



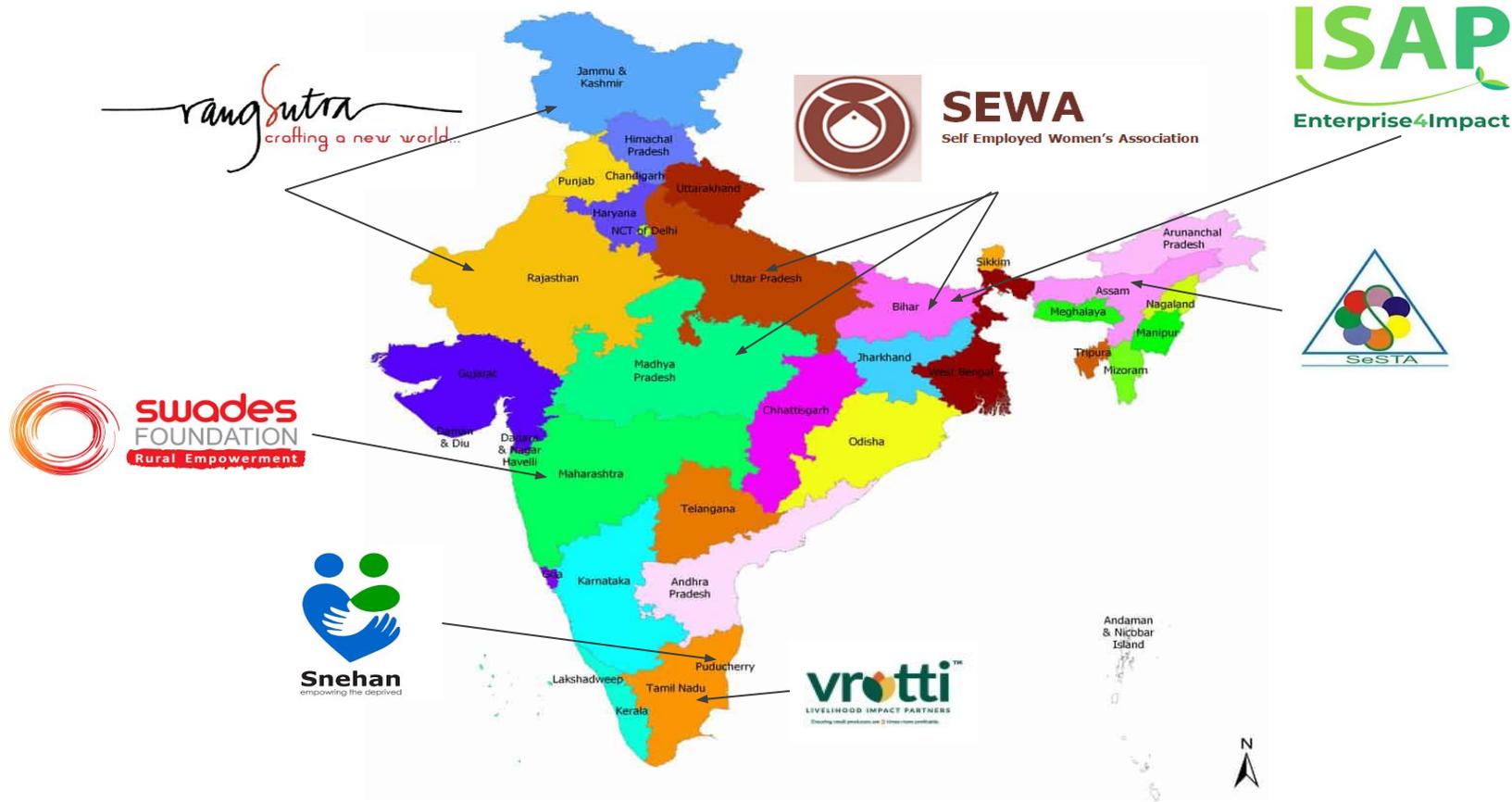
CoLive-Covid Livelihood Coalition

Workshop De-briefing session held on 20-21-22 Sept'21

CD, COLIVE and IF partners cover a tremendous width of over 80 product lines, including value added agriculture and creative crafts



24+ States/UTs across the length and breadth of India





Imagining the 2030 future... 50 mainstreamed product markets working with principles of equity and dignity and sustainability

0. Which are the first 20 Product Verticals we are committed to take to full potential

1. Incubation AND Growth AND Scale

(Today's incubates will be tomorrow's scalers)

