

Commodity Associations and Their Potential Role in Supply Chain Development

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Abstract

Commodity associations are organizations that bring together a wide spectrum of interest groups related to a particular commodity or sector in a particular country, whether for export, for the domestic market, or for both. Such associations can have, as members, individual farmers or their associations, crop buyers, processors, distributors, and exporters, as well as suppliers of support services and, sometimes, government representatives. Drawing on a literature review and case studies of relevant associations in Ghana, Mali, Nepal, the Philippines, South Africa, Vietnam, and Zimbabwe and covering the meat, poultry, horticulture, coconut, and rice sectors, this paper explores the role of such associations in improving supply chain performance. Particular attention is paid to interprofessional associations, a concept first developed in France, which draw their membership from associations representing each activity or “profession” of the chain. Associations can play a particularly important role as a focal point for policy dialogue with government, but they also have many other functions. These include regulation, setting or advising on grades and standards and their implementation, promotion of trademarks or quality signs within the industry, support for research, export and domestic market promotion, provision of information and statistics, education and training, and support to government in trade negotiation. Representing all sectors of an industry, such associations also have a potential dispute-resolution role. In many countries, policy formulation is inadequate because there are no clear channels through which governments can approach the private sector. Inefficiencies also exist within commodity sectors because of the lack of communication between chain actors. The paper concludes that the need to address such weaknesses, combined with the positive role played by many existing associations, argues for further development of the concept in developing countries. However, developmental efforts must consider the need to promote sustainable organizations.

Keywords: collaboration; cooperation; interprofessional associations

Abbreviations:

- CIRIZ - Comité National Interprofessionnel de la Filière du Riz Local
 - FAO - Food and Agriculture Organization of the United Nations
 - MESA - Meat Exporters of South Africa
 - NCC - National Cotton Council
 - NPEF - Nepal Poultry Entrepreneurs Forum
 - SAMIC - South African Meat Industry Company
 - UCAP - United Coconut Association of the Philippines
 - GRIB - Ghana Rice Interprofessional Body
 - HPC - Horticultural Promotion Council of Zimbabwe
 - FEBEVIM - Fédération des groupements interprofessionnels du bétail et de la viande du Mali
 - VINAFRUIT - Viet Nam Fruit Association
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Introduction

Associations in agricultural supply chains are to be found throughout the world. Farmers, traders, processors, importers, exporters, and sometimes input distributors, storage companies, retailers, and transporters are represented by associations or similar organizations. These can play an important role in representing the particular interests of their members and may conduct a broad range of other activities, such as product promotion, quality development, training, encouraging new technology uptake, and information provision. Some associations bring together a broad spectrum of interest groups related to a particular commodity in a particular country, whether for export, for the domestic market, or both. Because they draw membership from the entire chain, they tend to have much greater strength when advocating policy or regulatory changes than associations representing only one type of participant in the supply chain. This paper sets out to investigate the different roles undertaken by commodity associations in developing countries and to assess their potential to promote sound policy decisions by government.

Most state-controlled commodity boards, as commonly witnessed in developing and transitional economies in the 1980s, have failed. Direct intervention of state governments in the marketing of commodities has resulted in market inefficiencies and deficiencies (Vindel, 2005; Maertens and Swinnen, 2007), although subsequent liberalization often revealed problems when the linkage between input supply and output sale provided by the marketing board was removed (Shepherd and Farolfi, 1999). Some state marketing boards had developed into a convenient institution for collecting taxes from producers and traders or fostered large-scale corruption (ILRI, 1995). The liberalization of agricultural markets that came with structural

adjustments in developing countries, and with the embrace of capitalism in former socialist economies, has led to the privatization of commodity chains (Maertens and Swinnen, 2007). Chain participants are creating institutions to manage their common business environment. Supply relationships and contracts between sellers and buyers are the most studied aspects of these institutions (Raynaud et al., 2005). However, commodity chain participants have also created associations—sometimes with the backing of government—where the different professions linked to one commodity can jointly manage their business environment (Duteurtre, 2007). This paper looks specifically at such commodity associations as a development tool for industry growth and competitiveness.

In a general review of farmer, commodity, and supply chain associations, Lamb (2004) argues that associations represent an increasingly important form of participatory development in developing countries. He highlights a number of factors influencing the importance of associations to agribusiness development, including how representative the association actually is, how broadly or narrowly the association defines its mandate, the level of resources it has at its disposal, the wisdom of the board of directors and quality of senior management, and the level of support and effort the members themselves give to the association.

Chain associations may be established by government, by the chain participants totally independent of government, or by the chain participants with subsequent legitimacy being provided through national legislation. Commodity association membership may be decided by government; it may be open to all who wish to join, as in the United States of America, or limited to associations representing the individual activities of the chain or even just federations of such associations. This paper pays particular attention to the latter two categories, generally known as interprofessional associations. The most important feature of such interprofessional associations is that their membership is primarily drawn from other associations that represent the different activities, or professions, found in the supply chain. This distinguishes them from those chain associations that only permit individual membership.

After describing the forms taken by commodity associations in different countries, the second section of this paper briefly discusses possible conceptual frameworks for analyzing such associations. We then review the results from different case studies of such commodity chains commissioned by the FAO in developing countries,¹ and discuss the findings from the case studies in order to assess the usefulness of commodity associations in the development of competitive supply chains. The last section states our conclusions and provides policy recommendations to government, industry stakeholders, the donor community, and academia on promoting agribusiness development through such associations.

