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# Wild forest products innovation patterns and their support needs: an analysis based on European case studies

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Case study material also from: G. Corradini, S. Mutke, T. Dickson, M. Wilding, V.  
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# Background



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## Non-timber forest products („wild forest products“)

- cover a broad range of market sectors (food-cosmetics-crafts-chem's);
- are often claimed to be a **promising** business field;
- but still a **side-activity** of forest holdings (Rametsteiner et al. 2005);
- are in fact often **underestimated** in their economic value (Wolfslehner/Vacik);
- and named „minor,“ „secondary,“ „by-products,“ „niche-markets“ or even „non-market goods“ (Mantau et al. 2001; Mavsar et al. 2008)

Thus, they are often assumed to be produced in the wake of timber production and **not necessarily seen as a business opportunity.**

# Challenges



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1. A **limited marketability** because of an often public good character of the products (Mantau et al., 2001; Mavsar et al., 2008);
2. a **limited attention of established sectoral innovation systems**, thus only limited support or even barriers (Rametsteiner et al., 2005; Weiss et al., 2011; Buttoud et al., 2011).

# Research questions



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- 1. How do innovations in wild forest products (WFP) happen – in a situation where there is very limited institutional innovation support?**
- 2. How are those innovations supported by the institutional system and what are their support needs?**

# Aims and methods of this paper



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## Aims:

- to analyse innovation patterns in WFP in Europe;
- to derive innovation support needs for WFP.

## Methods:

**12 case study regions** across Europe;

**Questionnaires** to relevant organisations for supporting innovation processes; **interviews** of innovators and involved actors;

→ **in-depth analyses** of innovation processes in **20 innovation cases.**

# The innovation cases



|   |  |
|---|--|
| <b>Product Innovations</b>                      | “Cairn O’Mohr“ (UK, Scotland): wine from oak-leaves and elderberries |
|   | “Fine Pluck” (UK, Wales): hand-plucked tea                           |
| <b>Institutional Innovations</b>                | “Nature Park Specialities” (AT): wild food specialities              |
|   | “Xeis Edelwild” (AT): marketing of deer                              |
|   | “Wild vom Förster” (DE): marketing of deer                           |
| <b>Historical/<br/>Traditional Innovations</b>  | “Resinas naturales” (ES): natural resin                              |
|   | “Servizio di raccolte resine” (IT): natural resin                    |
| <b>Innovations with<br/>“embedded” products</b> | “LEADER Region Zirbenland” (AT): Pine products                       |
|   | „Out to Learn Willow“ (UK, Wales): willow weaving courses            |
|   | “Vale die Castione” (IT): Chestnut association and events            |
| <b>Service Innovations</b>                      | “Wild Pickings” (UK, Wales): foraging products and tours             |
|   | „Woodland Skills Center“ (UK, Wales): teaching woodland management   |
|   | “Christmas Tree Marketing” (AT): cut your own tree                   |
|   | “The Monegal Mushroom Hotel” (ES, Catalonia):                        |
| <b>Marketing Innovations</b>                    | “Del Monte de Tabuyo” (ES) gourmet products from mushrooms:          |
|   | “Adonis company” (SRB): tea spoon shaped bags                        |
|   | “Finnish Gift Firm” (FI): luxury gift packages                       |
| <b>Technical innovations</b>                    | “Birch Sap Company” (FI)   |
|   | Trentino Firm (IT): domesticating mushrooms                          |
|   | “Wooden Knots for Climbing Walls“ (SLO): wooden climbing holds       |

# Analysis questions



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**Type of company:** large (LALO), traditional (TRALO), or new forest owner (NEWLO), single entrepreneur (ENTR), industrial company (IND), social enterprise (SOC), institutional actor (INST).

**Geographical sphere of knowledge/ideas:** rural, urban, or mixed.

**Initiation from which sectoral sphere:** forestry, cross-sectoral, outside.

**Type of support – which sector:** forestry, rural development, or non-sectoral (start-up/industrial development).

**Type of support – which level:** local-regional, national, or Europe/EU.

**Type of support – which function:** information, financing, co-ordination.

→ **Innovation pattern and support needs?**

# Type of company



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| Type of company |              |             |           |
|-----------------|--------------|-------------|-----------|
| <b>LALO</b>     | <b>2</b>     | <b>ENTR</b> | <b>11</b> |
| <b>TRALO</b>    | <b>1 (3)</b> | <b>SOC</b>  | <b>2</b>  |
| <b>NEWLO</b>    | <b>(2)</b>   | <b>IND</b>  | <b>1</b>  |
|                 |              | <b>INST</b> | <b>3</b>  |



# Type of company



| Type of company |       |      |    |
|-----------------|-------|------|----|
| LALO            | 2     | ENTR | 11 |
| TRALO           | 1 (3) | SOC  | 2  |
| NEWLO           | (2)   | IND  | 1  |
|                 |       | INST | 3  |



# Geographical sphere of knowledge/ideas



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| Ideas         |   |
|---------------|---|
| Rural         | 6 |
| Urban         | 7 |
| Rural + urban | 7 |

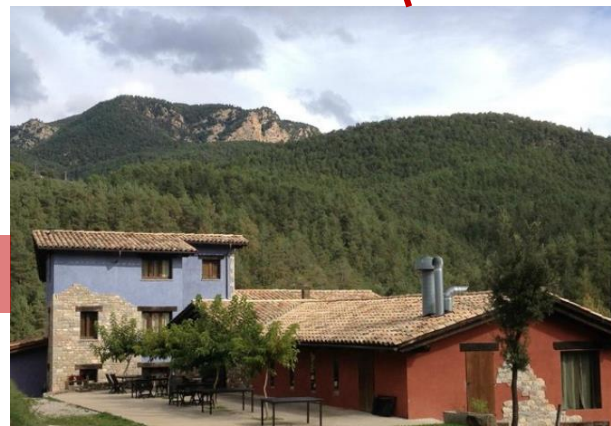
# Geographical sphere of knowledge/ideas



