

# Regoverning Markets

Small-scale producers in modern agrifood markets

## Innovative Policy

Canada

Maple syrup production in Quebec: Farmer self-determination for market control

Isabelle Gagné

L'Union des producteurs agricoles (UPA)

# **Maple syrup production in Quebec**

**Farmer self-determination for market control**

**Isabelle Gagné**

**UPA Direction de la Commercialisation**



## **Regoverning Markets**

Regoverning Markets is a multi-partner collaborative research programme analysing the growing concentration in the processing and retail sectors of national and regional agrifood systems and its impacts on rural livelihoods and communities in middle- and low-income countries. The aim of the programme is to provide strategic advice and guidance to the public sector, agrifood chain actors, civil society organizations and development agencies on approaches that can anticipate and manage the impacts of the dynamic changes in local and regional markets.

## **Innovative Policy series**

Innovative Policy is a series of short studies from the Regoverning Markets programme addressing a specific policy innovation in the public or private sector that improves the conditions for small-scale producers to access dynamic markets at national, regional and global level.

### **The case studies were coordinated by:**

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# 1 Introduction

*“Strength does not come from physical capacity. It comes from an indomitable will.”*  
Mohandas Karamchand Gandhi, 1869-1948

This desk study describes the collective strategy adopted by Quebec’s maple syrup producers in order to improve marketing conditions for their product.

We begin this study with an overview of maple production, followed by an analysis of the problems and issues that led producers to organize the production and marketing of maple syrup. We then examine the legal framework, notably the act governing the marketing of agricultural food and fish products.<sup>1</sup> For 50 years, this law has allowed agricultural producers in Quebec to adapt to the dynamics of the marketplace through the use of collective tools. For maple producers, the marketing board and surplus management have been key tools. We conclude the study with an analysis of the collective and individual benefits of the marketing board for Quebec’s 7,300 maple producers.

Maple production is a seasonal (spring-time) process and generally constitutes a secondary activity for farmers across Quebec. Consequently, the organization of its production is difficult. Through their motivation and self-determination, maple producers made use of collective tools, in an intelligent and efficient manner, in compliance with the act. This law fosters win-win negotiations that promote a better balance of power between producers and buyers. Owing to the powers granted by this law, the *Fédération des producteurs acéricoles du Québec* (FPAQ, see Appendix 1), which represents all of Quebec’s maple producers, administers, regulates and negotiates the production and marketing conditions for the maple syrup that is put on the market.

Subjected to variable climatic conditions and the dynamics of the marketplace, maple producers were forced to manage large inventory surpluses in the early 2000s, in addition to having to deal with a position of dependence and uncertainty with buyers. It was in this context that the regulations governing marketing boards, combined with surplus management, allowed the maple producers to take charge of production and to co-ordinate the marketing of their product in relation to the market dynamics. The introduction of this collective tool was beneficial to the whole maple industry.

Through their collective motivation and self-determination, and supported by a

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<sup>1</sup> See the entire text of the act on the website: [www.mapaq.gouv.qc.ca/Fr/md/lois](http://www.mapaq.gouv.qc.ca/Fr/md/lois)

rigorous legal framework, the maple producers were able to re-establish the balance of power between producers and buyers, to help develop their industry based on market demand, and also to contribute to the vitality of Quebec's rural communities.



## 2 Maple syrup production in Quebec

### 2.1 A unique seasonal production

Maple syrup production is unique to North America. Although maple products are associated with Quebec's heritage on the domestic scene, they are more likely to be considered as an exotic food on international markets.

Maple production is essentially seasonal and requires optimal climatic conditions to ensure a successful crop. The sap of the maple tree is collected in the spring using taps inserted into the trunk of the tree. It is then transformed into syrup through a process of evaporation, which develops the characteristic maple flavour and colour.

Maple syrup is therefore a natural product with no artificial colouring or additives. Furthermore, the product may be easily stored since it does not lose any of its flavour or organoleptic (sensory) properties over time.

For more information on the unique properties of maple syrup see: [www.siropderable.ca](http://www.siropderable.ca).

The old-fashioned method of sap collection, replaced today by plastic tube collection systems.