Commodity Associations: Examples in Context

Commodity associations have taken several forms, adapting to different geographic and socio-economic settings. In many cases, the structure and features of the associations can be explained by the historical problem that was to be resolved at the time of their creation. All have in common the fact that the members of the commodity association represent various professions, who are all linked by their activity in a specific commodity chain.

The French model of interprofessional associations

“Interprofessional” organizations in France usually cover a particular commodity chain. For example, the association representing the French dairy chain groups together three federations, which all have a regional structure. The French sugar association brings together the Union of Sugar Processors and the Federation of Sugar Farmers, which, in turn, is organized on a regional basis. The fresh fruits and vegetables interprofessional association consists of two “colleges”²: the college of producers representing four fruit and vegetable producers’ associations and the college of distributors, which represents four associations of wholesalers, exporters, and retailers. On the other hand, the meat and livestock association is composed of 13 national professional organizations representing such professions as farmers, traders, abattoir operators, meat processors, and distributors (Coronel and Liagre, 2006). As for the interprofessional organization of the processed tomato industry, its members are associations representing agricultural producers, canning cooperatives, and private canning companies (Vergniaud and Montigaud, 1993).

Both Zoma (2006) and Coronel and Liagre (2006) believe that interprofessional associations should follow three guiding principles:

1. They should draw their membership from organizations that represent chain participants, which must be fully representative of the stage(s) in the chain that they themselves represent.
2. There must be parity between the “professions” or activities represented. All must be treated equally and have the same vote. Under the French system and in many examples from Francophone Africa, the principle of parity is achieved through the use of “colleges.” Associations from the commodity chain do not join an interprofessional association individually, but are represented through a college. For example, there is a college of producers, one of traders, one of processors, etc., as applicable to the chain. Each college carries, in theory at least, the same weight in the interprofessional association. It is the responsibility of each profession to come to an agreement within its college on the position to be voiced before each meeting of the interprofessional association.

3. A third principle is that of unanimity. Interprofessional associations must speak for and act on behalf of all members.

A fourth principle, elaborated by Zoma (2006), is that of subsidiarity. An interprofessional association does not exist to take over the functions of its individual members: it only acts on areas of concern felt by more than one stage of the commodity chain.

The interprofessional concept has gradually been introduced and adapted into the French-speaking countries of Africa, either through the initiative of French or Canadian technical assistance or because of promotion by governments themselves. There are several associations in Burkina Faso and Senegal. In most cases, interprofessional associations cover one commodity (e.g., cotton) or one commodity grouping (e.g., fruits and vegetables or livestock and their associated products). The legal status of interprofessional associations remains unresolved in many countries. Instead, decrees are used to adapt the existing legislative framework to the diverse realities of interprofessional associations and to avoid enforcing a standard model (Pesche, 2005; Robast, 2006).

In Senegal, interprofessional boards have been created for commodity chains such as peanuts, processed tomatoes, small-scale fishing, cereals, milk, and local rice. These sometimes have an extremely wide range of member associations. For example, the Comité National Interprofessionnel de la Filière du Riz Local (CIRIZ)—the interprofessional body that focuses on the chain for local rice—includes representatives of producers, manufacturers, financial institutions, input suppliers, traders, consumers, agricultural service providers, public institutions, and development agencies. On the other hand, some associations draw representation from just two or three stages. While there can be arguments for associations being private sector based and not including government representatives, this does not seem to be a widespread practice. Duteurtre (2007) notes that in Senegal, most associations seem to be of a “hybrid” form, with the state or development projects often involved in the emergence and functioning of an association. Several interprofessional associations have experienced problems. In West Africa, these seem to stem primarily from the weakness of the member organizations and from the inability of associations to generate sufficient funds (Zoma, 2006).

American commodity councils and associations

In the United States of America, many commodity associations or councils cover the entire chain. Examples include the United States Apple Association, the American Soybean Association, and the American Sugar Alliance. They have a variety of structures but do not exactly follow the interprofessional model in that members usually join on an individual basis, although committee members are frequently nominated by state and other associations. In the case of the National Cotton Council (NCC), for example,

each membership segment (producers, ginners, warehousing, merchants, cottonseed processors, cooperatives, and manufacturers) has an equal voice in developing policy, which is done through a representative body of delegates selected by each segment through state, regional, and national interest organizations. When a majority of delegates from each of the seven segments, voting separately, approves a recommendation, it becomes NCC policy. Thus the American model departs from the French interprofessional association concept of “unanimity.” Another difference is that NCC members join the council individually and not through membership of interest organizations (NCC, 2008).

Commodity organizations in the United States of America often implement “check-off programs.” These are research and promotion programs funded by levies or taxes, usually on producers, on the basis of a fixed assessment per unit of production, which is normally levied at the time of sale. Such funds cannot be used for all association activities, in particular lobbying and advocacy, and are thus not normally a substitute for membership fees. However, some organizations, including the National Honey Board and the National Pork Board, are entirely funded by the check-off and limit their activities to promotion and research. The term “check-off” originated because such levies were in the past voluntary and producers were asked to check off a box on a form if they wished to contribute. However, national programs are now mandatory, having been approved by an act of Congress.

Seventeen such programs were in operation in 2007, and others have been authorized but not implemented (Becker, 2007). Programs are implemented by a variety of association types, and access to check-off funds are not confined to associations that represent an entire commodity chain. Producers’ associations are also major beneficiaries, and there are also numerous state-mandated programs. The approach is not without its problems. Producers have challenged check-off arrangements in the courts on the grounds that they constitute a “tax” that they would not pay for voluntarily, that the funds have not been used for the purposes intended under the legislation, or that more powerful members of the beneficiary associations have come to dominate how the money is spent, which is not necessarily in the best interests of producers (Becker, 2007; Findley, 2007).