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| Ideas         |   |
|---------------|---|
| Rural         | 6 |
| Urban         | 7 |
| Rural + urban | 7 |



Muchroom hotel



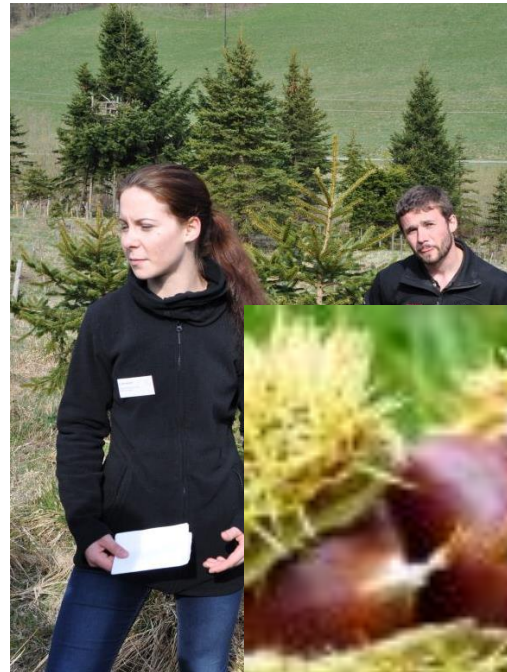
Stylish sparkling birch sap

# Initiation from which sectoral sphere



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| Initiation from which sector |    |
|------------------------------|----|
| Forestry                     | 1  |
| Cross-sectoral               | 11 |
| Outside forestry             | 8  |



# Type of support – which sector



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## Support – from which sector

|                          |           |
|--------------------------|-----------|
| <b>Forestry</b>          | <b>2</b>  |
| <b>Rural development</b> | <b>10</b> |
| <b>Non-sectorial</b>     | <b>10</b> |

# Type of support – which sector



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| Support – from which sector |    |
|-----------------------------|----|
| Forestry                    | 2  |
| Rural development           | 10 |
| Non-sectorial               | 10 |

| Support     |          |      |           |      |
|-------------|----------|------|-----------|------|
| Initiation  | Forestry | RD   | Non-sect. |      |
| Forestry    | 1        | -    | -         | (1)  |
| Cross-sect. | 1        | 8    | 4         | (13) |
| Outside     | -        | 2    | 6         | (8)  |
|             | (3)      | (10) | (10)      |      |

# Type of support – which level



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| Support – from which level      |    |   |
|---------------------------------|----|---|
| Local-regional                  | 13 |   |
| National                        |    | 5 |
| National - local implementation | 5  |   |
| European/EU                     |    | 1 |
| EU - local implementation       | 5  |   |

# Type of support – which function



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| Support – which function |         |
|--------------------------|---------|
| Information              | 15      |
| Financing                | 18 (10) |
| Co-ordination            | 10      |
| Regulatory               | 1       |

| Significance for entrepreneurs |     |
|--------------------------------|-----|
| Information                    | +++ |
| Financing                      | +   |
| Co-ordination                  | ++  |



# Innovation patterns and support needs



| HAVE                               | NEED                                       |
|------------------------------------|--|
| <b>Forest company-driven</b>       |  |
| In-house capacities                | Classical innovation management; R&D funds |
| <b>Forest owner-driven</b>         |  |
| Entrepreneurship                   | Info+fin+co-ord; cross-sectoral links      |
| <b>Entrepreneurial-driven</b>      |  |
| Entrepreneurship                   | Info+fin+co-ord; cross-sectoral links      |
| <b>Industry-driven</b>             |  |
| Investment capital                 | Regional cross-sector platforms; R&D funds |
| <b>Social enterprise-driven</b>    |  |
| Voluntarism; social engagement     | Public support and specific funds          |
| <b>Regional development-driven</b> |  |
| Regional development orientation   | Open framework and support structures      |

# Conclusions: innovation processes



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- **Small-scale innovations** and entrepreneurship dominate and do without much institutional support (Ludvig et al. – this session);
- There is no “one” innovation system supporting non-timber products; support is coming from various sources but is rare;
- For none of them, “wild forest products” are central;
- **Break-through** innovations and **scaling-up** need institutionalisation and systemic support (R&D, awareness raising; regulatory adaptations...) (Ludvig et al. 2016);

# Conclusions: support needs



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## Information:

- Technical AND business knowhow
- Cross-sectoral knowledge and links
- R&D

## Financing:

- small un-bureaucratic start-up funds for entrepreneurs
- Large R&D funds for industrial scale investments

## Co-ordination:

- For information, funding, business co-operation, conflict resolution, regulatory adaptations, and public awareness!

# Conclusions: top-down support for bottom-up innovations



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- **open and flexible** support programmes AND **systemic structures** for tailor-made support.
- Explicit sectoral innovation policy, including information measures, cross-sectoral networking and risk-oriented innovation funds (seed money);
  - Rural development agencies offering comprehensive and systemic support (inf+fin+co-ord), e.g.:
    - LEADER
    - Cluster organisations
    - Triple (quadruple) helix/cross-sectoral platforms



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**THANK YOU for your attention!**

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