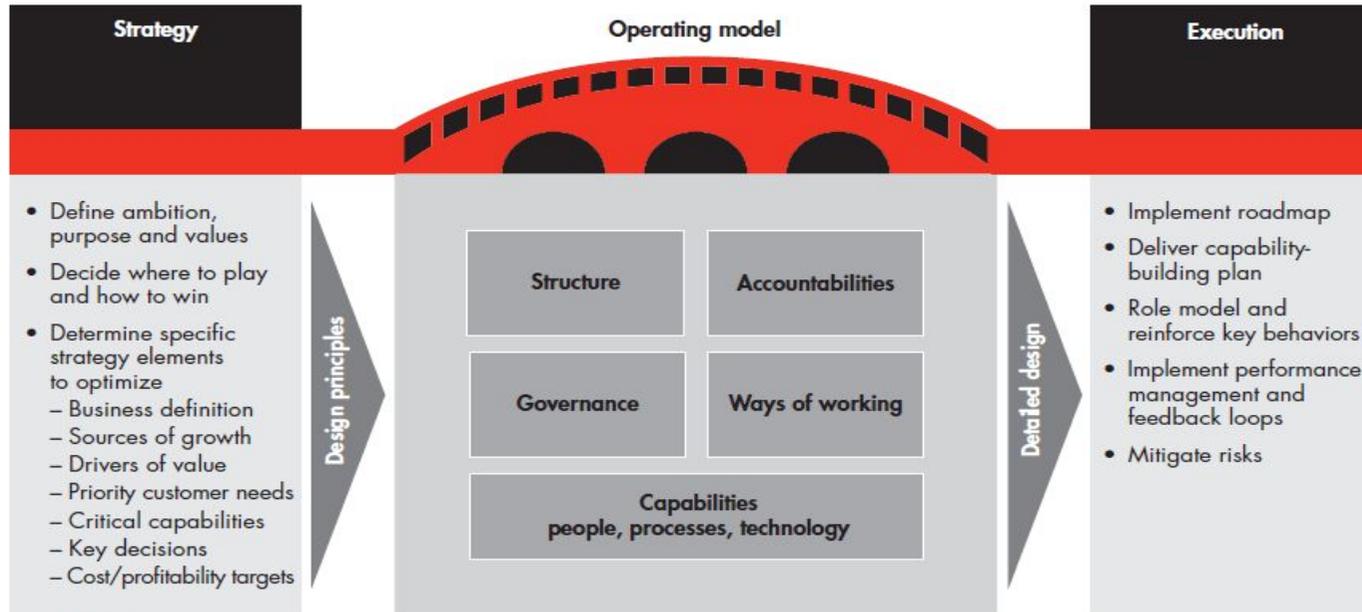
2. Informal AND formal enabling structures

3. Product Clusters being the Verticals for coordination

4. Mainstreaming product verticals will catalyse future artisans and their children to thrive with dignity

5. Horizontal capabilities (Capital, Channel, Capacity Bldg, Digital, Design) are in service of verticals

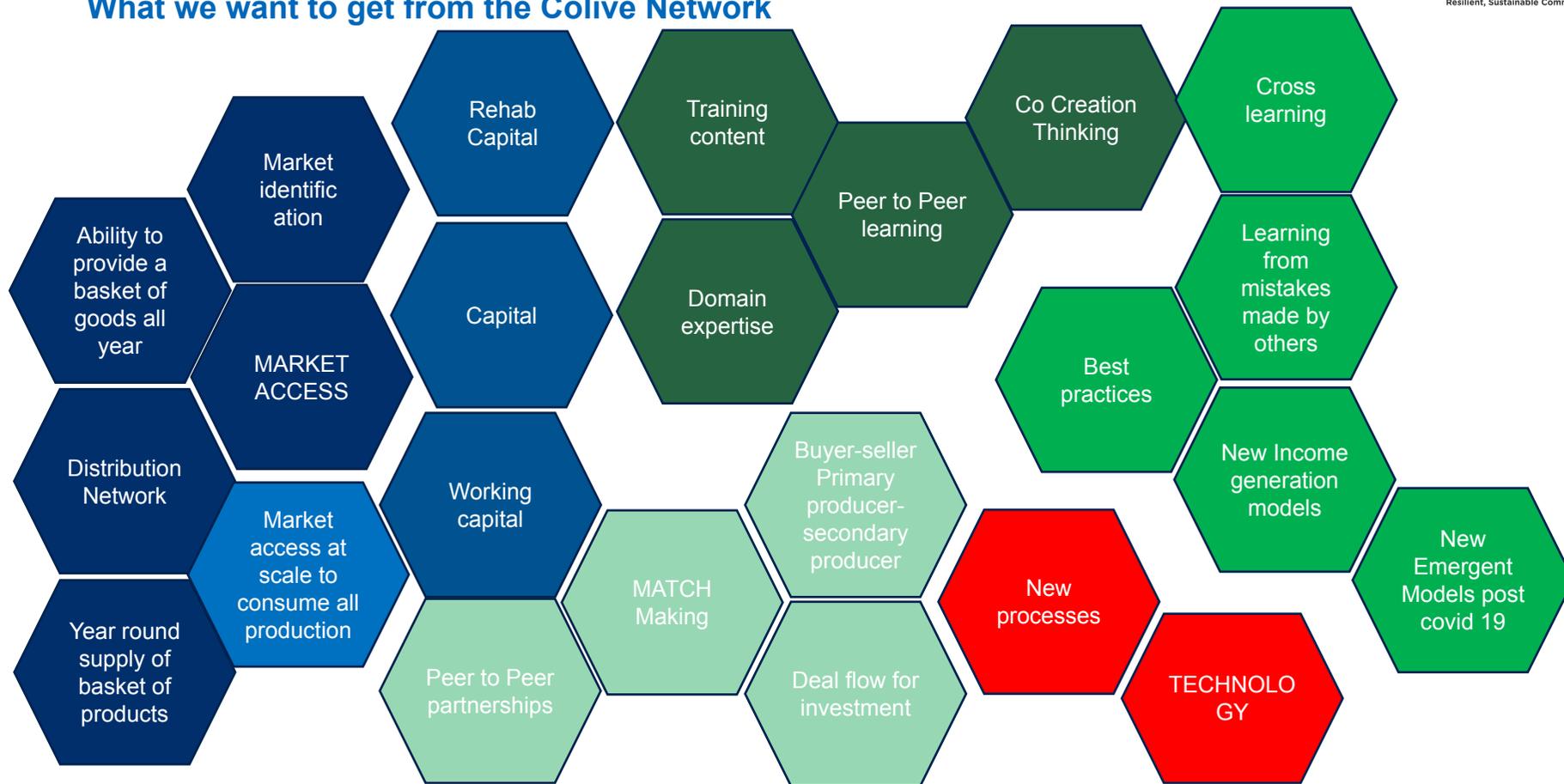
Operating model is the bridge between Strategy and Execution. This is one of the most common reason for great ideas not reaching their full potential... Conversely, enables a smooth journey towards full potential