### 2.2 An impressive market share

Although maple production constitutes a secondary farming activity for 4,300 of the province's maple producers, Quebec is nonetheless the largest producer and exporter of maple syrup in the world. In fact, 80 per cent of the maple syrup sold internationally is produced in Quebec. In 2006, the value of the crop was estimated at USD 148 million,<sup>2</sup> representing 2.8 per cent of all sales in Quebec's agricultural sector.

More than 80 per cent of the total production is sold in bulk (defined as containers exceeding five litres) to buyers who re-sell the syrup on both the

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<sup>2</sup> Monograph on Quebec's maple industry, Ministère de l'Agriculture, des Pêcheries et de l'Alimentation du Québec, 2006.

domestic and foreign markets. Retail sales by producers in small containers (public supermarkets, kiosks, direct on-farm sales) represent 20 per cent of the remaining production.

### 3 What problems made a marketing board necessary?

#### 3.1 Managing surplus production and buyer power

Between 1990 and 2000, maple syrup production grew rapidly because of new technology, an increase in the number of taps in existing sugar bushes and the introduction of new sugar bushes. Figure 3.1 shows the evolution of the volume of production versus exports. In 2000, the industry was facing a surplus of between 15 and 22 million pounds.

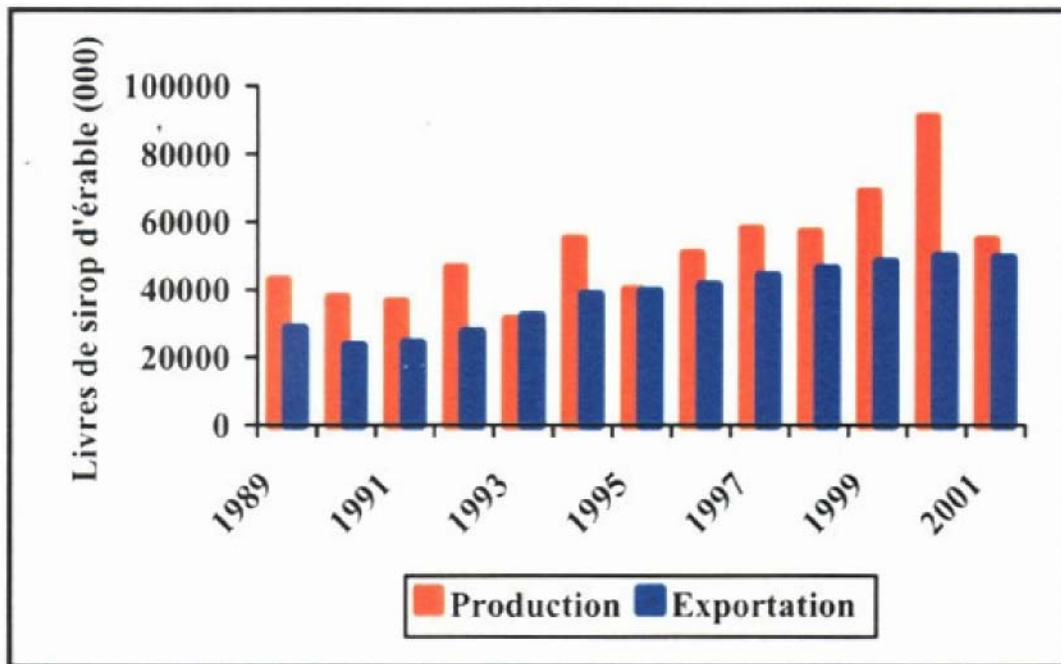


Figure 3.1: Volume of maple syrup production versus exports, 1989 to 2001. Source: Statistics Canada ([www.statcan.ca](http://www.statcan.ca))

With production conditions and yields constantly improving, supply became difficult to manage and the industry was faced with a surplus. During periods of excess production, buyers could negotiate lower prices and fill their warehouses. This meant that in later years when yields were lower, these buyers did not need to buy any more syrup. Although there was a marketing agreement in effect at that time, the prices negotiated within the contract were set as a function of supply rather than demand. Thus, these surpluses became a key issue in the organization and development of the production.

