regeneration mauritius

PROJET LABELISATION
Focus Group Report

Mauritius Chamber of Agriculture

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MANDATE

CONTEXT

Farmers (beneficiaries of the SMART-AGRI initiative by the Mauritius Chamber of Agriculture) transitioning from conventional to Good Agricultural Practices wish to **differentiate and valorise their produce on the market**.

REQUIREMENTS

Facilitation of 4 focus groups to gather insights on the market requirements for the implementation of a label that would differentiate and valorise the produce of farmers implementing Good Agricultural Practices, thereby rewarding their efforts & engagement, and encouraging other farmers to engage in the same process.

- Farmers
- Distributors
- Consumers
- Consensus regrouping all of the above stakeholders

EXPECTED OUTCOME

- Explore the level of **awareness & understanding of existing Agricultural Practices and Certification Labels in Mauritius**
- Understand the **motivations and concerns across the value-chain**
- Identify **requirements and barriers to the implementation of a ‘Good Food Label’**

CAVEATS

USE OF FINDINGS

The insights shared in this report should be **interpreted and used with caution,** for the reasons outlined below.

We strongly recommend that the insights shared be used in combination with other data sources and/or be validated by a quantitative study for reliable decision-making.

1 Recruitment Methodology

- Recruitment & selection of the focus group participants was done by the Mauritius Chamber of Agriculture
- Recruitment of consumers & farmers via social media may introduce biases as they can be assimilated to a relatively 'aware' segment
- The context & challenges of the current distribution landscape invariably implied a focus on the niche market of retail distribution

2 Limitations of Sample Size & Composition

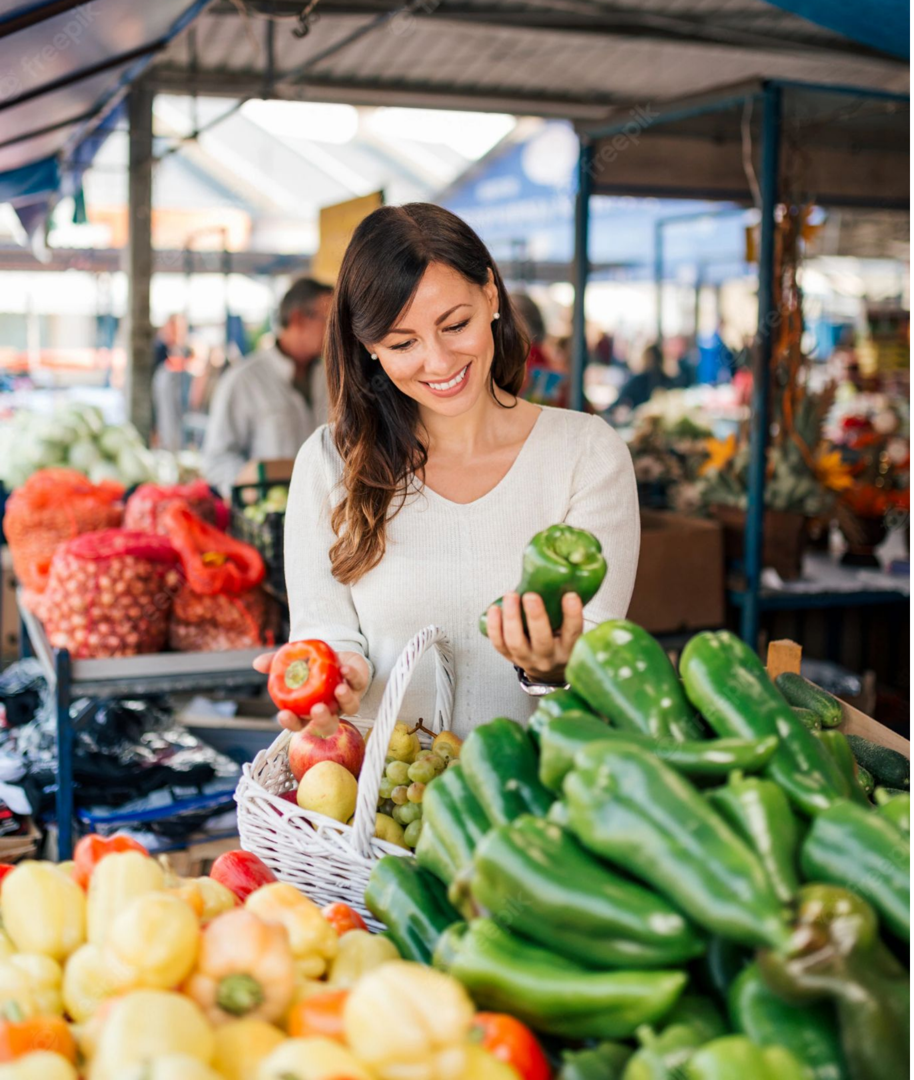
- Focus groups were carried out with a small, select groups which were not designed be representative of the population of Mauritius
- The insights shared can in no way be construed as the views of the wider population

3 Subjectivity & Accuracy

- The findings of a focus group are **QUALITATIVE ONLY** and relay the **opinions, beliefs, perceptions and experiences** of the participants
- The focus group report recollects the insights **as they have been shared** by participants
- The findings of a focus group are in no way, meant to be statistically true, relevant or accurate

4 Group Dynamics

- The group dynamics may influence the discussion and responses of some participants
- Insights from distributors were gathered in 1 to 1 interviews of 1 hour, and for farmers and consumers, in group discussions



