

出國報告(出國類別：考察)

參加亞洲生產力組織(APO)辦理「農業利基行銷最佳案例」多國性研習
(Multi-country Study Mission on Best cases of Niche Agricultural Markets)

服務機關：行政院農委會農糧署

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派赴國家：日本

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摘要

日本農產品的利基行銷有長期成功經驗，對於有興趣學習利基行銷的國家，極具學習價值。不但可以學習創新商業技能，還可學習現代化管理方式，科技化生產、加工、包裝及標示技術等經驗，本次研習課程即是期望透過組織學習方式來診察各國農業利基行銷經驗，藉此討論利基行銷發展之相關議題。會議分為專題演講、實地參訪及小組討論三部分，專題演講邀請馬來西亞、美國及日本的三位專家說明，實地參訪地點包括米食博物館、夢有機超市、清里牛乳牧場、清里道之驛、非政府組織 Eago Tsunagete、甲府中央批發市場、Toyotami 道之驛及 Marquis 酒莊等，最後進行分組討論及經驗分享。經由本次研習可了解利基行銷鎖定具特定需求之消費者，並非與市場大宗產品競爭，因此，提供差異化產品滿足消費者需求才是生產者須努力的第一要務。既是針對特定消費者，大量生產降低成本的競爭模式則未必能提供滿足個人化需求的產品，價格高低也未必是消費者選擇的主要因素，小規模公司或產業反而較能彈性調整，這對於小農制國家而言具有發展利基，但要投入利基市場，生產者除需具有基本的生產技術外，尚需具有經營管理及行銷的能力。只要生產者隨時注意社經指標的變動，掌握社會趨勢脈動，了解消費者需求，確實付諸執行，成功指日可待。

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壹、目的

利基行銷係針對特定消費者提供符合其特定需求之產品或服務。對農產品而言，可透過差異化產品提供主流市場以外的特定小眾市場，進而創造農民或農民團體新的商機。如有機或無農藥農產品、免敏殺菌羊奶、高品質蘋果及具健康概念之果汁等皆是針對特定消費者所提供之產品。

然而，開發利基市場並非一件簡單的工作。首先需利用各種企業管理技巧找出市場利基，並需能掌握時機適時採取正確的行銷方法，以提供給最需要的消費者。根據利基行銷的定義可知，小眾的利基市場很快就會飽和，但從過去成功及失敗的經驗中學習，仍有許多成功機會存在於食品或農產品部門中。

日本農產品的利基行銷有長期的成功經驗，可以提供創新商業技能、現代化管理方式，科技化生產、加工、包裝及標示技術等經驗，對於有興趣學習利基行銷的國家而言，極具學習價值。本次研習課程目的即是以組織學習方式來診察各國農業利基行銷經驗，藉此討論利基行銷發展之相關議題。

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參、議程

研習日期自 2006 年 10 月 31 日至 11 月 7 日，共 8 天。議程包括分別來自馬來西亞、美國及日本的三位專家專題演講，實地參訪米食博物館、夢有機超市、清里牛乳牧場、清里道之驛、非政府組織 Eago Tsunagete、甲府中央批發市場、Toyotami 道之驛及 Marquis 酒莊等，最後進行分組討論及經驗分享。議程如下：

| Date | <u>Time</u> | Tentative Program | Stay |
|------------------------------|------------------|--|-----------------------------|
| 30 Oct. 2006 (Mon.) | | Arrival of participants in Tokyo Proceed individually to Diamond Hotel 1-10-3, Kojimachi, Chiyoda-ku, Tokyo 102-0083 Tel: 81-3-3263-2211 Fax: 81-3-3263-2222 | Stay at Diamond Hotel |
| 31 Oct. (Tues.) | 09:00 | Assemble at lobby of Diamond Hotel where staff from the JAICAF will meet and guide the participants to the APO Secretariat <u>APO Secretariat Conference Room</u> 1-2-10 Hirakawacho, Chiyoda-ku, Tokyo 102-0093 Tel: 81-3-5226-3924 Fax: 81-3-5226-3954 | |
| | 09:30 – 09:50 | Registration | APO Secretariat |
| | 09:50 – 10:15 | Opening session <ul style="list-style-type: none"> • Welcome address by Director, Agriculture Department, APO • Welcome address by the representative from Ministry of Agriculture, Forestry and Fisheries of Japan • Introduction of participants | |

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|------------------|------------------|---|-----------------------|
| | | <ul style="list-style-type: none"> • Group photo | |
| | 10:15 – 10:30 | Program orientation by the APO Secretariat | |
| | 10:30 – 10:45 | Coffee Break | |
| | 10:45 – 12:15 | <p>Presentation and discussion of resource paper 1: <i>“Recent development and trends in niche marketing for agricultural/food products in the Asia-Pacific region: overview and lessons learned”</i> By Mr. Chan Seng Kit, Managing Director, K-Farm Sdn Bhd, Malaysia</p> | |
| | 12:30 – 13:30 | Welcome Luncheon to be hosted by APO at Hotel Grand Arc Hanzomon 6F “Nagomi” Room | |
| | 13:45 – 15:45 | <p>Presentation and discussion of resource paper 2: <i>“Distribution of farm products and the niche market: Consumer needs and changes in distribution”</i> By Mr. Koh Harada, Chairman, Association for International Promotion of Agricultural Co-operatives</p> | |
| | 15:45 – 16:00 | Coffee break | |
| | 16:00 – 17:30 | <p>Presentation and discussion of resource paper 3: <i>“Successful examples of niche marketing of agricultural products”</i> By Mr. Morton Satin, International Consultant, U.S.A.</p> | Stay at Diamond Hotel |
| 1 Nov. (Wed.) | 09:15 | Check out and leave hotel by chartered bus | |
| | 09:30 – 09:50 | Explanation on field study by JAICAF at APO | APO Secretariat |
| | 09:50 – 10:20 | Presentation of Video “Japanese Agriculture and Farming Villages” | |

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| | 10:20 | Leave APO by chartered bus | |
| | 11:00 – 12:00 | Visit Gohan (Rice) Museum, Tokyo | |
| | 12:00 – 13:00 | Lunch | |
| | 14:30 – 17:00 | Visit Supermarket “Mothers” [Yume-ichiba (Dream Market) Co., Ltd.], Yokohama City, Kanagawa Pref. | |
| | 17:10 – 18:30 | Dinner at Restaurant “Country Kitchen” [Yume-ichiba (Dream Market) Co., Ltd.], Yokohama City, Kanagawa Pref. | |
| | 20:00 | Arrival at Hachioji Plaza Hotel 4-6-12 Myoujincho, Hachioji, Tokyo Tel: 81- 426-46-0111 Fax: 81-426-46-0004 | Stay at Hachioji Plaza Hotel |
| 2 Nov. (Thu) | 07:30 | Check out and Leave hotel by chartered bus | |
| | 10:00 – 12:00 | Kiyosato Milk Plant Inc., Hokuto City, Yamanashi Pref. | |
| | 12:30 – 16:00 | Lunch and observation at Michi-no-Eki (Roadside Station) “ <u>Minami Kiyosato</u> ”, Chuo City, Yamanashi Pref. | |
| | 17:00 | Arrival at Kofu Washington Hotel 4-3-5 Chuo, Kofu, Yamanashi Tel: 81-55-232-0410 Fax: 81-55-232-0607 | Stay at Kofu Washington Hotel |
| 3 Nov. (Fri.) | 08:30 | Leave hotel by chartered bus | |
| | 10:00 – 12:00 | Non Governmental Organization “Egao-Tsunagete” (Bridge between smiles), Hokuto City, Yamanashi Pref. | |

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| | 12:00 – 13:00 | Lunch and experience of green tourism | |
| | 14:30 – 16:30 | Salad Bowl Co., Ltd., Chuo City, Yamanashi Pref. | |
| | 17:00 | Arrival at Kofu Washington Hotel | Stay at Kofu Washington Hotel |
| 4 Nov. (Sat.) | 06:00 | Leave hotel by chartered bus | |
| | 06:20 – 08:00 | Kofu Central Wholesale Market, Kofu City, Yamanashi Pref. | |
| | 08:00 – 10:30 | Breakfast and recess time at hotel | |
| | 10:30 | Check out and leave hotel by chartered bus | |
| | 11:00 – 13:00 | Observation and lunch at Michi-no-Eki (Roadside Station) “ <u>Toyotomi</u> ”, Chuo City, Yamanashi Pref. | |
| | 14:00 – 15:00 | Marquis Winery, Koshu City, Yamanashi Pref. | |
| | 18:00 | Arrival at Diamond Hotel | Stay at Diamond Hotel |
| 5 Nov. (Sun.) | | Free time | Stay at Diamond Hotel |
| 6 Nov. (Mon.) | 09:00 | Assemble at lobby of Diamond Hotel where staff from the JAICAF will meet and guide the participants to the APO Secretariat | |
| | 09:30 – 11:00 | - Country paper presentations in each team | |
| | 11:00 – 11:15 | Tea break | |

