Pacific Horticultural and Agricultural Market Access Program (PHAMA)

Technical Report 20: Samoan Taro Export Development – Workshop Outcomes

19 MARCH 2012

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AusAID

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Abbreviations

Abbreviation	Description
AusAID	Australian Agency for International Development
CEO	Chief Executive Officer
GDP	Gross domestic product
IRETA	Institute for Research Extension and Training in Agriculture
MAF	(Samoa) Ministry of Agriculture and Fisheries
MAWG	Market Access Working Group
NZAP	New Zealand Aid Programme
PHAMA	Pacific Horticultural and Agricultural Market Access Program
URS	URS Australia Pty Ltd
WIBDI	Women in Business Development Inc.

Executive Summary

Two workshops were held in Samoa between 20 and 25 February 2012 as a follow-up to Activity SAMOA3.1 (see PHAMA Technical Report 14). These workshops, which involved farmers, exporters, key government staff and staff from various other Samoan agencies[1], were designed to:

- Explain the key findings of Activity SAMOA3.1;
- Build consensus of what needs to be done to build sufficient export volume to enter the New Zealand market;
- Outline quality and volume issues on the supply side with a view to ensuring demand-side aspects of the value chain are understood;
- Act as a catalyst for discussion on the development of an overall industry and export development strategy, including specific areas of responsibility;
- Challenge the current focus on taro and encourage consideration of other product options; and
- Meet with and brief Ministers and senior officials.

Attendance at both the Apia and Savai'i workshops was high, with over 70 participants in total for both events. The Upolu Workshop was opened by the Minister for Agriculture and Fisheries. There was keen media interest in proceedings, especially the Upolu workshop. Television was present for most of the event and interviews were conducted with key presenters.

There is still much work to do on developing a formal structure for taro exports from Samoa. While there is willingness among farmers to consider a cooperative approach to exporting, it will take time and investment for this to become reality. Farmers are interested in pursuing export opportunities, but consistently high prices in the domestic market continue to hold their attention. Government is doing its best to provide technical support, but is hampered by resource constraints. Exporters took a back seat in both workshops and are unlikely to become proactive until a more stable supply situation has developed. Both workshops noted that the export pathway is *already* open for Samoa taro to New Zealand. However, exports need to be organised on a reliable and consistent basis with high quality product, and supported in-market with a planned and active marketing program.

Farmers again raised concerns about the lack of planting material for the new varieties. Government on the other hand notes that farmers ask too much of an under-resourced department. The possible solution of developing a taro export cooperative found favour on Savai'i but reaction was more muted on Upolu. There are also major differences between the islands in terms of access to market, shipping, business knowledge and understanding of export processes. Any program going forward, if under the proposed cooperative approach, will require a combination of technical support, market education and commercial development.

It should be noted that taro may not be the ideal product to be focussing efforts on; however, it is a product that government is committed to. Cabinet has recently discussed one paper on developing taro exports drafted by the Samoan Trade Commissioner based in Auckland and is shortly to consider another. There are signs that the players in the taro industry could work together but it will take a concerted effort to get a formal, commercially-based structure in place. There was discussion on continuing to export individually, with the response being that this is an option but it is not the best option. The overwhelming domination of Fijian taro in New Zealand requires a national-level strategy which the industry in Samoa needs to be involved in developing, have ownership of, and support. The

[1] A full list of participants is attached as Appendix A.

functions of a taro export cooperative must be agreed first, with the structural form and roles/responsibilities to follow. There is an apparent level of goodwill across the industry which could be capitalised upon. Any formal structure will require resources, financial and human, in addition to commitment on the part of buyers in New Zealand to purchase Samoan taro. Management of biosecurity risks and pest management were also discussed. But the main and immediate issue for the industry is to develop export capability and sustainability.

