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The Role of Governance and Agricultural Marketing Organisations (AMOs) Concerning Origin related labels (ORLs) in Germany: A Qualitative Analysis

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ABSTRACT

This study investigates the governance structures and roles of agricultural marketing organizations in implementing Origin Related Labels (ORLs) within Germany's food craft sector. Using Kuckartz's qualitative content analysis approach, we analyzed 14 expert interviews with decision-makers from agricultural ministries (n=5) and marketing organizations (n=9) to examine their roles, coordination mechanisms, and potential for future development. The findings reveal three interconnected dimensions: First, ministries provide essential legal frameworks and financial support for quality and origin labels, though coordination challenges exist between federal and state levels. Second, marketing organizations serve as crucial intermediaries between producers and markets, supporting implementation through quality assurance measures, training programs, and market development. Third, our analysis identified structural coordination deficits at the national level since the dissolution of the CMA (Centrale Marketing-Gesellschaft der deutschen Agrarwirtschaft). The study suggests that establishing a nationwide competence center could enhance system effectiveness by improving stakeholder coordination and knowledge transfer while preserving regional autonomy. These insights advance both theoretical understanding of multi-level governance in agricultural marketing and provide practical recommendations for enhancing ORL implementation through improved institutional coordination.

Keywords: agricultural marketing organisations (AMOs); Origin Related Labels (ORL); governance structures; qualitative content analysis

1 Introduction

"Labels must pick up the customer" - this assessment by management consultant Prof. Dr. Otto Strecker (2023) emphasizes the dual challenge of origin-related labels (ORLs): they must appeal not only to end consumers but also convince potential users in the food craft to adopt them. Recent developments in Germany's food craft sector show promising trends, with the Bavarian bakery and butchery trades achieving record sales in 2023. New initiatives such as the "Freie Bäcker" quality label exemplify the growing significance of quality communication in the craft sector (Die freien Bäcker 2024). However, despite these positive developments, significant institutional challenges remain in implementing and promoting ORLs effectively. However, previous studies reveal limited knowledge about quality and origin labelling among food craftsmen (Hofmeier et al. 2023). A survey of 508 craft businesses identified a significant knowledge gap between these labels' potential and their actual use (Hofmeier 2024).

These findings raise fundamental questions about institutional roles: What specific functions do ministries and agricultural marketing organisations (AMOs) fulfill in promoting and implementing quality and origin labels? How do their current activities support or potentially hinder ORL adoption? What tasks are already being performed and how could these institutions contribute even more effectively to the dissemination of the necessary

expertise among label users in the future? It is reasonable to assume that an improvement in the level of knowledge among potential label users could lead to increased adoption of these labels.

Many consumers are increasingly paying attention to how the products they buy are made. Labels that provide information about quality, sustainability or regional origin help them to do so. In the 2024 Nutrition Report published by the German government, two-thirds of those surveyed (66 per cent) said that they always or usually look for labels that indicate the regional origin of a product – a significant increase compared to the 2020 Nutrition Report, in which only 51 per cent of those surveyed took this aspect into account (BMEL 2024, p. 16).

The Federal Ministry of Food and Agriculture (BMEL) has developed a research plan to meet these consumer needs and at the same time fulfil the sustainability goals. This plan promotes innovations that enable healthy food production, climate protection and the preservation of biodiversity. In doing so, the BMEL is creating a basis for the development and support of quality and origin labels, which play a central role in communicating product quality and regionality (BMEL 2023b). In recent years, a number of nationwide programmes have been created to promote the transfer of the objectives (BLE 2024).

This work is based on the findings of two previous studies in which the adoption factors of ORLs were analysed from the perspective of small and medium-sized enterprises (SMEs) in the food craft. A key finding of these studies was that governance structures and the work of AMOs are decisively influencing factors for the dissemination and use of ORLs. At the same time, a lack of knowledge on the part of producers was identified as a significant inhibiting factor that impedes the adoption of such labels. Against this background, this study specifically examines the roles of ministries and AMOs to analyse their current and potential tasks in connection with ORLs.

These national challenges mirror developments at the EU level, where origin labeling approaches have gained importance as instruments for socio-economic development in rural regions. The EU's Common Agricultural Policy (CAP) plays a central role in promoting quality and origin labelling, which serve as instruments for strengthening regional identity and economic stability. The combination of national and European measures forms an important framework within which ministries and AMOs operate.

This study analyses the role of governance structures and AMOs in relation to ORLs in Germany. The focus is on analysing the existing tasks of these actors and identifying potential future measures. Building on previous research findings that have identified governance as a central factor for the dissemination of ORLs, qualitative expert interviews will be conducted and analysed. These interviews provide a detailed insight into the perspectives and experiences of representatives from ministries, AMOs and conservation communities the remaining of the paper is organized as follows: After presenting the theoretical foundations of governance, AMOs and their significance in the context of ORLs, a detailed description of the methodological approach of the qualitative content analysis follows. The subsequent presentation of the analysis results shows current areas of responsibility and future potential. In the concluding discussion, the findings are discussed in the context of the research question and practical recommendations for action are derived from them, as well as an outlook on future fields of research.