Furthermore, since 80 per cent of the total volume of maple syrup was sold to purchasing agents, producers found themselves at the mercy of these buyers, who were becoming fewer in number but increasingly powerful. In fact, in 2001, eight buyers

controlled 90 per cent of the bulk maple syrup market. Furthermore, it is not uncommon for buyers to also be equipment dealers, thus increasing their bargaining power. Finally, since maple production is a “side-line” activity for 2,000 to 3,000 of the producers, many of them are often less aware of the official prices set by the agreement, a situation which most often works against the producers and in favour of the buyers.

Confronted with the dynamic forces of a free market, the price of maple syrup also experienced significant fluctuations.

### **3.2 Growing demand**

In 2002, the worldwide demand for maple syrup was estimated at 88 million pounds annually; in 2006, it had risen to between 98 and 100 million pounds.<sup>3</sup>

In this context, the *Fédération des producteurs acéricoles du Québec* (FPAQ, see Appendix 1) had a clear need for money to put into place a true development strategy for both the domestic and global markets, which would help to eliminate the surplus. Also, in spite of increased market demand, access to the retail market remained a daunting challenge for Quebec’s maple producers.

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<sup>3</sup> Periodic evaluation report of the interventions of the FPAQ before the RMAAQ, 2003 and 2006.

## 4 The legal basis for a collective solution

In order to solve these problems, maple syrup producers increasingly turned to the act governing the marketing of agricultural, food and fish products, which lays the foundations for a collective marketing strategy.

The following paragraphs describe in more detail the essence of this law.

### 4.1 The underlying principles of the law

The act provides for the supervision of commercial dealings between farmers and buyers, while at the same time protecting the public interest. The main advantage for producers is that it permits negotiations based on a new balance of power, in order to obtain a fair and decent return for farmers. By grouping themselves in accordance with the criteria set out in the law (as a federation or syndicate), producers may create a **joint plan**, which permits them to determine the production and marketing conditions for their products. The joint plan can be administered either by a board of agricultural producers, a syndicate, a federation or a specialized co-operative, as decided by the applicants.

Democratic management underlies all the activities associated with collective marketing. Indeed, all the producers involved must approve the joint plan through a referendum. Once adopted, it then becomes binding on all producers targeted by the plan. Furthermore, the board administering the joint plan must call a general meeting of all the producers once a year, in order to review the activities accomplished during the preceding year, to approve the financial statements and, if necessary, to elect directors.

Considering the joint plan as a “toolbox” for producers under the Act, several collective marketing tools can be inserted into it, as determined by their needs and by the evolution of the marketplace.

### 4.2 The role of the *Régie*

The *Régie des marchés agricoles et alimentaires du Québec* (RMAAQ)<sup>4</sup> is a quasi-governmental organization that acts as an administrative tribunal. It is charged with ensuring compliance with the Act. The RMAAQ is composed of eight members, including a president and three vice-presidents named by the government. Its mission is to foster efficient and orderly marketing of agricultural and food products, as well as the

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<sup>4</sup> Website: [www.rmaq.gouv.qc.ca](http://www.rmaq.gouv.qc.ca)

development of harmonious relations between the various interveners. It also oversees the settlement of problems arising in connection with the production and marketing of such products, taking into account the interests of consumers and the protection of the public interest. In other words, it has the authority to resolve differences that can occur in the course of the administration of the joint plan.

### **4.3 Producers' rights and obligations**

In order to ensure the sustainability and efficient operation of the collective marketing tools, the Act gives producers certain rights and also imposes certain obligations. Thanks to the joint plan, producer groups have the right:

***To administer:***

- the joint plan, while ensuring, in particular, the respect of existing regulations and agreements.

***To regulate production and marketing:***

- by fixing obligatory fees necessary for the management of the collective tools;
- by centralizing sales (through a marketing board);
- by instigating a quota system;
- by organizing a transportation pool;
- by establishing production and marketing rules; and
- by creating a guaranteed payment fund.

***To negotiate:***

- a uniform price for all producers;
- the conditions for payment, sales and transportation;
- quality standards;
- the inspection and grading of products; and
- payment guarantees.

***To develop the sector through the financing of:***

- advisory services for producers;
- education and training programs;
- research;
- a traceability system; and
- publicity and promotion for the development of markets.

In its role as administrator of the joint plan, the board must, in return, respect certain

obligations. Indeed, the act imposes certain requirements and the RMAAQ ensures that producers fulfill these requirements as follows:

***Transparency:***

- the board may not engage in the trade or the processing of any product affected by the joint plan;
- once every five years, the board must submit a report to the RMAAQ in which it reviews the interventions made by the joint plan.

