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How are legume crops valued in Europe?

Insights from the analysis of several value chains case studies in the H2020 LegValue Project.

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INTRODUCTION AND OBJECTIVE

The goal of H2020 LegValue Project is to pave the road to develop sustainable and competitive legume-based farming systems and agri-feed and food chains in the EU.
Using a list of 27 value chains reflecting the market diversity, it aims to demonstrate the added value of various legumes value chains and to provide a range of solutions to improve the economic interest of each actor involved in the value chains to use legumes.
For this, a first step is to analyze how legume crops are currently valued in the EU. More precisely, the focus is on the <u>economic behaviors of the stakeholders</u> along the legumes value chains.

METHODOLOGY

Through a comprehensive approach, a qualitative survey was conducted among 127 stakeholders in 27 legumes value chains. The survey investigated the institutional, technical and organisational aspects on their legumes activities in their value chains.
The data collected were analysed with a factorial analysis to get a value chain typology and a cross-analysis to characterize the stakeholders behaviours in each value chain type.

MAIN RESULTS

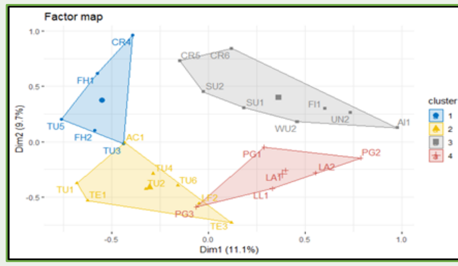
a) Value chains typology

The 27 value chains are classified into 4 types primarily based on <u>outlet type</u> (food or feed) and <u>stakeholders perceptions</u> about markets functioning and information exchange in their respective value chains.

To understand these perceptions, economic behaviours and practices of stakeholders in these value chains were analysed.

<u>1</u> : Negative perceptions, Inefficient information exchanges, Disequilibria in relations, Food and feed oriented

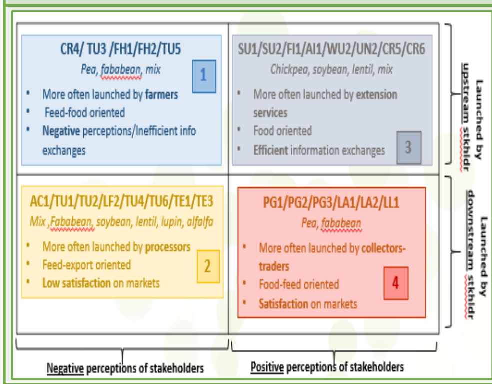
<u>2</u> : Low satisfaction on markets Feed and export oriented



<u>3</u> : Efficient information exchange, Food oriented

<u>4</u> : Positive perceptions of markets, Food or feed oriented

b) The main characteristics of each value chain type and some associated stakeholders behaviours

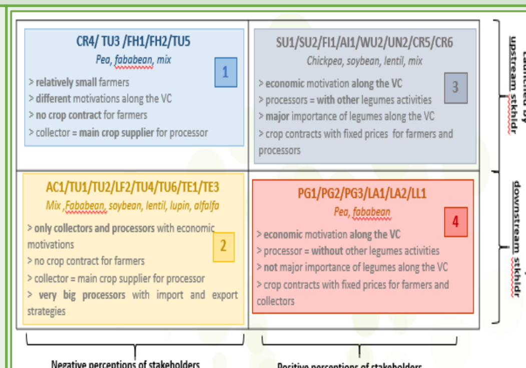


Some reasons why stakeholders have positive perceptions about the general functioning of their value chains:

- Existence of an economic development project shared along the value chain

- Strong involvement of farmers in the legumes valuation by contractualisation

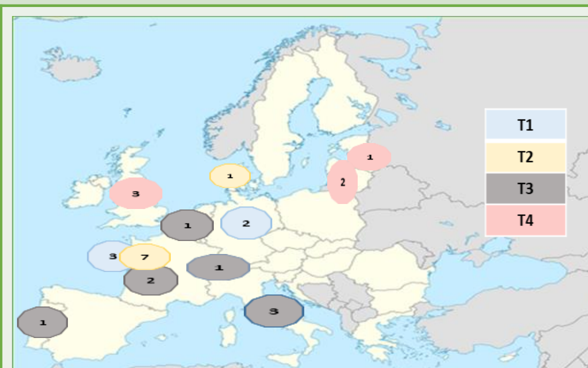
- Same importance given to downstream markets and upstream markets at the value chain level.



c) Discussion

The value chain types n°3 (T3) and n°4 (T4) can be considered as successful models for the development of legume value chains. T3 deals with pulses and soybean, and T4 with pea and fababean. They show two distinct ways of valuing legumes: in human food with organic legumes with a certain processing degree in T3, on the one hand, and in human or animal food for export with a minimum processing in T4, on the other hand.

Regarding the legume species treated, stakeholders in the value chain types n°1 (T1) would benefit from drawing inspiration from the development patterns of T4, and those of the value chain type n°2 (T2), both T3 and T4 value chains, depending on the processors strategies and the legume species concerned. The discussion is now open on the transition paths of value chains with negative perceptions of actors towards those considered as satisfactory models.



CONCLUSION: **Legume crops are valued across 4 different value chain types, each characterized by some well-identified behaviours of the 3 principal stakeholders: farmers, collectors, and processors. Food oriented value chains with closed link between farmers and processors seem to be those which work best. When they are feed oriented, collectors strategies on link with farmers and outlets are central.**

For further information: www.legvalue.eu

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