

## Appendix A

# List of acronyms and abbreviations

AIDS	acquired immune deficiency syndrome
CEO	Chief Executive Officer
CSR	corporate social responsibility
FAO	Food and Agriculture Organization of the United Nations
FDI	foreign direct investment
FM	frequency modulation (for radios)
GDP	gross domestic product
HIV	human immunodeficiency virus
IFAD	International Fund for Agricultural Development
IFAP	International Federation of Agricultural Producers
IFPRI	International Food Policy Research Institute
ILO	International Labour Organization
Inc.	Incorporated
Ltd	Limited
NGO	non-governmental organization
PPCP	public-private community-based partnership
PPP	public-private partnership
Prof.	Professor
SA	Société anonyme, French for public limited company
Sdn Bhd	Sendirian Berhad, Malay for incorporated
SME	small- and medium-sized enterprise
SMS	Short Message Service (mobile phone text messaging)
UN	United Nations
UNIDO	United Nations Industrial Development Organization
WB	World Bank
WDR 2008	World Bank's World Development Report 2008
WTO	World Trade Organization



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## Appendix C

# Executive summary of the e-forum discussions

### BACKGROUND

The e-forum was set up in preparation for the competitiveness roundtable discussions of the Global Agro-Industries Forum. The purpose of the e-forum was twofold:

(i) to take the roundtable discussions to the public in an effort to identify issues and experiences to be brought to the attention of the roundtable panellists; and (ii), to highlight areas of interest and priorities for the Regional Workshops expected to be organized following the Global Agro-Industries Forum.

For guidance to participants, the roundtable discussion papers were grouped in clusters of related subject areas. The background papers (propositions) for each topic were posted on the Global Agro-Industries Forum website. Participants were invited to comment on any of these topics.

Topics	Cluster 1: Organization and services	Cluster 2: Development and innovation	Cluster 3: Operations and enabling environment
1	Understanding markets: market research and intelligence	Meeting consumer requirements: quality, safety and emerging concerns	Improving productivity: technology acquisition and utilization
2	Business linkages: value chain development	Differentiating products: branding and certification	Attracting investment: agro-industry and agro-enterprise finance
3	Organizing smallholders: producer organizations and cooperatives	Staying competitive: innovation, product development and adaptation	Improving efficiency: agro-industries operations management
4	Establishing clusters: agro-industrial clusters and food parks	Human resources development	Reducing costs: infrastructure development

Information about the e-forum was provided in advance through professional networks, relevant websites and on the Global Agro-Industries Forum website. The e-forum was promoted through personalized emails with invitations to participate. All comments accepted for the e-forum were posted verbatim on the site.

The e-forum was run over the period 1 March 2008 and continued up to the start of the Global Agro-Industries Forum on 8 April. A synthesis of the discussions follows.

### UNDERSTANDING MARKETS: MARKET RESEARCH AND INTELLIGENCE

Demands of farmers for information are diverse. The availability of information is seen as important but this represents only part of a broader set of the intelligence that is needed to link producers and SMEs to markets. In all cases, the information collected has to be relevant, timely and accurate and users must possess the skills and competencies to use the information available effectively. Provision of market information needs to be considered as part of a more comprehensive package of support that includes market infrastructure, roads and capacity building. The public sector role is to provide basic market information of a public good nature. Private sector service providers also have an important role to play in collecting and disseminating market and marketing information to stakeholders along value chains on a cost recovery basis.

### **BUSINESS LINKAGES: VALUE CHAIN DEVELOPMENT**

An enabling environment for business is a necessary prerequisite for value chain development. Linkages can be forged by building back from business; building out from farmers; and establishing facilitation bodies (NGOs, donor projects, public-private collaboration). The choice of approach depends largely on the nature of the product and the nature of the end buyer, which determines the nature of the economic relationship between chain actors. In all of these situations, a lesson learned is that all actors in the value chain should avoid taking on functions for which they may not have the competence and time. The potential for linking farmers to markets exists when the actors along the chains focus on their core competence, and coordinated efforts are built to design market development schemes and initiatives that are based on market-driven models. Farmers must also be safeguarded from exploitation and interventions should be inclusive in order to address poverty issues.

### **ORGANIZING SMALLHOLDERS: PRODUCER ORGANIZATIONS AND COOPERATIVES**

Organizing smallholders is strongly supported, given the potential benefits of economies of scale and transaction cost savings. High costs of organizing and coordinating farmers and creating viable apex organizations and the failures of farmer cooperatives and associations in the past were highlighted as issues of concern. Weaknesses in creating viable apex organizations were seen to stem from a lack of human capacity and skills to develop farmer organizations into sustainable support service providers for business development. The range of business services required by small-scale farmers includes provision of financial services, market and marketing information and technical support related to production, processing, new product development and business management. The need for a professional level of management support was identified as crucial. Government has a responsibility to develop policies that address these weaknesses.

