

HORTIN II Co Innovation Programme

Backstopping & support mission

HORTIN II supply chain development

Recommendations, actions lists and planning 2008

Mission Report 11

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The Hague, Lembang, May 2008



The purpose of the HORTIN II programme is to contribute to the development of cost effective high quality value chains for the selected commodities hot pepper, shallot and sweet pepper. Among others this can be achieved when technology development takes place in close collaboration between public institutions, farmers and private companies.

In Indonesia, the programme is carried out by the Indonesian Vegetable Research Institute (**IVEGRI**) in Lembang. In the Netherlands Applied Plant Research (**APR**), WUR-Greenhouse Horticulture (**GH**) and Agricultural Economics Research Institute (**AEI**), all part of Wageningen University and Researchcentre, are the principal partners.

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If you think you could contribute to the goals of HORTIN II in any way, please contact one of the Programme members.

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1 Introduction

A combined mission for various ongoing and yet to be started WageningenUR projects was executed from May 5 until May 12, 2008 by Myrtille Danse (WageningenUR) and Marcel Stallen (Fresh Studio Innovations). The itinerary and an overview of time spent per activity and per project is attached as annex I.

1.1 Backstopping mission in short

Myrtille Danse (MD), Iskander Zulkarnain (IZ) and Marcel Stallen (MS) jointly worked on the agenda for HORTIN supply chain development 2008.

MS, MD and IZ discussed and prepared for the HORTIN fruit supply chain identification mission, to be executed in June, 2008.

MS, MD and CARE international staff prepared for the submission of the EU SWITCH Asia project MARKET, to be submitted May 29 to the EU in Brussels. All Indonesian partners were visited and the proposed project activities and input per partner were discussed and agreed upon. An internal write shop with CARE staff resulted in a sound logical framework and consensus about each others' tasks.

2. Cooperation HORTIN II with INA & HPSP

Participants:

Elmar Bouma, Haryadi, Myrtille Danse, Marcel Stallen and Iskander Z.

A quick evaluation of the first two months of cooperation between INA(HPSP), LEI and Fresh Studio revealed that the partnership is beneficial. Iskander is fully integrated in the internal INA / HPSP organization and participates in all horticultural discussions. Because of the early departure of a junior HPSP staff member office and desk space is not a problem anymore. A laptop for Iskander will be made available in week 21.

HORTIN and HPSP projects are still separated because of different funding mechanisms and a different approach. Eventually, it was argued, activities and projects can be merged into one program, because HORTIN and the HPSP program pursue the same objectives: market access and connecting smallholder producers with modern markets.

An idea was launched by Mr. Elmar Bouma (EB) to jointly (LEI/INA/HPSP/Fresh Studio) develop a project to be submitted with the EVD Indonesia facility (working title: Horticultural Supply Chain Development Centre). We discussed the purpose and activities of such a Supply Chain Development Centre and how it could generate sufficient income on the long run. We concluded that such a centre, providing information about markets and partners; enhancing the position of cooperatives in supply chains and facilitating supply chain development is much needed in Indonesia.

Conclusions and action points

- *EB will send the project brief and LEI / Fresh Studio will comment and send their feedback to EB*
- *MD will try to visit a meeting of the EVD on the Indonesia facility*
- *Deadline for submission of project brief is July 1, 2008. Final date for submission of a full proposal is August 15.*
- *LEI will decide whether this project can be supported and if LEI will be the applicant*
- *In case LEI is positive they will let EB know who will be responsible for further project development*

3. Meeting with Amazing Farm

Participants:

Marcel Stallen, Iskander Z., Titus Jonathan (Operations Director) and Wisnu Hascaryo (Operational Manager)