1 Workshop 1: Upolu (Apia)

1.1 Background

Workshop 1, held in Apia, was opened by the Minister of Agriculture and Fisheries[2]. The Minister strongly endorsed the Pacific Horticultural and Agricultural Market Access Program (PHAMA), noting also that government remains committed to kick-starting taro exports. Government strategy is focussed on increasing the contribution of agriculture to the national economy, and revival of taro exports is a key part of this. What is required is stakeholder agreement within the industry. The Chair of Samoa's Market Access Working Group (MAWG) spoke on efforts being made to ensure commercial development of Samoan taro with a view to exports.[3] Presentations were also made by government, the private sector, and PHAMA.[4]

The focus of presentations was on production capacity, market access issues (biosecurity, pest management, inspection requirements), and what is required in Samoa to ensure consistency and quality of supply. The Samoa Ministry of Agriculture and Fisheries (MAF) noted that it has sufficient capacity for current production but will require additional resources if an export trade is developed. Shipping is not considered a problem, with one line now providing weekly services. Refrigerated containers are in good supply given the level of imports into Samoa. Loading of product is done just prior to departure with a 24 hour window. The issue here is how the industry organises to get harvested product through quarantine and transported to the ship's rail in time. A consolidated approach was agreed to be the most efficient mechanism.

MAF outlined its research program, noting that of the five taro varieties researched, Samoa 2 and 3 appear to be the most appropriate for export. The availability of planting materials, however, remains low. Farmers were quick to point out that they need access to this to ensure they can plant on a consistent basis. Access to extension services was also raised by farmers. If the industry is to progress, better technical support from MAF will be required. Consistency of the product offering – size, taste, quality – was noted as a critical issue. This has to be ensured at the farm gate. There is little point in presenting product for quarantine processing if overriding quality standards are not being met. Farmers need to know what the market requires in order to reduce the level of rejects. MAF outlined a scenario where they factor in a 30% reject rate. The basis of the calculation is that they estimate 19.5 tonnes of 'raw' product will be required to ensure one container will be filled. This is a very large margin for error and brings into question not only production and grading methods but also what happens to the export rejects.

There was some discussion on value-added options, including frozen taro and further processing of taro into chips or ready-to-eat forms. Some local manufacturers already have this capacity. Examples were also provided of Fijian companies that are already doing this. It was agreed that Samoa needs to look at a range of product forms to increase market opportunities. It was emphasised throughout the workshop that the New Zealand market is open. The issue for Samoa is how it organises its taro industry in order to meet this opportunity. A comment from the floor noted that only 10% of farmers are interested in export. There was no indication of how many farmers 10% represents, the volume of their production, or their links to exporters.

[2] See Appendix B for his Keynote Address.
[3] See Appendix C.
[4] See Appendix D.

Mechanisation of production was raised, with comments that this is the best way to rapidly increase volumes. Traditional farming methods are viewed as too slow and will not result in consistency of production, quality and volumes. The level of investment required to mechanise production will be high, and government would need to support mechanisation through tax concessions and possibly even investment in capital equipment. As a flow-on from this, there would also need to be substantial investment in quarantine facilities should volumes increase. Current facilities are reported to be inadequate.

1.2 Key Issues and Outcomes

Discussion on the way forward focussed on how the industry should organise to meet New Zealand market requirements. Key points raised included:

- A cooperative model including representation from farmers, exporters, manufacturers and government may be the best way forward. There was general agreement on the concept but no in-depth discussion on who would take early responsibility. It was noted that donor support could be sought – possibly from the New Zealand Aid Programme (NZAP), which has now focussed on sustainable economic development.
- Samoa already has a number of industry organisations (Chamber of Commerce, Samoa Association of Manufacturers and Exporters, Farmers' Association). Is it better to development a sub-group under one of these umbrellas or go it alone?
- What is the purpose of a cooperative and how will it be organised? What services will be provided? Does it have a marketing function as well as a farmer support function? Most importantly, how will it be funded?
- If only 10% of farmers are willing to consider exporting, how will the cooperative ensure supply volumes? And will there be a mechanism (or premium) for farmers to come on board at a later time?
- Will government be prepared to offer improved technical support, i.e. extension services, adequate quarantine/inspection services, planting materials, marketing support in New Zealand?
- What will be the strategy to counter Fijian exports? Fiji will not be keen to see their market share eroded. A suggestion that a trade agreement be considered was dismissed as being impractical.
- What is the timetable for setting up a cooperative and who is going to lead this? There was little response to this question.
- How will a cooperative deal with rejects and excess export volume? There will need to be a strategy in place to either divert product to the domestic market and/or have a value-added option for processing reject taro. There was discussion on the sale of smaller-sized taro being a separate option, particularly given the Asian preference for small taro.
- Is it possible to develop a Brand Samoa for taro exports? The Samoan Trade Commission in Auckland will need to play an active role in promoting product once it reaches New Zealand.

