



SINER-GI project

Budapest Regional meeting

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Case Studies presentations

***Pampa Gaucho da Campanha Meridional
Meat***

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Case presentation

- “Carne do Pampa Gaúcho da Campanha Meridional”
- 4 high quality pieces of fresh meat (barbecue) from British breeds fed on “Pampean **Gaúcho**” native pasture
- Brazil, Rio Grande do Sul State, Campanha Meridional sub-region
- Very small quantities (<50 animals/week)
- One association : 15 producers (2005) to 42 (on June 2007) + one slaughterhouse
- Latin America = World beef production area with high quality fame (Argentina)
- Brazil = 1st beef exporter (volume + zebu)
- Wish of South Brazil (RS) producers to differentiate their production
- Very specific market : one retailer in Porto Alegre city



Protection schemes

- Brazil approved Industrial property law in 1996 (n°9279/96) but moved slowly to regulate registration process
- 2 kinds of GI species : DO and IP
- INPI is in charge of products register, MAPA since 2006 is in charge of GI promotion (2005 decree)
- Other national body begins to promote GIs (Sebrae)

- Origin strategies started in the 90s' (Institution-supported projects)
- In the 2000's: increase of Industrial property, patent, trademarks and acceleration of GI projects (MAPA, SEBRAE, INPI)
- Opposition from agribusiness : sanitary legislation vs origin protection
- Immature protection scheme still in construction (no control system, fundamental role of the institutions in the first GI initiatives)

Specific hypothesis

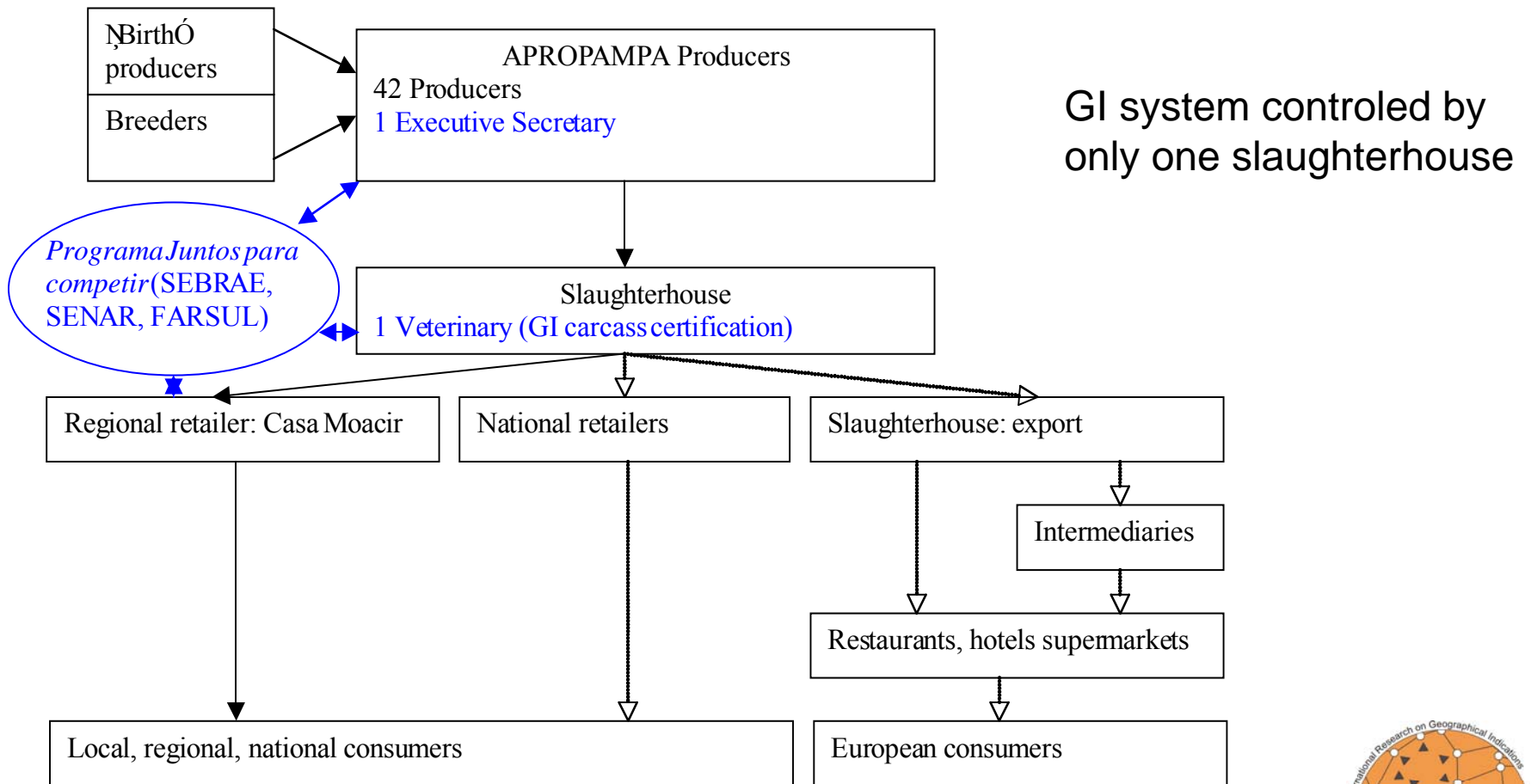
- H1: Brazilian Pampa beef is a collective initiative based on European market anticipation and national market segmentation (differentiation process based on British breeds and pasture feeding = marginal production in Brazil)
- H2: The way the GI rules have been constructed and defined imply strong effects on producers selection/exclusion, which could make the label less attractive.
- H3: Yet, the GI label could have some positive potential impacts (environment preservation, supply-chain organization, increased credibility of GI). It also fosters the creation of references across Argentina, Uruguay and Brazil.