2 Theoretical Framework

2.1 Governance Structures in Agricultural Marketing

2.1.1 Basic Concepts and Evolution

To understand the complex institutional dynamics of ORL implementation, we first examine governance structures that enable and control collective action through systems of rules and regulations. The concept has evolved from a narrow definition of state control to a more comprehensive understanding that includes all forms of social coordination. In addition to state action, governance encompasses the interactions between state, market and civil society, where autonomous actors collaborate through established orders and rules to achieve common goals (Kullmann 2021, p. 122).

Within the agri-food sector specifically, governance mechanisms play a crucial role in promoting regional value chains and sustainable development, particularly through their influence on quality assurance systems and market organization. It creates clarity about stakeholder roles and responsibilities, minimizes conflicts, and

ensures efficient resource utilization (Kullmann 2021). This is particularly evident in the European context, where agricultural governance has developed complex mechanisms for market regulation and quality assurance.

2.1.2 Multi-level Governance in Agricultural Systems

At the European level, the CAP has established itself as a central steering instrument and has been continuously adapted to changing economic conditions and societal demands (Strecker et al. 2010, 32 f.). The current legal framework of the CAP 2023-2027 and the CAP Strategic Plans approved by the Commission provide the basis for supporting farmers and rural stakeholders in the 27 EU Member States. These plans are expected to make a significant contribution to achieving the objectives of the European Green Deal (EU Kommission 2024b). In this context, the transition to sustainable food systems is gaining importance, leading to the strengthening of the legal framework for geographical indications and the inclusion of specific sustainability criteria (Amtsblatt der Europäischen Union 2024).

The development of agricultural governance in Europe shows the complexity of different levels of governance, particularly in the design of market regulation and quality assurance systems. A key feature of these governance structures is the pronounced state and supranational influence on agricultural markets, which manifests itself at the national and European level in the development of specific instruments for quality and origin labelling (Kullmann 2021).

2.1.3 Institutional Economics and Coordination Mechanisms

The theoretical foundations of multi-level governance are central to understanding institutional structures in agricultural marketing. Governance theory postulates that intermediary organisations play a key role in the implementation of quality and origin labels by reducing transaction costs and information asymmetries between institutional levels (Williamson 2010).

From the perspective of institutional economics, two central theoretical dimensions can be identified: vertical and horizontal coordination.

The literature emphasizes the necessity of effective vertical coordination mechanisms between different administrative levels (Kullmann 2021). These mechanisms are essential for translating policy objectives into concrete measures while minimizing frictional losses. Institutional economics argues that specialized organizations can fulfill this coordination task more efficiently than decentralized structures.

At the same time, the theory highlights the importance of horizontal coordination mechanisms for knowledge transfer between actors at the same level (North 2009). Such horizontal structures facilitate the exchange of best practices and the development of common standards, thereby promoting more effective collaboration and mutual learning processes.

Transaction cost theory provides important insights into the optimal institutional design of such coordination mechanisms. It shows that the lack of specialised coordinating instances leads to increased transaction costs, as illustrated by the example of the CMA dissolution (Balling 2009). This theoretical framework explains why coordinated institutional approaches to the governance of quality and origin labels are often more efficient than fragmented regional efforts.

The institutional economic perspective also makes it clear that effective governance structures must include both formal and informal institutions. While formal institutions provide the legal and organisational framework, informal institutions such as trust and shared norms contribute significantly to the system's ability to function (North 2009). This theoretical insight is particularly relevant for the design of quality assurance systems that are based on the interaction of different actors.

2.2 Quality and Origin Label Systems

The evolution of European quality and origin label systems exemplifies how multi-level governance can effectively address complex market challenges while protecting regional interests. This is particularly evident in the EU's geographical indications system, which has become a model for balancing centralized oversight with regional autonomy. This evolution is particularly visible in the EU's geographical indications system, which demonstrates how supranational governance structures can effectively address market quality assurance needs.

2.2.1 European Framework

The EU system of geographical indications exemplifies complex governance arrangements in agricultural marketing. Originating from French wine law's terroir concept, it expanded to address limitations of national protection systems in global trade (Schober et al. 2023). As global trade increased, national protection systems reached their limits when numerous imitations appeared outside national territories. The 1992 establishment of Europe-wide protection created a central governance structure for agricultural product quality, marking a significant advancement in supranational quality assurance (Wirsig and Lenz 2023).

Council Regulation (EC) No. 510/2006 of 20 March 2006, which replaced the previous Regulation (EEC) No. 2081/92, and Implementing Regulation (EC) No. 1898/2006 created a new legal basis. This new regulation brought about significant changes, particularly in the filing of applications for protection and the communication policy of manufacturers of protected designations (Benner et al. 2008). In addition, the review and further development of labels of origin was intensified as part of the reorientation of European agricultural policy. Not only the quality requirements, but also the specifications and control mechanisms were tightened to remove unauthorised barriers to trade on the free EU internal market. Marketing and promotional activities were restricted to products with qualified geographical indications under Regulation (EC) No. 510/2006, ensuring that only verified origin claims received official support and recognition (Spiller et al. 2007; Zühlsdorf, Franz 2010; Becker 2000).

The successor regulation (EC) No. 1151/2012 replaced Directive (EC) No. 510/2006, which in turn was repealed by (EC) No. 2024/1143. The new Regulation on Geographical Indications, which came into force on 13 May 2024, simplifies and strengthens the protection of these labels. A standardised legal framework and a shortened registration procedure facilitate the process for food, wine and spirits. It also improves the protection of geographical indications, particularly online and as an ingredient in processed products. Sustainable practices can now be given greater consideration and producer groups will be given more powers to manage, protect and develop their products (EU Kommission 2024a).