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| | 11:15 – 12:00 | Workshop - Discussion by each team to sum-up the findings and discuss the applicability of lessons learned/Japanese cases in each country | |
| | 12:00 – 13:30 | Lunch break | |
| | 13:30 – 15:00 | Workshop discussion by each team (continued) | |
| | 15:00 – 15:15 | Tea break | |
| | 15:15 – 17:00 | Workshop discussion by each team (continued) | Stay at Diamond Hotel |
| 7 Nov. (Tues.) | 09:00 | Proceed <u>individually</u> to the APO Secretariat | |
| | 09:20 – 09:30 | Program orientation by the APO secretariat | |
| | 09:30 – 10:15 10:15-10:30 | Review of workshop output by each team Presentation of discussion output by each team | |
| | 10:30 – 10:45 | Tea break | |
| | 10:45 – 11:15 | Presentation of discussion output by each team (continued) | |
| | 11:15 – 12:00 | Summing-up and concluding sessions | |
| | 12:00 – 12:30 | Closing ceremony <ul style="list-style-type: none"> • Closing remarks by the APO Secretary-General • Awarding the certificate | |
| | PM | Free time | Stay at Diamond Hotel |
| 8 Nov. (Wed.) | | Return of participants to respective countries | |

肆、會議內容

● 專題演講

- 一、「亞洲地區農產品利基行銷之發展現況與趨勢」:由馬來西亞 K-Farm Sdn. Bhd. 公司 Managing Director Mr. Chan Seng Kit 報告



Mr. Chang Shen Kit 說明全球經濟的發展受世界貿易組織(WTO)及自由貿易協定(FTA)趨勢影響逐步走向自由化，亞洲地區新興國家經濟急速發展，帶動中產階級人口成長，從鄉村向都市集中，而工業化國家經濟成長趨緩且人口逐漸老化，消費者需求趨於多樣化，通訊業成長、農業生產技術提升、農產品加工技術及行銷方式改進等因素，更使消費型態、銷售方式及包裝也隨之改變。

(一) 消費型態

1. 新興國家中產階級興起，消費支出增加，且每人每日消費量達 3000 大卡。
2. 工業化國家逐漸老齡化，以日本為例，預估到 2015 年將有 30% 的人超過 60 歲，每人每日消費量僅剩 2300 大卡，將轉向消費健康高品質產品。
3. 消費者轉而重視有機或自然食品，購買專賣或具個人特色產品。

(二) 銷售方式

1. 超市大量擴張，提高其零售市場佔有率，形成產品、價格及附加價

值之激烈競爭，供應商轉由產地直接供應，強調品牌及驗證標章。

2. 大型量販店、集中商店街、連鎖店等紛紛興起。
3. 餐飲品牌蓬勃發展，不僅匯集人群，並提供集中店鋪主動找尋客戶。
4. 專賣店提供精品符合個人需求。

(三) 包裝

1. 注重消費者溝通，以 GAP、圖形或功能說明讓消費者認同。
2. 合法標示營養成分或是否為基因食品。
3. 爭取賣場展示之上架位置，並重視視覺效果。

由於消費型態及競爭模式已有大幅度改變，隱涵著生產者可依個別消費者需求尋求發展利基。以熱帶水果而言，產品易腐性、產品運輸方式、採收前後品質一致性、供應季節性、需求一致性及價格扭曲性等因素，提供銷售者各種服務的機會，隱藏無限商機。因利基行銷強調獨特性，需提供特定顧客特定的產品，包括特定的服務、品質或通路，有別於主流市場外的小眾市場，因此訂定行銷策略有以下幾個步驟：

- (一)分析可形成機會或對企業造成威脅的環境因子：如經濟環境、自然環境、技術發展、政策轉變或文化發展。
- (二)了解消費者特質及需求：如文化需求、社會認同、個人成就或心理層面轉變。
- (三)策略目標為增加產品附加價值：
價值=價格+品質+包裝+相關性

至於創造利基市場的方法，則分市場區隔、市場定位及價格策略三部分：

(一) 市場區隔：

1. 地理性：以特殊市場、區域或鄰近地區分類。
2. 社經指標：以年齡族群、所得、教育水準分類。
3. 心裡指標：以種族、社會階層、生活型態及個人特質分類。
4. 行為指標：以消費者知識、態度、使用習慣及產品反應。

(二) 市場定位：

1. 開發產品地位：採取廣告促銷，並利用網際網路工具。
2. 確認產品可能的競爭優勢：透過價格、品質或商譽提供較其他競爭對手更佳的价值優勢。
3. 新產品定位方法：採取與競爭者面對面的競爭或以差異化定位尋求較小競爭的市場利基。

(三) 價格策略：

1. 價格已是影響消費者選擇的主要因素。
2. 高價將影響銷售量，但低價卻會影響利潤。
3. 訂價考量因素包括成本、達成目標(利潤、銷售量或市場佔有率)、產品需求現況、競爭對手採取策略(成本、價格及提供之服務)。
4. 利潤價差會增加交易風險。
5. 新產品的定價策略為市場吸脂定價法(market skimming pricing)及市場滲透定價法(market penetration pricing)。

企業的永續經營仰賴於新產品面對新市場的能力，新產品的發展策略更是不可或缺，特別是須與種苗業者、超市或配銷商及生產者密切配合，以能快速開發新產品符合不斷創新的需求。然而變化從不停止，唯有適應變化才能生存，而教育及創新即是適應之道，在激烈競爭的環境中，不止要做最適生存者，更要以作最迅速生存者為最終目標。

二、「農產品通路與利基市場：消費者需求與通路之變動」由日本 Association for International Promotion of Agricultural Co-operatives 的主席 Mr. Koh Harada 說明：

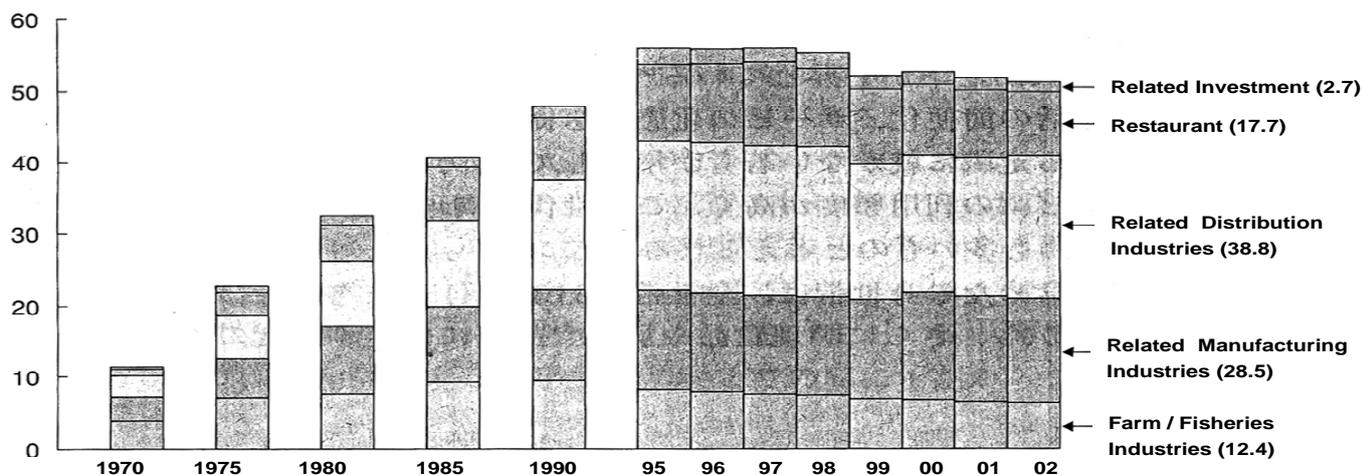


(一) 日本食品銷售體系

日本食品銷售體系分為生產、食品產業及消費三部分，產品流是從上游的農場生產再送至中下游的批發商、零售商、食品加工廠或餐廳，最後送到消費者。而資訊流就相反，資訊會從消費者反應回中游的食品產業，最後再反應給生產者。

從 1970-2002 年的日本食品產業的型態變化來看，配銷業者成長最快，且佔食品產業的比重也最大，其次為製造廠，其餘依序為餐廳、農漁產業及相關投資。

In trillion yen



Resource: "Economic Calculation of Farm / Food Related Industries" by the Ministry of Agriculture, Forestry and Fisheries

Note: Figures in parentheses () are the rates (%) of each type of business during 2002.