Industry discussion forums

An alternative approach to commodity chain consultation is found in the *tables-filières* of Quebec, Canada. These were developed in the early 1990s as a response to a deficit in Quebec’s terms of trade for agrifood products. They are less formal arrangements than associations and bring together actors from different sectors of a commodity chain for ad hoc meetings, with the secretariat being provided by the Ministry of Agriculture, Fisheries, and Food. Although the organization of these roundtable meetings of chain participants is done

by the ministry, Rouleau (1994) notes that it is important that government representatives avoid requests to take a leadership role and confine themselves to providing support and coordination. Poussier (2000) argues that the approach is an ambitious one, bringing together at the same table people who do not always have interests in common, permitting them to establish business contacts, improve business linkages, and identify the advantages of working together. More recently, Canada has adopted the idea from Quebec and has established eight value-chain roundtables (AAFC, 2007). The model has also been introduced to West Africa under Canadian technical assistance (Duteurtre, 2007), most notably in Burkina Faso.

In the United Kingdom, similar “commodity groups” have been encouraged by the government to allow producer organizations and processor organizations to meet and negotiate issues of interest for the whole industry. These loose groups have been useful forums to harmonize contractual arrangements in some agrifood industries: the National Farmers’ Union, the Grain and Feed Trade Association, and the United Kingdom Agricultural Supply Trade Association have been involved in developing “fair” contractual terms (Young and Hobbs, 2002).

Commodity associations with strong government representation

Yet another alternative commodity chain approach, found in several developing countries, involves significant representation by government, even though the association may be nominally independent and largely self-financing. An example is the Coffee Industry Corporation of Papua New Guinea, which was set up in 1991 to consolidate three separate agencies working in the coffee chain. Members of the corporation, which is a company limited by guarantee, are six grower associations, the coffee exporters’ association, an association of coffee plantations and processors, a land resettlement association, and representatives of three government departments: Agriculture, Trade, and the Treasury (CIC, 2007).

Conceptual Frameworks to Evaluate the Impact of Commodity Associations

In order to evaluate the impact of commodity associations on their respective markets, it is useful to choose a conceptual framework that can encompass the various services rendered by such associations. The neoclassical framework has set the background for market liberalization policies in many developing countries, using partial equilibrium models assuming pure and perfectly competitive markets (Scarborough and Kydd, 1992). The economics literature has demonstrated that perfectly competitive markets allocate resources

more efficiently than a monopoly setting. However, the assumptions of the neoclassical model do not appear to be relevant in the context of commodity associations as discussed here, where marketing chain participants agree to constitute a loose group while they continue to use market mechanisms to conduct transactions.

The analysis of food marketing systems under the conceptual framework of new institutional economics has become prominent since the 1970s. New institutional economics is concerned with transaction costs and the organization and development of economic activity. Transaction costs are the costs incurred by market agents when searching for a buyer or seller, negotiating terms of trade, and monitoring and enforcing contracts. New institutional economics theory suggests what type of marketing arrangement may be the most efficient to reduce transaction costs (Brousseau and Codron, 1998; Raynaud et al., 2005).

Williamson (1996) shows how the institutional environment of the commodity market impacts on the choice of governance structure in the marketing chain. In their study of vertical agrifood chains, Raynaud et al. (2005) have illustrated this through case studies of commodity chains defined by their quality assurance scheme. When the quality of the product is guaranteed by a private organization through its trademark, supply arrangements are predominantly based on formal contracts or financial links through joint ventures and integration. This is interpreted as the enterprise marketing the product under its own name and having the sole responsibility for quality. The firm is therefore encouraged to control the quality of its suppliers as tightly as possible. On the other hand, Raynaud et al. (2005) show that for agricultural products that are under a quality label guaranteed by the state and around which commodity chain associations have formed (in their examples, processed meat, cheese, fruits, and vegetables under a protected denomination of origin guaranteed by the European Commission in European Union–member countries), looser market mechanisms are preferred. Therefore, the existence of commodity chain associations may relax the contractual arrangements between suppliers and buyers in a given industry. More anecdotal evidence of this relationship comes from other studies of commodity chain associations in other country contexts (Vergniaud and Montigaud, 1993; Young and Hobbs, 2002; Coronel and Liagre, 2006).

Bachev and Labonne (2000) have reviewed the literature on agrarian innovation around the world. They describe how public-private partnerships are being increasingly used to stimulate innovative research and disseminate new technologies for industrywide benefit. Vergniaud and Montigaud (1993) have illustrated this through their case study of the interprofessional organization for processed tomato in France, which helps fund public sector research as well as its own research and development to improve production

and canning technology and disseminates innovations for the benefit of all the members of the association.