2.2.2 National and Regional Implementation

While the EU framework provides the overarching structure, member states have developed various approaches to quality and origin labeling as complementary systems. An alternative to EU-protected geographical indications are the combined quality and origin labels of individual countries, which are based on a quality component and a variable origin component. These labels, primarily awarded by the public sector, aim to promote the production of high-quality products while signaling product quality and safety to consumers (Profeta and Balling 2009). These voluntary certification schemes at the national level are regulated by the "EU Guidelines for Good Practice for Voluntary Certification Schemes for Agricultural Products and Foodstuffs" (EU Kommission 2010; Rempe 2020, p. 10).

The implementation and use of ORLs is thus shaped by a complex interplay of international, national, and regional political and regulatory frameworks. These frameworks not only determine which products can be marketed as origin products and under what conditions but also establish the legal and institutional structure necessary to guarantee the quality and authenticity of these products.

2.2.3 National Quality and Origin Labels

Some federal states in Germany attach particular importance to the promotion of quality and origin labels. These measures are strategically aimed at strengthening the competitiveness of regional agriculture and promoting the sale of regional products. In Brandenburg, for example, pro agro takes on the task of promoting regional marketing and strengthening the network between farmers, processors and consumers. By certifying products and creating quality brands, pro agro makes a significant contribution to value creation in the region (Erhart et al. 2020a; Pro agro) In the federal states of Bavaria, Baden-Württemberg and Hesse, specific quality programmes are being developed that have been notified by the EU Commission under state aid law. These programmes play an important role in the promotion of regional products. In Hesse, for example, an annual turnover of 324 million euros could be determined with products from the "Geprüfte Qualität Hessen" programme (Erhart et al. 2020a). The "Bayerisches Biosiegel" and the "Geprüfte Qualität Bayern" programme emphasise regional value creation and strengthen local agriculture. The programmes aim to create transparency throughout the entire production chain and offer consumers security (Hempel and Roosen 2020; Chilla et al. 2020). Baden Württemberg also pursues the strategy of convincing through high standards and controls with the "Qualitätszeichen Baden

Württemberg" (Hempel and Roosen 2020). Comprehensive state support and regular awareness studies contribute to effectiveness (StMELF 2023).

Other federal states such as North Rhine-Westphalia, Saarland, Schleswig Holstein and Mecklenburg-Western Pomerania also have quality and origin labels. Thuringia has discontinued its label as of 31 December 2023. The farmers' newspaper cited a cost-benefit analysis as the reason, according to which the desired success was not achieved (Hartmann 2023). Saxony, Saxony-Anhalt and Lower Saxony lack a similar private label.

2.3 Institutional Structures and Implementation Challenges

2.3.1 Role of Agricultural Marketing Organizations

Within the established governance framework, agricultural marketing organizations play a crucial role in implementing quality and origin labels. Research emphasizes that these organizations can significantly influence ORL implementation success, though they require adequate resources and clear governance structures (Wirsig et al. 2021; Resce and Vaquero-Piñeiro 2022).

In Germany, both the Federal Ministry of Food and Agriculture (BMEL) and the AMOs of the federal states are heavily involved in the promotion of ORLs. These institutions work closely together to promote the sale of agricultural products and ensure compliance with quality standards. The BMEL develops and implements national strategies to promote ORLs. It is responsible for creating a legal framework that regulates the use of origin labelling and monitors compliance with these standards. The BMEL also coordinates various funding programmes aimed at strengthening the competitiveness of German agriculture through the use of ORLs (BMEL 2023a).

The CMA, established in 1970 and supported by 41 leading associations from agriculture, trade and processing industry, had shaped national sales promotion for agricultural products and food for over 40 years. This was dissolved due to the lack of evidence of group usefulness following a judgement by the Federal Constitutional Court through the repeal of the Sales Promotion Act (Balling 2009; Deutscher Bundestag 2020b). Discussions were held at federal level as to whether a successor organisation could be founded. However, due to the different structures and requirements in the individual federal states, this approach was not pursued further (Balling 2009). Several new organisations such as "German Food", "Food - made in Germany" and "Gefa" were founded to promote exports. The BMEL provided some start-up funding for these organisations (Balling 2009).

After the CMA budget was cancelled, some federal states founded their own agricultural marketing agencies, such as the "Agentur für Lebensmittel (ALP) in Bavaria, in order to continue to promote the regional origin and quality of their products (Balling 2009). Other federal states already had regional agricultural marketing agencies whose areas of activity were partially modified by the changed situation. In 2011, a new law was introduced with which the remaining money in the sales fund was to be managed and utilised by Rentenbank (Deutscher Bundestag 2020a, 2020b; Agrarheute 2011). In recent years, there have been several motions by the CDU/CSU party to use the available funds to re-establish a nationwide agricultural marketing agency (Deutscher Bundestag 2023; Bundestag 2023; Deutscher Bundestag 2020a, 2020b; Bundestag; Bundestag; Deutscher Bundestag 2022). However, as there was a very strong focus on exports in addition to the expansion of regional value chains, this proposal was controversially discussed in the Bundestag. In addition, a feasibility study on the establishment of a national agricultural marketing agency was commissioned (Tender-Service.de 2021). However, the results of the study were not published. The study presumably formed the basis for a reestablishment being rejected in the Bundestag (Bundestag 2023; Deutscher Bundestag 2020a, 2020b, 2022).