The key outcome of the Upolu workshop was a consensus that a cooperative model is the preferred way forward. Individual exporters are unlikely to get the consistent volumes required to break into the New Zealand market. What was not resolved is who will take the leadership in developing the cooperative. If Samoa takes a single desk approach, government could pick up this role, but it would be much better if the producers and exporters were to take the lead. Government has enough to do already. There are possible options through the likes of the Pacific Business Mentors program funded by NZAP. Usually this program supports individual businesses, but a case might be made for more general support to a strategic industry like taro. Whichever route is taken, government – through the

Minister of Agriculture – will need to facilitate the initial stages of a cooperative being set up. From there, the industry will need to agree on the structure and governance arrangements.

In the meantime, a timetable needs to be set to re-launch Samoan taro into New Zealand. Fiftieth anniversary events for both Samoa's independence and the unique Treaty of Friendship between New Zealand and Samoa will be taking place in both Samoa and New Zealand over the coming six months. At least one of these could and perhaps should feature Samoan taro. More importantly, the industry needs to devise a plan that ensures regular and consistent volumes to meet market demands. The Samoa Trade Commission will need to play an active role in the process.

2 Workshop 2: Savai'i

2.1 Background

The Savai'i workshop had a very different 'feel' to the Apia workshop. The majority of participants were farmers, some of whom were also exporting. The same presentations were given as in Upolu, with slight changes in emphasis as it was felt important to get both a farmer perspective and a Savai'i perspective on taro exports. Savai'i's constraints are somewhat more complex than those on Upolu, e.g. no quarantine and handling facilities on the island, limitations on inter-island transport, and no manufacturing facilities.

Savai'i farmers were generally more vocal about the need for government support across all aspects of the industry. It is easy to see that they are used to asking for this assistance and not always getting what they want or need. MAF officials commented that it is always difficult to meet demand because of their own resource constraints. At the same time, they would like to see farmers taking more direct responsibility to grow their production and business. Exporters do not really take a role in Savai'i. They might purchase at the farmgate, but the processing and quarantine requirements can only be done in Upolu. Farmers did discuss the possibility of setting up quarantine facilities in Savai'i but officials could not commit to anything. There is space available near the wharf that could act as a packhouse, but additional investment would be required for equipment, staff, and establishment of certification procedures.

Subsequent discussion with MAF indicated that it will be a challenge to get farmers in Savai'i to work together. Despite appearances in the workshop, there are existing tensions which will take time to work through. There is no great desire to share materials or information. Even if a cooperative were to be established, issues around governance and function are likely to remain a challenge.

2.2 Key Issues and Outcomes

Key points raised included:

- Farmers are keen to get a final decision on which varieties are going to be exported. Discussion among the farmers was wide-ranging, with some in favour of only two and others claiming that all five varieties are of adequate quality.
- The idea of a cooperative received generally good support, but some felt that this is something government needs to take the lead on. Others noted they would be more comfortable with a grower-based organisation but were uncertain as to how to set something like this up.
- Lack of planting materials remains an important issue. There were some comments on the need to privatise this function, as government is unable to meet demand.
- If exporting is to proceed, farmers recognise that consistency of supply and quality is very important. While the farmers know how to grow, they will need advice on when to grow, how much to grow, and what the product needs to look like for the market. MAF extension services were seen as vital.
- Farmers acknowledged that they do not know enough about demand-side issues and would like to be kept better informed on these. They recognise the logic of ensuring their taro meets market requirements.

- Who will provide the resources to set up a cooperative? Again the possibility of donor support was raised but with the caveat that this is only one option. At some stage, farmers, exporters and government will have to put their hands in their pockets and come up with funding.
- Savai'i farmers view themselves as the core of any future export drive. There was recognition that they have the potential to supply the bulk of taro exports. Their main concern is not their ability to grow but more about who will organise the exporting.
- Growers will need to be registered to be part of any export cooperative. There was consensus that a farmer should have to pay to be 'inside the tent'.
- The Samoan Development Bank representative expressed support for a cooperative approach, noting that export finance and grower finance might be more easily facilitated through a group approach.