CONSUMERS

CONSUMER PROFILES

55%
ATTENDANCE
6 out of 11 registered

83%
FEMALE
1 male out of 6 attendees

50%
COASTAL REGIONS
50% North, 33% Central, 17% West, 0% East/South

67%
20-40 years
17% 40-50 years, 17% 50+ years

50%
WITH KIDS
33% expats

50%
WORKING PROFESSIONALS
33% without employment/retired, 17% student

- Based on the methodology and channel used for recruitment of participants, 100% of attendees had a 1st level of awareness / interest in the topic and had some level of knowledge on the matter
- 2 of the participants have a backyard garden / permaculture plantation project
- A quantitative survey should be implemented to understand & validate consumers habits and needs

CONSUMER INSIGHTS

CURRENT PRACTICES

- Selection Criteria

1) Look & Freshness (assimilated to quality)

2) Price

- Other considerations: Availability on stalls, Seasonality, Quantity required (couple/family), Type of use (raw / cooked)
- The origin is not a prime consideration, except for a niche of eco-consumers wishing to minimise impact

- Purchase Habits

- Purchase location is most often a mix, dictated by convenience, spontaneity & need for specific produce
- Mix: Market, Supermarkets, Direct with farmers, Roadside, Specialised shops,/markets, Online
- Market remains the preferred choice when looking for variety and quality (freshness)
- Supermarkets are the convenient choice in coastal regions as markets are less accessible and localised stalls have ‘tourist’ prices

VERBATIMS

“J’essaie d’acheter au plus près avec les planteurs autant que possible pour avoir cette qualité justement, avant que ça rentre dans la distribution avec 30% de marge. Je vais être prêt à payer le même prix qu’au supermarché ou au bazar parce que je sais que l’argent revient au planteur”

“Le consommateur veut quelque chose de joli, de beau, qui n’est pas forcément meilleur, mais beau”

“Rarement je vais penser ce que je vais acheter. J'achète ce que je trouve”

“ J’allais au bazar avant quand les enfants étaient petits car il fallait faire leurs potages, et tu ne trouves pas toute la variété dont tu as besoin au supermarché. Il y a des fruits que tu ne trouves pas au supermarché”

“Moi j’aime bien bazar parce que tu arrives à connaître les planteurs, mais ils n'arrivent pas trop à me dire si c’est bio, raisonnée, etc. J’ai essayé de faire un peu camarade pour qu’ils donnent l’info mais ils ne disent pas ”

CONSUMER INSIGHTS

LABEL REQUIREMENTS

- Perceptions & Understanding
  - → The knowledge of local agricultural practices remains limited and mostly self-acquired amongst consumers
  - Even among minimally informed/aware consumers, terminologies are not fully aligned and often used interchangeably (bio, organic, raisonnée, pesticides contrôlés, sans pesticides)
  - Bio is perceived to be less accessible (specific markets, specific areas, irregular supply, higher price)
  - Imported frozen vegetables is believed to be of better quality: regulated by international standards on pesticide use and better nutrient conservation
  - Expectation that better practices should give better quality produce (visual & taste)
- Motivators for an informed choice
  1) Under-aged kids
  2) Health Concerns / Disease, Doctor recommendations
  - Other considerations: environmental impact, emotional-connect and the feeling of contributing to the benefit of a community (fair trade)

VERBATIMS

“Chez moi ça fait quelques années que je mange quasiment bio, mais ça ne me dérange pas de ne pas manger bio”

“Plutôt que de me déplacer loin pour aller chercher ce légume bio, je me dis que my body can assimilate some chemicals”

“Je sais que c’est pas bien, mais quand un légume est moche, même si c’est bio, je n'achète pas forcément”

“Je sais pas ce que c’est un légume sain car manger un légume, c’est déjà sain, non ?”

“Alors pour moi la qualité c’est, enfin .... je ne consomme pas bio ni organique ni sans pesticides. Je ne suis pas très informée sur ce sujet là, donc je ne fais pas très attention à ça. Donc pour moi une belle laitue, en pleine forme, bien hydratée est pour moi une laitue de qualité comparé à une laitue frippée sur les étals de supermarché”

CONSUMER INSIGHTS

LABEL AWARENESS

- General
  - Unaware of existing labels for most
  - Consumers recall and associate more easily with brands that are believed to have good practices
  - Top-of-mind brands named: Les Jardins de Médine, Top Nature, Esprit Vert
  - Find it difficult to trust distribution systems on product claims without proof and/or unless they know / are familiar with the farmer
  - Consumers feel the need for an understanding of what grows naturally in the Mauritian soil ex: potatoes will never be bio
  - Consumers have no knowledge of the label, what it certifies, what it means/ guarantees to them and what are the points of sale for certified products
  - Mostly assimilated with the country of origin, which is not a primary criteria for the purchase fresh produce

VERBATIMS

"On n'a pas assez connaissance des labels, il faut prendre le temps, retourner le produit, trouver, lire …'

"Je ne pourrais jamais vérifier sauf si c'est quelqu'un que je connais vraiment"

"Un label = un cadre, ce qui me redonnent un p'tit peu confiance au niveau du produit, mais il faut comprendre le cadre pour comprendre le label"

"MAURIGAP tout ça … Maintenant qu'on connait, je vais aller vérifier. Vous savez, moi je suis très méfiante donc je vais aller voir, goûter, tout, ça"

"Je regarde ça comme un consommateur … peut-être que moi, mo pas interessé si so legal criteria in meet. "