In Germany, AMOs support the introduction and dissemination of ORLs, through campaigns and the training of producers. They act as an interface between state regulation and market-based implementation. AMOs promote the sale of regional products and offer support in public relations, training and market research (Rempe 2020; Besch and Hausladen 1999). The work of AMOs is characterised by complex legal and institutional framework conditions. Conflicts between German and EU law regarding geographical indications have already been addressed in the "Warsteiner judgement". The task remains to adapt existing systems to new market requirements (Rempe 2020). They must implement both national and EU-wide requirements and represent the interests of producers at the same time. An effective governance structure is therefore necessary to ensure close cooperation between these companies, producers and political institutions (Stember et al. 2021; Schober et al. 2023). The feasibility study for a Saxon food strategy shows that regional marketing companies are increasingly focusing on dialogue with civil society stakeholders to promote regional and ecological value creation. This shows

the growing trend towards emphasising regional characteristics and promoting sustainability (Erhart et al. 2020a). Based on this study, the "AgiL"- Saxon Agency for Regional Food was founded in 2021 (SMEKUL 2021). Similarly, Thüringen now aims to establish an agricultural marketing agency following the example of Sachsen-Anhalt. The new agency is intended to boost the sale of locally produced food and enhance the region's image. The state government also plans to consolidate existing initiatives and projects to create a more coordinated marketing strategy (Antenne Thüringen 1/14/2025). A national agricultural marketing agency could create synergies and promote international marketing strategies (Erhart et al. 2020b). However, different institutional structures make it difficult to harmonise standards.

2.4 Challenges in the adoption of ORL

Empirical studies show that successful ORLs can contribute significantly to the economic development of rural areas by emphasizing local characteristics and craftsmanship. Research on geographical indications (GIs) suggests that their adoption can enhance farm incomes and improve the financial performance of producers in specific sectors, such as cheese and wine production (Schimmenti et al. 2021; Poetschki et al. 2021). However, the economic benefits of ORLs are not uniform and depend on factors such as region, product type, and business strategy. While some businesses successfully leverage ORLs for differentiation and premium pricing, others face significant barriers, including limited knowledge, high certification efforts, and challenges in communication along the value chain (Hofmeier et al. 2023). Addressing these barriers through targeted education, support programmes, and improved communication along the value chain could help SMEs realise the full potential of ORLs (Bryla 2018; Hofmeier et al. 2023).

2.5 Synthesis

Governance, AMOs and quality and origin labels are closely linked. Governance provides the framework within which stakeholders work together, while AMOs support operational implementation. Quality and origin labels serve as instruments to ensure the quality, authenticity and competitiveness of regional products.

An effective governance structure must promote cooperation between state institutions, marketing organisations and producers and at the same time be flexible enough to respond to social and economic challenges. The theoretical basis thus lays the foundation for analysing which tasks ministries and AMOs take on in the context of sORL and which potential exists for further development.

3 Methodology

In a previous systematic literature review, the factors influencing the adoption of ORLs in the food sector were examined. The findings highlighted that governance structures play a crucial role in SMEs' decision-making regarding ORLs (Hofmeier et al. 2023). However, it remained unclear how exactly these structures shape the adoption process.

To address this research gap, this study focuses on the role of governance structures in the implementation of ORLs. Specifically, it examines the tasks performed by agricultural marketing agencies in different German federal states and the regulatory frameworks set by state governments. Given the complexity and contextual specificity of governance structures, qualitative expert interviews were chosen as the primary data collection method. This approach allows for an in-depth exploration of implicit and undocumented decision-making processes (Anger et al. 2024). The collected data were analyzed using qualitative content analysis according to Kuckartz, which facilitates both deductive and inductive category development. The following sections outline the sample selection, data collection process, and analytical procedures.

3.1 Sample Selection and Characteristics

This study is based on fourteen expert interviews conducted with representatives of German agricultural ministries and marketing associations. Following the methodological recommendations of Kaiser (2021), we aimed to interview experts from each federal state. Since the city-states Berlin, Hamburg, and Bremen do not have independent agricultural marketing institutions, they were excluded from the study. In the case of Saarland, no interview could be conducted due to ongoing structural changes in the ministry.

Direct interviews were conducted with the responsible ministries or subordinate state institutions (e.g., chambers) in five federal states, either because there was no independent agricultural marketing company or because resource constraints prevented the experts from participating in an interview. Seven interviews were conducted with managing directors or team leaders of agricultural marketing agencies, one of which involved two managing directors simultaneously. To supplement the information on geographical indications (GIs), an additional expert was included in the interviews.

3.2 Data Collection

The data collection process took place between December 11, 2023, and April 19, 2024. Fourteen expert interviews were conducted with an average duration of 51 minutes, following established protocols for qualitative research (Kaiser 2021; Kuckartz and Rädiker 2024a, 2024b). Twelve interviews were conducted via Microsoft Teams video conferencing software, with eleven being recorded for subsequent analysis. One interview was conducted via telephone with an email follow-up due to technical constraints.

To facilitate comparative content analysis, all interviews followed a structured guideline. This guideline was developed through a three-stage process: a comprehensive review of relevant literature, preliminary exploration of funding agency guidelines, and interdisciplinary expert discussions. Following data collection, the video recordings were encrypted and anonymized according to data protection requirements. Using MAXQDA 2024 software, the interviews were auto-transcribed and randomly assigned identifiers (I1-I13) to ensure participant anonymity. The researcher subsequently verified all transcripts manually to ensure transcription accuracy and data quality.

