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AGROSAVIA

Identification of bottlenecks and opportunities for the beef value chain of Córdoba, Colombia

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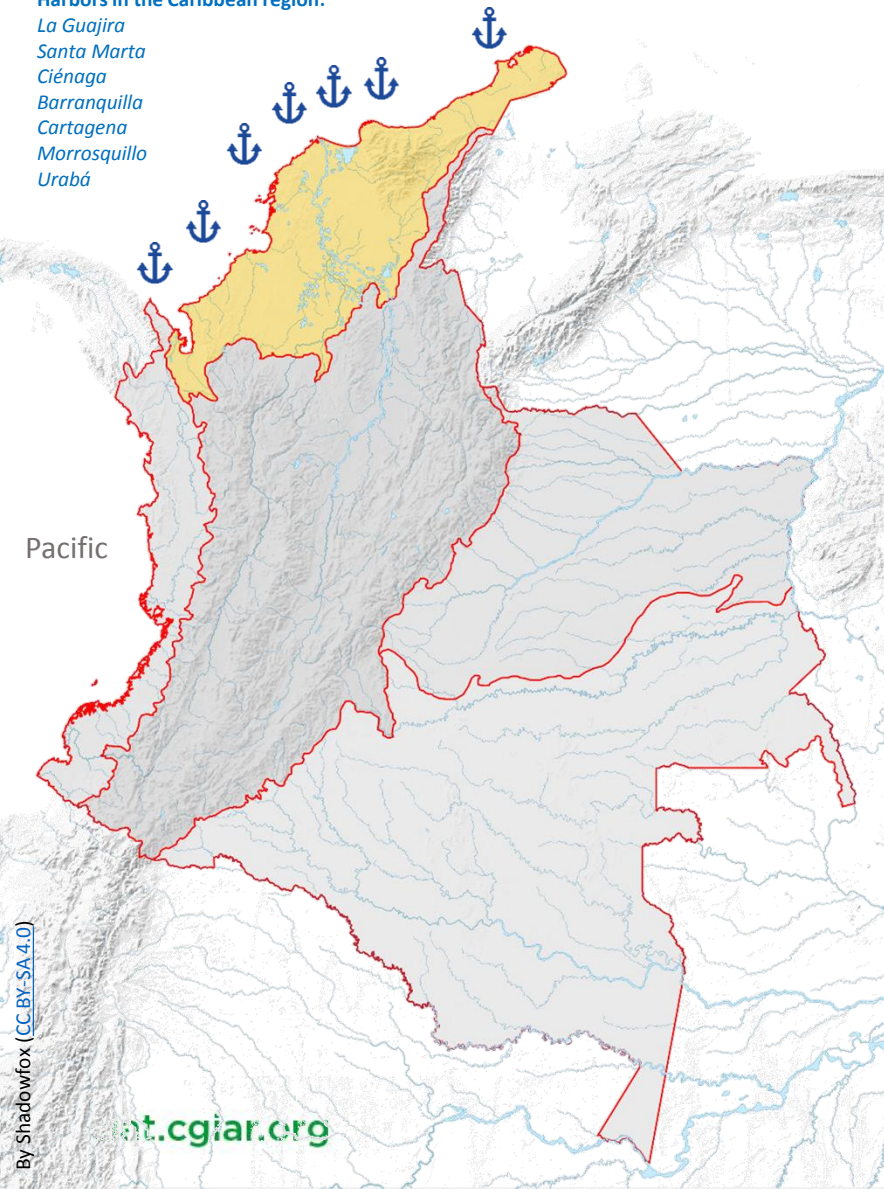


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Introduction

Harbors in the Caribbean region:

La Guajira
Santa Marta
Ciénaga
Barranquilla
Cartagena
Morrosquillo
Urabá





Colombian Caribbean region


 Population: 11,275,000 hab. (22.6% of total).

 Area: 132,288 km² (11.6% of total).

 The cattle sector prefigures the most important economic activity at regional level.