CONSUMER OUTCOMES

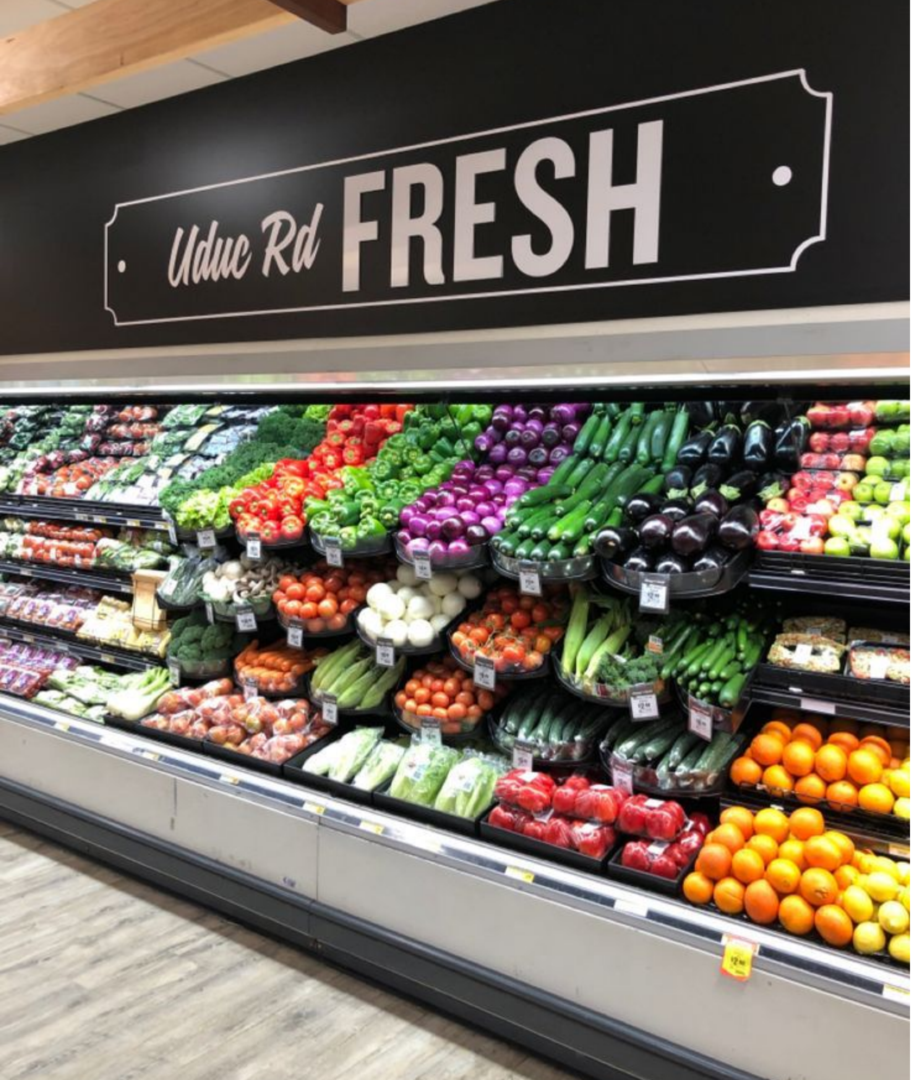
1. There is no straightforward pathway to the **consumer's purchase decision**. It is often a **trade-off** between freshness, price, needs, hygiene, convenience, variety and availability.
2. Consumers who make the **conscious choice** of fruits and vegetables produced using good practices are still a **niche**, motivated by under-aged kids, health and environmental concerns.
3. There is a keen interest in **purchasing labeled produce** amongst consumers provided their primary criteria in terms of **quality** (freshness/look) and **price** are met.
4. For consumers, beyond all the certification criteria of a label which may feel technical and bulky, any **label** should focus on and **visually communicate** the information that **matters to the consumer**.
5. Intentional, consistent, simple & straightforward **communication** is key to drive consumer awareness and choice.
6. Beyond the technical aspects of a label, consumers also need an **emotional connect** and the feeling that their purchase contributes to the wellness of a community-**fair trade**.
7. Questions from consumers: **Who does the certification ? How to trust the label ?**

VERBATIMS

" Si je peux planter chez moi, ca me fait deja un achat en moins"

"Je peux me permettre de mettre un peu plus sur mon panier de légumes bio, mais parce que j'ai réduit ma consommation ailleurs, sur les viandes et la charcuterie par exemple"

"Je pourrais un légume moche ou dépassé mais à condition que le prix soit complètement au rabais"



Focus Group Outcomes

1 to 1 interviews of 1 hour each in April - May 2023

DISTRIBUTORS

DISTRIBUTOR PROFILE

WHOLESALE
Wholesale Focus

SKC SURAT
Import / Wholesale / Retail

proxi fresh
Distributeur de nature
Import / Wholesale

RETAIL
Import & Retail

winners
25 outlets

SUPER U
4 outlets

SCORE jumbo
7 outlets

INTERMART
UNIS CONTRE LA VIE CHÈRE
10 outlets

ONLINE
Bio / Raisonnée Focus

Farm BASKET
your health basket
Niche market

theshop.mu
Niche market

DISTRIBUTION LANDSCAPE

Market Dynamics (contractual agreement / guaranteed purchase, communication support, retail pricing if branded)

Selection Criteria of Suppliers:

- **Reliability / Consistency of supply** (variety, volume, frequency)
- **Visual Quality** (perceived)
- **Price**
- Other Considerations:
  - Traceability (not always applicable)
  - Label (not always applicable, not marketed, and does not necessarily warrant a higher purchase price)
  - Brand (when applicable)

Import

Farmers
Including MauriGAP certified

Wholesalers Corporate

Network: Proximity

Network: Trust

Consumers

BAZAR

~ 70% pop

POINTS OF SALE

~ 30% pop

Grande distrib

Online
Niche market

By client type « premium »

By prod type « Philosophy »

Discount Expectations (life on shelf, look/freshness, promotion / competitor prices)

Unsold (returned to wholesalers/farmers, transformed, donated to NGOs, composted, landfill)