3.3 Data Analysis

The analytical process began with the development of a coding guide based on the research questions and interview guidelines, with preliminary main categories being deductively defined and documented in a codebook. These categories were applied in an initial coding round to identify patterns and distinctive features within the data. Through an iterative process, the categories were inductively refined, and relevant subcategories developed, culminating in a final category system. A second coding round was then conducted using this established system. All coding was performed by the researcher, who conducted multiple analyses and comparisons to ensure coding consistency (Kaiser 2021).

To enhance intracoder reliability, we employed ChatGPT as a supporting analytical tool. Following the researcher's initial coding, ChatGPT performed a secondary coding of the dataset using the predefined

categories. The results from both coding processes were compared to verify consistency. ChatGPT functioned as an objective instance for identifying potential discrepancies, thereby contributing to the reliability and transparency of the coding process. However, given that Al-assisted coding is still an emerging methodological approach, all final coding decisions were made by the researcher to ensure contextual accuracy and interpretative depth.

The final phase of content analysis involved interpreting the data from sociological and ethical perspectives. The findings were structured into three primary sections to systematically address the research questions. This methodological approach enabled a comprehensive examination of governance structures and institutional roles in ORL implementation.

4 Results

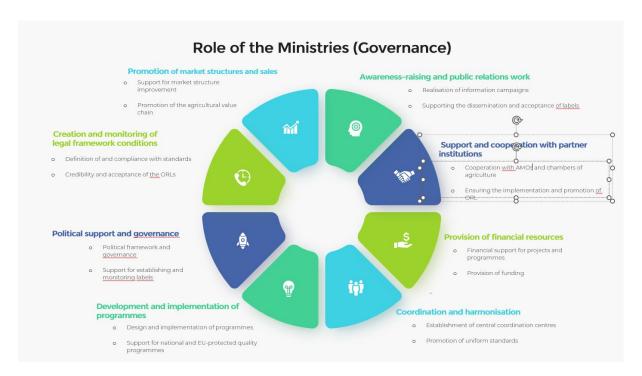
The analysis of expert interviews revealed three interconnected dimensions in the implementation and promotion of ORLs: governmental functions, marketing organization responsibilities, and the potential for a nationwide coordination center. These dimensions represent different yet complementary approaches to strengthening the ORL system in Germany.

4.1 The Role of Government in ORLs

The role of government institutions in the implementation and promotion of ORLs in Germany is multifaceted and extends across different levels of governance. Ministries at both the federal and state levels are responsible for setting legal frameworks, providing financial support, and ensuring compliance with national and EU quality standards. However, while the state's involvement is crucial for the credibility and enforcement of ORLs, the system faces challenges such as fragmented responsibilities, inconsistent regional strategies, and political influences that sometimes hinder long-term planning.

The qualitative content analysis following Kuckartz identified six key areas in which governmental institutions influence ORLs: financial support, regulatory frameworks, coordination mechanisms, public awareness campaigns, market structure development, and institutional cooperation. These roles were derived directly from the interviews and are structured in the following figure:

Figure 1: Role of Minitries regarding ORL



Source: Own compilation

While these areas highlight the structural importance of government involvement, several experts emphasized existing inefficiencies, overlapping jurisdictions, and political dependencies. Interviewee 3 stated, "There is no overarching national strategy for ORLs, which leads to inconsistencies between states and limits the efficiency of promotional efforts." Similarly, Interviewee 5 remarked, "Political influences often determine which ORL projects receive funding, making long-term strategic planning difficult."

A major challenge identified in the interviews is the lack of a unified national strategy. The dissolution of the CMA left a vacuum in national coordination, leading to state-level marketing efforts that often duplicate resources rather than complement one another. Interviewee 7 commented, "Every state has its own marketing strategy, which sometimes leads to contradictory messaging to consumers."

Recently, additional experts have highlighted the need for stronger national coordination. Interviewee 10 emphasized, "A nationwide coordination mechanism could help unify efforts while maintaining flexibility at the state level." This perspective reflects a growing sentiment among interviewees that a balance between national coordination and regional flexibility is necessary.

Additionally, political cycles shape ORL policies, often resulting in short-term decisions rather than long-term planning. Interviewee 2 noted, "Funding programs are often tied to political priorities rather than real market needs." This results in projects being structured around available budgets rather than long-term sectoral requirements.

These findings illustrate both the essential functions of government institutions in ORL governance and the challenges they face in ensuring effective coordination, standardization, and strategic development. In the following sections, the individual roles of ministries are further examined, alongside their interactions with other stakeholders in the ORL system.

4.2 Role of agricultural marketing organizations

AMOs play a pivotal role in bridging the gap between state regulations and market realities. Their primary functions include quality assurance, producer support, consumer education, market development, and campaign coordination. However, their effectiveness is often constrained by financial dependence on state funding, political influences, and a lack of standardized coordination mechanisms across different federal states.