- Amazing Farm, PT Momena Agrikultura (www.amazingfarm.com) is a leading supplier, distributor and producer of fruits and vegetables. AF has its own packaging, washing and storage facilities. AF is a platform / supplier of leading retailers and hotels in Jakarta and Bandung. Currently they have about 10 member producers / suppliers delivering to AF
- AF is about to complete a new facility with state of the art cold rooms and packaging and grading facilities in Jakarta. This new distribution centre will be opened in July 2008.
- AF has its own vision and strategy regarding quality of fresh produce and they want its members to share this vision. They cater for a growing market of safe, healthy and pesticide free fruits and vegetables. Hydroponics is a means to achieve this goal. AF mobilizes technical support and organizes training sessions for its members. AF develops best practices by exchanging knowledge among their members.
- AF organizes its own quality and safety inspections, including residue checks for export markets. AF wants to become an A label in the market specialized in organics and lowchem products.
- Until now there is not enough supply to fulfil market demand, AF is in need of more partners. However partner (grower) must share the AF vision regarding the quality of the products.
- Before making an agreement to cooperate AF will ask growers to show their production prognosis. AF will make a planning of the supply to discuss with clients / supermarket and other buyer. AF also actively developed the market for new products. Continuity of supply is important and for certain vegetables, AF already has a reliable pattern of supply and demand.
- One of the bottlenecks in sweet pepper supply chains is seed supply and seed costs. Often the supply of seed in the market does not match with grower's schedules causing overlap in production and harvest between growers.
- To implement a sweet pepper pilot supply chain, linking sweet pepper cooperative growers in Cisarua, AF as distributor (supplier) with retailers, AF needs more detailed information about: number of growers, production capacity, plastic house acreage, existing growing pattern and production volumes. AF also will visit the production sites in Cisarua later in 2008.
- Other products: AF has experience in the introduction of new products with supermarkets (which can also be a new packaging design, new presentation, 3 colour sweet pepper in one pack etc). HORTIN and its partners are invited to include hot pepper, after sweet pepper growers have been successfully connected. Melon is another product of which AF wants to have more and a better (quality) supply. AF continually looks for new product opportunities and innovations to be introduced at the market. They look forward to discuss new product / market combinations with EWINDO and WageningenUR staff

Conclusions and action points

- IZ will contact sweet pepper growers and organize the information that is needed by AF
- AF and growers will directly discuss the mode of cooperation, transport and packaging etc at a later stage, including the terms of a contract and prices
- AF will be invited to the EWINDO meeting to discuss new product concepts and varieties in July.

4. Retailers: Ranchmarket & Matahari

In general arrangements for the HORTIN program are clear. Both retailers never do business directly with producers and have some trusted intermediate parties who purchase, negotiate and check quality and quantities on their behalf. One of these intermediate platform is Amazing Farm. Iskander and the producers' organizations of sweet and hot pepper are requested to contact Amazing Farm. Both Amazing Farm and the retailers' representatives themselves will check whether producers meet their quality requirements.

4. 1. Matahari (Foodmart and Hypermarket)

Participants:

Myrtille Danse, Marcel Stallen, Iskander Z. and Budihardjo (GM fresh produce)

In 2010 Matahari wants to become the number one retailers in Indonesia. Currently Matahari opens about 10 to 12 new outlets per year (Foodmart and Hypermarket are the best known formulas of Matahari). A large share of their fruits is still imported from neighbouring countries, mainly due to the problematic logistics (small scale and fragmented) and the traffic congestion in Indonesia. In addition domestic fruits have an inconsistent quality throughout the year which is not acceptable to Matahari. The LEI / CARE offer to support Matahari with strategy development for fresh and processed foods, including fruits and vegetables, within the framework of the EU SWITCH project¹ is appreciated and is well timed.

Matahari will participate in the following activities:

- Strategy development for sustainable and eco friendly products at management level;
- Staff training activities on strategy development and positioning of sustainable and eco-products on the shelves;
- Consumer research on the market for these products and
- Pilots with selected products such as shallots, tahu and shrimp crackers in order to offer market opportunities to small scale producers and food processors.

This project (MARKET) comes at a crucial moment for the Matahari supermarkets, because they are at the brink of introducing the ISO 22000 standard for their retail outlets in (June) 2008. Within the ISO 22000 framework there is a continuous need to improve products and processes. Also producers need to comply with Matahari food safety and quality standards and firm guarantees need to be in place. Matahari will provide staff, facilities and space on the shelves to facilitate this SWITCH program. In return Matahari suppliers / producers as well their clients expect to benefit by means of better quality and safe products, increased turn over and better market opportunities. Matahari will actively disseminate this message to their clients.

