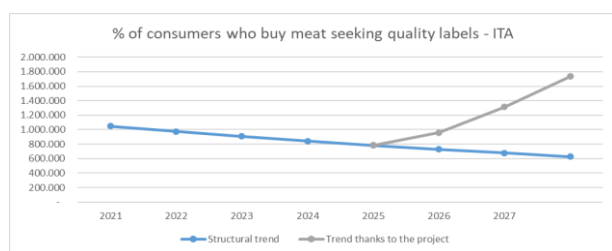
It has been estimated that, thanks to the project, the redemption rate in Year 1 will be 2% in Italy and 3% in France. As a result, the number of new consumers who will have changed their purchasing habits will be approximately 233.000 in Italy and 86.000 in France (319.000 in total), who will be added to the population already purchasing meat with quality labels. By the end of Year 2, the consumers persuaded by the project will be 352.000 and 145.000 respectively (497.000 in total, with a redemption rate of 2,5% in ITA and 4% in FRA), while in Year 3 they will rise to 424.000 and 284.000 (708.000 in total). By adding the consumers (aged 25–54) persuaded to the baseline, the final percentage of those purchasing meat while looking for quality labels by the end of the programme will be 8,05% in Italy and 5,89% in France (with an estimated 4,17% at EU level).

<b>% of consumers who buy meat seeking quality labels – ITA</b>								
	<b>2022</b>	<b>2023</b>	<b>2024</b>	<b>2025</b>	<b>2026</b>	<b>2027</b>	<b>2028</b>	<b>CAGR</b>
Population (25-54 yo) – ITA (.000)	22.911	22.665	22.415	22.205	21.997	21.792	21.588	-0,94%
% of population who buy quality branded products	4,25%	4,00%	3,75%	3,52%	3,31%	3,11%	2,92%	-6,13%
Consumers who buy quality branded products (.000)	973	907	842	783	728	677	629	
Consumers who buy quality branded products thanks to the project (.000)					233	352	424	
Consumers who buy quality branded products structural + project (.000)					961	1.313	1.737	
% of population					4,37%	6,03%	8,05%	

<b>% of consumers who buy meat seeking quality labels – FRA</b>								
	<b>2022</b>	<b>2023</b>	<b>2024</b>	<b>2025</b>	<b>2026</b>	<b>2027</b>	<b>2028</b>	<b>CAGR</b>
Population (25-54 yo) – FRA (.000)	24.300	24.276	24.195	24.154	24.113	24.072	24.031	-0,17%
% of population who buy quality branded products	4,09%	4,00%	3,91%	3,82%	3,73%	3,65%	3,57%	-2,27%
Consumers who buy quality branded products (.000)	994	971	946	923	900	878	857	
Consumers who buy quality branded products thanks to the project (.000)					86	145	284	

Consumers who buy quality branded products structural + project (.000)					986	1.131	1.415	
% of population					4,09%	4,70%	5,89%	

% of consumers who buy meat seeking quality labels - EU								
	2022	2023	2024	2025	2026	2027	2028	CAGR
Population (25-54 yo) – UE (.000)	302.739	273.859	297.616	295.754	293.904	292.065	290.238	-0,63%
% of population who buy quality branded products	4,14%	4,00%	3,86%	3,72%	3,59%	3,47%	3,34%	-3,51%
Consumers who buy quality branded products (.000)	12.535	10.954	11.486	11.013	10.560	10.125	9.708	
Consumers who buy quality branded products thanks to the project (.000)					319	497	708	
Consumers who buy quality branded products structural + project (.000)					10.912	11.409	12.117	
% of population					3,71%	3,91%	4,17%	



## Objective 2 – % of consumers who purchase meat seeking animal welfare certifications

According to the study conducted by Nomisma, in 2023, 4% of consumers in both Italy and France looked for animal welfare certifications when purchasing meat. By applying the CAGR (calculated based on the trend of responses to the Eurobarometer survey), the structural trend over the next four years has been reconstructed.