3 Summary

There is apparent goodwill on the part of stakeholders to consider a cooperative approach for developing taro exports to New Zealand. Discussion even ranged as far as considering the potential of other markets (Australia and the United States). It was suggested that the industry get a working model together first and try out the New Zealand market (ensuring volume/quality/consistency and commercial viability) before turning to other markets.

Goodwill aside, development of a cooperative approach will require substantial support. There was no clear view on where this could come from apart from suggestions that donors might be interested. The best outcome would be if industry begins the process of forming a cooperative of its own volition. However, no one at the workshops appeared to want to take the lead on this. The default view tends to be that ‘government will do it’. Government *could* do this. A single desk option could be legislated and government could equally buy and sell taro on behalf of industry. But is this the best way forward? Exporters would be cut out completely and State-owned enterprises are often not that efficiently managed.

However, there is momentum and some cause for optimism. A total of over 70 people attended the two workshops. The various positions of farmers, exporters, manufacturers and government are now out in the public domain. The Minister remains committed to reviving exports and should be lobbied to ensure that support goes beyond words and achieves delivery of resources. In that sense, the workshops accomplished the objective of getting the industry focussed on working together, recognising that there is a concrete opportunity in New Zealand. The spectre of Fiji competition aside, Samoa has an opportunity to re-enter the market. But the fact remains that Fiji’s industry is a lot better organised than Samoa’s and holds effective control of the New Zealand market. Unless Samoa can ‘get organised’, possibly through the development of an export cooperative, this position is unlikely to change.

If a cooperative structure cannot be set up as the primary development vehicle, the fall-back is to provide support direct to growers, buyers and exporters, as they will have to become the drivers of industry development. On the supply side, government would provide support in relation to extension and quarantine services. On the demand side, it could provide support through the proposed operations of the distribution hub in South Auckland.

For its part, PHAMA can potentially provide additional support in areas such as development of production and packhouse export standards, upgrading of quarantine inspection facilities and capability, and market development in New Zealand. However, it cannot do this until such time as industry and/or government is prepared to take the lead in resolving the more fundamental supply-side issues, with an emphasis on ensuring consistency and quality of supply. Establishment of an industry cooperative, with clearly defined roles and responsibilities, and with established funding mechanisms, would be a good starting point.

4 Limitations

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The methodology adopted and sources of information used by URS are outlined in this report. URS has made no independent verification of this information beyond the agreed scope of works and URS assumes no responsibility for any inaccuracies or omissions. No indications were found during our investigations that information contained in this report as provided to URS was false.

This report was prepared between February and March 2012 and is based on the conditions encountered and information reviewed at the time of preparation. URS disclaims responsibility for any changes that may have occurred after this time.

This report should be read in full. No responsibility is accepted for use of any part of this report in any other context or for any other purpose or by third parties.

Appendix A Workshop Participants

A.1 Upolu – 21 February 2012

- Hon. Minister of Agriculture and Fisheries, Afioga Le Mamea Ropati Mualia
- Reverend Utufua Naseri

PHAMA MAWG members

- Pelenato Fonoti – Chair
- Fonoiava Sealiitu – Chief Executive Officer (CEO), MAF
- Sesega Peseta
- Frank Fong
- Misa Konelio
- Tolo Iosefa
- Alberta Malielegaoi
- Lesceister Dean
- Pulotu Lyndon Chu Ling
- Papalii Grant Percival
- Samau Etuale Sefo

Ministry staff

- Mark Betham – Chair, Agriculture Sector Plan Steering Committee
- Tusagi Muliagatele Iosefatu Reti – Vice-Chair, Agriculture Sector Plan Steering Committee
- Tupa'imatuna Iulai Lavea – CEO, Ministry of Finance
- Taule'ale'ausumai Laavasa Malua – CEO, Ministry of Natural Resources and Environment
- Leituala Kuiniselani Tago-Elisaia – CEO, Ministry of Women, Community and Social Development
- Auelua Samuelu Enari – CEO, Ministry of Commerce, Industry and Labour
- Tilafono David Hunter – CEO, Scientific Research Organisation of Samoa
- Tuiasau Saumani Wongsin – CEO, Development Bank of Samoa
- Anoano – Quarantine