Matahari has developed three distinct product (safety) categories for vegetables:

- A (safe and clean with all residue limits below the Codex Alimentarius threshold levels including organic produce)
- B (safe to consume but occasionally pesticides are above threshold levels; bebas pestisida residues)
- C (beware, wet market quality)

In the medium to long run more products will be sold with the A (veggie safe) label and therefore Matahari is interested to upgrade its products. External support by means of HORTIN or EU –SWITCH pilots is welcome.

Apart from the sweet and hot pepper which are minor products currently. Matahari also has an interest in shallots because it is a major ingredient of the Indonesian kitchen. Increasingly Matahari customers wish to buy all their

¹ “MDG progress through local Agribusiness Reform and meeting Key Environmental Targets for Sustainability (MARKETS)”

food in one shop and do not like to go to the wet market for onions and hot pepper (although their servants might do this). According to Matahari – confirmed by HORTIN observations - there is a huge residue, environmental and public health problem with shallots. It needs to be discussed how Matahari could improve itself and its shallots on these aspects.

Inclusion of other SWITCH pilot products (shrimp crackers and tahu for example) can be discussed at a later stage.

Conclusions and action points Matahari

- *Matahari will participate in the above mentioned activities in the EU SWITCH program as associate partner*
- *A letter of intent will be drafted by LEI and will be signed by Budiharjo or his director*
- *For HORTIN pilots we should go ahead making arrangements with Amazing Farm*

4.2. Ranch Market

Participants:

Myrtille Danse, Iskander Z. & Carolina Beatrix Pola Ruru (fresh merchandise manager).

- Ranch Market (RM) customers are aware of the high quality of RM fresh products and are prepared to pay slightly more for this quality.
- About 70% of fresh vegetables that are sold in RM are organic vegetables.
- In case of organic vegetables, producers and / or suppliers must be certified. Certificates are issued by Sucofindo. All organic fresh vegetables delivered and sold through RM needs to be accompanied by a certificate. To ensure that organic fresh vegetables supplied to RS are truly organically grown, RM's QA team will perform tests and pay visits to production sites at random.
- RM does not have its own distribution centre, suppliers need to deliver their products to RM's stores directly.
- RM is ISO-9000 certified (Management Quality Standard).
- RM standard quality requirements are communicated to their suppliers (such as Saung Mirwan and Amazing Farm). These intermediate parties translate and enforce the RM quality specifications to their contract farmers.
- RM cooperates with the WWF program on Global Warming issues
- RM faces problems with the quality of local fresh products, for example broccoli. Broccoli from local farmers have a yellowish colour as compared with imported broccoli.
- RM has its own tahu (Tofu) production facilities (at Kelapa Gading, North Jakarta). The main reason not to be dependent on external suppliers is to guarantee RM's customers that tahu is free from formalin and any other harmful ingredients.
- A major problem with tahu is the quality of the soybean. Moreover prices have gone up tremendously recently. Large quantities of soybean are imported from abroad.
- RM already has 'ready to eat salad mixes' on its shelves, supplied by Saung Mirwan.
- RM has been informed about the presentation of EWINDO products early July.

Conclusions and action points Ranchmarket

- IZ and EWINDO will ensure that RM is invited for the product presentation early July.
- RM is keen to participate in one or more EU SWITCH pilots; LEI and CARE will draft a letter of intent that will be signed by RM management

5. Cooperation between EWINDO & HORTIN program

Participants:

Rien Rodenburg (director R&D), Myrtille Danse, Marcel Stallen, Iskander Z, Asep Harpenas (crop breeding manager) and commercial manager

EWINDO has developed and released some new promising hot pepper varieties which have been tested extensively at EWINDO's own fields and at farmers' fields. Each variety has its specific pros and cons. Some varieties have specific advantages when produced for an emerging consumers' market of safe and clean vegetables. This is also the market segment that the HORTIN supply chain projects are aiming at.

In addition to more established hot pepper varieties and types EWINDO has developed an alternative for the birds' eye chilli pepper (nowadays *Capsicum solanaceae* is used because of its shape and taste) The EWINDO variety (still not released and under code) neatly packed and graded could be an innovation in the market. It also has high production figures (hybrid).