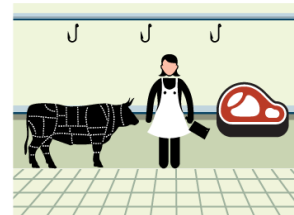
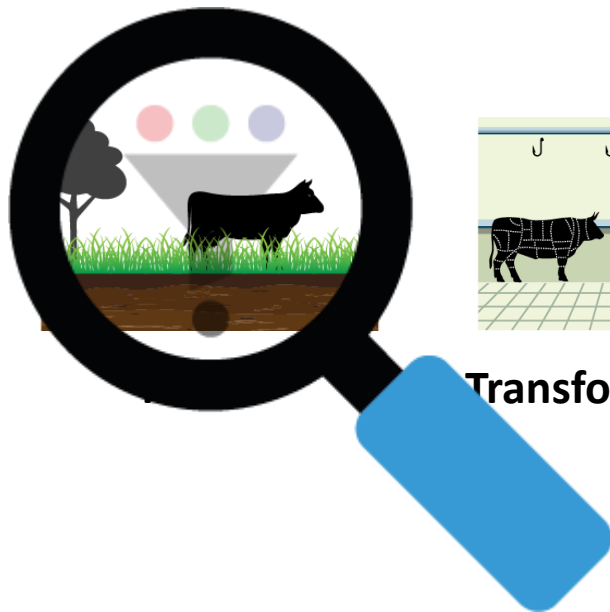
 **Best infrastructure** for accessing international meat markets, compared to the rest of the country.

 Existing bottlenecks **reduce competitiveness**, hamper efforts to achieve a joint market vision and aggravate **quality assurance in and sustainability** of the VC.

 Understanding these complexities and interconnections is a first step towards the definition of an **action plan** and the development of potential **new markets**.

Objective

To **identify** the most relevant bottlenecks and opportunities for the beef value chain (VC) in the Colombian Córdoba Department, in order to provide information on how to increase efficiency, added value and market participation.



Transformation



Packaging



Marketing



Consumption

Materials and methods



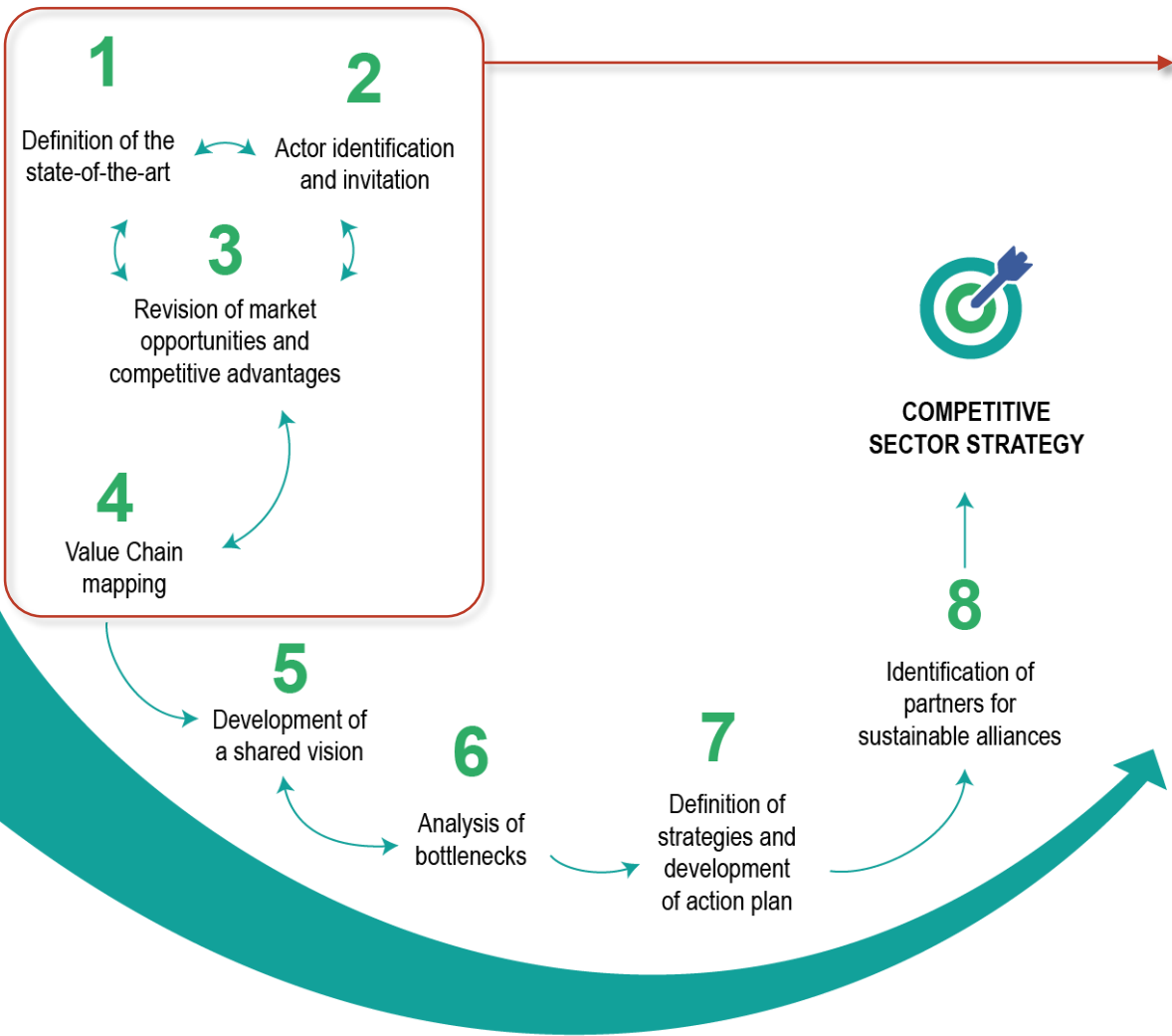
Study area: Córdoba Department, Colombia