Motivations and stakeholders

- 2004: Beginning of the project
Main motivation : access to European market offering a distinct product from Center-West Zebu fresh meat) / key role of one institution (Sebrae)
- 2005: GI project elaboration
 - Territorial, historical embeddedness recovery (gaucho's culture)
 - Code of practice elaboration with 6 requirements (delimited area, cattle breeds, animals feeding, animals fattening staying in the area, traceability, and animals' characteristics);
 - Association Apropampa creation
- 2006: Official recognition and first slaughter
- Conflicts: code of practice respect (breeds, feeding), local producers exclusion/inclusion, delimitation of the area

Motivations and stakeholders

Brazilian Pampean Beef system description



Impacts of the GI system / protection scheme on sustainability / economic effects

- New project + GI emergence in Brazil
- Few producers but regular increase of the number of associated members (15 → 42 in three years)
- Weak volume of production (due to the Code of Practices exigencies)
- Difficult evaluation of the GI impacts => general analysis on qualitative data of potential impacts according to the stakeholders (estimation) + price observation in 5 different shops.

Impacts of the GI system / protection scheme on sustainability / economic effects

- Expected and observed impacts according to the stakeholders

	Expected impacts	Observed impacts
In the supply chain	Net value added	Not yet
	Increase of the producers income	Not yet
	National and international demand stimulation	Not yet
	Market segmentation	Not yet
	Better supply-chain organization	Not yet
Out of the supply chain	Impacts on tourism (hotel-fazenda)	Not yet
	Impacts on regional economic development	Not yet

Impacts of the GI system / protection scheme on sustainability / economic effects

- Prices observation (reais/kg)

Trademark or certification program	Força do Rio Grande (IG)	Moacir	Reiter premium	Zaffari Hereford	Zaffari Angus	Top Quality	Zaffari	PUL	Campgiro	Campos do Sul	Best Beef	Mercosul frigorifico	Friboi
<i>Animal breed</i>	<i>British</i>	<i>Br.</i>	<i>Br.</i>	<i>H, HxZ</i>	<i>A, AxZ</i>	<i>Brx?</i>	<i>Zebu</i>	<i>?</i>	<i>?</i>	<i>?</i>	<i>?</i>	<i>?</i>	<i>Zebu</i>
Picanha	27.95	27.95	28.04	26.90	26.90	24.90	22.90	21.90	23.88	23.83	25.73	19.43	14.93
Picanha Org.								23.65	14.73	12.93			
Maminha	17.50	17.50		15.95	15.98	15.75	14.95				14.97		9.93
Maminha org.								13.98					
Entrecot	17.50	17.50		15.48	15.48	14.29	14.29				14.97		
Filé mignon	26.82	26.82											

US\$1=R\$2

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Impacts of the GI system / protection scheme on sustainability / social effects