Trips and aphid proof screen to keep peppers free of virus can be supplied by EWINDO on a pilot scale. They sourced it on the local market. In the long run it should be economically feasible to invest in screen and new varieties by small holders. With small screen houses of 200 m2 each it could be an interesting option for a grower and his household members to grow these new pepper varieties.

We also discussed opportunities for introduction of mini bitter gourd and cucumber as well as the tricolore sweet pepper (more acceptable weight when used in a traffic light pack) and tomatoes on a vine.

Hybrid shallot is another crop which is on the brink of a breakthrough in the market. Large scale testing of the hybrid true seed shallot (TukTuk) takes place in Central Java and results are promising. Because of its distinct red colour and large size this could be another interesting innovation in the market.

In the first week of July EWINDO will organize an international field day for its clients and new products and varieties will be demonstrated and displayed. HORTIN partners are welcome to join these meetings to discuss opportunities.

Conclusions and Action Points

- *IZ will invite retailers and intermediate HORTIN partners (Amazing Farm, MataHari and Ranchmarket) for the EWINDO field day*

Or

- *EWINDO in close collaboration with IZ will organize a separate meeting for HORTIN partners.*
- *Whenever parties are interested in any of these products (also beyond our target crops) and we can mobilize growers to participate in these pilots, they can be included in the HORTIN program*
- *For the time being our focus crops are sweet pepper (paprika), hot pepper and shallot.*

6. Role of IVEGRI in supply chain development

Participants:

Rofik Sinung Basuki, Witono A, Myrtille Danse, Marcel Stallen, Iskander Z

Myrtille clarified what could be the role of researchers in supply chain development by means of examples from other countries such as Ethiopia and the Netherlands. In general we discussed about supply chain bottlenecks (eg. buying desk of retailers) and how to upgrade products by improving the products itself, the process through which it is produced or the presentation of the product.

Researchers can help to develop strategic option for producers, traders or retailers (or all supply chain parties together). Often parties themselves are not able to develop these strategic options.

Researchers can also be helpful in the development of communication strategies for supply chain partners in order to 'make products and / or process quality visible in the market' and to support tailor made codes of conduct for a sector.

Conclusions and action points

- *IZ will connect with Amazing Farm. AF is the chief supplier / platform delivering fresh products to both Ranchmarket and Matahari. AF is a reputable intermediate partner and they can discuss on behalf of supply chain partners about quality standards, quantities, packaging requirement etc.*
- *In case of sweet pepper it was suggested to start with five progressive growers in Cisarua*
- *IZ will organize in close cooperation with farmers data collection on their farms as soon as possible. Data about farm inputs and outputs including labour will be analysed and discussed in between growers in study groups. IVEGRI will help to analyses data and identifying options for improvement,*
- *Wageningen UR will help to develop formats for systematic data collection and analysis.*
- *After making arrangements with Amazing Farm IZ is in need of checklist to systematically prepare farmers for the subsequent inspections of AF and retail staff.*
- *IVEGRI is fully equipped to support workshops and training sessions on specific issues. Contents and results are still to be discussed in between partners*
- *In general it was emphasized not to jump into training session on SOP, GAP, IndoGAP, PRIMA and other protocols for specific crops. This might scare away growers and these certificates are not yet required for domestic markets. It is crucial that safety and quality of products crops are guaranteed.*
- *Internal Quality management systems are needed by producer groups in order to comply with retail requirements*

7. Evaluation and planning

7.1. (internal) Evaluation

The role of supply chain facilitator is new and duties were not completely clear to Iskander yet. Feedback from WageningenUR staff on his work was limited and communication with WageningenUR staff should be improved. IVEGRI researchers are also waiting for more specific requests from Iskander.

With immediate effect Myrtille will take care that Iskanders' requests for input and support are channelled to a qualified HORTIN researcher in the Netherlands who will answer questions and send supportive material whenever needed.

Supply chain research issues that will be covered by LEI (lessons learnt, governance of chains, market access etc) are also not fully understood by Iskander. The hypothesis that will be tested and / or the methodology to monitor the effects of interventions need to be communicated soon.