Value Chain: Bovine meat

Methodology: Based on the approaches

- *“Participatory Market Chain Analysis for Smallholder Producers”* (Lundy et al, 2007)
hdl.handle.net/10568/54198
- *“ValueLinks manual: The methodology of value chain promotion”* (Springer-Heinze, 2007).
hdl.handle.net/10568/25053

Methodological steps of a VC improvement program



Advance on key objectives:

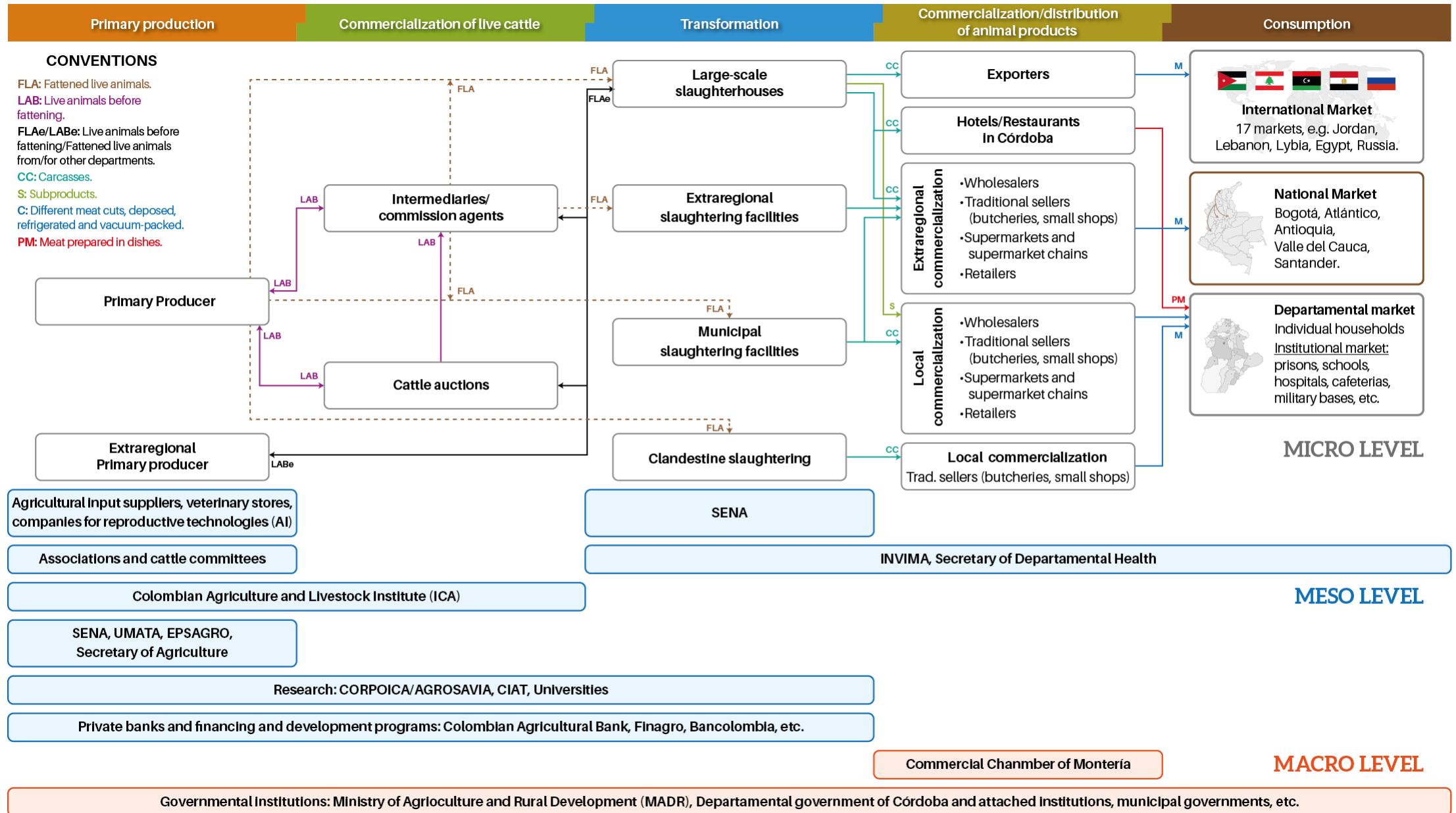
- ✓ Identification of the relationships and interconnections between the VC actors, product, service and information flows
- ✓ Improvement in communication between the different actors along the VC.
- ✓ Identification and analysis of bottlenecks that need to be solved in order to improve the VC.