從日本消費者的購買行為來看，無論是蔬菜、水果、魚類、肉類、餐點或冷凍食品，消費者自超市購買比例最高，分別有 61.7%、66.5%、67.7%、66.8%、65%、73.1%，其次是購自專賣店、消費者合作社。

Ministry of Agriculture, Forestry and Fisheries, January 2004, Unit %

| | Vegetables | Fruits | Fish | Meats | One meal | Frozen Food |
|--|------------|--------|------|-------|----------|-------------|
| Specialty Retailers | 16.2 | 16.0 | 15.1 | 12.1 | 6.3 | 2.3 |
| Supermarkets | 61.7 | 66.5 | 67.7 | 66.8 | 65.0 | 73.1 |
| Consumers' Cooperatives | 9.8 | 9.1 | 10.6 | 14.4 | 7.5 | 13.3 |
| A-Co-ops (supermarkets operated by JA) | 3.4 | 1.7 | 0.5 | 0.3 | 0.3 | 0.3 |
| Department Stores | 1.1 | 1.3 | 2.7 | 2.7 | 8.5 | 0.6 |
| Others | 7.9 | 5.2 | 3.5 | 3.8 | 12.5 | 10.5 |

(二) 批發市場機制

日本的批發市場最早在 1923 年成立，係依據批發市場交易法運作，該法令目的係為使生鮮農產品可穩定供應到都市且維持社會秩序。最初，僅有蔬果批發，後來畜牧及花卉產品也納入。

日本生鮮農產品的配銷系統是以批發市場為中心。從 1923 年至今，法令及運作方式雖隨著社會及經濟變動而多次修正，但仍維持這種分配核

心。1970 年代及 1980 年代，農產品市場的生產、分配及消費有極大的變化，為符合自由貿易及市場機制，批發市場一直維持著公平、無歧視及開放的原則運作。

批發市場是由販運商 (Shipper)、批發業者 (Wholesaler) 及買者 (Buyer/retailer, consumers) 所組成的，原則上採公開拍賣，販運商將貨品委託給政府授權的批發業者 (Wholesaler) 拍賣給零批商 (Intermediate wholesaler) 及授權買者 (Authorized buyer)，其中包含餐廳、包裝業者或其他食品等相關產業業者，零批商再將產品售給零售商，而授權的買者則將產品直接銷售給消費者。但自 2002 年以後，法令修正為允許以議價方式交易。

販運商並未限制身分，任何人均可委託批發業者拍賣，並付給批發業者固定的手續費，而批發業者也會將成交金額在三日內以現金交付給販運商。不同類的農產品手續費不相同，資料如下：

| % Percentage of sales proceeds | | | | |
|--------------------------------|--------|-----------------|------|---------|
| Vegetables | Fruits | Marine Products | Meat | Flowers |
| 8.5 | 7.0 | 5.5 | 3.5 | 9.5 |

日本的批發市場制度完善，許多產品長期透過批發市場配銷，特別是蔬菜、花卉、水產及水果等，分別有 80%、79.7%、61.2%、55.5% 的產品透過批發市場分配。批發市場佔有大幅市場佔有率的原因有以下幾點原因：

- 1、 目標定價：由於價格由拍賣決定，因此在批發市場均以此為價格基準。
- 2、 保證支付：拍賣後保證三天內支付現金。
- 3、 土地與建物由政府提供且補貼興建，批發業者只要支付固定租金。
- 4、 價格穩定體系：對進入批發市場之特定蔬菜提供價格穩定措施的補償機制。
- 5、 其他批發市場也必須遵守法律禁止事項。
- 6、 農協是最大的販運商，將產品委託給特定的批發業者，這就是所謂的「區分貨物體系(Divided Cargo system)」。
- 7、 超市是最大的買者，善用零批商去降低購買成本。

(三) 批發須具備的功能

- 1、 為販售產品的基本功能：加強零售分類、建立資訊網路、財務及信用建立等。
- 2、 銷售農產品所需具備的功能：市場調查、農民生產技術的指導、分級包裝、倉儲管理、運輸、價格決定機制，收支均衡，資訊蒐集及系統

化等等。

(四) 改善農產品配銷相關事項

- 1、全面調查產品配銷現況。
- 2、掌握家計單位與零售商間的交易細節。
- 3、動物產品需知道屠宰商及生產點。
- 4、建立批發功能和實務面互相結合的組織體系。

(五) 利基市場中銷售之該與不該

- 1、消費者問卷調查是很具參考性資料，但須注意反應的問題未必與實際購買行為相同。
- 2、即使是無法依照現行產品分配體系運作，被認定為具吸引力的商品是否仍可生產？
- 3、是否能建立具有批發功能的系統？
- 4、是否能建立商品分配與結算機制？
- 5、基本的方針：開發利基市場是指在現有的一般配銷制度下，創造一種產品和銷售系統可增加生產者的淨所得。

(六) 日本蔬果銷售特色

- 1、日本定價方式：其他國家以公斤為銷售單位，單位價格就是以公斤為基準。然日本是以單一產品、一包裝、一組或一餐為單位提供定價，首先測試個別產品是以何種規格較受歡迎，如是要大的或是好看的外表或是好的形狀，展示後再逐步改進，最後以大小或外表產生價格區別，同時搭配生產面方法(如標示或耕作技巧)，訂定分級標準，而有高品質及高價格產品。
- 2、委託銷售：很少國家採取委託銷售方式，直接銷售比較普遍，而委託銷售具有以下特點：
 - (1) 有客觀且公平的立足點，沒有個人立場。
 - (2) 沒有價格波動及存貨過多的風險。
 - (3) 買賣單位是利潤的決定因素。

日本生產的蔬菜及水果具有高品質，而有高品質才有高價格的觀念一直是由行銷策略及消費者購買行為所建立的，至於各國的銷售方法，就要視各國消費者行為而定，同時也要搭配調整生產機制以及配銷模式。

三、「農產品利基行銷成功案例」：由美國 Salt Institute 的 Director of the Technical and Regulatory Affairs, Morton Satin 報告。



Mr. Satin 演講的主題為農產品利基行銷的成功案例，首先定義利基市場是較大市場中的較小比例市場，通常是指主流市場並未提供的特定消費者需求。另一個定義則是指具潛力的消費群。因大企業體必須生產大量產品才有利潤，難以區隔市場，無法提供符合特定需求的產品，因此創造出小型生產者或特殊企業的獲利機會。

這類市場近年快速成長，提供多元產品型態，如新品種蔬果、有機產品、種族特色產品及符合生活型態產品，利基產品具有不易被帶入大型生產的優勢，且大廠商也沒有興趣生產如此小量的產品，而小廠商卻可以資本化生產這些特殊產品。已開發國家的消費者，價格不是限制，因強調個人化的特別待遇，利基市場也正在發展，然而，成功的小型生產者仍必須了解企業經營及行銷與製造是同等重要，而成功就是來自於 20%的技術及 80%的行銷。如何能使利潤極大化？就是以最少的行銷通路直接銷售差異性產品，或直接銷售給消費者，因為小型操作者較大廠商更容易與消費者接近，已開發國家已發展的很普遍，但開發中國家當地市場則沒有如此強烈需求，因此轉而出口。

出口需考量市場特性，如出口到歐洲就比到美國容易，因為歐洲法令並未較美國嚴格，出口到美國則必須符合 FDA 的規範，因此出口成本也就相對高。經

營規模則不是那麼重要，在「**Making Your Small Farm Profitable**」一書中即指出加州有個農場以 0.2 公畝的土地創造出每年超過 20 萬美金的獲利。鎖定個人特殊需求，整合生產、行銷及配送等工作，進入利基市場，極為重要，**Prosper Well Farm** 即是由畜牧經營轉為蔬果行銷專家的成功案例。

當主流市場逐漸縮小時，利基市場反而成長，有機食品即是最佳案例，現在有機產品遍佈各地，即使是寵物食品都有。消費者的購買決策是以個性特質為基礎，而且市場沒有更好的方式能滿足他們對食品及飲料的特殊嗜好。除此以外，人們也想要過更長壽且更好的生活，同時也懷疑工廠食品含許多添加物，而大廠商無法永遠滿足個人獨特偏好，因此小廠商也就理所當然成為最佳供應商。傳統上而言，法國及義大利是被公認能找到最好食品的國家。

哪些產品能使消費者沉迷？果汁及酒類是最容易想到的，25 年前，這兩樣產品的生產者還很有限，但近年來已有戲劇性轉變，在美國已經有許多知名廠商，如 **Tropicana** 果汁，**Mondavi** 葡萄酒等。但須特別一提，利基產品總會快速變化的普遍，因此使產品專利化，才能使維持穩定上架的機會，此項產品也才會佔有主流市場部份佔有率。

在利基市場中有數不盡的成功案例，如推行每日五蔬果政策，帶動不同種類蔬果的需求增加；昂貴的廚具市場擴張，帶動消費者購買特殊食材如菇類或傳統番茄的需求；強勁的有機產品需求，也帶領著有機市場的擴張。以下介紹幾個成功的利基產品：