***Democratic operations:***

- the board must ensure the respect of producers' rights;
- as previously stated, the board must call a meeting of all the producers affected by the joint plan, at least once a year.

***Ethics:***

- to take into account the restrictions and limitations inherent in the exercise of certain rights and powers.

## 5 Steps towards collective maple syrup marketing

After concerted effort and numerous battles, the maple producers succeeded in developing one of the pillars of agriculture in Quebec: the joint plan.

This then allowed the FPAQ, in February 2002, to create a new collective tool: a **marketing board** to manage production more effectively and to develop markets. By regulating the bulk sales of maple syrup through the marketing board, the FPAQ has become the sole supplier of maple syrup through the centralization of supply.

In particular, it negotiates prices as a function of the quality of the crop and determines the conditions of payment, which are included in an agreement. All the maple producers take on the operating costs of the marketing board, including marketing costs, which are determined democratically (see Appendix 1). In addition, the board has the power to authorize buyers to receive the product in its name.

Besides the procedures associated with establishing the marketing board, it is important to note the numerous challenges that the FPAQ had to face in order to co-ordinate the production and marketing of maple syrup. The major obstacle was, without a doubt, the extreme resistance from other stakeholders in the industry. Also, the changes in the marketing methods for bulk maple syrup caused intense anxiety for some producers faced with the unknown. In addition, the climate between producers and buyers became very tense because buyers had lost trading power: from then on, they would have to deal with a new intermediary, the FPAQ.

It is important to note that the organized mobilization of the maple producers was the prime factor in overcoming this climate of resistance and in winning the battle. In this regard, their self-determination and their persistence in organizing the marketing of their product were quite remarkable.

Figure 5.1 summarizes the full spectrum of collective tools adopted by the maple producers and their reasons for adopting them.