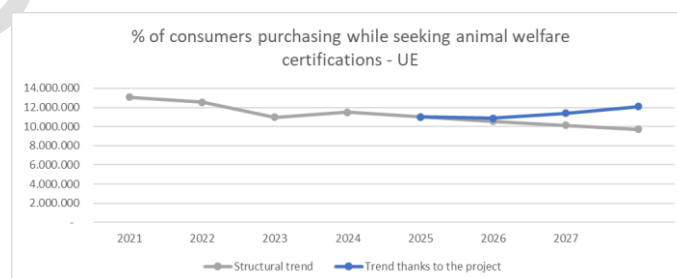
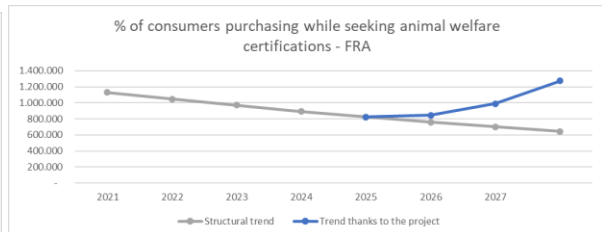
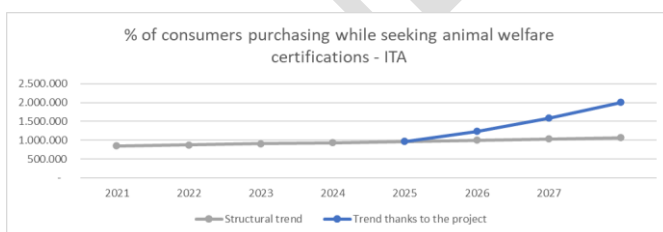
Using the redemption rates previously calculated for each target country and the corresponding number of consumers persuaded by the programme, it is estimated that, thanks to the project, the total number of people who will have changed their purchasing habits by the end of the promotional campaign (sum of the baseline and the project's impact) will be 2.009 million in Italy and 1.274 million in France (12.084 million at European level). In percentage terms, the final result for the Italian population purchasing beef with animal welfare certifications will be 9,30%, and 5,30% for the French population (with an EU average estimated at 4,16%).

% of consumers purchasing while seeking animal welfare certifications – ITA								
	2022	2023	2024	2025	2026	2027	2028	CAGR
Population (25-54 yo) – ITA (.000)	22.911	22.665	22.415	22.205	21.997	21.792	21.588	-0,94%
% of population who buy products with animal welfare certifications	4,25%	4,00%	3,75%	3,52%	3,31%	3,11%	2,92%	-6,13%
Consumers who buy products with animal welfare certifications (.000)	973	907	842	783	728	677	629	
Consumers who buy products with animal welfare certifications thanks to the project (.000)					233	352	424	
Consumers who buy products with animal welfare certifications					1.232	1.585	2.009	

structural + project (.000)								
% of population					5,60%	7,27%	9,30%	

% of consumers purchasing while seeking animal welfare certifications – FRA								
	2022	2023	2024	2025	2026	2027	2028	CAGR
Population (25-54 yo) – FRA (.000)	24.300	24.276	24.195	24.154	24.113	24.072	24.031	-0,17%
% of population who buy products with animal welfare certifications	4,09%	4,00%	3,91%	3,82%	3,73%	3,65%	3,57%	-2,27%
Consumers who buy products with animal welfare certifications (.000)	994	971	946	923	900	878	857	
Consumers who buy products with animal welfare certifications thanks to the project (.000)					86	145	284	
Consumers who buy products with animal welfare certifications structural + project (.000)					845	990	1.274	
% of population					3,51%	4,11%	5,30%	

% of consumers purchasing while seeking animal welfare certifications – EU								
	2022	2023	2024	2025	2026	2027	2028	CAGR
Population (25-54 yo) – UE (.000)	302.739	273.859	297.616	295.754	293.904	292.065	290.238	-0,63%
% of population who buy products with animal welfare certifications	4,14%	4,00%	3,86%	3,72%	3,59%	3,47%	3,34%	-3,51%
Consumers who buy products with animal welfare certifications (.000)	12.535	10.954	11.486	11.013	10.560	10.125	9.708	
Consumers who buy products with animal welfare certifications thanks to the project (.000)					319	497	708	
Consumers who buy products with animal welfare certifications structural + project (.000)					10.878	11.375	12.084	
% of population					3,70%	3,89%	4,16%	



### Increase in ROI

This project proposal also aims to enhance the competitiveness of quality beef, in particular the Piemontese and Gasconne des Pyrénées breeds, in the respective target countries and at overall level.