(一)有機咖啡

有機咖啡是利用作業方法及對環境影響極低的資材生產的，須兼顧土壤肥份，及降低農藥及化學肥料之使用。要銷售有機咖啡到美國，必須符合美國有機生產規範及並獲得認證。

- 1、2005 年有機咖啡在美銷售額為 8 千 9 百萬美元，較前一年成長 40.4%。與 2004 年同期比，成長 55%，而非有機咖啡則僅成長 8.5%，且美國咖啡專賣店中至少有 56% 販售具認證的有機咖啡。
- 2、有機咖啡的生產國遍布世界各地，主要的生產者包括墨西哥、哥斯大黎加、瓜地馬拉、尼加拉瓜及秘魯。根據世界銀行資料顯示，全球有機咖啡銷售量僅佔主要消費國的 0.6%，最新的統計資料是 2003 年主要咖啡消費國的有機咖啡消費量為 4 萬 2 千公噸，表示有無可限量的未來。
- 3、目前市場上的有機咖啡產品包括去除咖啡因咖啡、加味即溶咖啡、有機咖啡冰淇淋、咖啡蘇打、硬質巧克力及含咖啡豆巧克力。其中去除咖啡因的方法須採取認證的處理程序，最常用的方法為 **Swiss Water Process**，只用水即可去除咖啡因。

4、須特別提醒的是美國 USDA 有機認證標籤表示至少包含 95% 的有機產品，凡經過美國農部認證，即隱涵該產品為”百分之百的有機”或”有機”產品。

(二)有機農產品

有機蔬果在歐洲有機食品市場中佔有極重要的地位。消費者對有機生鮮農產品需求強勁，收益在 2001 至 2004 年間成長 26%。德國的有機蔬果需求更為強烈，2004 年的銷售量已達 14%，主要是因超市及折扣促銷的有機商店的帶領。

歐洲銷售有機蔬果集中在少數國家，德國與英國佔有最大市場，其收益超過所有歐洲國家的一半。英國的有機水果市場是歐洲最大的，其市值約 3.3 億歐元。北歐國家銷售有機蔬果佔其蔬菜銷售量的比例是最高的，荷蘭、丹麥及瑞典銷售的有機蔬菜約佔蔬菜銷售的 6%。南歐國家有機蔬菜市場佔有率極低，西班牙即不到 1%。

雖然有機蔬菜收益佔大部分，但有機水果的市場也呈現高度成長，其中有機熱帶水果成長快速，尤其是有機香蕉，約 8 萬公噸，大約一半銷售至英國。有機馬鈴薯在 2004 年也銷售超過 35 萬噸。

有機蔬果的產量在歐洲成長快速且扮演重要角色，淡季有機生鮮產品及熱帶水果進口至西歐，2004 年有機水果進口量佔總銷售量的 22%，而超市販售有機蔬果約佔 48%，但市佔率卻逐漸降低，通路逐漸轉至專賣店，且超市已使許多大型日常生鮮公司投入有機市場，有機蔬果的供應者正面臨策略同盟與擴張的考驗。

(三)有機牛肉

這是北美有機食品產業成長最快速的產業，在 2005 年已成長至 51%，尤其在美國首次報導狂牛症後每年以兩倍的速度在成長。

(四)有機雞

雖然有機牛是成長最快的產業，但有機家禽卻是數量最多的產業，在北美，雞肉已是廣泛應用有機雞肉。

(五)中國有機牛奶的利基

中國北京附近有一家農場，其飼養的牛是以自然放牧，伴隨著音樂播放，所吃的是具健康營養而無農藥的青草，喝的純淨的地下水，所生產的牛乳正符合消費著健康無農藥的需求。乳品產業在中國是成長最快的食品產業，近年來平均每年成長 29%，2005 年達 8 百 90 億人民幣，然而，有機牛乳製造商卻無法像一般牛乳提供者一樣能回收成本，因此有機業者售價約 5-6 元人民幣高出一般的 1-2 元人民幣。該公司決定以他們自有品牌銷售，同時設定標準作業流程，面對艱困的環境。

(六)種族食品的利基市場

美國具有種族特色市場估計每年約有 7 百 50 億美金的銷售額。相當於每支出 7 元中就有 1 元購買種族特色產品。食品服務業佔有 65% 的該項產品銷售額，而超市則佔有 35% 的市場。

根據 USDA 的估計，到 2020 年，美國人口估計約再增加 5 千萬至 8 千萬人，成長最快速的是非洲、亞洲及拉丁美洲人。目前約有 1 千 4 百 30 萬人聲稱他們是亞洲人，包括中國、菲律賓、韓國、越南及日本等，這大約佔有美國人口的 5%，加州有最多的亞裔美國人，約有 4 百 80 萬人。因此如當地商家不販賣種族性產品，消費著則將轉至其他通路(如網路)購買他們想要的產品。

其餘尚有許多特色產品，如有機果汁、納豆產品，甚至是海鹽，都可以是利基市場的產品，總而言之，利基市場上有數以千計的成功案例，且還在成長中，這樣市場對小型生產者或加工者而言都代表難得的機會，只要利用想像力與行動力，成功的機會永遠都在。

● 實地參訪

一、米食博物館(Gohan Museum)

米食博物館是日本推動食品教育的基礎，特別是教育小孩以米為主食觀念的博物館，提供參觀者快樂學習日本稻米的源起，同時用五官感受稻米的相關文化。

米食博物館的主要對象雖然是學校小朋友及家長，但也針對商業界人士，內部設計適合各種參觀者，地點設置在繁榮的商業中心，在 Otmachi, Marunouchi, Yarakucho 及東京都有。內部共分為五個區域：

(一)食品教育及水稻田區

本區以圖片教導參觀者每日健康飲食的觀念，同時以實物模擬水稻田供民眾觀賞。另設置 360 度多媒體區，參觀者不但可看到稻田影像，更可聞到稻香味。



實物模擬水稻田

(二)活動區及烹飪教室

本區不定期舉辦各種活動，如脫口秀、研討會或地方性產品發表會，並在烹飪區定期舉辦各項親子烹飪課程。另外也設置促銷區，提供食品

公司宣傳稻米產品資訊和廚具公司發表新產品，參觀者可取得免費試用品。



活動區



烹飪區

(三)遊戲區

本區設置電腦遊戲區，供小朋友在遊戲中學習稻米知識。

(四)農民市場

本區安排 10 台推車，搭配動態影片，販售日本各地農民所生產的生鮮農產品，提供週末逛街名眾或旅遊團購買稻米或其他農產品。

(五)餐廳：GOHAN CAFE

這個餐廳是博物館的一部分，提供來自日本各地的米食餐點，讓參觀民眾可了解米食的美味及多樣化的吃法，同時讓民眾能在離開博物館之前，留下美好的回憶。

二、夢市場株式會社(Organic Supermarket ‘ Mothers’)

夢市場株式會社集團以銷售有機農產品為主，強調生產者與消費者的互信關係是有機農產品的基礎，因此承諾以兼顧消費者需求及注重食品安全與環境前提，建立食品配銷系統，並持續改善產品品質。



該會社強調需建立與生產者及製造商的互信，所採取的方法是支持能創造有機與生態的農業，並建立環境與生產、配銷緊密連結的關係，同時該會社為提供對環境有利及具食品安全、美味、健康、高品質產品，致力於將法令規章與消費者需求相結合，同時需確保從生產、加工、批發及銷售各階段均能避免食品安全或環境不佳的障礙。並依這些方法訂定未來的

經營目標。

該會社以代表消費者蒐集安全、對環境有利及高品質產品為職志，自 1978 年，該會社創辦人從兩輪車販售無化學成分的農產品開始經營，1981 年開始批發，1983 年正式成立 Yuime Ichiba Co., Ltd。之後逐步建立有機



農產品配銷系統及宅配系統，並於 1998 年正式從 Pan Network Co., Ltd 購入夢有機市場株式會社，且另開設其他分店。社長小野敏明帶領員工及事業夥伴以安全、防護、環境及回收作為處理原則，也強調企業成功的關鍵是改變人際關係，如以綠色旅遊取代一個旅遊點概念，建立與參觀者間親密、多重且良好的互動，期望透過當地文化建立一個多目標走廊，也請農協組織農民向旅客介紹牧場經驗。而針對現代職場工作的電車族及外食族，蔬菜取用不足，因此該會社自 2004 年則開始經營有機餐廳”Fujisan no Yasai Juku”，並於 2006 年再開設有機餐廳”Country Kitchen”。該會銷售額目前以每年 20-25% 成長，2005 年 3 月估計營業額達 30 億日圓，約有 1000 家農場與其契約生產，供應將近 3500 種產品。

三、清里乳牛牧場(Kiyosato Milk Plant)

牧場成立於 2002 年，由 27 個當地酪農組成，目前有 6 個全職員工及 5 個兼職員工，每年 4 月至 10 月的開放時間為早上 9 時到下午 6 時，11 月至 3 月開放時間則為 早上 9 點到下午 5 點。消費者包括當地個別宅配到家的顧客、學校及公司行號。