## The Joint Plan for Maple Production

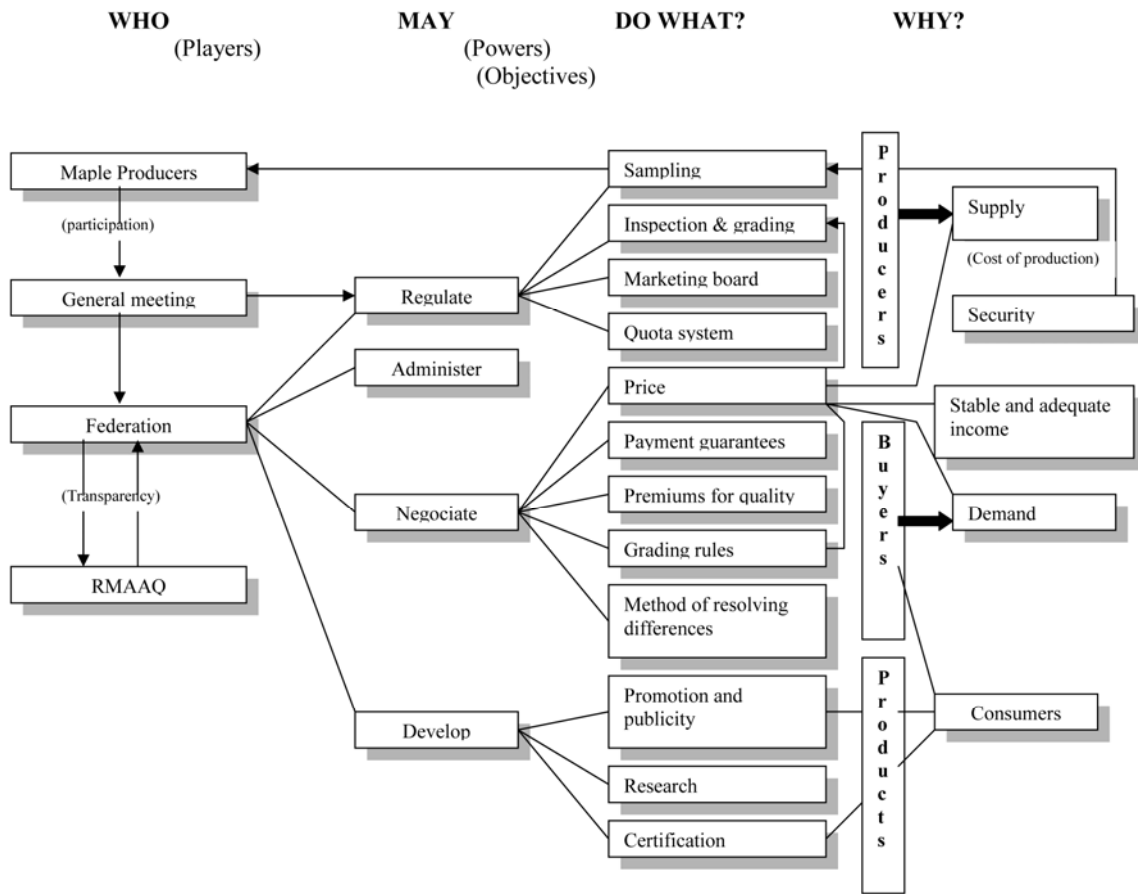


Figure 5.1: The joint plan for maple production

## **6 The benefits of the marketing board for the maple production sector**

### *Economic gains*

- improvements in the methods of payment;
- elimination of abusive payment delays;
- stabilization of prices in spite of inventory supplies; and
- guarantee of a fair price for maple syrup.

### *Inventory management*

- efficient disposal of surpluses;
- equitable sharing of costs and revenues; and
- better co-ordination in the process of selling surplus inventory.

### *Development of the industry in the marketplace*

- increased funding for research;
- increased effort for market development; and
- improvement of product quality.

### *Guarantee of a stable high-quality supply*

- continuous supply; and
- better planning in the development of markets.

### *Impact on the entire industry*

- optimization of the quality/price ratio;
- guarantee and facility of supply;
- quality control;
- product uniformity;
- rationalization of marketing costs;
- promotional support; and
- capacity for innovation.

Some of the performance indicators for the sector are summarized in Table 6.1.

**Table 6.1: Performance indicators for the maple syrup sector, 2002 and 2006 (all prices in US dollars)**

PERFORMANCE INDICATORS	2002	2006	INCREASE
Total volume of exports (M lb)	66.5	80	~ 20%
Total value of exports (USD\$ M)	153.9	190.2	~ 24%
Evolution of income per tap (\$/tap)	4.14	4.52	~ 9%
Total sales at the farm level (\$ M)	115	133	~ 16%
Adjusted price of maple syrup (\$/lb)	1.92	2.11	~ 10%
Net revenues to producers (\$ M)	110.6	126.8	~ 16.2%

## 6.1 Benefits at the farm level

Thanks to the mechanisms associated with the marketing board, maple producers are now better able to obtain fairer prices, regardless of crop yield. Their improved income means they can invest more in their farm infrastructure and further increase their yield per tap. Although this situation could generate a surplus, the consequences are diluted because the management costs are spread across the 7,300 maple producers in Quebec. In addition, the act allowed the producers to establish a quota system in 2003. By managing the level of production by issuing quotas, the sector has been able to better balance supply and demand, and this has helped to stabilize prices. A more equitable negotiation of marketing conditions can promote the credibility of producers in the eyes of the buyers and ultimately can lead to more productive relationships, based on trust.

From a more general point of view, the increase in producers' income has also contributed to the economic vitality of their communities, thanks to their increased buying power.

## 6.2 Collective gains

In addition to seeing their individual incomes improve, maple producers have also given their federation the means to develop new collective tools or to improve existing ones. The spin-off benefits of these actions have proved to be

advantageous to the entire maple industry.

The following are some examples of the tools and initiatives created, thanks to collective marketing:

### **6.2.1 Market development**

Over the past several years, maple producers have invested in various promotional programmes to increase the visibility and sale of maple products. For example, generic promotional campaigns have been conducted in Quebec, while promotional activities destined for the media and foreign consumers have also been launched, notably in Japan.

Furthermore, the intensification of research has helped the industry create new maple products, such as cooking sauces. Thus, in addition to diversifying the demand for maple products, processing enterprises have also benefited directly from these initiatives. Currently, we can list over 235 different products based on maple production.