Iskander has prepared an indicative list of issues (below) that he is in need of and that should be covered by the HORTIN / IVEGRI research team for maximum synergy and output. These issues will be discussed with the HORTIN team June 3.

Tentative issues for backstopping, literate research or experimental research

- *Forms and tools to register farm inputs and outputs and to analyse farm results (study groups); review and advise on farm record keeping system*
- *Training on internal quality management systems of cooperatives and implementation; Develop, review and advise on the traceability system*
- *Contracts and how to deal with price fluctuations*
- *Strengthening of cooperative management (including support for loan applications)*
- *New products / market concepts*
- *Pesticide sampling protocols and fool proof analytical protocols*
- *Codes of Conduct, Good Agricultural Practises and Standard Operational Procedures specific for Indonesian conditions. Review and advise on the INDOGAP system sweet pepper*
- *How to translate ISO 22000 standards to the farm and farming practices*
- *Branding opportunities for fresh products*
- *Business planning; enhancing entrepreneurship*
- *Assistance on Biological Control systems and sound spraying techniques.*

Iskander's role / performance

- *Until to date Iskander follows instructions of Wageningen UR regarding who to meet and what to do and develop.*
- *We agreed that from now onwards Iskander will be more pro active and that we expect him to act as a real facilitator.*
- *Whenever Iskander sees opportunities to connect farmers with modern markets and it fits in the HORTIN framework – he will let us know and will explore opportunities*
- *This backstopping mission of Myrtille and Marcel was very much appreciated and the timing was perfect. It should be a routine that whenever a HORTIN researcher visits Indonesia that he / she will contact Iskander and discuss progress. A roster of who and when will be in Indonesia could be useful.*
- *Iskander developed a detailed planning and roster of sweet pepper activities for the coming period that has been modified after our meetings and discussions.*
- *June 1, Andre de Jager will take care of the more formal evaluation of Iskander in relation to his contract*

7.2. Planning

From high to lower priority the next pilot cases and activities will to be implemented following the action points listed in the previous paragraphs:

- Sweet Pepper (annex II)
- Hot pepper and other crops
- HORTIN fruit identification mission (annex III)

ANNEX I

Itinerary & time spent per activity

HORTIN / EU missie Myrtille Danse en Marcel Stallen, mei 2008						
datum	aanvang	einde	overleg / bezoek	Wie	dagen MS	project
maandag 5 mei	9.00	12.00	HORTIN overleg met Iskander	MS, IZ	0,5	HORTIN II veg
	13.00	15.00	HORTIN overleg met MarieJose en Elmar Bouma	MS, IZ	0,5	HORTIN II veg
	19.00	21.00	(HORTIN) project ideeën besproken met Rijk Zwaan (Jos vd Knaap)	MS		
	19.00		aankomst Myrtille			
dinsdag 6 mei	9.00	14.00	CARE EU switch overleg	MS, MD	0,5	EU SWITCH
	14.00	16.00	programma gemaakt en HORTIN fruit voorbereid	MS, MD	0,5	HORTIN fruit
	18.00	20.00	ASBINDO bloemen voorstellen besproken	MS		
woensdag 7 mei	9.00	10.00	INA/LEI/ Fresh Studio overleg	MS, MD	0,5	HORTIN II veg
	11.00	14.00	HORTIN programma	MS, MD		HORTIN II veg
	17.00	18.00	ITB / LEI / FS overleg over EU SWITCH voorstel	MS, MD, IZ	0,5	EU SWITCH
donderdag 8 mei	8.30	12.00	IVEGRI overleg over link HORTIN supply chains	MS, MD, IZ	0,5	HORTIN II veg
	14.00	17.00	EWINDO Purwakerto samenwerking en pilots doorgenomen	MS, MD, IZ	0,5	HORTIN II veg
	21.00	22.00	MarieJose voortgang	MS, MD		HORTIN II veg
vrijdag 9 mei	9.00	10.00	MataHari deelname aan EU SWITCH	MS, MD, IZ	0,5	EU SWITCH
	12.00	17.00	CARE naar Bogor, Kvk's	MD		EU SWITCH
	13.00	15.00	Amazing Farm	MS, IZ	0,5	HORTIN II veg
	15.00	16.00	Functioneringsgesprek Iskander	MS, IZ		HORTIN II veg
	19.00	21.00	PT Monferi weefselkweek e.a	MS		
zaterdag 10 mei	10.00	15.00	EU SWITCH voorstel gewerkt met CARE	MS, MD	0,5	EU SWITCH
	18.00		vertrek Marcel			
Maandag 12 mei	14.00	15.00	Ranchmarket deelname aan EU SWITCH	MD		EU SWITCH
	18.00		vertrek Myrtille			
Mei			rapportage en nazorg	MS	1	EU SWITCH / HORTIN