經營宗旨為安全、新鮮、美味及生態，所謂安全是指乳牛所吃的配方飼料是採非基因改造大豆及以有機肥所種植的乾草及玉米所製成的；所謂新鮮則是指牛乳是由當地健康乳牛所生產的，品質由專家鑑定，每天宅配

到消費者手中；美味是指高乳脂的天然牛乳、含 100% 生乳的優格及冰淇淋；符合生態的牛乳則是包裝是以可回收的玻璃瓶，雖然清洗成本較高，但卻可保護森林資源。

經營目標為發展乳業農場管理、提高生產力、創造當地特產、恢復當地社區生氣、改善消費者食品安全及健康。並採取下列措施達到目標：

- (一) 進行市場研究及成立危機管理機制，以符合消費者需求。
- (二) 注重生產與銷售對自然環境的影響，並與社區連結，辦理展售促銷活動及交換意見。
- (三) 提供教育訓練機會以提高智能及建立員工共識。

四、南清里道の駅-花之森公園 Michi-no-Eki(Roadside station) Minami Kiyosato



地理位置圖



由登山鐵道車鳥瞰餐廳

道の駅顧名思義是指路邊休息站，這個休息站內有農民市場、紀念品館、餐廳等，全區景觀優美。

入口處的左邊即是農民市場，農民市場內販售當地農民種植的新鮮農產品，因強調衛生安全，產品均有條碼，並標示生產者姓名，隨處可見當地特色農產品。入口處的右手邊是紀念品店，販售附近居民所製作的手工藝品。

這個休息站不只提供民眾購買所需物品，也兼顧休閒功能。穿越中廊後可見一片廣場，穿越廣場即可至餐廳用餐。旅客可在享用美食後，選擇在附近人造湖邊照相或是搭登山鐵道車上山，這一醒目的登山鐵道車，可到達山頂的花園。山頂的花園是個世外桃源，不僅有各式各樣不同的植物供旅客觀賞，還有農場體驗區供民眾學習耕作技術，是個休閒多元化的休息站。

五、非營利組織“Egao Tsunagete”

這個組織成立目的是刺激山區經濟發展，主要是辦理鄉村與都市地區的交流活動。會員來自以山梨縣(Yamanashi Prefecture)附近各地不同年齡及職業的人，同時也有來自東京及神奈川縣(Kanagawa Prefecture)地區的會員。這個地區是被指定為結構改善地區，所有的土地開發都是特許的，且辦理許多與生物量及能源相關的綠色旅遊活動。

(一)為鄉村、人們及時間貢獻：山梨縣北社市須玉町特殊地區交流振興計畫

1、管理市辦的溫泉 Spa 設施成為地區交流中心

Egao Tsunagete 是一個都市與鄉村交流中心，2003 年接管山梨縣北社市主辦的溫泉 Spa，且將其轉型為鄉村及都市交流中心，以此為基地，結合當地農地、林地等天然資源及文化旅遊資源，全面振興當地經濟。

2、第一個獲得「結構改善特殊地區(Special District for Structural Reform)」認證

為執行前項計畫，當結構改善體系於 2003 年 4 月開始執行時，該組織即申請特殊農業地區，也因此獲得簽署農地使用契約，並獲得第一個認證為地區交流促銷的特殊地區，且能正式以非營利組織身份獲得農場租任契約。

3、多樣化的都市與鄉村交流計畫

近來，該組織承租三公頃土地，大約有 100 位來自日本各地的年輕人自願來耕作，有效帶領農地再利用，同時也可以有各廣泛的都市與鄉村交流農業或其他的計畫。例如，經營各種套裝行程，或成立食品公司開發當地農特產，開始與知名廚師合作進行商業交流等等。更甚者，2005 年時在東京開設都市與鄉村交流直銷市場，將當地產品直街販售給消費者。

目前這個地區以被農林水產省選為四個模範地區之一，同時也期許能成立旅遊計畫吸引外國人體驗日本鄉村文化。最值得一提的是，該組織設計一個箱膳體驗活動教育新一代年輕人或外國人了解日本傳統文化，從虔誠的祈禱開始，至吃完箱內食物後，留下最後一片高麗菜與湯汁清洗碗盤，並將洗完湯汁喝下，用布擦拭所有碗盤，完成整個吃飯程序，讓旅客有深刻體會以往愛物惜物的



文化特質，深具教育意義。

(二)強化當地鄉村振興：山梨縣都市與鄉村交流之調查與旅遊模式計畫

近來由於都市人們對於生活型態有新需求，希望能回歸自然或住在鄉村，因此，必須增加鄉村與都市人、物及資訊的交流，且將對鄉村地區經濟更有幫助，山梨縣與東京都相近，且有豐富的天然環境，可以帶動大量的都市與鄉村交流，山梨縣具有行銷鄉村與都市交流的優勢。

但山梨縣並未有充分的交流計畫可以符合都市居民的需求，因此，本組織特進行調查當地資源可符合都市與鄉村交流計畫，研究如何開發示範計畫以及尋求基礎建設。

六、Salad Bowl 公司

Salad Bowl 公司是自 1958 年開始營農的，再逐步轉型為目前的有機農產銷售。期間曾於 1996 年開始生產蘭花，2001 年才轉變為經營有機生產，生產無或減少化學成分的產品，2004 年正式成立 Tomato Bowl 的農民組織。其經營哲學是提供最美味、尋求最安全、產銷有秩序及創造夢想與歡樂。

Salad Bowl 公司特別強調栽培管理，其要點如下：



(一)栽培環境

特別注重土壤的養成，以落葉及富含負離子與微生物的水製造優良的栽培環境，並利用乾草、落葉及米糠自製有機肥，如此可提供最高品質的土壤。雖然確認各項原料的工作繁瑣，但因可提供最佳肥料，該公司也仍然樂此不疲。

(二)栽培控制

採取以自然的力量處理雜草，利用覆蓋層防止雜草生長，同時可防止病害，並維持水分及土壤溫度在一定的水準。

覆蓋的方法有許多種，Salad Bowl 公司認為以落葉覆蓋是最好的方式，因為除可防止雜草生長外，還提供微生物最佳生長環境，微生物數量增加就可預防疾病發生，因為疾病多因土壤引起的，過冷的水或潮濕就會生病，落葉對作物正是最佳的防護層。

(三)農藥控制

不只是雜草，害蟲對有機栽培而言也是一大問題，Salad Bowl 公司使用貼紙捕捉蟲子，雖然害蟲太多是個問題，但仍需有一定數量的蟲

子，因為益蟲也需要害蟲，兩者之間有一定的平衡。

七、甲府中央批發市場

甲府中央批發市場是隸屬於甲府市政府，於 1973 授權經營，蔬菜及水果部門從 1973 年 7 月開始營運，水產品則從 1973 年 9 月開始營運。每天營運時間為早上 4 點至下午 3 點，總面積為 115,720 平方公尺，主要設施包括蔬果及水產品主要場地(11,611m²)、批發場地(5,165m²)、交易後暫時儲藏區(1,580m²)、倉庫 (1,000m²)、冷凍庫 (6,636m²)、香蕉處理區 (753m²) 及其他等。



拍賣市場貨物置放



香蕉處理區

其主要功能如下：

- (一) 有效辦理農產品運送集中及分類工作，並能快速、有效率的分配。
- (二) 依市場法則運作獲得公平且合理的均衡交易價格。
- (三) 會計結算的透明制度能提高市場信賴度，且能獲得更好且更有效率的食品分配。
- (四) 市場提供生產者安全永續的運銷通路，因此市場能維持有一定數量的各類產品。

其交易系統是由販運商將貨物送給批發業者進行拍賣或議價，具授權的承銷人購買後，再賣給最終消費者。販運商可以是生產者、販運團體或當地商人，其農產品可直接賣給批發業者，或委託拍賣。拍賣時或議價時，買方包括零批商或被授權的買者，消費者所需的產品則需透過這兩者取得。近年來市場處理的數量逐年遞減，而處理金額也逐年遞減。



拍賣情形



已完成拍賣的蔬菜

八、Toyotomi 道の駅

Toyotomi 道の駅位於 Toyotomi 地區國道 140 線旁，具天然環境及鄉村景色，是推廣 Toyotomi 地區最好的基地，除可提供當地民眾工作機會，也可作為 Toyotomi 地區資訊推廣及交易中心，農林水產省於 1994 年認定此處為「鄉村地區農特產品推廣中心」，Toyotomi 道の駅正式於 1998 年開始營運。



由於 Toyotomi 地區豬農利用農協設施製造火腿，且當地生活改進團體也利用當地大豆製作味噌，因此於此設置農畜產加工處理中心，不但可增加農產品的附加價值，提高農業生產及認證農民，也進步一步帶動當地社區改革，處理場於 2002 年正式營運。