The expert interviews confirmed that AMOs serve as key operational entities for ORLs but also revealed significant structural weaknesses. The analysis of interview data identified five primary areas of AMOS involvement: market access facilitation, regional branding, compliance assurance, producer consultation, and national representation. These core functions are summarized in the following figure:

Role of Agricultural marketing Organisations (AMOs) Market structure improvement and sales Quality assurance and monitoring Specific projects to improve market structure o Announcement from ORL 0 Monitoring compliance with the standards Promotion programmes for sales 111 Translation of political guidelines into practical measures **Education and training programmes** Further education programmes Realisation and promotion of and training courses 9 projects Information campaigns to raise Organisation and implementation of trade fairs and events Services for stakeholders Support in ORL and central iii Support for producers Community marketing and public relations for regional producers

Figure 2: Role of agricultural marketing organizations

Source: Own compilation

While AMOs play a crucial role in ORL implementation, several experts highlighted funding inconsistencies and structural limitations. Interviewee 6 remarked, "The level of state involvement in AMOs varies significantly, leading to differences in funding structures and strategic focus." This was echoed by Interviewee 8, who noted, "Some AMOs receive long-term financial support, while others operate on uncertain budgets, making it difficult to develop sustainable marketing strategies."

Additionally, the absence of a national coordination mechanism has led to inefficiencies and duplication of efforts. Several experts, including Interviewee 9, pointed out that while AMOSs from different states do collaborate in specific areas—such as joint trade fair appearances at major industry events like International Green Week in Berlin. (IGW) and Biofach—there is no overarching structure to streamline knowledge transfer, optimize resource allocation, or coordinate nationwide marketing efforts.

Interviewee 10 added, "A competence center could provide structural coordination while preserving regional decision-making power." This aligns with the perspective of other neutral or cautiously supportive experts wo advocate for improved national coordination but stress the importance of flexibility.

A particularly controversial issue emerging from the interviews was the potential establishment of a national Agricultural Marketing Competence Centre. Interviewee 1 argued, "A centralized competence center could improve coordination and ensure standardized messaging for ORLs." However, skepticism remains, as Interviewee 7 warned, "A new institution could add another bureaucratic layer without necessarily solving existing coordination issues." Interestingly, Interviewee 10 expressed cautious optimism, suggesting that any new structure must be carefully designed to avoid excessive bureaucracy.

These findings highlight both the essential contributions of AMOs to ORL implementation and the systemic inefficiencies that hinder their effectiveness. The following sections provide a detailed analysis of each AMOS function, discussing both their impact and the institutional challenges they face.

4.3 Future Development Potential: Agricultural Marketing Competence Centre

To systematically analyze expert opinions on the potential establishment of a nationwide Agricultural Marketing Competence Centre, this study applied qualitative content analysis following Kuckartz (2016). This method allows for a structured, transparent classification of expert perspectives, ensuring that key themes emerge from the data rather than being pre-imposed. Through inductive coding, three broad categories of opinion were identified:

- Supporters of a Competence Centre (35%)
- Neutral or cautiously positive perspectives (40%)
- Skeptical or critical voices (25%)

Although opinions on the ideal structure of agricultural marketing coordination vary, three-quarters of interviewees acknowledged the need for improved national coordination. However, they differ in their views on how this should be achieved—whether through a new Competence Centre, optimization of existing structures, or a hybrid model that strengthens coordination while preserving regional autonomy. The following figure provides an overview of the identified themes, illustrating how experts position themselves regarding national coordination in agricultural marketing:

Strategic pacemaker - Bundling of topics - Conception and development of measures - Community marketing 99 Advising the federal states AMOs and **Networking and** A mouthpiece for the federal states overarching tasks **Knowledge transfer** - Networking and coordination COMPETENCE Preparation and dissemination - Annual ERFA meetings **CENTRE** of information **Agricultural** Central stand booking marketing Knowledge databases Project coordination iii Support for transformation EU projects processes GI projects Sales promotion projects Theme workshops

Figure 3: Future Development Potential: Agricultural Marketing Competence Centre

Source: Own representation

Strategic Coordination and Standardization

A frequently cited issue among interviewees was the fragmentation of marketing efforts across federal states, leading to duplicated structures and inefficiencies. Many experts emphasized that a centralized coordination mechanism could facilitate more effective national strategies:

"There needs to be an overarching body that brings together topics that apply to everyone. Generally applicable definitions, such as for regionality or bio-regionality, would be helpful in order to act in a more standardized way." (113)

"An institution like the former CMA was hugely important for setting uniform communication standards. Its absence is seen as a major shortcoming." (18)

"Cooperation between the federal states is often fragmented. A Competence Centre could act as an overarching coordination body to address national marketing issues more effectively." (I11)

Several proponents argued that nationally aligned marketing initiatives could provide more clarity for producers and consumers while reducing regional inefficiencies. Interviewees 3 and 12 emphasized that without standardized communication, ORLs lose credibility in the marketplace. However, concerns were raised by Interviewees 7 and 10, who warned that a centrally managed institution might risk interfering with regional expertise and established structures.

Knowledge Transfer and Best Practice Exchange

Another widely discussed function of a Competence Centre was knowledge management and structured interregional collaboration. Experts noted that best practices, research insights, and consumer trend analyses could be more effectively shared if there were a centralized knowledge hub:

"A nationwide organization could initiate thematic workshops and establish a knowledge database that facilitates exchange between marketing companies." (I4)

"We need an institution that acts as a network and mouthpiece to promote dialogue between the federal states and facilitate joint projects." (I1)

"The creation of a central knowledge hub that provides both consumer trends and market analyses would significantly support the work of regional marketing organizations." (I11)

While this argument was widely supported, some interviewees (15, 17, 19) raised concerns that a new institution could lead to unnecessary complexity if it is not carefully integrated into existing structures. They argued that regional AMOSs already share knowledge through informal networks and that a Competence Centre should complement rather than replace these mechanisms.