Farmers

- Atoa Paialii
- Asovale Faoagali
- William Hall
- Ene Pupi
- Aukusitino Rasch
- Lina Aumua Maposua
- John Maposua

Exporters

- Maiava Vala Ueselani
- Ben Ah Liki
- Tusagi Luasamotu

Appendix A

Private sector / Non-governmental organisations

- Adimaimalaga Tafunai – Executive Director, Women in Business Development Inc. (WIBDI)
- Namulau'ulu Sami Leota – President, Chamber of Commerce
- Edwin Tamasese – Private sector
- Afoa Kolone Vaai – Adviser, KVA Consult Ltd
- Toilolo Pueata Tanielu – Development
- Levaopolo Ricky Faatonu – Development
- Emele Ainuu – Research
- Lemalu Mikaele Peti – Manager, Samoa Maritime Services
- Mohammed Umar – Director, Institute for Research Extension and Training in Agriculture (IRETA)
- Fonoti Lafi Iupati Fuata'i – Director for Samoan Studies (National University of Samoa), incoming Trade Commissioner (New Zealand)
- Vaatu'itu'I Apete Meredith – Former Trade Commissioner (New Zealand)

A.2 Savai'i – 23 February 2012

Ministries

- Ministry of Agriculture and Fisheries
- Development Bank of Samoa
- Small Business Enterprise Centre
- Ministry of Women, Community and Social Development

Farmers

- Fonoia Ta Him
- Rev Vaueli Vaueli
- Folu Faalafu
- Lio Tupuaga
- Lefua Manu
- Leievaga Iakopo
- Uuasa Ulu
- Ielu Su
- Asiata Solomona
- Auano Pati
- Mumulu Lapi
- Tauiliili Masi
- Faga Samuelu
- Peseta Futu
- Manuieuta Ioane
- Tauiliili Keko
- Unasa Toga
- Tulafili Faifuaina
- Fiu Pepe
- Tapunuu Lautaimi
- Masa Temukisa
- Soga Setu
- Fiu Usoalii

Appendix A

- Laufiso Naneseni
- Val. Tenari
- Maulupe Faatall
- Lelevaga Farao
- Anaua Tofaeono

Exporters

- Tiatia Moto'otua
- Tauloa Tugaga
- Tapuai Lama
- Mose Mata'u
- Satuala Moti
- Papalii Siaosi

Non-governmental organisations

- WIBDI

Appendix B Keynote Address by the Minister of Agriculture and Fisheries (Afioga Le Mamea Ropati Mualia)

Reverend Utufua Naseri

Representatives of the Pacific Horticultural and Agricultural Market Access Program (PHAMA)

Heads of Government Ministries and Organisations

Representatives of Non-government Organisations

Private Sector

Distinguished Guests

Ladies and Gentlemen

It is indeed a pleasure to be given the opportunity to address and officially open this important workshop, with the main agenda being to develop taro export to New Zealand.

On behalf of the Government of Samoa, I would like to extend to you all a very warm welcome this morning. Special greetings to our overseas guest, Bruce Shepherd, who came specifically for this purpose, and I hope that you have an enjoyable stay in Samoa.

With regard to today’s occasion, I wish to confirm our Government’s commitment to the revival of the taro industry.

Taro was our main cash crop and a major staple food for our people over decades. Unfortunately, it was attacked by the Taro Leaf Blight disease. The first symptoms of the fungus were observed at a farm on the south coast of Upolu in July 1993, and it took just six months for the disease to spread throughout the country. This was extremely fast and beyond anyone’s expectations. By December 2004, a full destruction of the industry was realised, when exports suddenly dropped to zero, as there was absolutely no taro in the country.

There was a significant amount of effort to revive the industry, starting with the immediate use of chemicals to control the blight. In addition, scientists travelled throughout the Asia and Pacific regions in search of resistant materials, as all our traditional cultivars were susceptible to the disease.

It was fortunate for Samoa to obtain some excellent materials from Papua New Guinea, Solomon Islands, the Philippines, and Hawaii. These were subjected to a screening program to determine materials that were well-suited to local conditions.

