



Innovation processes navigated by women groups in the Malian shea sector: How targeting of international niche markets results in fragmentation and obstructs co-ordination

A. Sidibé^{a,*}, S. Vellema^a, F. Dembelé^b, M. Traoré^b, T.W. Kuyper^c

^a Technology and Agrarian Development Group, Wageningen University, P.O. Box 8130, NL-6700 EW Wageningen, The Netherlands

^b IPR/IFRA de Katibougou, BP 06 Koulikoro, Mali

^c Department of Soil Quality, Wageningen University, Wageningen, The Netherlands

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ABSTRACT

The incorporation of women and their associations into international markets and value chains is proposed increasingly as a development pathway in Sub-Saharan Africa. The underlying assumption is that exclusion of individual women from groups specialized in supplying a single international niche market is the main obstacle to their development. Intervention under this assumption focuses on linking women groups to international business and development organizations (NGOs). To validate this pre-analytical choice, we conducted a case study of a community-level co-operative of women in Mali (COPROKAZAN, Zantiébougou) that collects shea kernels from producers and processes them into butter and then trades the shea butter for the export market. The choices made in this co-operative are exemplary for other women Malian co-operatives involved in the production of shea butter. The strategic direction taken by the co-operative results from developmental interventions that encourage exclusive reliance on the links between the women co-operatives and niche markets in the international cosmetics industry. The case study shifted attention to the capacity of the women co-operatives to link their handling of fluctuations in supply to opportunities in a range of markets. We found that this in turn also opened new opportunities to a growing number of non-members. We then applied concepts drawn from the research literature on shea in West Africa, market fragmentation, competition, and path dependency to reframe our research focus, to examine how the co-operative in fact navigated this more complex development pathway through co-ordination at group and sector level. The study concludes that a focus on the provision and use of working capital, a strategic priority identified within the studied co-operative, opens new perspectives on what types of institutional arrangements enable the inclusion of a larger number of women in the sourcing of kernels.

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1. Introduction

Approximately 80% of the Malian population lives in rural areas. Rainfall-dependent agriculture and livestock husbandry are the main sources of income for people working under these risk-prone agro-ecological conditions. Government and development organizations have explored ways to diversify rural incomes: the shea tree (*Vitellaria paradoxa*), a native wild species, has been identified as offering strong potential for income diversification. The collection, processing and commercialization of shea nuts are almost exclusively under the control of women [1]. The shea sector in Mali falls under the responsibility of the Ministry for Women's Promotion.

However, very few successful attempts to domesticate the tree have been reported. A more promising strategy appears to be selective enrichment in cultivated fields, where tree densities can be 3–5 times higher than in fallows, in combination with selection for trees with desirable traits in the fruits and nuts, leading to the purposeful creation of parklands dominated by the shea tree [2].

The fruits of the shea tree contain an edible pulp that can be used as a snack, especially during the hungry period, the period at the beginning of the rainy season when food reserves run low and cereal crops have just been sown. However, its main product is the nut. After shelling the nut, the kernel can be processed to provide a fat known as shea butter or *beurre de karité*. Shea butter is an important ingredient of local diets and serves household needs as a vegetable fat, for example in combination with millet as a frying medium or added to porridge, and for moisturizers and soap [3]. There is a huge domestic market for shea butter, and

* Corresponding author. Tel.: +31 317 482776; fax: +31 317 485616.

E-mail address: amadou.sidibe@orangemali.net (A. Sidibé).

more than 90% of it is consumed domestically and traded in local markets. Mali's share of international trade is less than 10% [4], selling into markets that range from regional trade networks operating throughout West Africa to specialized export trade routes to Europe and North America. For instance, the European chocolate industry, in particular after the European Union allowed various vegetable fats to be used as cocoa butter equivalent, exerts a strong demand for shea kernels on local markets, operating through extensive agent networks [5]. The actors in this value chain are well co-ordinated, dominated by a few monopolies, and to a large extent under male control [6]. The international cosmetic and pharmaceutical industries provide niche markets for 'improved' shea butter of low acidity. International demand is increasing and in response the organization of trade is being stimulated by numerous international development organizations. In a number of cases, market organization along the value chain has been linked to Fair Trade labels [7]. However, this market remains strongly fragmented, a point that is explored in more detail later in this paper.

Mali is the world's second largest producer of shea fruits after Nigeria [3]. It is estimated that there are around 20 million shea trees in Mali. The annual production of shea kernels is about 100,000 metric tons, representing only 50% of the country's production potential [8]. Shea nut is one of the commodity chains that are receiving priority from government, donor agencies and development organizations, including national and especially international non-government agencies (NGOs). The gathering of the shea nuts alone is estimated to contribute 8.5% to agricultural production [8]. Currently, over 500,000 people are estimated to work in Mali's shea sector, most of whom are rural women who collect, process and sell kernels and butter. The ripening of shea fruits occurs during the labour-intensive rainy season, so women usually store the nuts for processing at a later date when their labour-time is less constrained. However, inadequate storage facilities reduce the quality of the shea butter.

