

Wageningen University & Research

'Holistic Development of Apple Value Chain in Jammu & Kashmir

10 mins => 10 slides

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Introduction

- Goals
- Results
- Most promising holistic approaches
- Round table: The Netherlands
- Conclusions (of round table) on next steps

Goal


To identify and assess a holistic and coherent development plan for apples in J&K

- Desk study
- Mission & workshop J&K
- Round table NL
- PPP setup

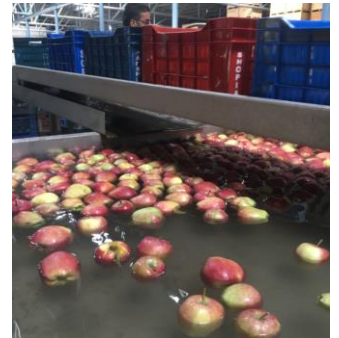


Results: 'Holistic' in a nutshell:

Use full potential of region by:

Current sector	 The ambition
Focus on production only	<i>Focus on market requirements & SC</i>
1 variety	<i>Multiple varieties</i>
Traditional trees	<i>High density trees</i>
First apples 8-15 years	<i>First apples 1-2 years</i>
9.000 kg / hectare	<i>50.000 kg / hectare</i>
30% grade a Grade	<i>70% A grade</i>
Produce to sell	<i>Produce to store</i>
Small % of Indian market	<i>Region can supply 100% and export</i>
Poor quality image	<i>Export quality image</i>

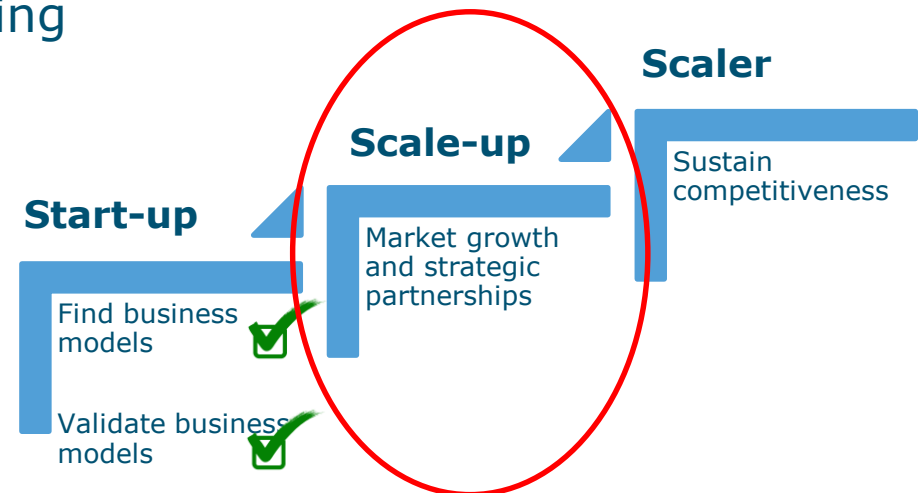
Results: 'Holistic' in images



Results: before going into content

Most promising food sector I've ever seen:

- Size
 - Apples for rising middle class
 - 100mln trees required in 5 years!
- Scale up phase: best time to start NL/IN business
 - Full supply chain proof of principle
 - Demand for optimization
 - Demand for nearly everything
- All local partners ready to go
 - Business
 - Research institutes
 - Governments (2x 50%)