Agriculture has traditionally been classified as a primary production industry. However, there is increasing evidence that the more successful agribusinesses are those selling not just a primary product, but a mix of product and service. Nefussi and Aznar (2007) view agriculture as the latest service industry, the manufacturing sector having already reached the stage of customization of customer-specific product-services. For example, when a market gardener tends to and grades his or her tomatoes in order to deliver the produce with the grade and degree of maturity that is expected by the customer, he or she is also selling the service of a customized product combined with the primary commodity of tomatoes (Cadilhon et al., 2007). In the context of service agriculture, the institutional framework of agroindustries determines how agriculture internalizes extra services into its products. Nefussi and Aznar (2007) allocate two specific roles to commodity associations in the management of industries producing such product-services:

1. The elaboration of a common language between industry stakeholders, which will elaborate definitions for the new products. This helps harmonize names and characteristics at an industrywide level, thus making marketing easier.
2. The guaranteeing of the definitions and product characteristics it has defined. It plays the role of mediator and judge when buyer and seller within an industry do not agree on the definition of the product they are transacting. It is therefore very important that decisions taken within the association are as unanimous as possible; unanimity ensures that future contestation of an industrywide standard can be more easily resolved.

According to Kaynak (1986), the “food marketing system is a primary mechanism for coordinating production, distribution and consumption activities in the food chain. In this context, marketing includes the exchange activities associated with the transfer of property rights to commodities, the physical handling of products and the institutional arrangements for facilitating these activities” (p. 5). In this light, commodity associations can be part of the institutional arrangements that facilitate the trading of agrifood products specific to a given industry within the food marketing system.

Mettas (2007) considers using multiple models and conceptual frameworks to describe multiple-stakeholder commodity associations. Although the robustness and generalization potential of analyses under such a loose framework may be doubtful, their ability to explain the processes underway in decision making within and managing of commodity chains are worthy of consideration.

Review of case studies

The associations studied by FAO for the purposes of this paper:

- Nepal Poultry Entrepreneurs Forum (NPEF)
- South African Meat Industry Company (SAMIC)
- United Coconut Association of the Philippines (UCAP)
- Ghana Rice Interprofessional Body (GRIB)
- Horticultural Promotion Council of Zimbabwe (HPC)
- Fédération des groupements interprofessionnels du bétail et de la viande du Mali (FEBEVIM)
- Viet Nam Fruit Association (VINAFRUIT)

Reasons for establishment

Most of the associations studied seem to have been initially promoted as a response to problems being faced by the particular industry. In 1996, South Africa deregulated its commodity sectors, moving from a system of marketing boards to one in which the private sector was to play the leading role. In common with other commodities, the meat industry saw the need for an umbrella organization that would ensure the effectiveness of the industry in the newly deregulated marketing environment, and SAMIC was established in 1997. In Vietnam, VINAFRUIT was one of several enterprise associations promoted by the government in the early 2000s. In the case of Nepal, the Philippines, and Ghana, on the other hand, the associations studied seem to be one-offs, and no similar associations have been identified in those countries.

In the early years of producing for the export market, Zimbabwe's horticulture farmers faced a whole range of problems related to production, postharvest handling, and marketing. Participants in the export chain considered that an overall institutional framework was necessary if the industry was to be successful. HPC's fundamental role was thus seen as promoting linkages between producers and other sectors such as processors, exporters, traders, and transporters. In Ghana, GRIB was established in 2004 to address the many problems being faced by the Ghanaian rice industry relating to quality issues and difficulties faced in competing with imported rice. The NPEF in Nepal was formed in 1994. It does not appear to have emerged as a response to a specific problem, but more, as its name implies, in reaction to a felt need for a forum for discussions and joint activities of existing associations representing different sectors of the industry. VINAFRUIT was set up in 2001 to address the many problems facing the industry, including scattered and small-scale production, lack of suitable varieties, absence of standards and certification, and poor logistics. UCAP in the Philippines dates back to 1966, having been established at a time when there was considerable conflict within the coconut industry and when farmers, in particular, felt that their interests were being threatened.

Membership

Some of the commodity associations studied follow the principle of the French interprofessional organization, where members are generally associations representing different stages of or functions in the commodity chain rather than individuals or companies. Others, however, permit membership to companies, individuals, and government organizations. Mali's FEBEVIM, being from a Francophone country, closely follows the French system. Membership consists of associations of cattle producers, cattle exporters, hides and skin producers, and meat processors. Absent from the association are representatives of market intermediaries such as cattle brokers and traders in hides and skins, probably because representative bodies do not exist.

Apart from FEBEVIM, SAMIC possibly comes closest to the French system. Twelve associations are members. These represent feedlots, red meat producers, livestock and meat brokers, pork producers, "emergent" (i.e., black African) red meat producers, meat processors, meat traders, meat importers and exporters, and abattoirs. Additional organizations represented are the Skins, Hides and Leather Council, the South African Consumers' Union, and the union representing employees of meat traders.

HPC in Zimbabwe includes four specialist associations among its members, representing flower, citrus, and deciduous fruit producers, and the Fresh Produce Producers' Association. However, larger producers can also join on an individual basis, as can exporters and marketing agents.

NPEF in Nepal also exhibits hybrid characteristics. Its membership primarily consists of five associations representing egg producers, the hatchery industry association, the feed industry, livestock raw material entrepreneurs, and veterinary drug suppliers. Individuals who have significantly contributed to the poultry sector or have potential to provide a contribution can also join, if supported by two-thirds of existing members. A major weakness with NPEF is that broiler farmers' associations are no longer members.

In the Philippines, UCAP is made up of associations representing coconut growers, oil crushers and refiners, coconut brokers, exporters, desiccated coconut manufacturers, virgin coconut oil producers, and others. A weakness is the lack of representation of traders, and this has adversely impacted on the ability of the association to undertake quality improvement activities. In addition to the associations, other members include the Philippine Coconut Authority, the United Coconut Planters Bank, and the Philippine Coconut Research and Development Foundation. Other participants involved in the coconut chain, including shipping companies and insurers, can be associate members. In Ghana, individuals cannot join GRIB, and representation is through farmer organizations, groups of rice millers, and female rice processing groups, but rice brokerage or trading companies can join on an individual basis.