The Malian support strategy (by the government and development organizations) to the shea sub-sector has a strong focus on building rural women organizational capacity to process higher volumes of good quality shea kernels and butter for high-value export markets. In practice this strategy neglects the development of domestic consumption and local high-value export markets [6]. Currently, the domestic and international chains are not connected [3]. The Malian strategy resembles those of other West African countries [9,10] in that it favours the formation of direct linkages between women groups and niche cosmetics markets by investing in upgrading the groups' capacities to comply with supply contracts and quality control assurance in these markets. The emphasis on global niche markets, driven by externally conceptualized and project-based interventions, creates path dependencies and risks marginalizing low-income women whose livelihoods are partly dependent on the collection of shea nuts. It also fails to build on the skills and networks embedded in local trade [11].

This paper focuses on co-related institutional issues in the development of markets for shea nut, and in the development of capacity, at various levels, to meet the emergent market demand. It is based on a diagnostic study that zooms in on how shea nut co-operatives, mostly with women members, navigate in this situation, evidenced in the choices they have made over time. It first presents the co-operative COPROKAZAN (*La Cooperative des Productrices de Beurre de Karité de Zantiébougou*) as a case study, in order to reveal its strategic choices with respect to shea nut collection and processing as well as the linkages maintained with supporting agencies. Three comparable cases are examined of similar co-operatives engaged in the making of improved butter for external markets. Next, we briefly report on the relation among COPROKAZAN, support organizations, and the still underdeveloped sector-based umbrella organization or *inter-profession* known as

SIDO [12]. In the discussion section we build on middle-range theorizing about development strategies deployed in the West African shea sector in order to refine our original diagnosis and underlying assumption. We reconsider this assumption and conceptualize the experimental strategy chosen by COPROKAZAN, namely, accessing working capital (*fond de roulement*) from external institutes in order to scale up its operations, as an endeavor to create more space and influence in the co-operative's navigation of opportunity in the face of supply fluctuations. Our study suggests that capacity of the co-operative to tailor problem solving to its relationships with its members and non-members in the locality is connected to the development of co-ordination at higher levels. We conclude that previous choices made in shea nut development policy and practice, particularly the emphasis on single market export-oriented arrangements, may constrain such capacity development.

2. Research location and methods

Data collection took place throughout 2010 and 2011, mainly at Zantiébougou in the Bougouni prefecture, 187 km from Bamako, and also from Sikasso, on the road (RN7) that connects the two cities and where the co-operative COPROKAZAN is located. Recently, the RN7 has been much improved, increasing opportunities for trade. The constituency of Zantiébougou encompasses 42 villages and covers 1500 km². According to the 1998 census, the population totals 31,316 inhabitants of whom 51% are female. The population is composed mainly of Bambara and Peulh ethnic groups. Agriculture, animal husbandry and woodland exploitation are the major economic activities. Agriculture revolves around cereal crops, grown for subsistence, and cotton, grown as the main cash crop. Shea nut is the main source of income for women [13].

COPROKAZAN was selected because it is the first community-based organization of women that received external support. It has pioneered joint learning and action for adding value and trading shea products and has become relatively independent of the supporting organizations. The co-operative features very prominently in the national and international media. The number of Google hits for this co-operative is higher (3000; accessed December, 2011) than for the three other co-operatives treated in this study (less than 600 hits each). COPROKAZAN has also played a major role in the revival of the *inter-organizational network* (SIDO): COPROKAZAN's president was chosen as the first president of SIDO.

Three comparable community-based organizations, COOPROKASI (at Siby, 35 km from Bamako), Siyiriwa and ULPK (both in Dioila, 160 km from Bamako) were selected purposefully in order to compare and contrast the ways in which access to support and the negotiated relationships with support agencies were arranged.

Data from the support agencies in the five villages (20 in total) were collected through 25 group meetings focusing on the shea nut value chain, involving women shea nut collectors and processors as well as representatives of the support agencies, 28 key informant interviews with co-operative members, professionals working in the sector, and traders, direct observation, and the gathering of secondary data from project documents, reports and literature. The interviews were semi-structured, guided by checklists in order to cover the same issues with each respondent. The interviews focused on the respondent's experience with and perceptions of the organization of shea butter making and trade activities. Interviews were conducted also with seven former members of the co-operatives who had chosen to leave the organization. In addition, over a four-month period, all meetings within the co-operatives and between the co-operatives and support agencies, as well as visits by women groups from shea producing areas not covered by the study, were attended and monitored.

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