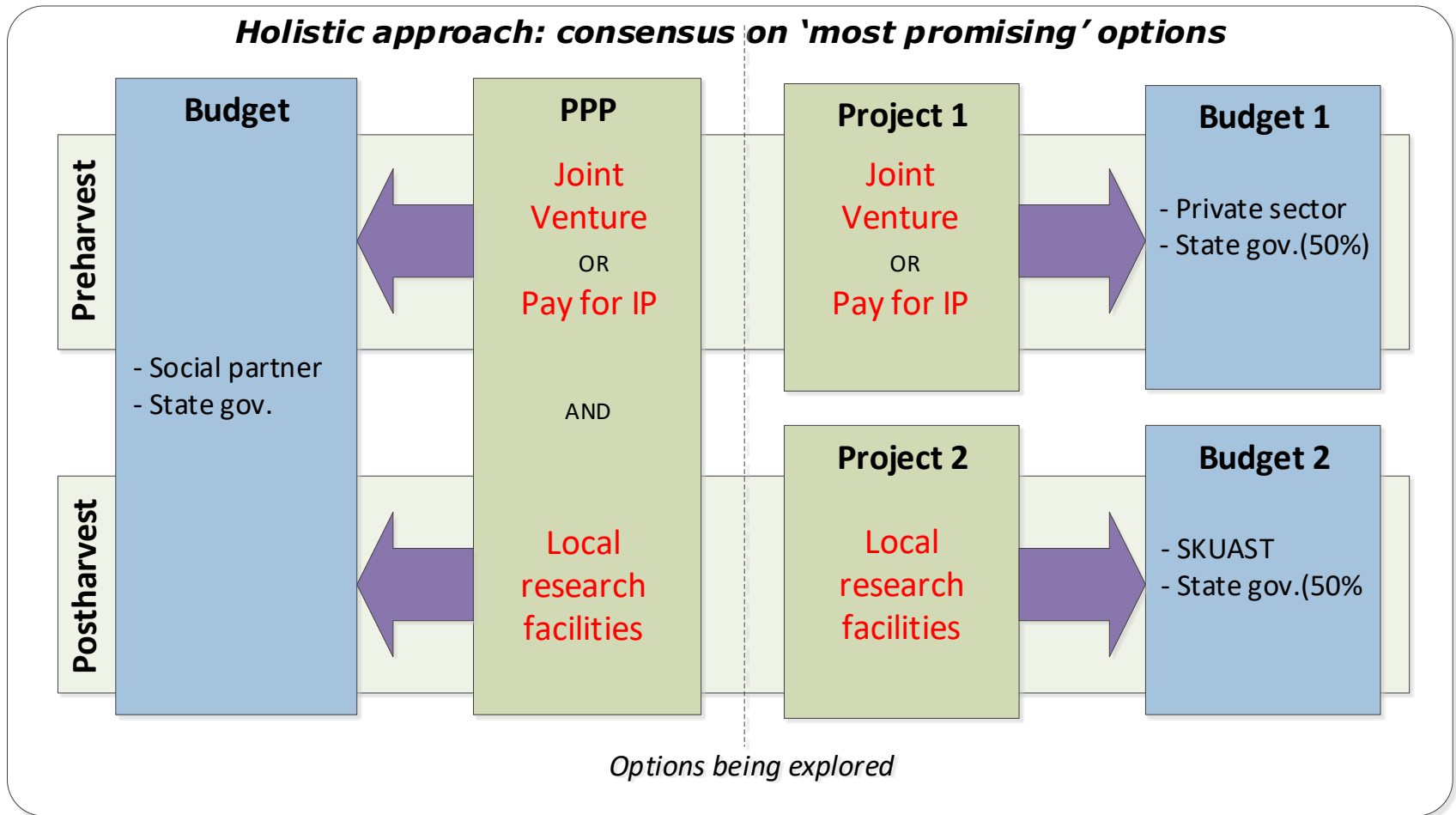
Results

Opportunities for sector development

	Hardware	Software	Orgware
Preharvest	<ul style="list-style-type: none"> • Soil & leave testing facilities • Plant tissue culture lab 	<ul style="list-style-type: none"> • Nursery skills • Orchard management skills • Integrated pest management skills • Plant nutrition skills • Micropropagation skills 	<ul style="list-style-type: none"> • Structures enabling exploitation of IP • Integrated pest man. structures • Extension services (ESs) • Link between universities and Ess • Horticulture school for vocational training of farmers & unemployed (youth)
Postharvest	<ul style="list-style-type: none"> • Postharvest Research Facilities • Full cold chain • Waste management (processing) • Last mile delivery 	<ul style="list-style-type: none"> • Controlled Atmosphere Standard Operation Procedures (SOPs) • ULO skills • Basic farmer knowledge on quality 	<ul style="list-style-type: none"> • Additional branding • Structures for operational planning • Link between universities and Ess • Horticulture school for vocational training of farmers & unemployed (youth)

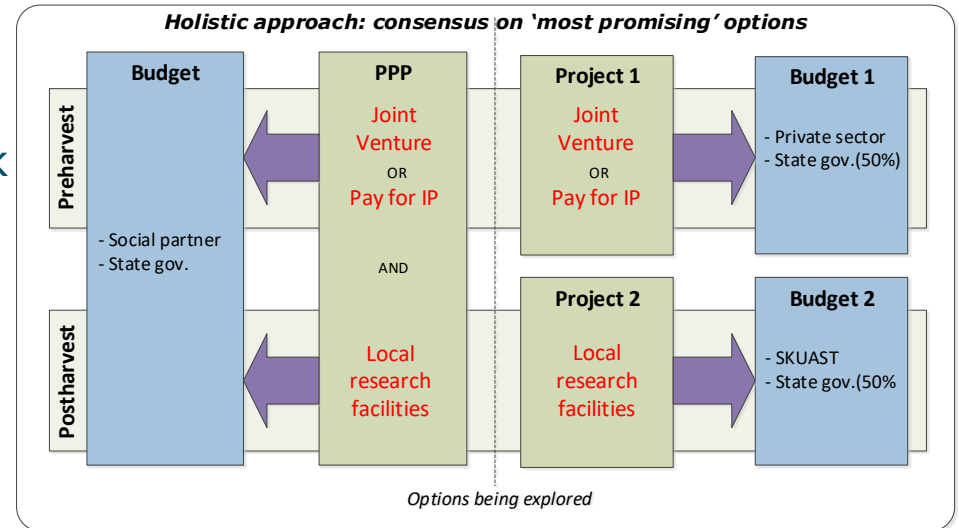
Implementation is expected to be most effective by a public private partnerships

Holistic approach



Round table @ Rabobank Rotterdam

- Christiaan Schoemaker – Rabobank
- Siebe Schuur – MinBuZa
- Anand Krishnan – MinBuZa
- Auke Schripsema – WUR
- Swathi Vurrakula– WUR
- Sanna Masood - Farm2U group
- Waseem Nazir - Farm2U group
- Ashaq Pandit - SKUAST – Kashmiri
- Jan Neele – Neele Expertise
- Emiel Neele – Neele Export



Round table Conclusions

Preharvest

- Challenge to find Dutch nurseries
- Worries about IP

Postharvest

- Challenge to find budget

Competition

- Italians are winning the game without any government support
- Dutch embassy: willing to organize second mission to Kashmir, but requires active involvement Dutch private sector

Rural approach

- Limited Indian private sector money