Four varieties, such as the “Talo Fili” and “Polovoli”, were found to be highly resistant to the disease and adaptable to local conditions. These were released to farmers in 1996.

These varieties also formed the first pool of parental genetic materials to initiate a breeding program, which was designed with specific interest on the long-term sustainability of the expected progenies. This objective has been well established, as evidenced with a wide array of taro types that are now available at the farming community.

After almost twenty years of commitment, I believe that we have produced some very good varieties to be promoted. About three years ago, the variety ‘Samoa 2’ was tested at the Scientific Research Organisation of Samoa, and was identified as nutritionally better than our traditional “talo niue”. The other varieties were all similar, with high potential for export. As such, the opportunity is already here

Appendix B

for export exploitation, bearing in mind that any new commodity on any market requires intense effort to develop its competitiveness.

As alluded to earlier by the Chairman of the Samoa Market Access Working Group, the PHAMA project is available to assist, with its central theme to increase Horticultural and Agricultural export through a well-managed regulatory framework. I fully support the efforts to strengthen the management of biosecurity risks and trade facilitation, to provide an enabling working environment. As such, the farmers and exporters would be more resilient to rebuild and maintain the competitiveness of our Samoan taro in the New Zealand Market. This initiative is in line with the priority of Government to increase the contribution of the sector to the national revenue (GDP), as expressed in the Strategy for the Development of Samoa, 2008–2012.

The Government of Australia is commended for its continuing assistance to Samoa over the years.

To conclude, I look forward to some stakeholder agreements on the many issues that will be highlighted during this workshop. It is my pleasure to now declare the workshop officially open.

Soifua.

Appendix C Address by Samoan Market Access Working Group Chair (Susuga Pelenato Fonoti)

Reverend Utufua Naseri

Hon. Minister of Agriculture and Fisheries, Afioga Le Mamea Ropati Mualia

Distinguished Guests

Ladies and Gentlemen

In November 2011, it became clear at our Samoa Market Access Working Group meeting that a workshop was needed to seek stakeholder agreements on the many issues that were impacting on the export of taro to New Zealand. On this note, I sincerely acknowledge your presence here today.

The promotion of taro export to New Zealand was identified as one of the activities for assistance by PHAMA in early 2011. For this activity, the consultant, Mr Bruce Shepherd, carried out a review of the market status for taro in New Zealand in mid-2011. This study led to the many issues that pointed to the supplying capacity of taro from Samoa. Subsequently, our MAWG agreed that a study be conducted in Samoa, with particular interest on matters that were strongly linked to the concerns identified in the New Zealand taro market.

In October 2011, Mr Shepherd visited Samoa, and conducted the required work, through consultation with the relevant authorities in Government and the private sector, both in Upolu and Savai'i.

The report was presented at the Samoa MAWG in November 2011, and again there were concerns that required attention. A decision was made to host a workshop, as is happening today, to provide the forum to deal with the issues highlighted in the reports.

In summary, today's meeting is for Mr Shepherd to present the main issues identified as associated with developing the export of taro to New Zealand. These issues are debatable, so it is necessary to seek stakeholder agreements regarding the issues presented. It would also be very useful to have the consensus of all those here today as to where the responsibility lies in regards to implementation.

To conclude, I wish you all a successful workshop.

Soifua.

Appendix D Workshop Presentations

Talo export development

Overview and summary of findings

Bruce Shepherd – PHAMA Consultant

Background

- TLB has led to the development of new varieties of talo
- Government has directed that the industry explore the NZ market for Samoan talo
- Initial trial exports have proceeded with limited success
- Fiji remains the main supplier to NZ and represents the most immediate competition
- The talo industry in Samoa now needs to consider a more integrated export development framework

Findings from October 2011

- Shortage of planting materials
- Exporters cannot get consistent supply
- Domestic prices remain very high
- Lack of understanding of the export supply chain
- Compliance issues require further explanation
- Farmers remain wary of exports – domestic market offers good prices and less risk
- Consumers in NZ need more information on varieties
- Shipping between islands is difficult

Key issues

- Supply side constraints
  - Availability of planting materials
  - Consistent quality
  - Pest management procedures
  - Harvesting and timing of harvesting
  - Shipping – interisland and international
  - Packaging and labelling
  - Local market proximity