To estimate the revenue trend for quality beef, the programme uses as a starting point the total number of animals slaughtered, the average wholesale price (€/carcass kg), and the revenue from beef of the respective breeds. The total number of animals slaughtered over the years was calculated based on historical trends.

This figure was then multiplied by 483, representing the average carcass weight (in kg) obtained from each animal. The amount of meat produced in previous years was therefore reconstructed, while the data for 2025–2028 were estimated based on structural market trends.

To this dataset, the growth percentage attributed to the promotional activities was applied to the average €/kg carcass price, considering the expected shift in consumer preference from quantity to quality. Taking this increase into account, it was then possible to determine the final revenue for quality beef and the impact of the programme's implementation in terms of ROI (Return On Investment).

Improve the competitiveness and revenue of beef from Piemontese and Gasconne des Pyrénées cattle breeds							
ITALY	2022	2023	2024	2025	2026	2027	2028
Piemontese heads slaughtered in previous year	136.087	133.396	127.312	120.934	118.130	115.391	112.716
Total meat produced in previous year (.000 carcass kg)	65.730	64.430	61.492	58.411	57.057	55.734	54.442
Piemontese heads slaughtered in current year – structural	133.396	127.312	120.934	118.130	115.391	112.716	110.102
Variation %	-1,98%	-4,56%	-5,01%	-2,32%	-2,32%	-2,32%	-2,32%
Structural variation (.000 carcass kg)	-1.300	-2.939	-3.081	-1.354	-1.323	-1.292	-1.262
Total meat produced in current year structural (.000 carcass kg)	64.430	61.492	58.411	57.057	55.734	54.442	53.179
Average carcass price – structural (€/carcass kg)	3,51	3,21	3,92	4,17	4,44	4,72	5,02
<b>Structural revenue trend compared to the previous year (.000 €)</b>	<b>-4.562</b>	<b>-9.433</b>	<b>-12.077</b>	<b>-5.648</b>	<b>-5.869</b>	<b>-6.099</b>	<b>-6.339</b>
Increase in average carcass price thanks to the project (%)					0,50%	0,75%	1,00%
Increase in average carcass price thanks to the project (€/carcass kg)					0,022	0,035	0,050
<b>Estimated final average carcass price (€/carcass kg)</b>					<b>4,46</b>	<b>4,78</b>	<b>5,13</b>
Estimated revenue (.000 €)	226.151	197.388	228.971	237.949	247.279	256.975	267.051
<b>Increase in revenue compared to previous year thanks to the project (.000 €)</b>					<b>1.236</b>	<b>1.927</b>	<b>2.671</b>
<b>Programme investment (.000 €)</b>					<b>447</b>	<b>532</b>	<b>532</b>
<b>ROI – Total revenue / investment (%)</b>					<b>276,38%</b>	<b>362,56%</b>	<b>502,37 %</b>