### **ESTABLISHING CLUSTERS: AGRO-INDUSTRIAL CLUSTERS AND FOOD PARKS**

Limited experience with clustering in the agriculture sector was noted. Agricultural clusters are harder to realize than industrial ones, because of the spatial aspects related to agricultural production. Promotion of clusters is an example of PPP where the burden of initiating and sustaining activities ought to fall on the private sector. Experience with agro-industry clusters showed that clustering is the best way to manage and use infrastructure in the given location as well as to achieve standardization and quality of products. Clusters are also a means to foster value chain integration and co-ordination.

### **MEETING CONSUMER REQUIREMENTS: QUALITY, SAFETY AND EMERGING CONCERNS**

These are noted as major defining issues for market access by farmers. The establishment of quality control systems, the application of Hazard Analysis and Critical Control Point (HACCP) principles along the chains and the provision of financial and technical support to SMEs and farmers to upgrade their agricultural and manufacturing practices would address the stringency of food safety and quality demands. The rules of the game are seen to be determined by retailers in international markets, rather than consumers. There is still a need to strengthen the public sector capacities to address consumer demand issues and raise awareness on standards and requirements.

### **DIFFERENTIATING PRODUCTS: BRANDING AND CERTIFICATION**

The benefits of adopting the protocols of certification may be offset by other aspects, such as high cost of certification, short duration of certificates and reduced target market of certified products. The quality assurance system would be better implemented by the private sector if high quality products were to be assured. Some scepticism on the possible role of the public sector in supporting product differentiation was put across. In some countries government-initiated programmes have been implemented successfully as components of national strategies to upgrade production and supply chain systems to comply with these new market challenges. Another role of governments would be to create an enabling environment for the operation of agri-oriented SMEs and to provide infrastructure requirements.

### **STAYING COMPETITIVE: INNOVATION, PRODUCT DEVELOPMENT AND ADAPTATION**

Innovation was characterized as a private business that requires creative development. The idea of innovation originating from the public sector was considered quite challenging. The establishment of centres of excellence

was suggested as one of possible mechanisms to address the needs of SMEs. A multi-stakeholder approach was deemed useful in promoting effective product and process innovation.

### **HUMAN RESOURCES DEVELOPMENT**

The misalignment between the technical and managerial requirements of the agro-industrial sector is attributed to the weak linkages between food science academic programmes and the food industry. The need for context appropriate training and capacity building at all levels starting with farmers was highlighted, as was the need to put knowledge into practice. South-south cooperation is one of the models that is particularly suited for knowledge transfer. Language issues were flagged as being a critical element of knowledge transfer.

### **IMPROVING PRODUCTIVITY: TECHNOLOGY ACQUISITION AND UTILIZATION**

Improved technologies are agreed to be a requisite for improving productivity, but capacity building and other factors must accompany, if technology acquisition is to be effective. It is important to set up the role of the public sector ahead of the introduction of technology. In the past experience, technology focus was excessively given to production processes and insufficiently to value addition and marketing.

### **ATTRACTING INVESTMENT: AGRO-INDUSTRY AND AGRO-ENTERPRISE FINANCE**

Creating an enabling environment by the government was highlighted as most important for attracting investment. The government's roles also include coordination and to a certain extent regulating the operating environment to ensure coordination among donors and investors, as well as quality assurance. There is a lack of financial services for many in the sector, especially the small agriculturalists and agribusinesses who lack security. Thus, non-traditional forms of finance and investment must be considered.

### **IMPROVING EFFICIENCY: AGRO-INDUSTRIES OPERATIONS MANAGEMENT**

There is a relative lack of managerial prowess in the agro-industrial sector of developing countries. Improving existing training programmes and offering attractive tertiary food-industry management degrees would be one possible option to solve this issue. Public policy should support small agro-enterprises by reducing administrative requirements, adopting appropriate regulations and licensing.

### **REDUCING COSTS: INFRASTRUCTURE DEVELOPMENT**

Public policy in many developing countries needs to promote and directly support new business models for infrastructure development in rural areas that involve the direct participation of the private sector. "Smart subsidies" may be useful to mitigate the risks and start-up costs of private infrastructural investment. Even though there are many successful PPPs in infrastructure development, some scepticism was raised on the general suitability of these organizational arrangements. One of the most successful interventions is where government using its own finance or donor funds helps the actors engaged in the private sector to increase efficiency. The public sector's role, the primary driver for at least common infrastructural development, is to ensure that basic infrastructure is in place. Then the private sector could provide secondary types of infrastructure.