除處理場外，另設有交流促進中心及農畜產品直銷中心，在交流中心包括當地絲工業及文化的特產展示區、當地農產品品嚐區及以媒體介紹當地資訊。農畜產品直銷中心販售的是 Toyotomi 當地農產品，項目包括當地新鮮蔬果、米果、絲質產品、玉米酒及畜產加工品等。味噌、泡菜及果醬由當地農家婦女團體所製作的，販售項目超過 200 種。



九、Marquis 葡萄酒廠



酒廠具有百年歷史，自 1981 年開始設立，是現存最古老的酒廠，1972 年遷至現址，一樓為展售中心，二樓為品酒區。走出展售中心即可看到釀酒設備，葡萄經脫皮技術及精密釀製過程，所生產的酒履獲國內大獎，創新中又不失傳統風味。葡萄園內結實累累的葡萄，強調的是安全衛生，可立即摘取食用。酒窖與葡萄園相鄰，酒窖內的酒桶定期排氣，有效掌握酒的品質。

● 分組國情報告及討論

為能實際應用日本參訪經驗，工作小組會議採分組進行，並於隔天就

參訪結論進行簡報，選出優勝的小組。各組有半天時間進行國情報告及檢討參訪重點，並準備隔天簡報資料。分組情形如下：

第一組：包括寮國、台灣、印尼、伊朗、馬來西亞、菲律賓、斯里蘭卡及越南代表共 9 人，由美國 Mr. Morton Satain 指導。

第二組：包括巴基斯坦、寮國、印尼、韓國、尼泊爾、巴基斯坦、菲律賓、泰國及越南代表共 10 人，由馬來西亞 Mr. Chan Seng Kit 指導。

第一組進行國情報告共有 6 人，問答時間合計每人報告 15 分鐘，台灣是第一個報告的國家，其次為印度、伊朗、馬來西亞、菲律賓、斯里蘭卡。為節省時間，主持人請各國代表僅說明該國利基行銷的案例，印度選擇說明 Safal 蔬果拍賣市場；伊朗說明特殊香草植物；馬來西亞說明紅色蕃石榴汁，菲律賓說明稻米、斯里蘭卡則是報告漁類。



分組討論

國情報告後便進行討論，本組主持人引導大家創造新產品，作為隔日簡報的主軸。本組所創造的產品是因應日本逐漸老齡化趨勢，針對老年人長壽且健康的需求，創造出來自喜馬拉雅山的人蔘所製造的新產品人蔘清酒，搭配包裝，推銷給現場各國代表。隔日簡報由台灣與印度共同發表，也成功的吸引各國代表，而獲得優勝。



創新產品-人蔘清酒

伍、心得與建議

- 一、 利基行銷鎖定具特定需求之消費者，並非與市場大宗產品競爭，因此，提供差異化產品滿足消費者需求才是生產者須努力的第一要務。
- 二、 利基行銷既是針對特定消費者，因此大量生產以低成本競爭的公司則未必能提供滿足個人化需求的產品，價格高低也未必是消費者選擇的主要因素，小規模公司或產業反而較能彈性調整，這對於小農制國家反而具有發展利基。
- 三、 利基行銷強調產品特色，因此需隨時教育消費者正確觀念，例如正確選購安全衛生的農產品的方法，這需要政府與生產者共同努力，由政府建立規範與確實施行，生產者也需確實遵守，獲得消費者認同，也才能獲取利潤。
- 四、 投入利基市場，生產者除需具有基本的生產技術外，尚需具有經營管理及行銷的能力。
- 五、 行銷具有利基的產品時，需事先規劃通路系統，尤其是在現有的通路系統運送時，需注意避免被主流市場之大宗商品淹沒，以免成為不具特色產品，喪失市場價值。
- 六、 利基行銷市場小，也易因高利潤成為其他競爭對手模仿對象，為保護研發者經營利潤，應加強推廣專利權。
- 七、 隨時注意社經指標的變動，掌握社會趨勢脈動，了解消費者需求，確實付諸執行，成功的機會指日可待。

陸、附錄

國家報告書 (country paper)

Summary of R.O.C. Country Report

Niche marketing in Taiwan- A Case of Organic Rice

- Price is no longer the first priority of the consumers who have high willingness to pay and special needs. Any producer that focuses on a niche market is addressing a need for a product that is not being addressed by mainstream providers. In Taiwan, health issues have become an increasingly important factor in consumer preference of fresh produce in recent years.
- Organic agriculture developed rapidly in Taiwan. The government provided appropriate support for long-term development. In addition to establishing the proper certification system, government has also set up the some measures to assist in developing the organic agriculture.
- Yin-chuan Organic Rice is a successful case in developing niche marketing for organic rice. During 10 years of hard work in producing organic rice, farmers not only can protect their environment but also attract all the consumers with strong health conscious. The logo of Yin-chuan rice, "Good Rice, Good choice", impressed the consumers. The planted area of the group has already extended to 160 hectares from 1 hectare in 1996. The number of members has been extended to 66 persons. Its product, Yin-Chuan Rice, has been the largest organic rice brand in Taiwan.
- Most of Taiwan's farms are small-scaled with high production cost and niche marketing is one of the possible ways to survive. In the years to come, countries that succeed in agriculture are those who adapt to the changing tastes of consumers.

Niche marketing in Taiwan

- A Case of Organic Rice

Niche marketing is the symbol of social progress. Mass production without any specialty cannot catch the potential consumers who have high willingness to pay and special needs. Price is no longer the first priority of this type of consumers. Any producer that focuses on a niche market is addressing a need for a product that is not being addressed by mainstream providers.

Taiwan's society is changing at any moment. Agriculture needs to follow this social trend to adjust the marketing strategies. The government needs to provide appropriate support for long-term development. Private and public sector work together to upgrade agricultural production and marketing. Taiwan has some experiences and achievements in agricultural niche marketing. This paper will discuss the recent consumption trend, the development of agricultural niche marketing, governmental policies, and the best example in Taiwan.

What do consumers want

Niche is a focused, targetable portion of a market and the key of making profits for producers, but the question is how to find it. The answer can be found in the consumption trend. Taiwan's per capita gross domestic product (GDP) is USD\$ 15,217 in 2005, 13% higher than ten years ago. Food consumption has become less important for households than in the past decade. The food expenditure in household is down to 24% in 2005, 8% decrease from 1995.

This declining trend indicates that consumers make food purchasing decisions based on factors other than meeting caloric needs in modern life style.

Cereals, fruit and vegetables are the three major part of Taiwan's food consumption bundle over the past decade. The average per capita consumption is, respectively, 92, 112, 139 kilograms per annum during 1996-2005. The rising real income allows consumers to purchase more varieties and expensive products and can pay premiums for the desired attributes. Consumers demand new food items, new packaging, convenience, new delivery system, safety and more nutritious foods. These food choices will have implications for the organizational structure of the food industry and for the economic well-being of farmers, food processors, retailers, and other participants in the food production and marketing system, which is the concept of a "consumer-driven agriculture."

Health issues have also become an increasingly important factor in consumer preference of fresh produce in recent years. The elderly groups demand more natural, fresh fruits and vegetables to keep away from diseases. Higher educational attainment heightens the awareness of health risks from excess saturated fat intakes. At-home consumers will pay more for additional variety, quality and more convenient food. Consumer willingness to pay more for safe, high-quality, value-added products will create niche markets those regular commercial-style markets cannot supply.

Development of niche marketing on organic agriculture in Taiwan

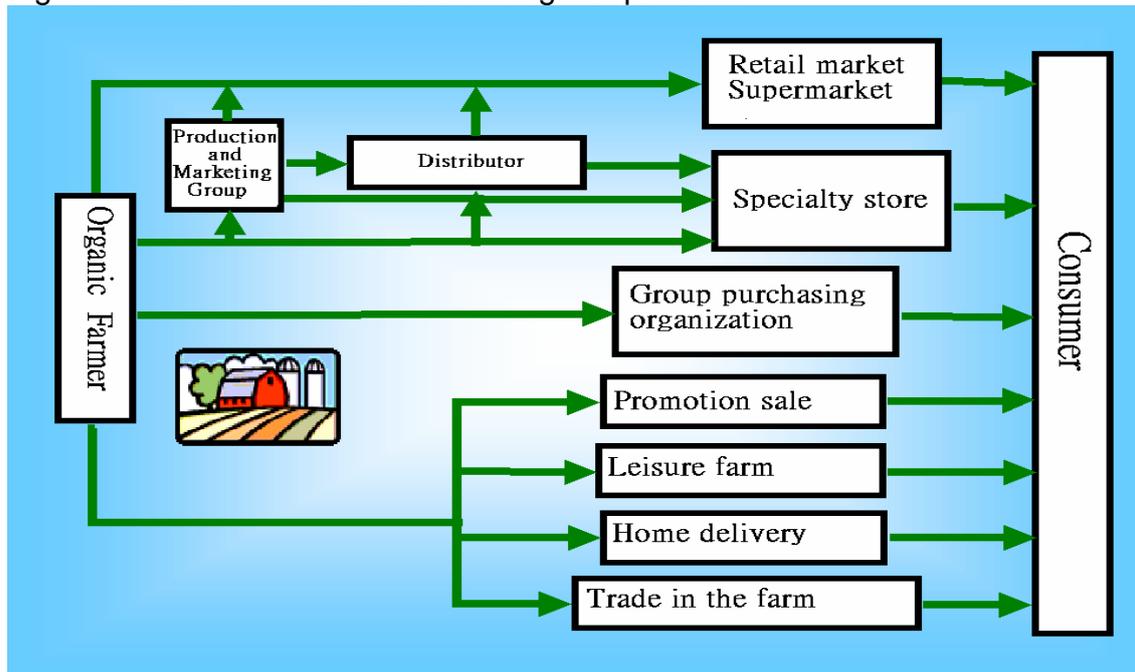
According to the consumer trend, Taiwan has developed some high quality products in the agro-food market. We have specific original products, branded fruits, CAS-GAP (Good Agricultural Practices) fruit and vegetables and so on. The sellers are delivering greater varieties by offering more items, more choices of a single item, and prepared items (for example, pre-cut fruits and vegetables). Packaging can increase the desirability and value of produce

by adding convenience (for example, resalable bags), more desirable packaging materials, or a broader selection of sizes. However, in determining where to spend their food dollars, consumers are demanding more natural foods.