DISTRIBUTOR INSIGHTS

CURRENT PRACTICES

- Markets

  Retail Distributors serve 2 major personas:

  1) Price- driven > bulk section (motivated by convenience)

  2) Quality-driven > chiller section (niche)

- Produce Differentiation

  Products sold under any sustainable agriculture framework/brand are currently packaged, allowing:

  - Differentiation on stalls
  - Reduction of product manipulation
  - Easier checkout, including less weighing mistakes
  - Traceability in case of quality issues
  - Smoother operations overall

  While less sustainable vs bulk, it remains the easiest operational option to showcase a better quality product

- Price Differentiation

  - There is niche segment is ready to pay more for better quality / labeled or branded produce
  - However it is believed that people will not go beyond the + 20-25% price threshold

VERBATIMS

“Le client cherche la variété”

“les clients achètent 50% avec leur yeux”

“les gens achètent ce qui est beau”

“le consommateur regarde son porte-monnaie d’abord”

“on a eu un fournisseur bio, on a dû arrêter”

“Il n’y a pas de production ou des récoltes constantes”

”Nous favorisons un circuit court pour avoir un produit plus frais”

“C’est bien présenté, visuellement tu vois. Comment différencier sinon ?”

“Dès qu’on a une marque, ils nous laissent fixer nos prix. Mais dès qu’on est sur du vrac, c’est le prix qui va primer”

DISTRIBUTOR INSIGHTS

LABEL REQUIREMENTS

General agreement that a label could be a good overarching means to elevate the industry

- Challenges & Barriers
  - **Limited support from the institutions:** distributors wishing to increase their supply of certified produce end-up engaging financial & human resources to accompany & support their farmers in the process, wherein acceleration of certification becomes entirely dependent on distributors' will and capacity.
  - **Farmers lack structure & means:** need hand-holding and support throughout the process to effectively transition & structure their production to meet certification requirements
  - **Low number of certified farmers/variety of produce:** highly increases the risk of a disruption in the supply chain. In that context, certification cannot yet be a prerequisite for supply.
  - **Low consumer awareness:** there is a clear lack of communication and education on the matter for it to effectively drive consumer/market demand. A label should warrant the same marketing tools/efforts as a brand to be effective.

VERBATIMS

"Le label permet de distinguer le vrai du faux."

"Les planteurs certifiés pour nous c'est un gage de confiance pour nos clients »

"Convaincre les planteurs de faire respecter les normes, c'est meilleur pour le marché"

"A Maurice, c'est très dur d'aller inspecter ou de demander à un planteur un rapport sur tous les pesticides"

"Nous devons nous-mêmes accompagner le planteur!"

"Or notre métier c'est la vente !"

"Il ne faut pas oublier que at the end of the day, on est là pour vendre, pour répondre à la demande"

"Le label sécurise le consommateur mais ne triple pas les ventes"

"On peut être idéaliste, mais si le client ne perçoit pas, ne comprend pas cette qualité, le client n'achète pas. Tout dépend du client"

DISTRIBUTOR INSIGHTS

LABEL AWARENESS

- General
  - Consumers are not aware / cannot decode acronyms and terminologies ex: consumers do not know what GAP stands for (Good Agricultural Practices)
  - It is easier for consumers to identify with brands which are believed to have good practices, or with attribute claims ex: bio, organic, zero pesticide
  - Education of the consumer is a key market driver

MAURI GAP GOOD AGRICULTURAL PRACTICES

- Perceived to be a 1st necessary step
- Conditions are not stringent enough compared to GLOBAL GAP, which is international, hence more relevant/ valuable
- Level 1 Certification, even if a start, is not enough to drive more sustainable practices with real benefits for the soil

made in moris™

- Does not certify quality of the produce based on type of agricultural practice
- Perceived to be more commercial, opening access to some markets ex: Hospitality

VERBATIMS

"Chacun fait ce qu'il veut. On est dans un domaine qui est extrêmement flou et finalement chacun peut dire n'importe quoi"

"On ne sait pas ce qu'on met dans notre corps"

"On veut proposer un produit meilleur pour la santé à un prix accessible"

"Aujourd'hui si on devait imposer le MAURIGAP, on n'aurait pas toute la gamme et il y aura des rayons vides"

"S'il y a suffisamment de volume de produits certifiés, le prix ne sera pas un soucis"

"Il faut que ce soit intégré à la stratégie d'entreprise, avec le soutien de la direction et la conviction des employés".

"Le consommateur ne connaît pas les différents labels, il y a une éducation à faire !"

DISTRIBUTOR OUTCOMES

1. Distributors are willing to support provision of certified / labeled produce, motivated by **vision/philosophy, strategy, consumer demand,** or **competitor strategy.**

2. The above is valid only if the label is **identifiable, understandable and valued by the consumer**, thereby driving demand, and scalable / sustainable if there is there is an adequate number of certified farmers / volume of certified produce to ensure **consistency of supply** at market **price**.

3. Certification would allow distributors to **onboard suppliers faster** (trust that the farmer is trained, equipped, reliable & audited) and focus on **marketing quality** (rather than brands).

4. It is believed that the volume of certified suppliers / farmers could be accelerated if **certification becomes a mandatory procurement criteria** for **retail distributors** and the **hospitality industry** (which is currently price-driven).

5. Acceleration of the implementation of good practices & ensuing certification would require the **commitment, support and collaboration of local authorities**, which are currently perceived to operate in silos (legislation, training, certification, support resources).