## Appendix D

# Additional events held during the Forum

On Wednesday, 9 April, a full morning of side-events was held at the facilities of the National Agricultural Science Centre (NASC), which included case studies on Indian agro-industries, organized by the Confederation of Indian Industry (CII), and presentations of international cases and best practices of agro-industries development, given by selected industry delegates. A networking space was also made available by NASC, where publications and information materials could be shared among participants.

The programmes for the two main components of the side-event activities were:

### 1. INNOVATION IN INDIAN AGRO-INDUSTRIES

#### Inaugural session

- ▶ Welcome and keynote address on CII's vision on "Agriculture" by Mr Dhruv Sahney, Chairman, CII National Council on Agriculture, Chairman & MD Triveni Engineering Ltd.
- ▶ Address by Mr Geoffrey Mrema, Director, Rural Infrastructure and Agro-Industries Division, FAO, Rome.
- ▶ Vote of thanks by Mr Ajay Shriram, Chairman, CII National Committee on Agri Inputs, Extension and Farm Services Chairman & Senior MD, DCSL.

#### Technical Session I: New models for aggregation and consolidation:

- ▶ Case study 1: Transforming rural lives and landscapes, presented by Mr M. Srinivas Rao.
- ▶ Case study 2: Innovation in Indian agro-industries: Case of Maha Grapes, presented by Ashok Gulati & Kavery Ganguly.
- ▶ Case study 3: UP-linking smallholders with market based agribusiness economy: The emerging paradigm, presented by Ravindra Pastor.

#### Technical Session II: Innovative models of public-private partnership:

- ▶ Case study 4: Mitigating small farmer public private partnerships, presented by Amir Ullah Khan.
- ▶ Case study 5: PPP in agriculture – The PepsiCo Experience, presented by Vivek Bharti.
- ▶ Case study 6: Agroprocessing in production catchment for rural prosperity: The Indian experience, presented by Dr Nawab Ali.

### 2. INDUSTRY PRESENTATIONS: SELECTED INTERNATIONAL CASES AND BEST PRACTICES IN AGRO-INDUSTRIES DEVELOPMENT

- Tropical Wholefoods, by Adam Brett (UK). Tropical Wholefood is a fair-trade food business based in the United Kingdom that works with partner businesses in Africa and Asia.
- Danisco Innovation Activities, by Lisbeth Munksgaard (Denmark). Danisco is a world leading producer of bio-based food ingredients.
- Choice Nuts Zambia, by Berhilda Kalinda (Zambia). The company is a leader in processing and marketing of groundnuts.
- Agriculture and agrifood business at Crédit Agricole S.A., by Anne Pacquet (France). Crédit Agricole is a member-based financial company that started in the agricultural and rural sector in France and is now a large, well-known diversified provider of financial services in many countries.

- Technoserve, by Simon Winter (USA). Technoserve is one of the most active and best known international NGOs for providing support to public and corporate partners and small entrepreneurs on “business solutions to rural poverty”.
- Rainforest Alliance, by Ana Paula Tavares (Brazil). Rainforest Alliance is an international conservation organization that collaborates with governmental, intergovernmental agencies and the private sector to promote the development of sustainable products and services, and the mainstreaming of sustainable practices in global markets.
- Zambia Agribusiness Technical Assistance Centre, by Likando Mukumbuta (Zambia). ZATAC Limited provides support for market development, market linkages and smallholder commercialization, especially for high value agricultural commodities.
- Green Lane, by Nune Sarukhanyan (Armenia). Green Lane Agricultural Assistance NGO in Armenia supports milk cooperatives and organic farmer field schools.
- LAFISE, by Enrique Zamora (Nicaragua). The LAFISE group is a Central American corporation with interests in the agribusiness and financial sectors. The group works with small farmers, providing financial resources and channelling them through partnerships with public and private organizations that lend technical assistance, training and institutional support.
- Africert, by Ruth Nyagah (Kenya). Africert Ltd., one of the first African certification bodies, carries out third party inspections, verifications and certifications.
- Juboken and Coco Technologies Corporation – Cocotech, by Justino Arboleda (The Philippines). Juboken and Cocotech manufacture geotextile nets, fibres and facines from waste coconut coir.

The events were very well attended and appreciated by the participants. Further information, including most presentations, can be accessed at the Global Forum’s web site ([www.gaif08.org](http://www.gaif08.org))



## Appendix E

# GAI F organization team

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Report of the

# GLOBAL AGRO-INDUSTRIES FORUM

New Delhi (India), 8-11 April 2008

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ISBN 978-92-6-10072-0



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TGDr0548168.062008