

MARKET CONSTRAINTS AND OPPORTUNITIES FOR CASSAVA PRODUCTS IN TAMIL NADU, INDIA; A VALUE CHAIN ANALYSIS

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Cassava (*Manihot esculenta* Crantz), renowned as a highly productive tropical tuber crop, known to support rural communities for its high caloric value and vast industrial application uses, supports over 10,000 smallholder farmers in Tamil Nadu. To support this large community of smallholder farmers, the Indo-Swiss Collaboration in Biotechnology (ISCB) has established a project aimed to develop cassava varieties to overcome the negative impact on production yields associated with the Cassava Mosaic Disease (CMD).

To support ISCB project objectives for improving food security and rural development, socioeconomic research tools have been utilized. A value chain analysis was conducted to understand market structure, supply, demand and trends of production for cassava in Tamil Nadu. This information serves to develop an understanding of market constraints and opportunities that exists amongst the value chain actors. In 2015 and 2016, two field surveys were conducted in Tamil Nadu, utilizing purposive sampling to conduct interviews and group discussions. Quantitative and qualitative data were collected from actors and key informants along the industrial cassava value chain.

Clear constraints were observed influencing market functions and actors. The industrial cassava industry is undergoing continual transition amidst pressure in an unregulated and highly fluctuating marketplace; further constraining demand trends. The industrial market, composed of highly diverse production units relative to size and economical value, has become very competitive, resulting in constraints relating to product quality, environmental practices, and production methods. These constraints have a direct impact on farmers, who often take the greatest economical risk along the value chain.

The findings show that socio-economic and market interventions are of crucial importance in addition to the varietal development of cassava. Key recommendations resulting from this research include; establishing government imposed minimum support prices, establishing industrial production standards, further development of industrial quality and safety standards, and the introduction of improved marketing methods. Essential to these recommendations is a collaborative effort towards innovation along the value chain, as growth will need to be pursued collectively in order to ensure sustainable market function. These solutions serve to benefit continued production of an essential crop supporting the smallholder farmer community.

Keywords: Cassava, Cassava Mosaic Disease, value chain, rural development, market access, smallholder farmers, agribusiness, tropical agriculture, Tamil Nadu

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