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The evolution of geographical indication (GI) distribution channels in the Canastra/Br region in the face of the COVID-19 health crisis.

Confronted with one of the greatest health crises of recent years, humanity finds itself in an unprecedented situation given the global scale of the crisis. Even if the agri-food sector seems to be less affected than other sectors, the pandemic nevertheless affects the entire sector by modifying supply and demand, disrupting the entire food supply chain both locally and internationally. Among vulnerable populations, small producers are in the front line: difficulties in selling their production and accessing markets, acquiring seeds and inputs. To analyse the effects of the current health crisis, the study focuses on the effects suffered by Canastra GI producers and the actions taken to circumvent the difficulties encountered. To this end, a study was conducted among all members of the IG association and association officials based on a questionnaire and interviews between April 1 and May 31, 2020. The agri-food sector of the Canastra GI is relatively simple. Producers are, by all accounts, milk producers, cheese makers and ripeners. When the products arrive at their maturation point for marketing, they are sent by subcontracted carriers to the main intermediaries, which are cheese stores/Delicatessen, markets, restaurants. This market is approximately 95% for national export to large cities such as Belo Horizonte, São Paulo or Rio de Janeiro and 5% for local sale (APROCAN 2020). Following the collapse of the markets at the end of March 2020 (closure of markets, shops, restaurants and customer confinements). Producers reacted very quickly by taking technical measures of production containment, by changes in technological routes (long maturing cheese) and by the creation of new channels of disclosure and distribution. The producers have thus set up an online sales system (e-commerce or online marketing) that has enabled them to reach consumers directly at home. Another form of resilience has been to organize by their own means a new distribution network based on voluntary knowledge. There is a clear transition from a physical market (transport, intermediaries, consumers) to a virtual market (50/50). These new circuits have made it possible to increase the margins of producers and to promote exchanges between consumers and producers. The opening up of these new communication channels already suggests an impact on an increase in tourism. Will this call into question the role of commercial intermediaries? In order to avoid penalising these intermediaries, who are true partners for the association, a price adjustment has been made on the final products marketed directly. Will there be a shift in sales areas? Will new customers be found outside the traditional areas, or will greater proximities appear? There are already signs of openings in Brasília, the central-western part of Brazil. The study, which is still underway, should provide answers to these questions.

In conclusion, the transition by producers to a virtual market has developed and seems set to last. A positive impact on producers' margins has been observed. Moreover, these changes will affect both traditional intermediaries and consumers, with the potential impact on local tourism and the opening up of marketing areas, both local and in new regions.

APROCAN Association of Canastra Cheese Producers. Personal communication. June 2020

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