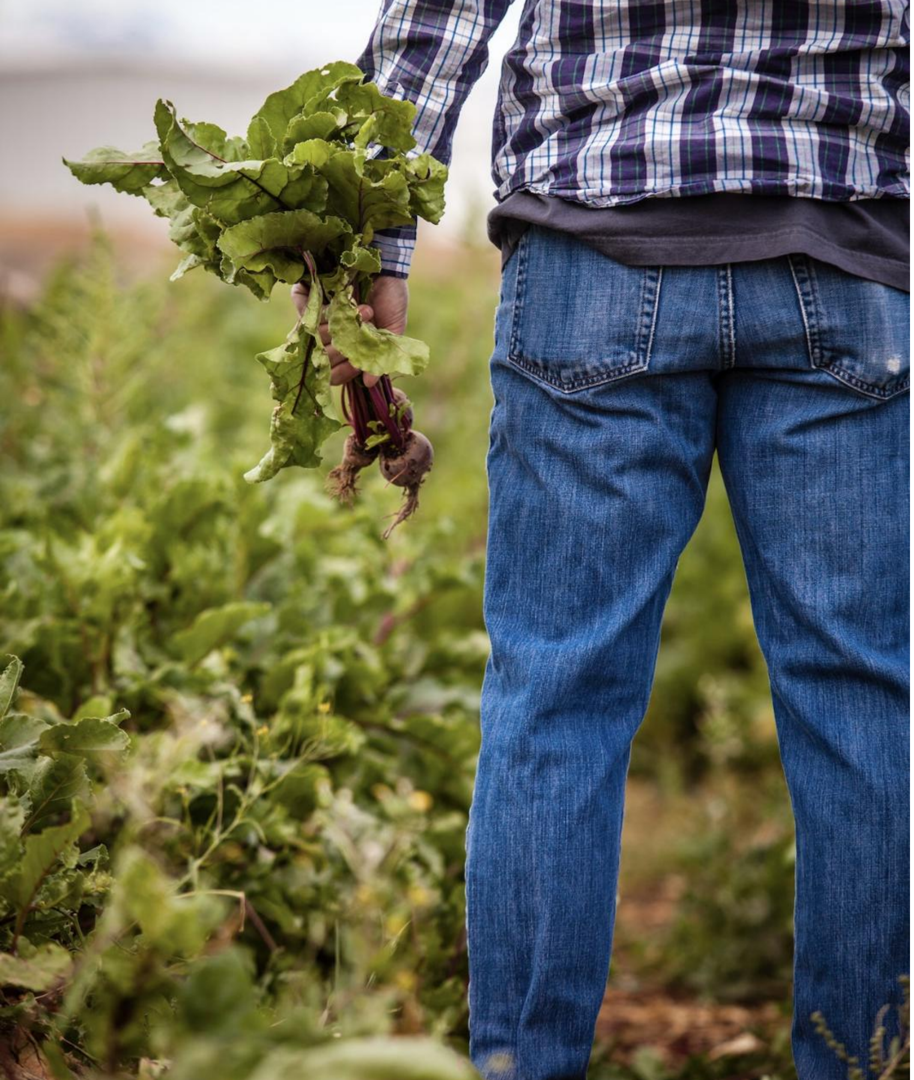
6. Questions from distributors: **How to trust that what is being delivered is what had been certified ? What about certification for other sustainable production methods ? Are there labels (outside of Mauritius) we should get inspired from ?**

VERBATIMS

"Demain moi aussi je peux venir dire que je fais de l'Agriculture raisonnée. Qu'est-ce qu'il y a derrière? Qui contrôle?"

"Il faudrait que tous les acteurs se mettent d'accord sur les critères et les cahiers des charges. Il faut plus de cohésion, plus de partage "

"Il faut que la grande distribution s'engage, c'est la 1ere étape! Parce que c'est eux finalement qui peuvent imposer. Ou même l'hôtellerie. Ça fera bouger les choses"



Focus Group Outcomes

1 focus group discussion of 3 hours on the 4th May 2023

FARMERS

FARMER PROFILE

73%
ATTENDANCE
11 out of 15 registered

7%
ALTERNATIVE PRACTICE
1 Aquaponics farmer

14%
BIO FARMING
2 Regenerative farmers

55%
SMART AGRI
6 Smart-Agri Beneficiaries

33%
MAURIGAP
5 engaged in the certification process

FARMER INSIGHTS

CURRENT PRACTICES

- General
  - No clear/shared definition on terminologies used for agricultural practices ex : agriculture raisonnée, smart agri, organic, bio, etc.
- Challenges in enabling Good Practices:
  - **Lack of access to 'intrants'**: paillage & green waste for composting
  - **Govt. support out of sync with needs:** most solutions proposed by institutions/sustained by financial schemes are chemical ones + non-regulated of generic pesticides introduces new/unknown chemicals in the soil
  - **Chemical Residues in soil/ from surroundings:** impact of conventional farms around + transitioning a land under conventional practice takes a lot of time & effort
  - **Lack of workforce:** sustainable practices needs more manual workforce, which is scarcer locally
  - **Engaging the new generation:** Agricultural students are in the fields only to get a degree; there is no transmission of knowledge, techniques or succession planning for the sector. There is a wish for more internships involving farm work to arouse interest.

VERBATIMS

"A 1 moment donné seki ou trouver c'est qui fertilité la terre in diminier.. Et le probleme quand fertilité la diminuer, la meme plante la pu pli sensible ban maladies, ban insectes pou vin attack li."