In Vietnam, VINAFRUIT does not follow the interprofessional approach. Its membership of around 100 is drawn from companies responsible for input supplies, production, processing, and trading and export. A prominent member is the Southern Fruit Research Institute, which is a research and development unit of the Ministry of Agriculture and Rural Development.

Structure and staffing

The interprofessional associations established in the French-speaking countries of West Africa, particularly Burkina Faso, follow an organizational structure that involves overall supervision by a general assembly. This has participation of associations representing the different stages of the commodity chain, according to agreed percentages, with producer associations tending to predominate (usually 60% of membership of the assembly). The assembly elects an administrative council, which is charged with implementing the decisions of the general assembly and which, in turn, supervises the executive committee. This committee is responsible for overseeing the secretariat. In South Africa, SAMIC has no need of large-scale general meetings, given its limited, albeit comprehensive, membership. Around five board meetings are held annually, attended by all members and by observers from the country's National Agricultural Marketing Council. SAMIC has a chief executive officer and seven staff, as well as regional managers in the country's nine provinces.

A similar structure is witnessed with UCAP in the Philippines. The 11-member board representing all members meets six times a year, while the executive committee meets in the months when there is no board meeting. A secretariat based in Manila has an executive director and 12 staff. Board members are unpaid.

HPC of Zimbabwe holds an annual general meeting for all members. Every two years this nominates an executive committee. VINAFRUIT has a board of governors consisting of the president, the secretary-general, and three vice presidents.

Funding

All associations studied, as well as those in developing countries covered in the literature review, appear to experience financial limitations. A variety of funding sources are used, including annual membership fees, levies on exports or other transactions, and government or donor support. Some associations depend on assistance provided by richer members. While a shortage of funds does not always jeopardize the associations' sustainability, it does affect their ability to carry out all of the activities they would like. Furthermore, some associations appear to endanger their independence by being dependent on government for financial support and to put at risk the principle of parity by obtaining additional contributions from individual members.

The newest association studied, GRIB, is presently 85% funded by the French government. FEBEVIM in Mali, on the other hand, appears to receive no external support, but annual membership fees (at just US\$50 per member association) are considered insufficient to carry out the association's work. It is no surprise, therefore, that FEBEVIM does not have paid officials or staff. SAMIC is funded by the government of South Africa through the Meat Industry Trust, which was established using funds of the former Meat Board and from fees charged for training and inspection services. A levy on meat exports was approved in 2005. In Nepal, NPEF membership fees are not high, at around US\$70 per association, but the forum is able to generate additional funding from input suppliers and from the five umbrella associations that represent the individual stages of the poultry chain.

In Zimbabwe, HPC obtains just 2.5% of its revenue from membership fees. It derives operational finance from levies on exports. VINAFRUIT, in theory, charges annual membership fees of around US\$100; but the association has been negligent in chasing up payment, and in 2005, only 30% of members reportedly paid their fees. Membership fees of UCAP are assessed according to the capacity of member associations to pay. However, the main source of funds is an export levy paid to UCAP by the oil milling sector. Funds are also generated by the sale of publications.

Advocacy and trade negotiations

The need for industries to be well represented in policy discussions with government appears to be a persuasive reason for the development of commodity associations. This is the major activity of almost all of the associations studied here. Moreover, the role of these associations seems to be generally well appreciated by their governments. However, the fact that associations represent an entire industry means that it can often be difficult to reach agreement on a common position. In South Africa, for example, both meat producers and meat importers are members of SAMIC. While producers often seek tariff protection against competitive imports, the importers are inevitably opposed to this.

VINAFRUIT began in 2001 to address the many problems facing the Vietnamese fruit industry, including scattered and small-scale production, lack of suitable varieties, absence of standards and certification, and poor logistics. In the Philippines, UCAP has carried out a range of advocacy activities since its inception. In the 1980s, the coconut industry was jeopardized by suggestions that coconut oil had a negative effect on health, and UCAP generated resources to pay for a lawyer and lobbyist in Washington DC, as well as for scientific research on the subject.

In Nepal, NPEF has played an important role in assisting the government to formulate a response to avian influenza, in particular the drafting of a quarantine act. HPC in Zimbabwe has provided effective representations

on such issues as foreign exchange management, input tariffs, taxation, the country's land reform program and on transportation, as well as on general macroeconomic reform.

With varying degrees of success, FEBEVIM in Mali has advocated reform of the animal feed industry, worked to overcome illicit taxes levied by police, and sought to persuade the government to reform rules that inhibit more intensive rearing of cattle. It has also played an important role in advising the government on World Trade Organization negotiations.

In Ghana, GRIB, although still a young association, plays an important advocacy role, and the government reportedly relies on the board for advice on the rice industry.

Promotion and quality development

The associations studied all carry out product promotion on domestic markets, export markets, or both, depending on the supply chain represented. A related issue is that of quality improvement, also an area in which the associations are all involved.

In Nepal, NPEF responded to fears over avian influenza by organizing eight chicken festivals in five locations. These involved giving away samples of different chicken dishes to visitors. GRIB in Ghana carries out campaigns to promote the sale of domestically grown rice. SAMIC is playing a growing role as a supervisor of trademarks, ensuring that they are correctly applied. It played an active role in the "Beef Up 2006" campaign, which focused on the role of beef in a balanced diet. UCAP is presently conducting a campaign in the Philippines to promote the health benefits of coconut oil.