National Campaigns and Joint Projects

A third core function of a Competence Centre discussed in the interviews was the coordination of national campaigns and projects. Some experts emphasized that ORLs need a more cohesive and structured communication strategy to remain effective:

"The former CMA ran national campaigns that could be adapted by the federal states. We lack something like that today in order to be consistent and effective." (112)

"An agricultural marketing organization could implement campaigns for overarching topics such as milk or meat, which could then be adapted regionally. This would increase efficiency and consistency." (I13)

"The central organization of trade fairs and international appearances would save the federal states considerable resources and present a unified image to the public." (I1)

However, critics of a Competence Centre (I6, I9, I10) expressed doubts about whether such an institution would be able to operate efficiently without bureaucratic delays. Some interviewees also emphasized that existing marketing organizations have already established successful collaborative efforts, such as joint trade fair stands at IGW and Biofach. Thus, any new structure should not duplicate existing efforts but rather enhance coordination where gaps remain.

Implementation Considerations and Challenges

While many experts see potential benefits in enhancing national coordination, others stressed the importance of maintaining regional flexibility. Several interviewees (I5, I7, I9) noted that any new structure should complement rather than replace existing regional marketing efforts:

"We already have established marketing organizations in each state. A national body should focus on coordination rather than centralization." (I10)

"A Competence Centre could be useful, but only if it avoids becoming another bureaucratic layer. We need efficiency, not additional complexity." (17)

"Political influence could limit the effectiveness of such an institution. It's essential to define clear boundaries between policy and market-driven strategies." (15)

Some interviewees (I9, I10) also pointed out that earlier attempts to create a similar structure faced political and structural resistance, suggesting that any future Competence Centre must be designed with clear governance mechanisms to avoid similar challenges.

4.4 Synthesis of Key Findings

The analysis of expert interviews revealed several overarching themes regarding the governance structures and the role of agricultural marketing organizations AMOs in the implementation of ORL. A key finding is the clear division of responsibilities between government institutions and marketing organizations. While ministries provide regulatory frameworks, financial support, and strategic direction, AMOs are responsible for operational implementation, producer support, and market development. However, the lack of national coordination and standardization has led to inefficiencies, overlapping responsibilities, and duplicated efforts across federal states.

Structural challenges further complicate ORL governance. AMOs rely heavily on short-term public funding, which limits their ability to engage in long-term strategic planning. Small producers often struggle with high certification costs and bureaucratic hurdles, making it difficult for them to participate in ORL schemes. Additionally, political influence plays a significant role, as ministries set strategic directions but are often driven by shifting political agendas, which can lead to inconsistent policy implementation and funding priorities.

A major point of debate in the expert interviews was the potential establishment of a nationwide Agricultural Marketing Competence Centre to improve coordination and efficiency. The findings revealed a polarized expert opinion on this issue. While 35% of experts strongly supported such an initiative, emphasizing its potential to harmonize ORL standards, enhance knowledge transfer, and streamline national marketing strategies, 40% remained neutral or cautiously positive, recognizing the potential benefits but expressing concerns about bureaucratic expansion, financial sustainability, and the need to maintain regional autonomy. Meanwhile, 25% opposed the idea, arguing that existing institutions should be optimized instead of creating an additional administrative layer. The main concerns included the risk of increased bureaucracy and political interference, which could compromise the effectiveness of such a central institution.

Overall, the findings indicate that most experts recognize the need for improved national coordination but remain divided on how this should be achieved. While some favor a new central institution, others advocate for better cooperation and optimization of existing structures. A hybrid approach, preserving regional flexibility while improving national coordination mechanisms, emerges as a potential solution. Further research should focus on exploring the feasibility, governance structure, and financial sustainability of such a model to ensure effective ORL implementation in Germany.

5 Discussion

Our analysis of the roles of ministries and marketing organizations in ORL implementation reveals more complex institutional arrangements than previously documented in the literature. The findings highlight significant governance inefficiencies, particularly due to a lack of national coordination, inconsistent ORL definitions, and fragmented resource allocation. Unlike prior studies that have focused on broad coordination challenges (Spiller et al. 2007), this research provides empirical evidence of specific operational inefficiencies arising from the absence of intermediary coordination mechanisms.

Regarding the specific functions of ministries and AMOs, our analysis reveals distinct but complementary roles. Ministries primarily provide regulatory frameworks and financial support, while ensuring compliance with national and EU quality standards. AMOs serve as crucial intermediaries between producers and markets, supporting implementation through quality assurance measures, training programs, and market development. However, the effectiveness of these functions is often hampered by coordination challenges and resource constraints.

Our findings support institutional economic theories regarding intermediary organizations in reducing transaction costs. The absence of centralized coordination mechanisms leads to increased transaction costs and redundant efforts, aligning with theoretical predictions. Additionally, the strong dependence on short-term public funding in AMOs limits their ability to engage in long-term strategic planning, further exacerbating inefficiencies.