"Mo p gagn 1 problem maladi lor mo plantation banann. Ban la in avoy 1 lalist, me lalist prodwi simik »

"Agriculture raisonnée, ce n'est pas que bann pesticides. Li bizin vin depi la terre qui est le poumon. Si la terre n'est pas correcte, automatiquement nou pou gagne ban problèmes. Mo bizin coumas a zero et coumans par travay la terre. Mo coumans par fertilité du sol après lerla mo pou vin met agroécologie lor la, mais petit à petit "

"Des fois seki mo download mo lire, mo trouv moi in ti p plis conné comparé a seki certains formateurs pou dire"

"Ici kan ou planteurs, dimoun prend ou pou 1 laboureur, 1 dimoun couma dir bas "

FARMER INSIGHTS

LABEL REQUIREMENTS

- Getting Certified
  - Clear **lack of knowledge on the MAURIGAP process**: requirements, what it certifies, levels, the value/benefits, applicable incentives, timelines, costs, etc.
  - Perceived **lack of reactivity of MAURIGAP**: no visibility on certification schedules, field visits, etc.
- Transition Period
  - **Transition Support:** no clear framework/structure to support those in transition for certification purposes (decreasing residue vs no residue, what to do with produce during transition phase, guidance on issues,..)
- Produce Valorisation & Selling Price
  - **The market is driven by consumer demand** & the consumer doesn't always make a distinction between better agricultural practices and conventional ones.
  - **A label is meaningful if it's advertised and explained**: from ads to facebook to hostesses at point of sales, there is a need for extensive communication.
  - **Influencing habit change:** awareness campaigns should involve nutritionists, sports coach, doctors, etc.
  - **Economic Benefit:** the transition should create some form of economic benefit for the farmer

VERBATIMS

"Si ou pou faire li grande échelle, b bizin gagne profit en plis. Sinon pou ki ou p travay ?"

"Nou aussi nou certifié MAURIGAP. Mone resli gagn pomme de terre, oignons, giraumon. B la mo pareil couma zot … Bann la zis bizin vinn pren échantillon carottes… mo pe atann mwa oussi. Mo krwar bizin res appel zot… ena 1 tifi laba, mo krwar bizin apel li, apel li, apel li.. »

"Mais moi mo plante ban légumes couma roquette, légumes fins. Couma ou plante roquette, dans 1-2 semaines ou fini al vend li sa. Mais ziska MAURIGAP vin guet ou, prend échatillons, avoy laboratoire. Zot pas vini couma ou téléphoner"

"Consommateurs dan difficulté. Zot pas pé forcément rod qualité"

Mois p trouver mo problème avec la terre ! Pou sorti depi agriculture conventional pou rentre ladans, li pas trop facile."

FARMER INSIGHTS

LABEL AWARENESS

- General
  - For those who believe in the merits of their sustainable agricultural practices, **certification is not required**
  - They operate on the basis of education, direct interactions & **trust with their consumers** (the cost of certification @ Rs 300K for BIO is a deterrent)
  - The absence of differentiation & valorisation in the market raised ideas for an **alternative distribution platform** for sustainable produce and **processing opportunities** to create more **value for the farmer**

Main motivators for those in process:

- Requirement of the distribution network
- Costs borne by MSB (subsidized)
- GIves access to incentives/rebate schemes
- Expectations of higher selling prices / guaranteed markets with distributors

- Low awareness / interest especially since it involves costs and does not certify the agricultural practice / create economic value

VERBATIMS

« Mo ena 1 voisin fer MAURIGAP. B moi mo dans Smart Agri / Agro-ecologie, mo fer 10 fois pli bien ki li. Mo met moins pesticides ki li, mais li ena certificat MAURIGAP, moi mo pena »

« linn met enn lord dan mo fason prodwir »

"Mo kone mo pa pe empwazonn personn »

"Mo p bizin aret servi produits simik parce ki mo gagne notice ek Ministere la Santé quand zot prend echantillons lor mo produit. Mais mem si depi 6 mois mo p servi pesticide bio, mo produits touzour ena résidu"

"Si mo envi fer la kalite, mo pou faire li mwa ... avek ou san MAURIGAP. Mo pense pa mo pou al ver MAURIGAP enkor"

FARMER OUTCOMES

1. **Alignment in the definition of agricultural practices** (smart-agri, raisonée, bio, organic, zero-pesticide) is key to clearing confusion among farmers & in the market and creating a level playing field.
2. While the transition to more sustainable practices is often driven by philosophy & beliefs, the **need for certification is driven by market demands** (distributor / consumer), the opportunity to secure **new markets** (hospitality) or the **expectation of better revenues**.
3. Unless existing labels create one of the above opportunities, farmers would prefer the a **label that values the efforts they engage in their practice and makes them proud** (which existing labels fail to convey).
4. Farmers engaged in **sustainable or regenerative practices**, or alternative production methods, **do not find an equivalence** in existing labels.
5. Their is a perceived/experience **lack of clarity, information, support and responsiveness on the certification process**: the why, what, how, who, when is unclear at every stage of the process
6. **Communication is a key lever** to create awareness on existing practices, educate them on the healthier options and encourage them to change their current consumption habits.
7. Questions from farmers: **What about support during the transition period which is long? What is the incentive to certify ?**

VERBATIMS

"Agro-écologie, li difficile kan p plante large scale et ki ou p rode fer volume"

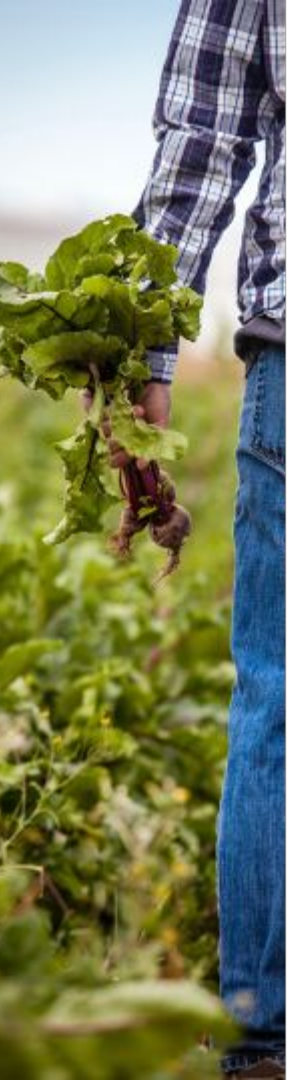
"Le client pa fer okenn distinction, qu'est-ce qui est bio, qu'est-ce qui est pas bio"