- Family breeders vs agribusinees (*patronal* breeders)
- According to the producers, the GI drives to:
 - Increase of human and cultural value
 - *Gaucha* culture preservation
 - Actors auto-satisfaction and pride
 - implication of the stakeholders in territorial development debate
- According to our fieldwork:
 - Exclusion within Apropampa members themselves
 - Exclusion of others producers (either large or small-scale)
 - GI process does not seem to improve or facilitate market access for family farmers

Impacts of the GI system / protection scheme on sustainability / environmental effects

- Expected and observed impacts according to the stakeholders

Expected impacts	Observed impacts
Biodiversity	Biodiversity
Native pasture preservation	Native pasture preservation
Reforestation fight	
Agriculture expansion fight	
Landscape valorization	
	International recognition of the ecosystem quality (BirdLife NGO)
	Awakening of the environmental value in the marketing strategy
	Apropampa became a new actor in the debate of sustainability and territorial development at the regional level
Recognition of the Brazilian ecosystem " <i>Pampa gaucha</i> "	

Impacts of the GI system / protection scheme on sustainability / environmental effects

- Synchronic comparison :

IP carne do Pampa Gaucho da Campanha meridional	Programa ANGUS	Rio Grande do Sul Beef
<ul style="list-style-type: none"> - System based on preservation of native pasture, environment preservation : system based on animal native pasture feeding (native pasture, improve native pasture and native or exotic cultivated winter pasture) - Weak utilization of chemical inputs 	<p>Not specified</p>	<ul style="list-style-type: none"> - Pasture feeding but several systems with or without focus on native pasture preservation: native pastures, improve native pasture, cultivated (winter and spring) pastures, cereals culture (rice, soy) - (Intensive) agriculture associated with chemical inputs use
<ul style="list-style-type: none"> - Marketing argument = native ecosystem valorization : consciousness of the landscape safeguarding importance - Difficult conditions of agriculture in the area 	<p>Risk of reforestation and expansion of agriculture: weak native landscape preservation / degradation?</p>	

Comparison with other cases - initiatives

- Few RGI products in Brazil (6 products)
- With different justifications and stakeholders motivations (international market segmentation, biodiversity conservation, strategies based on notion of territory and family farming as social category)
- Heavy dependence on the institutional support (national body, international cooperation..)
- Many difficulties (supply chain interest conflicts, incompatible sanitary legislation....)
- Alternative quality schemes : IPHAN, but also organics, fair trade, Slow Food...

Trends and perspectives: GI system

Driving forces

- European market demand differentiated products, traceability,
- New reforestation dynamic in the south with exotic plants
- Brazilian public policies to increase beef production in center west and north regions

Response

- Discussion by Apropampa members to “soften” the code of practices with less rigorous criteria
- Promote environmental actions to protect ecosystem and insert them in marketing strategies
- Became a new regional actor in the debate of sustainability and territorial development (Public/Private)

Pressure

- Ecosystem threatened : biodiversity /monoculture plantation
- Loss of 134 mil pasture ha/year since 30 years expansion of soy, trees plantation..
- Loss of local competencies (breeds, feedings and manage animals, consumption)

State

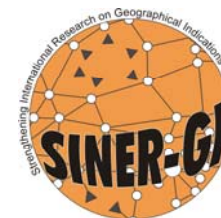
- First Beef GI in Americas (creation of referent frame for others Latina-American countries - Argentina)
- Valorization of British breeds and Pampa ecosystem trough origin protection
- Production system modified (grain complementation restricted, traceability)
- Code of practices without real appropriation by stakeholders
- Heavy sebrae 's dependence on association (still pay the costs)

- Remarque : GI vs *trademark*



Confusion GI /Trademark at the slaughterhouse level

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Trends and perspectives: national GI framework

Driving forces

- Bilateral agreement with European Union
- European market demand differentiated products, traceability, Will to improve organization supplies chain
- Will to develop economic tool to improve food quality and rural development (?) on national level and international level

Response

- Creation of o GI coordination to improve
- Training module organization
- Specific think tank to define public policies for GI

Pressure

- Weak institutional coordination (INPI, MAPA, others institutional bodies ..)
- Agribusiness think tank against GI
- Need to find some innovating measures to protect small scale family farmers and promote sustainable development

State

- Few initiatives
- System to be improved (control system)
- Difficult appropriation of the GI concept at different level (policy makers, technical..)
- (Effects of quality turn evident)
- Confusion GI / trade mark– usurpation