Annex II

Tentative planning sweet pepper 2008

Sweet Pepper Supply Chain activity sheet	
Producers	Cisarua Producers Association; about 20 growers / members
Market / end user	Matahari and Ranch market retail markets
Intermediate / platform	Amazing Farm
Quantity	about 300 kg per day
Quality and packaging specs	yet to be decided after discussion with buyers
Case description	Matahari and Ranchmarket have shown an interest to replace their current supplier (PT Agrindo) at Lombok with suppliers at West Java.

Description and Planning of activities		
What / description	Who / organisation	When / timing
1. Setting the specifications of the produce; examples / photos etc	Iskander with Coop	June
2. Workshop on IndoGAP vegetables and quality requirements	DG Hort. IVEGRI and Iskander	June (optional)
3. Developing the registration system / farmers log books and standard registration sheets	Iskander and WUR-LEI	June / July
4. Follow and support of growers in the field with record keeping	Coop staff or independent person	June onwards
5. Developing and implementation of foolproof traceability system (lot numbers etc to be allocated per box and on farmers record sheets). Record sheets will be stored at central coop. level.	Iskander and WUR	June
6. Quality monitoring system developed and implemented. Samples taken randomly and analysed for critical pesticides. (Residues optional)	Cooperative with support of WUR / Iskander	June / July onwards
7. Wrapping and packaging facilities for sweet pepper depending on specific requirements of clients. Certification requirements (HACCP) fulfilled by AF	At intermediate party level (Amazing Farm)	July onwards
8. Economic and cost price calculations and discussing / negotiations on delivery conditions of coop. and invoicing system (before and after situation and margins)	Iskander and Coop.	July
9. Cooperative development and strengthening; business plan development	WUR	

ANNEX III

HORTIN fruit

I Preparations: week 19 – 20 – 21 (May 5 onwards);	
I. 1. List of projects / documents on fruit chain and fruit sector development (for domestic and export markets) development. (Reports and project descriptions)	Iskander Z
I. 2. Statistical al data on fruit import and export Indonesia (FAO / EU and Indonesian Sources	Marcel & Iskander Z
I. 3. List of relevant importers / exporters / traders/ distribution centres and institutes; specialisation and key issues	Iskander Z
I. 4. Retailers' strategies on fruit import and domestic sourcing	Iskander Z
I. 5. Identify possible local resources' persons (all round fruit specialist) to prepare for the mission and support us during field work	Iskander Z & Marcel

II. Literature study week 22 -23;	
II.1. Based on this information we should be able to make already an initial analysis of the Fruit sector and execute a modified porter oranalysis. (or SWOT) and develop a list of relevant issues / problems in the sector ; important markets and key fruit products.	Marcel and Alex
II.2. Interview with local Indonesian fruit specialist and recruitment of consultant	Marcel
II.3. Making appointments, logistical arrangements for field survey	XX

III. Survey and identification mission week 25-26 (June 16 onwards)	
III. 1. Visit facilities and interviews with traders / importers and exporters / distribution centres managers and fresh fruit buyers, producers. (systematic check list to be pre prepared)	Marcel, Alex and XX
III. 2. Analyse data and prepare for workshop	Marcel, Alex and XX
III. 3. Joint workshop with stakeholders fruit and identification of bottle necks and topics for improvement by means of (technical or institutional) innovations	Marcel, Alex and XX
III. 4. Develop joint action plan	Marcel, Alex and XX

IV. Reporting 25 (Week 26-27) ;	
IV. 1. Reporting	Marcel, Alex and XX

XX = consultant yet to be identified.

This could also be Iskander himself or a combination of XX and Iskander