Demand side issues

- Lack of knowledge by consumers of new varieties
- Quarantine and biosecurity at the NZ border
- Distribution and associated costs in New Zealand
- Consistency of supply
- Quality of product
- Marketing budget will be required
- Talo remains a price sensitive, low value commodity product
- Fiji looms as a major competitor

Asia Pacific Weekly Price Monitor

Regional Office for Asia and the Pacific

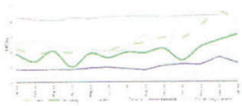
Issue 49, 10 January 2012

SAMOA, Fugalei (January 2012)

Country Highlights

- Towards the end of 2011 supply of root crops in national markets plunged and pushed prices up. In January 2012, taro and taro palagi prices were 78 and 76 percent above those observed three months ago. Following significant price fall during November and December 2011, ta'amu prices show a 130 percent increase in January 2012; however, ta'amu prices are only 11 percent above the prices registered a year ago.

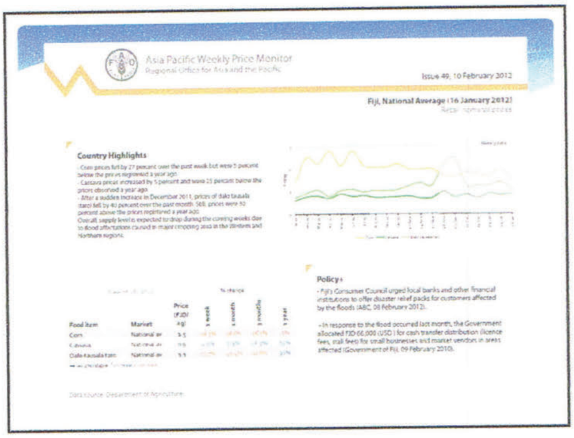
- Banana prices start to fall after reaching their highest level on December 2011. In January prices fell by 25 percent from the previous month; however, prices were still 17 percent above those observed a



Food item	Market	Price (SAT/ kg)	1 month	3 months	1 year	3 years
Taro	Fugalei	3.8	[illegible]	[illegible]	[illegible]	[illegible]
Taro palagi	Fugalei	3.1	[illegible]	[illegible]	[illegible]	[illegible]
Ta'amu	Fugalei	4.7	[illegible]	[illegible]	[illegible]	[illegible]
Coconut	Fugalei	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Banana	Fugalei	3.2	[illegible]	[illegible]	[illegible]	[illegible]
Chicken leg quarters*	National Av	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]

Policy

NA



What is Fiji up to?

Government is setting prices, export and local:
http://www.fijisun.com.fj/2011/05/31/set-price-for-dalo/ -

Growers are getting organised:
http://www.facebook.com/pages/Taveuni-Dalo-Farmers/289629564411779

The Agricultural Marketing Authority is being given powers to help grow the export industry.

Where's the competition?

China
http://www.alibaba.com/product-gs/521731626/taro.html -

Fiji
http://www.alibaba.com/countrysearch/FJ/taro.html -

Talo exports: forward thinking

- Why does the industry want to export?
- Is the industry ready to export?
- What is required?
- Who will be involved?
- Is a cooperative required? Who sets this up? Runs it? Funds it?
- What is the role of government?
- What is the role of the Samoan Trade Commission?
- Who has control?
- What are the best forms for exporting? Where is the value add?

Issues for debate

- **Structure of the export industry** – should a cooperative model be pursued? If so what are the costs, benefits, organisational structure, governance and payout mechanisms
- **Role of farmers** – what do farmers need to do to ensure production is of high and consistent quality?
- **Role of exporters** – what do exporters need to do to ensure that product is collected on time, processed, packaged and made ready for export
- **Role of government** – what type of materials will government supply, what are the advisory services available, are the quarantine facilities able to handle extra volume, are extension services consistently available?

Issues for debate

- **Market knowledge** – what support facilities are available from regional organisations (PT&I) and the Samoa Trade Commission?
- **Market import requirements** – do all members of the industry understand the regulatory aspects of market entry?
- **Product marketing** – how is Samoan talo going to be marketed in New Zealand? Direct to consumers, through retail outlets?
- **Research on market demand** – what is the pricing structure? Who are the competitors? What are the market segments?