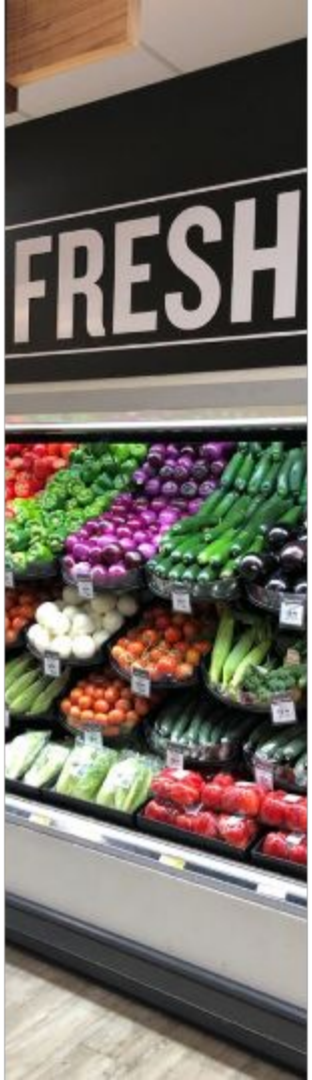
"Mone suiv in p cours avec Ministere l'Agriculture ek MAURIGAP, mais mo trouver zot pas donne assez bon l'information"

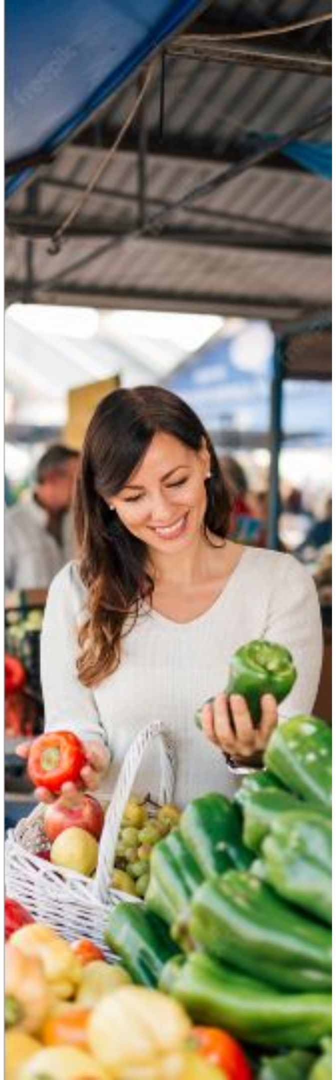
"Solution mo p trouv li par moi. Seki mo p faire, mo p change terrain"

Focus Group Outcomes

#Results Restitution on 30th May 2023







CONSENSUS

CONSENSUS ATTENDANCE

57%
ATTENDANCE
16 out of 28 present

21%
ATTENDANCE
6 out of 28 present

21%
ATTENDANCE
6 out of 28 present

PARTICIPATING GUESTS / STAKEHOLDERS

Australian Aid

MAURI GAP GOOD AGRICULTURAL PRACTICES

HOST

Mauritius Chamber of Agriculture

CONSENSUS OUTCOMES

GENERAL AGREEMENT

- There is a need to define the mechanisms and infrastructure needed for large scale certification, based on agricultural practices
- Education at all levels is key to drive engagement & sustainable change in production, production and consumption patterns

MISSING CONSIDERATIONS

- Integrating the hospitality industry perspective as a shift in their procurement policies for fresh produce (currently price-driven) could also become a driver of larger scale transition and certification

IDENTIFIED CONSTRAINTS

Only 1 Production Type

Limitation of labels to vegetables
What about fruits & breeding ?
What about other levels?
What about other sustainable production methods: aquaponics, bio,...?

Local Label Landscape

The need to clarify, differentiate the purpose or align between the existing labels (MAURIGAP, Made in Moris) & those under development (AGRISAFE)

Funding Limitations

Certification is currently subsidized for a limited number of farmers, out of which 63 have been delivered. There is no guarantee that funding (Ministry of Agriculture & Ministry of Commerce & Industry)) will be renewed.

This represents a major risk if we are capitalizing on the deployment / enforcement of this label

Laboratory Capacity

Equipment Costs
Running a lab is expensive, capital intensive at the beginning

Capacity Building
Laboratory analysis requires qualified technicians; trust in the results is also an issue across labs.

Certification Quota

Limited certification capacity based on: %subsidies available, laboratory capacity v/s actual number of farmers / demand, frequency of requirements

PROJET LABELISATION

Main Insights & Outcomes

ACROSS THE VALUE-CHAIN

OPPORTUNITIES

- Willingness to transition, motivated by :
  - ➔ Concerns for soil health & yield
  - ➔ Health concerns
  - ➔ Market requirements /guarantees
  - ➔ Better economic model
- Holistic vision to drive transition on a wider scale & addressing challenges at source

- Willingness to drive transition, motivated by :
  - ➔ Vision / Philosophy / Strategy
  - ➔ Consumer demand
  - ➔ Competitor strategy
- Supporting the transition process (resources & market for produce)
- Strengthening the relationship with suppliers & customers

- Existing niche / Growing segment
- Motivators
  - ➔ Under-aged children
  - ➔ Health / Doctor's recommendations
  - ➔ Environmental concerns
  - ➔ Fair Trade / Community Support
- Procurement requirement for Hotel supply