### **6.2.2 Positioning maple products**

Studies funded through the collective tools of the joint plan have led to a better understanding of the nutritional value and the “health-related” properties of maple products. These nutritional qualities are promoted in various publicity campaigns tied to healthy food habits.

It should also be noted that the federation’s website lodges the “Maple Product Showcase,” which provides an opportunity to promote new maple products to consumers, while also permitting Internet surfers to buy products directly from producers and processors.

### **6.2.3 Product quality**

Funding dedicated to market research and market development has been increased, thus improving the quality of the products and making their promotion more attractive.

It should be mentioned that the syrup inspection system also helps to better respond to consumer expectations. In fact, faced with increasing demands for food safety and wholesomeness, the FPAQ has launched a certification programme which has generated an added value to Quebec maple syrup.

## 7 Conclusion

Over the years and through the continued advancement of farmers' associations, the *Union des producteurs agricoles* (UPA, see Appendix 2) has been able to stimulate the intrinsic values that are essential to the success of collective action. Indeed, over and above a rigorous legal framework, the effectiveness of any collective marketing tool depends on the support and commitment of producers.

Although they had to face vigorous and frequent opposition, often from within their own ranks, maple producers succeeded in taking charge of their production and marketing, thanks to their sense of responsibility, their commitment and their motivation. Through their determination, they developed a collective maturity that permitted them, over time, to perfect their marketing techniques and to adapt their collective tools to the dynamics of the marketplace.

Each of the steps that led to the improvement of the production and marketing conditions for maple products was successful because of:

- strong support by producers;
- producer participation: information and consultation;
- discipline;
- clear regulation and rigorous compliance;
- proposing meaningful solutions which are flexible, realistic and simple; and
- taking advantage of acquired knowledge and not making unrealistic promises.

Collective marketing is a winning option for all groups of producers who wish to improve their production and marketing conditions.

By sowing the notion of collective action in an environment ripe for mobilization, the conditions for improved production and marketing can grow, leading to an abundant harvest which responds to the dynamics of the marketplace.

## 8 Appendix 1

### **Federation of Quebec Maple Syrup Producers (Fédération des producteurs acéricoles du Québec, FPAQ)**

The Federation of Quebec Maple Syrup Producers (FPAQ) was founded in 1966 with the mission of defending the interests of Quebec's 10,000 maple syrup producers.

#### **Democratic functioning**

These producers are grouped within 7,300 maple syrup enterprises and distributed across 11 regional maple syrup producers' unions. The 11 unions hold their general assemblies twice a year, enabling maple producers to meet, exchange information and discuss future activities. They nominate the delegates who will participate in the General Assembly of the federation. The Federation supports the unions' activities financially.

In order to promote greater participation by producers in the democratic life of their Federation, the FPAQ has created six working committees. Each of these is mandated to address a specific issue assigned to it and to make recommendations to the Federation's administrative council. The working committees are:

- Committee on problems encountered by maple producers and processors.
- Committee on organic maple syrup production.
- Committee on public lands.
- Committee on quotas.
- Promotion committee.
- Finance committee.

#### **The FPAQ's joint plan**

Since 1989 the FPAQ has operating according to a joint plan which consists of a range of effective means of regulating the marketing of the members' products:

- Grading and inspection of syrup in bulk (+/- 150,000 barrels graded and inspected per annum).
- Stock control support.
- Centralization and organization of the sale of bulk syrup (by means of a selling agency).
- Adjustment of supply to demand (contingent upon the production and management of inventories).
- Promotion and market development.

- Scientific research and technology transfer.

## **9 Appendix 2**

### **Cohesion among producers: the basis for collective action**

Mobilizing a whole organization around a shared vision and collective solutions means deciding to act together. However, achieving dialogue amongst all producers is also a major challenge facing leaders in putting collective actions into practice.

In order to support the farmers of Quebec in their representations, the UPA participates in the collective action of the groupings in the defense of the professional, economic, social and moral interests of the affiliates which it represents.

#### **The Union de producteurs agricoles (UPA)**

The farmers' union UPA is a professional trade union organization recognized as the official voice of all farmers in Quebec, men and women. It is empowered to charge compulsory subscriptions. This financial autonomy is a lever enabling the maintenance of an active union life. Some 90 per cent of farmers voluntarily adhere to its structures.