The findings also advance theoretical understanding of how governance structures can balance centralization and regional autonomy. The proposed competence center model provides a framework that could harmonize national marketing efforts while allowing for regional adaptations. However, expert interviews revealed diverging opinions on its feasibility. While 35% of interviewees supported a central competence center to enhance standardization, knowledge transfer, and strategic coordination, 40% expressed cautious support, citing concerns about bureaucratic expansion and financial sustainability. Meanwhile, 25% opposed the concept, arguing that existing institutions should be optimized rather than replaced by a new administrative layer.

Their primary concerns included the risk of increased political influence, which could shape funding allocation and strategic priorities, the danger of additional bureaucracy, which could reduce flexibility in implementation, and uncertainty regarding financial sustainability, as a national competence center would require stable long-term funding. Interestingly, some of the critics of a national competence center had previously been involved in efforts to re-establish a nationwide AMOS, which ultimately failed due to structural and financial constraints. While not all skeptics were directly involved in these attempts, the challenges encountered during this process—particularly political considerations that hindered implementation—have reinforced concerns about the feasibility of new centralized structures. The fact that past efforts to create a stronger interregional organization remained unsuccessful may explain why some experts are now skeptical about a new competence center, questioning whether such an initiative would face similar obstacles.

Furthermore, the research identifies critical gaps that emerged following the dissolution of the CMA, particularly in knowledge management, quality assurance, and resource allocation. These gaps have led to inconsistent ORL implementation standards, inefficiencies in campaign coordination, and missed opportunities for economies of scale. Unlike previous proposals for centralized agencies (Deutscher Bundestag 2020b), our findings suggest that a hybrid model, combining centralized coordination with regional decision-making autonomy, could mitigate these challenges.

Despite these insights, the study has several limitations. The geographic focus on German institutions may limit international applicability, and the selection of experts could introduce potential bias. Moreover, while the qualitative approach provides rich insights into institutional structures, further quantitative analysis is needed to assess the effectiveness of different coordination mechanisms and their long-term impact on ORL adoption.

These findings both support and challenge existing theoretical frameworks. While confirming the relevance of multi-level governance theories (Kullmann 2021) and institutional coordination models (Schober et al. 2023), they also suggest that existing governance structures require adaptation to meet the evolving needs of the agricultural sector. Future research should explore comparative studies across different national contexts, longitudinal assessments of ORL governance effectiveness, and quantitative analyses measuring implementation success.

These insights point to critical practical implications. A well-designed institutional framework must balance central coordination with regional flexibility while ensuring knowledge transfer, standardized implementation, and efficient resource allocation. This could address fragmentation in ORL governance, reducing inefficiencies while maintaining the benefits of localized decision-making. The existing self-organized network of AMOs could serve as a starting point for more structured national coordination, rather than requiring the establishment of an entirely new institution.

6 Conclusion

This study investigated the roles of ministries and agricultural marketing organizations in implementing and promoting ORLs in Germany, revealing both the essential functions these institutions fulfill and the significant challenges they face. The analysis demonstrates that ministries and AMOs serve complementary but distinct roles in the ORL system, though their effectiveness is often constrained by structural and coordination challenges.

Our investigation reveals that ministries provide critical foundational support through regulatory frameworks and financial mechanisms, while simultaneously ensuring compliance with national and EU quality standards. AMOs, in turn, operate as crucial intermediaries between producers and markets, facilitating implementation through quality assurance measures, training programs, and market development initiatives. However, the research identified significant coordination deficits at the national level, particularly following the dissolution of the CMA. These deficits manifest in fragmented resource allocation, inconsistent implementation standards, and limited knowledge transfer between regions.

The findings also highlight how current institutional arrangements often struggle with structural challenges. Short-term funding cycles constrain strategic planning capabilities, while varying regional approaches to ORL implementation create inconsistencies that can confuse both producers and consumers. The lack of standardized coordination mechanisms between federal and state levels further compounds these challenges, leading to occasional duplication of efforts and missed opportunities for synergistic collaboration.

Our analysis suggests that enhancing system effectiveness requires addressing these challenges through improved institutional coordination. This could be achieved through several complementary approaches. First, establishing more robust coordination mechanisms between federal and state levels could reduce fragmentation and improve resource allocation. Second, developing standardized knowledge transfer systems could help disseminate best practices and market intelligence more effectively across regions. Third, creating more stable funding frameworks could enable better long-term strategic planning.

The study's findings advance theoretical understanding of multi-level governance in agricultural marketing while offering practical recommendations for improving ORL implementation. However, open questions remain regarding the optimal organizational frameworks to balance national and regional governance, sustainable funding mechanisms, and evaluation methods to assess the effectiveness of different coordination models. Future research should investigate these aspects, particularly focusing on:

- Optimal organizational frameworks to balance national and regional governance
- Sustainable funding mechanisms that ensure long-term viability
- Evaluation methods to assess the effectiveness of different coordination models

The findings also suggest that enhancing the already existing cooperation mechanisms among AMOs—such as their annual self-organized meetings and collaborative trade fair efforts—could be a more pragmatic approach to improving national coordination, rather than establishing an entirely new institution. By leveraging and formalizing these existing networks, it may be possible to strengthen interregional collaboration without creating additional administrative burdens.

These insights offer both theoretical and practical contributions, demonstrating the need for institutional adaptation in ORL governance. While existing structures provide essential support, enhanced coordination mechanisms are critical to improving system efficiency and ensuring long-term sustainability. The success of

future ORL implementation will depend significantly on how effectively these institutional challenges can be addressed while maintaining the benefits of regional autonomy and market responsiveness.

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