CHALLENGES

- Knowledge of certification requirements/process
- Cost of + Incentive for transition (financial)
- Understanding the value of a label (market)
- Support during transition period
- Responsiveness of certifying institutions
- Relevance of support received vs type of agricultural practice
- Certification Life Cycle vs Production Life Cycle
- Product segregation at point of sales
- Valorisation of the farmer & his produce
- Consumer awareness & understanding

- Managing demand & supply + unsold produce
- Traceability
- Reliability / Consistency in supply of certified produce (volume, selection, frequency)
- Product differentiation on stalls / Packaging
- Minimal manipulation to maintain quality
- Trust produce certified vs produce delivered
- Multi-level certification (different production practices)
- Consumer awareness & demand

- Visual Quality & Price vs Agricultural Practice
- Price Sensitivity / Purchasing Power
- Availability / accessibility
- Visual differentiation of produce
- Value of produce
- Knowledge vs perception/beliefs
- Trusting a label
- Awareness & knowledge of labels

A GOOD LABEL

Farmers

- A label they can be proud of
- A label that valorises & differentiates them
- A label that identifies them: name, geographical location, phone number
- Independent Certifying Body
- Aligned to their sustainable agricultural practice (smart, raisonnée, sans pesticides, bio, zéro-résidu de pesticide)

Distributors

- Explicit and clear on what it stands for
- Independent Certifying Body
- Regular follow-up / controls including on delivered produce
- Traceability of produce / producer
- Support soil regeneration

Consumers

- Explicit and clear on what it certifies
- Certifies /gives information on what is meaningful for the consumer
- Does not require a lot of reading
- Highly Visual (Symbols / Colour Coded)
- Can be spotted by kids
- Indicator of Fair Trade Practices
- Independent Certifying Body
- Inspires trust

1 VISUAL & SELF-EXPLANATORY

2 CATERS FOR ALL AGRI PRACTICES

3 EQUATES TO A BRAND

4 FULLY INDEPENDENT

THE COMMUNICATION CHALLENGE

"Le client pa fer okenn distinction, qu'est-ce qui est bio, qu'est-ce qui est pas bio"

"Ce que j'appelle agriculture raisonnée, n'est peut-être pas ce que quelqu'un d'autre appelle agriculture raisonnée"

"Sa ban produit la zis faire zoli lor l'étagère, pena mem 1% consommateur qui consommer"

"Est-ce qui ban dimoun faire confiance à MAURIGAP?"

"Est-ce ki client la conscient ki tou sa la exister ? L'Éducation par derriere pas p faire?"

"Tu vas te fier beaucoup plus à une marque que tu penses est vertueuse qu'à une certification"

"A moins que ce soit une certification bio ou organique, que tout le monde connaît. Sans pesticide, bio, organic .. ca les gens comprennent"

"Il y a aussi un problème d'espace car nous avons des magasins qui font différentes tailles"

"Je connais le MAURIGAP comme ça parce que j'ai participé à un forum. Si je suis un consommateur lambda, je ne crois pas que je sais c'est quoi MAURIGAP"

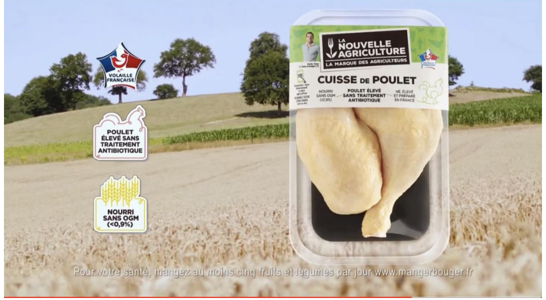
" C'est clair pour vous parce que vous savez de quoi vous parlez. Mais pour le consommateur... ça pourrait bénéficier de descendre d'un niveau de langue le rendre plus accessible."

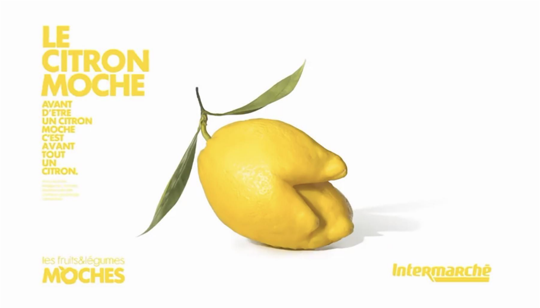
"C'est très spécialisé parce qu'on parle de label, de producteur, de consommateur, etc ...et je ne pense pas que le consommateur de base, sauf s'il est intéressé réellement, ait en tête les différences."

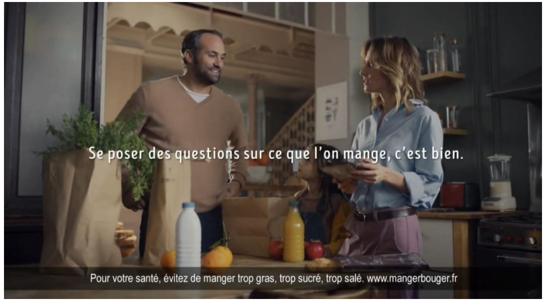
"Déjà qu'est-ce que ça veut dire de faire smart agriculture pour un consommateur lambda ?"

THE COMMUNICATION CHALLENGE

Click on the images to play the video ads







1. A label assimilates to a **BRAND**
2. Requires a long-term **communication vision & strategy**
3. Build **credibility** & goodwill
4. Dedicated **budget** / investment
5. **Alignment** of terminologies
6. **Popularising** the concept
7. In line with **consumer needs** & concerns
8. Beyond the rational aspects, it needs an **emotional-connect**
9. Participation & alignment of **all stakeholders** in the ecosystem
10. Deployed **over time: Repetition**

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