#### **The UPA's mission**

The UPA's mission is to promote, defend and develop the professional, economic, social and moral interests of the men and women farmers of Quebec.

Further, in constant interaction with the whole of Quebec society, the UPA contributes to the improvement of the conditions of rural life at the social, economic and cultural levels.

Finally, the UPA recognizes that agriculture in Quebec is set in the context of global interactions and that, consequently, it can participate in the collective action of farmers' groups both in Canada and more broadly in the world.

#### **The UPA's structure**

The organization unites 155 local trade unions affiliated to 16 regional federations and 213 regional specialized unions affiliated to 25 specialized federations and groups. The FPAQ is one of these specialized groups. The diagram overleaf shows the organizational structure of the UPA.

#### **A democratic organization**

The UPA has always been led and controlled by farmers, both men and women. Some 2, 580 farmers, all democratically elected, occupy different administrative posts within the Union.



### The General Congress

The General Congress is the UPA’s most representative decision-making body. Its 420 delegates, representing all the regional and specialized constituents, meet once a year. They decide on the general direction and official policies of the Union. Every two years the senior officers of the organization – the president general and the first and second vice-presidents general – are elected.

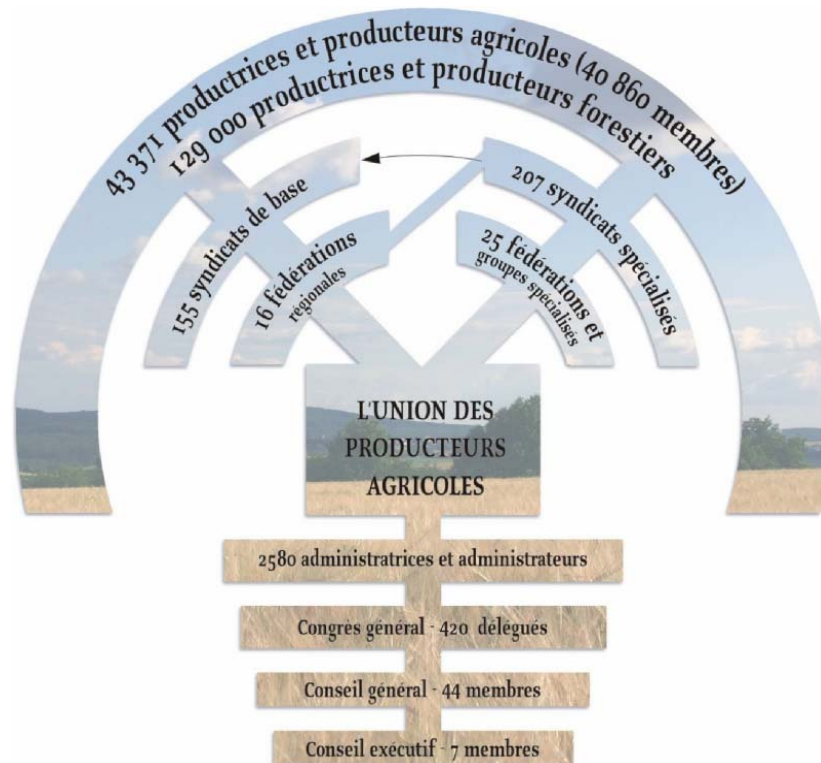
### The General Council

Between General Congresses, the General Council, consisting of elected members, exercises authority. As well as the president general, it is composed of two vice-presidents and the presidents of 41 affiliates. The general councillors usually meet every two months to take decisions on major issues concerning the UPA. It is also their job to approve the annual budget and monitor its application

### The Executive Council

The UPA’s Executive Council has seven members: the president general, two vice-presidents general, and four general councillors elected from the 41 presidents of affiliates. Monthly Council meetings lasting two days enable this body to manage the ordinary business of the Union and oversee its general direction.

Appendix 2: diagram – Structure of the UPA



**Translation of text in diagram (top to bottom):**

43,371 farmers (male and female) (40,860 members)  
129,000 forestry producers (male and female)  
155 local trade unions                      207 specialized trade unions  
16 regional federations                      25 specialized federations and groups  
The Union des producteurs agricoles (UPA)  
2,580 administrators (men and women)  
General Congress – 420 delegates  
General Council – 44 members  
Executive Council – 7 members

## Regoverning Markets

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