Improve the competitiveness and revenue of beef from Piemontese and Gasconne des Pyrénées cattle breeds							
FRANCE	2022	2023	2024	2025	2026	2027	2028
Gasconne des Pyrénées heads slaughtered in previous year	13.420	13.091	12.803	12.482	12.227	11.977	11.733
Total meat produced in previous year (.000 carcass kg)	6.482	6.323	6.184	6.029	5.906	5.785	5.667
Gasconne des Pyrénées heads slaughtered in current year – structural	13.091	12.803	12.482	12.227	11.977	11.733	11.493
Variation %	-2,45%	-2,20%	-2,50%	-2,04%	-2,04%	-2,04%	-2,04%
Structural variation (.000 carcass kg)	-159	-139	-155	-123	-121	-118	-116
Total meat produced in current year structural (.000 carcass kg)	6.323	6.184	6.029	5.906	5.785	5.667	5.551
Average carcass price – structural (€/carcass kg)	5,50	5,85	6,04	6,41	6,81	7,23	7,67
<b>Structural revenue trend compared to the previous year (.000 €)</b>	<b>-873</b>	<b>-815</b>	<b>-935</b>	<b>-790</b>	<b>-822</b>	<b>-855</b>	<b>-889</b>
Increase in average carcass price thanks to the project (%)					1,00%	1,50%	2,00%
Increase in average carcass price thanks to the project (€/carcass kg)					0,068	0,108	0,153
<b>Estimated final average carcass price (€/carcass kg)</b>					<b>6,88</b>	<b>7,40</b>	<b>8,00</b>
Estimated revenue (.000 €)	34.760	36.169	36.415	37.872	39.387	40.963	42.602
<b>Increase in revenue compared to previous year thanks to the project (.000 €)</b>					<b>394</b>	<b>614</b>	<b>852</b>
<b>Programme investment (.000 €)</b>					<b>205</b>	<b>240</b>	<b>224</b>

ROI – Total revenue / investment (%)					191,91%	256,42%	380,58%
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Improve the competitiveness and revenue of beef from Piemontese and Gasconne des Pyrénées cattle breeds							
ITALY+FRANCE	2022	2023	2024	2025	2026	2027	2028
Piemontese + Gasconne des Pyrénées heads slaughtered in previous year	149.507	146.488	140.115	133.416	130.357	127.368	124.448
Total meat produced in previous year (.000 carcass kg)	72.212	70.754	67.675	64.440	62.962	61.519	60.108
Piemontese + Gasconne des Pyrénées heads slaughtered in current year – structural	146.488	140.115	133.416	130.357	127.368	124.448	121.595
Variation %	-2,02%	-4,35%	-4,78%	-2,29%	-2,29%	-2,29%	-2,29%
Structural variation (.000 carcass kg)	-1.458	-3.078	-3.236	-1.477	-1.444	-1.410	-1.378
Total meat produced in current year structural (.000 carcass kg)	70.754	67.675	64.440	62.962	61.519	60.108	58.730
Average carcass price – structural (€/carcass kg)	3,69	3,45	4,12	4,38	4,66	4,96	5,27
<b>Structural revenue trend compared to the previous year (.000 €)</b>	-5.435	-10.248	-13.011	-6.438	-6.691	-6.954	-7.227
Increase in average carcass price thanks to the project (%)					0,59%	0,89%	1,18%
Increase in average carcass price thanks to the project (€/carcass kg)					0,026	0,041	0,059
<b>Estimated final average carcass price (€/carcass kg)</b>					4,41	4,70	5,02
Estimated revenue (.000 €)	260.911	233.557	265.386	275.821	286.666	297.938	309.653
<b>Increase in revenue compared to previous year thanks to the project (.000 €)</b>					<b>1.630</b>	<b>2.542</b>	<b>3.523</b>
<b>Programme investment (.000 €)</b>					<b>653</b>	<b>771</b>	<b>755</b>
<b>ROI – Total revenue / investment (%)</b>					<b>249,81%</b>	<b>329,58%</b>	<b>466,28%</b>

## 7. Timetable

### Timetable

Fill in cells in beige to show the duration of each work packages. Repeat lines/columns as necessary.

**Note:** Use the project month numbers instead of calendar months. Month 1 marks always the start of the project.

WP		MONTHS																																					
		M 1	M 2	M 3	M 4	M 5	M 6	M 7	M 8	M 9	M 10	M 11	M 12	M 13	M 14	M 15	M 16	M 17	M 18	M 19	M 20	M 21	M 22	M 23	M 24	M 25	M 26	M 27	M 28	M 29	M 30	M 31	M 32	M 33	M 34	M 35	M 36		
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	FRA																																						
WP2.1	ITA																																						
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WP3.1	ITA																																						
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