With regard to export promotion, HPC has worked to promote Zimbabwean horticultural produce at overseas fairs and exhibitions. VINAFRUIT organizes overseas trips for members. SAMIC manages the Meat Exporters of South Africa (MESA), which promotes the South African brand in selected markets.

With regard to quality promotion, FEBEVIM plays an active role in ensuring that its members are kept informed of prevailing legislation related to slaughter, the registration of premises, and veterinary certificates. It organizes training courses on quality for its members.

SAMIC has been assigned responsibility by the government to ensure that appropriate meat classification standards are applied in a uniform manner.

Providing training

Most of the associations studied organize, conduct, or fund training courses and seminars. Most of these are aimed at disseminating improved technologies and market information. In Nepal, NPEF organizes occasional National Poultry Expos. In addition to displays, the expo presents a variety of technical seminars and workshops. In Zimbabwe, HPC has well-established

relationships with two national training institutes and has helped design training programs. FEBEVIM organizes an annual exhibition of livestock products, as well as seminars and workshops, which are funded by various development agencies. VINAFRUIT regularly organizes workshops and seminars on new technologies and on quality requirements of world markets. SAMIC organizes and carries out initial training and refresher courses for meat classifiers in the beef, lamb, and pork industries. It works closely with agricultural colleges and other training institutions to develop both formal and informal training courses.

Market and other information

All associations studied provide statistical and market information. UCAP produces daily, weekly, monthly, and annual statistical reports for subscribers, as well as an annual journal. FEBEVIM collects and analyses market information and disseminates this through its regional structure. SAMIC publishes an electronic newsletter once a week, but in more urgent cases, it will also send out a news flash. VINAFRUIT updates members on a regular basis by e-mail and mail with information on trade issues, government programs, and training courses. GRIB produces a monthly newsletter. NPEF collects prices for dissemination through the local media.

Other activities

Associations studied carry out a variety of important activities that do not fit into the categories discussed above. These give an interesting insight into the potential roles other commodity associations could play. For a country involved in large-scale horticulture exports such as Zimbabwe, there can be many logistical difficulties. In particular, there is a need for storage facilities to be available close to the airport and for arrangements to be made to ensure fair and efficient use of cargo space. Before the formation of HPC, booking of freight space was haphazard. HPC set up an airfreight task force to ensure the availability of cargo aircraft, to coordinate exports, and to work closely with the civil aviation authorities. Following representations from HPC, a site was made available to a consortium of exporters to enable them to construct a cargo-handling facility, with cool storage, adjacent to the airport.

Research and technology development is an area where most associations studied play an important role. While they often lack resources to fund research themselves, their role as a representative organization for an entire industry gives them a strong voice when approaching government agencies or donors. In South Africa, SAMIC is closely linked to the Red Meat Research and Development Trust and also works closely with the country's Agricultural Research Council. HPC has been instrumental in organizing research funding; for example, for a project to phase out the use of methyl bromide for

fumigation purposes. UCAP also actively seeks funding from the government of the Philippines for research of relevance to the coconut industry.

Two associations market specialized quality control equipment of relevance to their industries. UCAP sells copra moisture meters, both in the Philippines and overseas. SAMIC is the sole agent in South Africa to distribute classification equipment for the red meat industry. This includes labels for age identification and edible ink for marking carcasses.

Discussion

In some way or another, the commodity associations studied have contributed to solve some of the problems faced by their members. Nonetheless, apart from the interprofessional associations established with French support in the French-speaking countries of Africa, there appear to be relatively few associations in existence in developing countries. Of the other countries studied by FAO, only South Africa and Vietnam appear to have more than one such association. It proved hard to identify other such associations for the study, particularly in countries outside of the Francophone area. Nonetheless, the following four key points can be extracted from the case studies implemented:

Commodity associations as service providers to their members

A review of the experiences of the associations studied, together with the available literature, suggests that commodity associations could play an important role in several areas. They generally act as a service provider for their members, in line with the analysis by Nefussi and Aznar (2007) of modern service-driven agroindustries. For instance, they can promote dialogue between government and the chain. They can support compliance with trade and other regulations and promote improved quality and product safety. Nearly all provide market information, and many have developed training programs. The research conducted for this paper was not sufficiently detailed to identify the extent to which commodity associations can reduce individual transaction costs as a consequence of greater communication between chain participants. More research on the impact of such associations, if any, on the business decisions of individual members, is required.

Without such associations, there is often little or no communication between chain participants. However, if there is no communication, then how do the participants identify the need for an association in the first place? It is no accident that most associations that have emerged independently of donor or government support have done so as a collective response to industry problems, which provided the incentive for chain participants to come together.

At the same time, many associations face problems. Lack of financial sustainability is one. Given the financial difficulties that existing associations appear to face, it would appear wise for new associations to be established with only a limited range of objectives and services to members and to expand as and when their financial position becomes sound.

Achieving adequate representation of all chain actors

It is self-evident that a commodity association should be representative of all participants in the chain and that it should deliver a set of services that address the different needs of the chain participants in a balanced manner.