Organic agriculture is a recent development in Taiwan. The amount of certified organic farmland is an important indicator. In 2005, Taiwan had 1,335 hectares of certified organic farmlands. This is an increase of 734% from ten years ago when there was 160 hectares of organic farmlands. Main products are rice (697 ha.), tree fruits (152 ha.), tea (72 ha.), vegetables (343 ha.), and various other products (71 ha.). The organic production value was estimated about USD\$ 18 million. It's about 0.4% of crop production value. Products grown on these farms are all consumed domestically.

The organic market sector has been small and dominated by small producers and processors who use direct marketing or specialized market outlets. Figure 1 depicts the structure of the organic market system in Taiwan. Organic foods are about 70% sold through specialty stores, some supermarkets and upscale communities. Recently, E-commerce and home delivery are becoming increasingly popular on Taiwan. Marketing of organic products will no doubt make use of the internet technology to expand their sales. Taiwan's department of agriculture recently established a web site where consumers can order products advertised by farmers as well as a homepage to promote organic production and consumption to the general public, the food industry and academics. (USDA, [Gain Report 2005](#))

Figure 1. Distribution channels of organic products



Source: Organic Agriculture Information Center

In addition to the rapid growth of fresh produce, all the organic demands including processed items are growing in Taiwan. According to the Gain Report 2005 of the U.S, it is estimate that the annual consumption for organic food in Taiwan is about USD60 million. Furthermore, the total demand for organic products has been growing at a rate of 7-10% each year. The fast growing organic market will become a highly interesting target for the private investors and importers. They also want to process and sell the organic food products directly to the consumers. All of these developments indicate that the organic/natural food market in Taiwan is on the rise.

Government policies in Taiwan

Organic agriculture basically follows the principle of recycling to maintain the sustainable use of natural resources, and does not allow the use of synthetic chemicals. The management system must place emphasis on water and soil conservation as well as ecological balance, and must achieve the goal of producing natural and safe agricultural products.

Inadequate labeling rules have made it difficult for Taiwan consumers to determine whether a product was truly organic. The Taiwan government has provided guidance to the accreditation organizations for inspection and issuing certificate of organic agricultural products through standardized operation procedures. Moreover, Taiwan's Council of Agriculture (COA) announced revisions to the island's National Organic Standard on 15 September 2003 in order to incorporate certain international organic standards as well as more restrictive guidelines for domestic organic farmers.

To help develop organic agriculture, the COA has licensed four non-profit entities to certify farmers as organic producers. Once the farmer's land passes inspection, the farmer can label all products with a seal from the organization that inspected them. The seal is only applicable to certain products: vegetables, fruits, tea and rice as these are the products for which Taiwan authorities have already set organic standards. The seal lets consumers know that a product has been grown in accordance with Taiwan organic standards. Farmers can apply to any of the four entities for certification. The four certifying entities are MOA (Mokichi Okada Association), FOA (Formosa Organic Association), TOPA (Taiwan Organic Production Association) and TOAF (Tse-Xin Organic Agriculture Foundation). Moreover, to make it easier for consumers to identify organic products, the CAS labeling for organic products was put in place besides the labels of the certification bodies.

In addition to establishing the proper certification system, government has also set up the following measures to assist in developing the organic agriculture:

- **Set up an Agricultural Products Traceability System**

Consumers' concern to the safety of their food and drink grows with the increase of national income. All the nations in the world are actively establishing a set of total recording system of all the process from the farm to the table, and providing a reverse tracing system to protect consumers. The

COA began implementing an agricultural products traceability system in 2004, being applied first in organic rice and root vegetables. In 2005, the contractor, Taiwan Organic Agriculture Foundation (TOAF), was responsible for selecting nine certified farms covering a total of 4.5 hectares to conduct the demonstration work and paper records for the production of cabbage, carrot, corn, cherry tomato, burdock, white gourd, pumpkin, taro, sweet potato, and potato etc.

The technology of global positioning system (GPS), geographical information system (GIS), PDAs, and grid were integrated in the agricultural products traceability system, made reverse tracking of the origin of products, and used field monitoring equipment to keep tabs of the production environment and its management accurately, simultaneously initiated standardized operating procedures for consumers' protection.

- **Strengthen the quality control of organic produce**

To monitor the quality of organic agricultural products, COA also performed random checks at farms and sales outlets and found 22 cases with chemical residues, a detection rate of 2.48%. These cases were referred to their ruling inspection agencies, county governments and regional agricultural research and field stations to follow up with education and counseling to correct the shortcomings. Related information (including products untested but labeled as organic) was sent to the Health Administration for penalty assessment in accordance with the Food Sanitation Control Law. At the same time, the monitoring results were posted at the Organic Agriculture Information Portal (<http://organic.niu.edu.tw>), a website sponsored by the Agriculture and Food Agency (AFA), for public reference.

- **Establish the organic cultivation zones**

In order to reduce production cost, the COA helped six plantations operated by organic agriculture groups to be certified as organic cultivation zones, which cover 191 hectares in total in 2005. The technical experts have

conducted five demonstration seminars on production techniques, drawing the attendance of 609 people.

- **Strengthen to promote the organic concept**

The COA held technical lectures and symposiums on organic produce marketing, organic farming achievement exhibitions (sales promotion), organic food and beverage promotions, and organic concept seminars.

Case Study: Yin-chuan Organic Rice “Good rice, Good choice”

Rice is Taiwan’s staple food and also the most important crop in term of planted area and the number of farmers. Because of high production cost, its yearly revenue per hectare was always lower than gross domestic product over the past decades. However, the Second Organic Rice Production and Marketing Group in Fuli Township, Hualien County worked together to twist the weakness of rice. During 10 years of hard work in producing organic rice, farmers not only can protect their environment but also attract all the consumers with strong health conscious. The logo of Yin-chuan rice, “Good Rice, Good choice”, impressed the consumers. The planted area of the group has already extended to 160 hectares from 1 hectare in 1996. The number of members has been extended to 66 persons. Its product, Yin-Chuan Rice, has been the largest organic rice brand in Taiwan. The key of their success is that their product characteristics match what consumers’ want. Meanwhile, their marketing strategies have touched consumers’ heart.

Product

The director, Mr. Lai, a PhD of Agriculture Economics, of the Second Organic Rice Production and Marketing Group noticed the development of organic in Japan and then devoted to produce the Yin-chuan Organic Rice in

1996. Hualien was his homeland and isolated from the rest of the country by the peaks of the Central Mountain Range. Lacking the industry of the west or the business centers of the north, the county is famous for its clean air and water. Therefore, it has been a comparative advantage for him to produce organic rice. At the beginning, he not only sought reference materials from libraries, the Internet, teachers, extension agents, specialists, and the news media, but also consulted the Hualien District Agricultural Research and Extension Station. As a result, the product with high quality meets the consumers' taste. Specific consumers with awareness of health and higher income welcomed Yin-chuan Organic Rice.

Furthermore, recognizing the importance of consumer trust, Yin-chuan Rice had obtained the certification from the TOAF(Tse-Xin Organic Agriculture Foundation) in 2002. It also became the first demonstration model of the Production Profile System in organic rice in 2005. The group also provided several different products, including organic brown rice, germ and roasted rice tea, and grew 10 species of rice in the farmland to satisfy the consumers' diversity desires.