Data collection

- Compilation of information from secondary sources.
- Semi-structured personal interviews (11 direct VC actors).
- 1 Focus group discussion (11 cattle experts from the department).
- 1 participatory multi-actor workshop (36 direct and indirect VC actors).

Results

Figure. Map of the bovine meat value chain of the Córdoba Department, Colombia.



Results

The identified bottlenecks were grouped into the following three pillars:



Sustainable intensification

- The impact of technical assistance is insignificant
- Limited access to credit
- Absence of credit lines that encourage transformation
- Lack of comprehensive support packages adapted to the conditions of the region/subregions and VC segment.
- Low productivity and profitability of the primary VC segment
- Prevalence of extensive production models with negative effects on the environment



Differentiated markets

- Weak market vision of the cattle sector
- Farms are not seen as businesses
- Low levels of industrialization of the sector
- No identified alternatives for the development of meat products with differentiated characteristics
- There are no projects/programs that promote the process of value generation at farm level
- Low levels of product standardization (high genetic variability, many crosses and breeds)

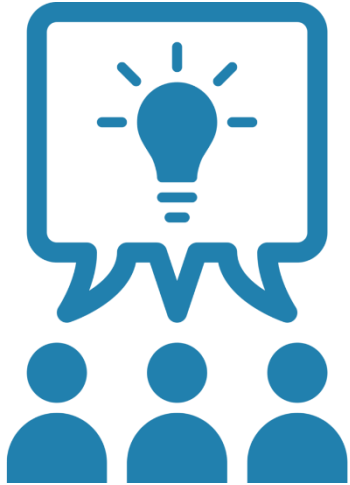


Communication and cooperation among (direct and indirect) actors

- Weak institutional framework
- There is no continuity with the goals and commitments defined at different roundtables established previously. This affects the confidence in such processes.
- Absence of a solid / strong organized structure along the chain that improves competitiveness
- High levels of intermediation along the chain
- Absence of cooperation mechanisms within and between the links of the chain

Next steps

Design of a competitive sector strategy for the Department of Córdoba:



Building a joint vision

A vision for improvement for at least 10 years as a result of the participatory and inclusive process among the actors.



Designing an action plan

Includes activities, actions, responsibilities and deadlines.



Identifying possible alliances for inclusive businesses

Linkages between producers and potential buyers

Reflections on the methodology (1)

The **participatory approach** guarantees equitable participation, transparency and the **development of associations and networks** among VC actors.

The participatory workshop allowed the different actors to get to know the **points of view** and **difficulties faced by each actor** and each VC segment.

The work carried out promoted the generation of **bonds of trust between the actors**, who demonstrated their **motivation for and commitment with** participatory VC development.

The state of the art of the chain obtained in the first phase of the study represents a key input for the **construction of a competitive sector strategy** and strategic plans for sustainable sector development.

Reflections on the methodology (2)

The construction of the state of the art of the VC can be a complex process given the lack of information and reliable statistics.

In this sense, **continuous participatory work** and **collective feedback** is key to identifying such shortcomings and making the diagnosis and context of the chain more realistic.

It takes time to make progress on the construction of a competitive sector strategy. This requires **long-term availability of funds** and **strong commitment** from all involved actors.

After the strategy has been built, it is advisable to **create a VC committee** that follows up on the established actions, in order to **assure compliance and long-term sustainability**.

This committee should also **work as a lobbying institution** for public policy making.

Thank you!

ACKNOWLEDGEMENTS

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