The French model for commodity associations is that they should, in effect, be umbrella organizations for a chain, where the members are associations, federations, or unions representing the different stages of the chain or *filière*. Most of the associations studied by FAO follow this model to some extent, but some also allow membership of private companies, individuals, or government agencies. Clearly, it would be impossible for numerous farmers to be represented individually on commodity associations. Participation of farmers therefore requires that they be represented by farmers' associations or similar organizations. One possible problem with this approach is that farmers' organizations may not necessarily be fully representative of all farmers in a country. Farmers may choose not to join associations or may live in areas where they lack access to membership. In some cases, farmers' associations or unions may be dominated by larger, more commercial farmers, leaving smaller farmers effectively disenfranchised. In South Africa, this problem has at least partially been overcome by including one association representing black African farmers, together with one representing the commercial sector.

Some concern has been expressed that membership of associations has been open to organizations that are, at best, peripheral to the commodity chain, as theorized by Lauret and Perez (1992) in their analysis of agrifood marketing chains. In Burkina Faso, for example, retailers have been represented on *tables-filières* associations even though the particular commodity may account for just a small fraction of their turnover. Such participation may reflect outside intervention in the establishment of the association, where membership was effectively decided by the donor or government rather than by the chain participants themselves. However, several associations studied by FAO actually welcome membership from actors who are only indirectly involved in the commodity, such as input suppliers, transporters, bankers, and government bodies. UCAP in the Philippines counts a bank and a parastatal agency among its board members. Input suppliers play an important role, both technically and financially, in Vietnam and Nepal. In South Africa, SAMIC includes an association representing meat importers, a union representing abattoir employees, and the consumers' union.

In practice, membership should probably be available to those associations and relevant companies or organizations that want to join. The shortage of funds experienced by many associations argues for a broad membership of associations able to help meet the membership costs. Where membership of an association, organization, or company only marginally involved in the commodity becomes disruptive, it can be asked to resign.

Interprofessional associations in some Francophone countries have been experiencing problems because of weaknesses among member associations representing farmers. Considerable efforts were being devoted by the interprofessional associations to strengthen farmers' organizations, but this was diverting attention away from their core activities. There is one view that interprofessional associations can serve as a stimulant to the development of stronger associations representing the different chain participants, but experience to date suggests that efforts by associations to do this may jeopardize the interprofessional approach.

In Nepal, the association representing farmers, in this case broiler producers, resigned from NPEF. It is believed that the main reason for this was that the broiler producers did not feel they could relate to other members as equals. Any association bringing representatives of small-scale farmers or small-scale traders together with representatives of large, more sophisticated companies inevitably runs the risk that there will be an unequal relationship. The dangers of such relationships can, in part, be addressed by the rule that all decisions reached by interprofessional associations should be unanimous. However, this does not overcome the risk that the weak member(s) may give in to domineering one(s) and that associations become top-down organizations where the stronger partners set the agenda, even if the association is governed by legislation that tries to avoid such an occurrence.

Nevertheless, a precondition for commodity associations seems to be the existence of organizations representing those farmers and small-scale entrepreneurs. While it may be possible for some stages with relatively few participants to organize quickly and easily, that will not apply to farmers. Thus, the prior existence of farmers' organizations seems essential. Where such farmers' groups do not exist, the alternative of a commodity chain association following the American model seems impractical: it is unrealistic for chain associations to work with and raise fees from individual small farmers in developing countries.

In this case, the question then becomes whether to follow the interprofessional approach, with membership made up of associations, federations, or colleges from each stage of the supply chain; to follow the American model of individual membership; or to follow a hybrid approach, as found in some of the case study associations. It may be possible to have hybrid associations that draw membership from farmers' associations as well as from individuals or companies farther along the chain.

Sources of funding for the secretariat and activities

Participants in a commodity chain must share a perception that joint action will be beneficial. Promoters of such associations, such as donors, must be careful to ensure that organizations and individuals are joining because they see potential long-term benefit and that they are prepared to make the compromises required to contribute to the association. The dangers of donor-led initiatives are that the chain participants or their representatives may attach more importance to the possibility of short-term personal gain from working with donors than the long-term benefits derived from an association.

Where an industry considers that activities other than advocacy are required, such as research, promotion, training, and information provision, a secretariat appears necessary, and funds need to be generated to pay for the staff and the associated costs of providing an office. Where the main purpose of an association is to develop policy in discussion with government representatives, the value-chain roundtable approach may be more relevant, for the same results may be achieved without the need for a secretariat.

While those associations set up in Francophone countries with government or donor support are in many cases facing financial difficulties, the same applies to many of the associations that developed because of a common need felt by chain participants. Even where the association has developed from within the chain, it may be financed by the government or by levy, as is the case with SAMIC in South Africa. The most long-lasting association studied, UCAP in the Philippines, appears to have a sound financial footing, but even UCAP has many activities it would like to undertake that remain unfunded.

The role of government

Many associations have been established because of government initiatives. There are dangers in such an approach, for the associations may become too dependent on the government and thus sacrifice their independence. The relatively recent promotion of commodity associations has come about because of structural adjustment measures that led to the closure of state parastatals (Vindel, 2005). While the private sector was generally able to take over the marketing functions of the former marketing boards, there was often no mechanism in place to cover the important nonmarketing functions of these boards.

It is not easy for associations to function completely independently of government. In some countries, major support is offered by government agencies. The government is a member of some associations and has associate member or observer status in others. Even where associations do not receive funding directly from government, they may be dependent on government to raise funds by levies. As noted, several national commodity associations in the United States of America depend heavily on legally mandated assessments to fund generic promotion and research functions.

However, dependence on government for funding may not compromise the effectiveness of a commodity association. Such associations may play an advocacy role, but governments are free to accept or reject their recommendations. Thus, being in receipt of funding from the government may not affect the policy recommendations made by the association. Of greater concern is that government funding cannot be relied upon. Dependence on government resources can therefore threaten the sustainability of the association.