Price

Price level is always related to the production cost. Organic rice is grown and processed without the use of synthetic pesticides or fertilizers. Management-intensive and long-term, often complex strategies are used to control pests and nourish the crop. These include crop rotation to break pest cycles, the production of leguminous green manures or barnyard manure as fertilizer, deep water to control grass weeds, and high seeding rates to suppress weeds and other pests. All of these works will cost much more than producing the conventional products. Yin-chuan Organic Rice targets a market that expects a high quality and healthy product, that consumers should be willing to pay a higher price. According to the investigation, the price of milled rice is about NT\$108 per kilogram which is much higher than NT\$ 34 of the conventional products.

Promotion

At the beginning of selling Yin-chuan Rice, it's very hard to meet the right consumers. People won't buy the product if they've never heard of it. Promotion should be done to influence the attitudes and buying behavior of the targeted customers. After setting up the brand, Yin-Chuan, the director of the farmer's group used different ways to communicate the message that they have a product that can meet the consumers' need. He and his wife cooked the rice to the shoppers in the upscale supermarket. Display their products in the agriculture exhibition as often as they can. They also construct a web site to attract the consumers on the Internet. Of course, the media and magazines delivered the right messages also do them a favor. What the Yin-chuan Rice had done was to introduce their products and ideals at anytime and anywhere. They pay much attention to the reaction of consumers. They also provide field trips to customers who wish to experience working on the farm and educate them about the organic concept. Especially, they adopt innovated marketing methods to deliver New Rice directly and instantly to customers.

Place

Place refers to where the consumers purchase the products. With regard to the distribution channels for the Yin-chuan Organic Rice, role of supermarket is the most important for them. Its share of total sales is about 70%. It includes 12 supermarkets all over the island. The second channel is through specialty organic stores that accounts for 20% of total sales. The group purchasing and delivery to the home respectively account for 5%. It implicates that the distribution channel of Yin-chuan Organic Rice is concentrated on the supermarkets. However, they also have the opportunity to extend their consumers in direct marketing or the E-commerce.

Yin-chuan Organic Rice is a successful case in developing niche marketing for organic rice. In spite of providing good condition of production environment, the marketing strategy is the key to the success. Although this group has some achievements in protecting the environment and making money, they never stop looking forward to not only provide the consumers with safety and fresh rice but also let the producers enjoy their healthy lifestyle.

Conclusion

Taiwan is a small island with limited natural resources but abundant hard-working citizens. Agriculture has been the most important contributor in the stage of economic development. The world changed rapidly, with which the agricultural contribution has been reduced. However, agriculture not only provides economic means but also multifunctionality to the residents in Taiwan. In order to sustain the multifunctionality, we need to help farmers gain enough profit for them to stay in the farms. Moreover, after Taiwan's accession to the WTO, the agricultural market has gradually opened to the imported products. Farmers are confronted by the tough competition with foreign products. Most of Taiwan's farms are small-scaled with high production cost and it is very difficult for them to compete against the farms of large operations. Niche marketing is one of the possible ways to survive. Organic product is only one of the market niches. Indeed, the consumer is at the center of a profitable niche marketing strategy. In the years to come, countries that succeed in agriculture are those who adapt to the changing tastes of consumers.

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Mr.chairman, ladies and gentlemen, good morning.

It's a great pleasure to give presentation on niche marketing in Taiwan. I hope all of us can benefit from this mutual sharing of experience.



Outline

- Forward
- What do consumers want
- Development of niche marketing on organic agriculture
- Government policies in Taiwan
- Case of Yin-chuan Organic Rice- “Good rice, Good choice”
- Conclusion

In this presentation, I would like to focus on the best case give you the idea about the consumption trend in my country. Among these situations, organic is noticeable and targetable. Then, I will focus on the organic agriculture's development of niche marketing and introduce what the government policies are. After that, we will show you the best case for better understanding.



Forward

- “Niche” is the key of making profits for producers, **the question is how to find it.**

➤ The answer can be
in the consumption trend.

Now, I'd like to begin with the idea about the niche. As we know niche is the key of making profits for producers, but the question is how to find it. The answer can be found in the consumption trend.



What do consumers want

- Consumer willingness to pay more for value-added products ,including:
 - new food items
 - new packaging
 - convenience
 - new delivery system
 - safety and more nutritious foods

Because of the rising real income allows consumers to purchase more varieties and expensive products. Consumers demand new food items, new packaging, convenience, new delivery system, safety and more nutritious foods.



R.O.C.(Taiwan)

Development of niche marketing on organic agriculture

- Taiwan has developed some high quality products. However, consumers are demanding more natural foods.

Specific regional products



Branded fruit



CAS-GAP



Organic products



According to the consumption trend, Taiwan has developed some high quality products. There are specific regional products, branded fruit and CAS-GAP products. Furthermore, consumers are demanding more natural foods. Organic products are welcomed by consumers.



Government policies in Taiwan

- Establish the proper **certification system**
- Set up an **Agricultural Products Traceability System**
- Strengthen the **quality control** of organic produce
- Establish the **organic cultivation zones**
- Strengthen to **promote the organic concept**

For the organic agriculture, Taiwan's government made some efforts to build consumer trust. We not only establish the proper certification system but also set up an Agricultural Products Traceability System. Moreover, we perform random check to strengthen the quality control of organic produce. In order to reduce production cost, we establish the organic cultivation zones. Promoting the organic concept is also an important education for all of people.



R.O.C.(Taiwan)



Case Study



好米 好選擇

“Good rice, Good choice”

Yin-chuan Organic Rice

Yin-chuan Organic Rice

Now, I'd like to show you the best case. Yin-chuan Organic Rice.



R.O.C.(Taiwan)

Yin-chuan Organic Rice

➤ The largest organic rice brand in Taiwan

- Producer: Organic Rice Production and Marketing Group
- Members: 66
- Managing area : 120 hectare
- Annual profit
 - 7.2 million NTD/ 225,000 USD



Yin-chuan organic rice is produced by the production and marketing group. There are 66 members and managing area is 120 hectare. The annual profit has reached 7.2 million NTD. They have their own processing factory. During 10 years of hard work in producing organic rice, farmers not only can protect their environment but also attract all the consumers with strong health conscious.



Yin-chuan Organic Rice

- Product
 - completely free of residues
 - Produce in Hualien known as clean air and water
 - Obtain the certification
 - Diversity product



What's the key of the Yin-chuan organic rice success? The point is that their product characteristics match what consumers' want. Yin-chuan rice is produced in the east of Taiwan. This place is famous for its clean air and water. That's why the Yin-chuan organic rice can convince the consumers that the rice is completely free of residues. It had obtained the certification. Their products not only limited on traditional rice grain but also developed new types of the products.



Yin-chuan Organic Rice

- Price
 - Cost much more than the conventional products
 - the price of milled rice is about NT\$108 per kilogram
 - higher than NT\$ 34 of the conventional products.



Let's turn now to the price. Price level is always related to the production cost. In order to protect the environment from damage, producing organic rice always cost much more. Of course, the price is higher than usual.



Yin-chuan Organic Rice

■ Promotion

- introduce products anytime and anywhere
 - Cook the rice to the shoppers
 - Use modern information technology
 - Provide field trips to experience
 - Deliver New Rice directly and instantly

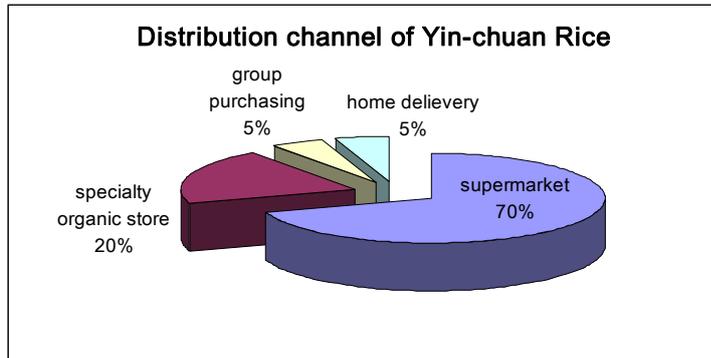


At the beginning of selling Yin-chuan Rice, it's very hard to meet the right consumers. People won't buy the product if they've never heard of it. Promotion strategies play the important role. They try to introduce products anytime and anywhere. The strategies included to cook the rice to the shoppers, use modern information technology such as setting up the web-site, provide field trips to experience. The most innovation method is to deliver new rice directly and instantly.



Yin-chuan Organic Rice

■ Place



Now, consumers can buy Yin-chuan rice all over the Taiwan island. There are 70% through supermarket to the consumers. Yin-chuan organic rice has been the first choice for the consumers with high willingness to pay .



Conclusion

- Organic product is only one of the market niches.
- Consumer is at the center of a profitable niche marketing strategy.
- Countries that succeed in agriculture are those who adapt to the changing tastes of consumers.

Here, I would like to make a conclusion of my report. Most of Taiwan's farms are small-scaled with high production cost and niche marketing is one of the possible ways to survive. Consumer is at the center of a profitable niche marketing strategy. In the years to come, countries that succeed in agriculture are those who adapt to the changing tastes of consumers.



Thank you for your attention and welcome to visit Taiwan to enjoy our specialty.