What support is available?

- **ACIAR** – providing assistance on planting material and consumer preferences
- **PHAMA** – development and implementation of production/packhouse standards, quarantine requirements
- **Other programmes** – NZ's aid programme has a strong emphasis on sustainable economic development, SPC has the IACT programme, EU has enterprise level programmes

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Where to from here?

CURRENT TARO EXPORT CAPACITY- SUPPLY

MAF Crops Division, February 2012

Plant materials and field planting

Supply of plant materials per month/MAF (as at February 2012).	- 260,000 *tiapula* distributed since 2009. - average 2,000 per month	MAF's current capacity.
Taro on the ground at March 2011 (on the five selected varieties) Pilot Survey.	414,575	Only 47 farmers in Upolu covered
Taro on the ground at February 2012	?	
Note:		
Taro needed for one 20 ft container @ 30% reject level	19.500	= 5 acres
Taro for 60 containers @ 5/month (Make up benchmark)	1,170,000	= 292.5 acres

Taro/Facility for export

Potential varieties for export as at February 2012	Samoa 1, 2, 3, 4, 5 From cycle 7	Impact-: Samoa 1-5 (immediate) Cycle 7 (takes 5 years down the line)
Selected varieties for export as at February 2012	Two Nominated Varieties; Samoa02, Samoa03	Comments: SROS Findings (Nutritional analysis), Feedback from consumers in NZ.
Issues 1. Facilities	-No proper processing facility	-Samoa
	- No central market facility	- New Zealand
2. Exporters	No exporters	

PACIFIC HORTICULTURE & AGRICULTURAL MARKET ACCESS (PHAMA)

"MARKET ACCESS"

SANITARY & PHYTOSANITARY MEASURES

QUARANTINE

INTERNATIONAL STANDARDS FOR PHYTOSANTARY MEASURES (ISPMs)

INTERNATIONAL PLANT PROTECTION

CONVENTION (IPPC) (website : www.ippc.int)

177 SIGNATORIES

34 APPROVED ISPMs, e.g. ISPM 2, ISPM 3, ISPM 34.

QUARANTINE

IMPORTANT ISSUES :

- **FACILITIES** – required improvement.



- **STAFF CAPACITY** – Enough for the time being, need more into the future.

TASK :

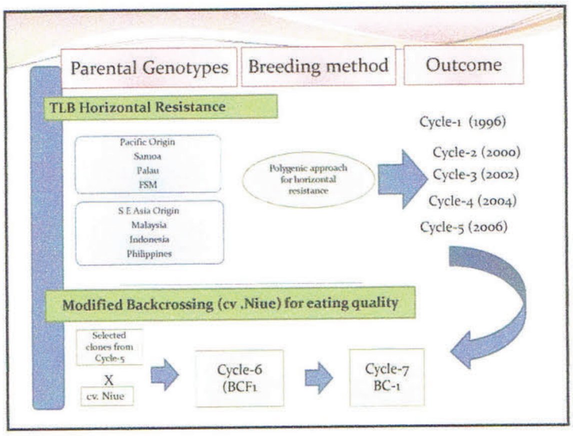
"FACILITATE TRADE"

Please Contact : Main Office : 20924
Fax/Phone : 20103
Website : www.samoaquarantine.gov.ws

Samoa Talo breeding programme

Presentation to PHAMA workshop

February 2012



Pacific Agribusiness Research for Development Initiative (PARDI)

Project: Developing a clean seed system for market ready taro cultivars in Samoa

Aim:
To support the sustainable growth of Samoa's taro export market by developing a viable system for providing high quality planting material of an appropriate diversity of market-preferred varieties supported by relevant information, to all supply chain actors.

Objective 1
Screen available varieties of taro for defined market opportunities, such as fresh exports, higher- value or more durable products (chips and other snack foods) and partial processing (especially peeling and freezing or drying)

Objective 2:
Improve methods for delivering and multiplying disease- and pest-free planting

Objective 3:
Establish viable private-sector nurseries for commercial multiplication and dissemination of new, TLB-resistant and market-preferred varieties

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