Associations that are established by government and have government representatives as board members are not an acceptable alternative for most supply chain participants. While government representatives can bring a wealth of expertise and analytical skills to the board, government representation on a board is likely to inhibit discussion and policy dialogue. Associations established by government do not represent an alternative to associations promoted by supply chain participants, even if they draw much of their membership from the same organizations.

Conclusions

Several ways of organizing supply chain or commodity industry representation have been touched on in this paper. Apart from interprofessional associations, there are *tables-filières* or value-chain roundtables, found in Canada and the United Kingdom, for example; membership commodity councils or associations in the United States of America; boards funded by assessments; and industry associations in which the government plays a leading role, as found in several developing countries.

There are clear and acknowledged weaknesses in policy formulation related to agriculture. The limited number of staff in many ministries means that those employees face a considerable burden in providing sound policy advice. Even where adequate policy expertise is available, experience suggests that ministers frequently by-pass in-house expertise and make ad hoc policy decisions on the basis of little or no reliable analysis.

This situation, observed in many countries, provided one of the reasons for the research reported here. It was hypothesized that a commodity association representing the entire supply chain would provide an important focal point for policy discussion and could reduce the ad hoc nature of some decisions. Evidence from the literature review and the associations studied suggests that commodity associations or, in some cases, *tables-filières* do play an important role in policy formulation and are much welcomed by policy makers, as well as by administrators, who generally prefer to deal with one association rather than many.

The growing role of contract farming in many developing countries has in places been jeopardized by the failure of both farmers and companies to honor contracts. At the beginning of the research, it was felt that commodity associations could emerge as a major force to overcome such problems. However, there is little evidence from the case studies that this has occurred.

Shortages of funds are problems that are experienced widely. Both the *tables-filières* and government-supported associations may overcome the problem of financing. Thus, there appears to be good arguments for governments who wish to promote commodity associations and to develop *tables-filières* with a limited mandate first, in the hope that they can subsequently develop into full-scale associations. Some of the problems experienced by interprofessional associations in West Africa seem to have arisen because they tried to take on too many responsibilities in their initial stages.

The necessity that commodity associations or roundtables include strong farmer representation can present major difficulties, whatever the association model used. Resources that have been put into developing farmers' associations in the past have not achieved great success. Governments and donors do need to assess critically whether the further allocation of resources can overcome in a sustainable way some of the difficulties experienced in establishing successful associations. The need for strong farmer representation on commodity associations is probably not, in itself, sufficient justification for the promotion of farmers' associations.

Traders' associations are widespread. However, the limited evidence suggests that they work better when representing traders based at a specific market rather than traders who have no such focal points, such as those who buy export crops for sale to processors (Shepherd, 2005). The case studies and literature review did not identify examples where associations of traders working with small farmers played an active role in interprofessional associations. As noted in the case of UCAP in the Philippines, this can have a significant impact on the success of some activities, notably those that require trader participation in order to promote improved product quality. Donors and technical assistance agencies that have devoted significant resources to the development of farmer associations have tended to neglect the potential for association development among intermediaries.

The question of legislation is a complex one. There are significant differences between French law, which is used in former French colonies, and Anglo-Saxon law. Requirements for legislation relating to commodity associations will vary depending on the prior existence of suitable legislation on associations in general and whether it is intended that the association should benefit from levies, taxes, or assessments, as done in the United States of America, or solely depend on membership fees and donations. All associations require some sort of legal status, if only because it would be difficult to operate a bank account without it. However, it must be stressed that true representation of a chain

requires a legitimacy that cannot be legislated. This can only be conferred by the members of the association. Governments need to be aware of this and work with legitimate representative associations.

Recommendations

If the further promotion of commodity associations is considered desirable, governments may wish to take the following actions:

- Review the most significant commodity chains in their country and identify those for which they feel there are significant policy and other weaknesses that could, in part, be overcome by the existence of a commodity association.
- Either organize by themselves or request external agencies to organize meetings of supply chain participants to discuss potential for interprofessional or similar associations or value-chain roundtables.
- Contact chambers of commerce and associations covering particular stages of each commodity chain to alert them to the possibility of forming an interprofessional commodity association.
- Identify existing legislation related to associations and seek legal advice on the suitability of such legislation to govern various forms of associations.

Chambers of commerce and existing associations may wish to take the following actions:

- Consider the desirability and feasibility of establishing interprofessional associations or of working with government to establish value-chain roundtables.
- Identify existing associations that could be members of such associations and identify stages of each commodity chain presently unrepresented by associations.
- Call meetings to discuss potential for interprofessional actions.

Donors and technical assistance agencies may wish to take the following actions:

- Conduct surveys of commodity chains to identify the need and justification for association development.
- Finance meetings and workshops to enable commodity chains to discuss the possible development of associations and provide technical support for these.
- Provide initial “seed money” for interprofessional associations, while being careful not to jeopardize long-term sustainability.

Finally, the research community is invited to document any existing examples of successful or struggling commodity associations as defined in this paper. Indeed, studies on such institutions appear to be rare, despite the fact that such associations and their members constitute fertile ground to collect empirical evidence and to illustrate the concepts developed by systems analyses, new institutional economics, and emerging theories characterizing agroindustry as a service industry.

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Disclaimer

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Endnotes

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2. According to the *Oxford Concise Dictionary*, a college is an organized group of professional people with particular aims, duties, and privileges.

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