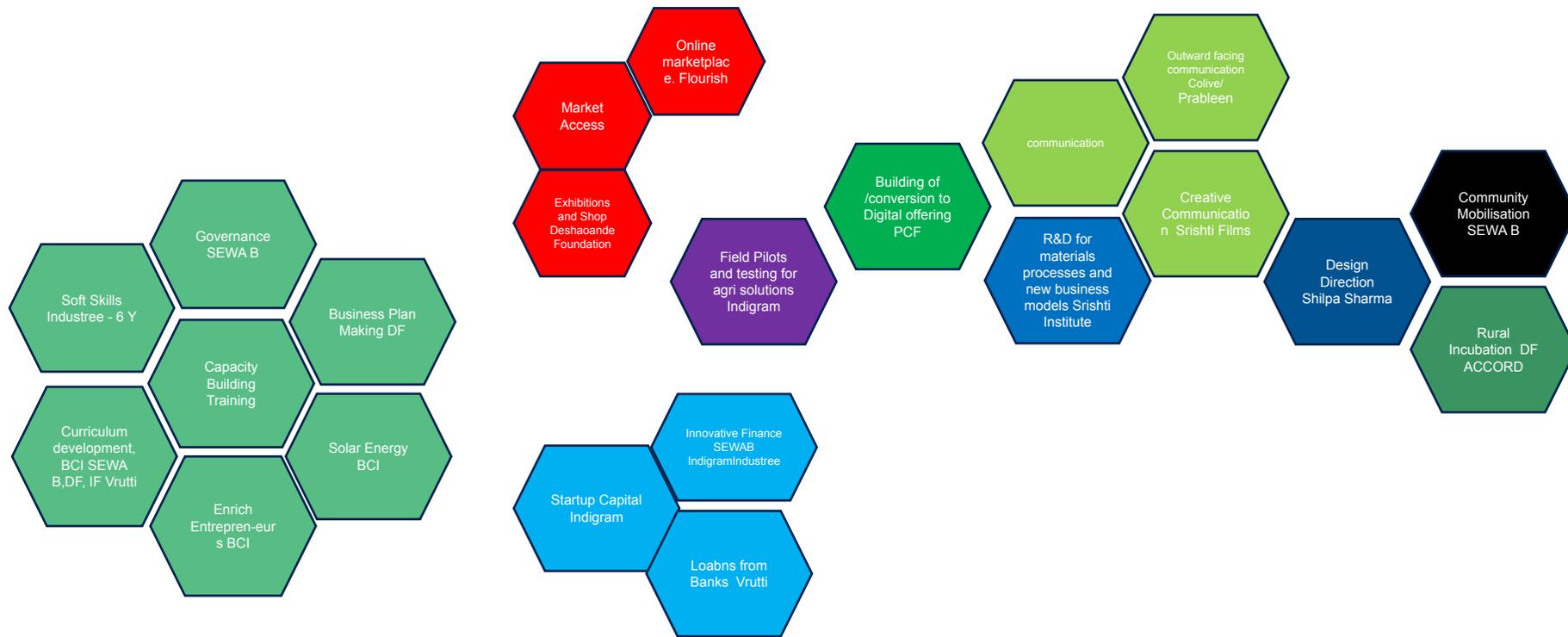
Source: Bain & Company

Operating Model themes

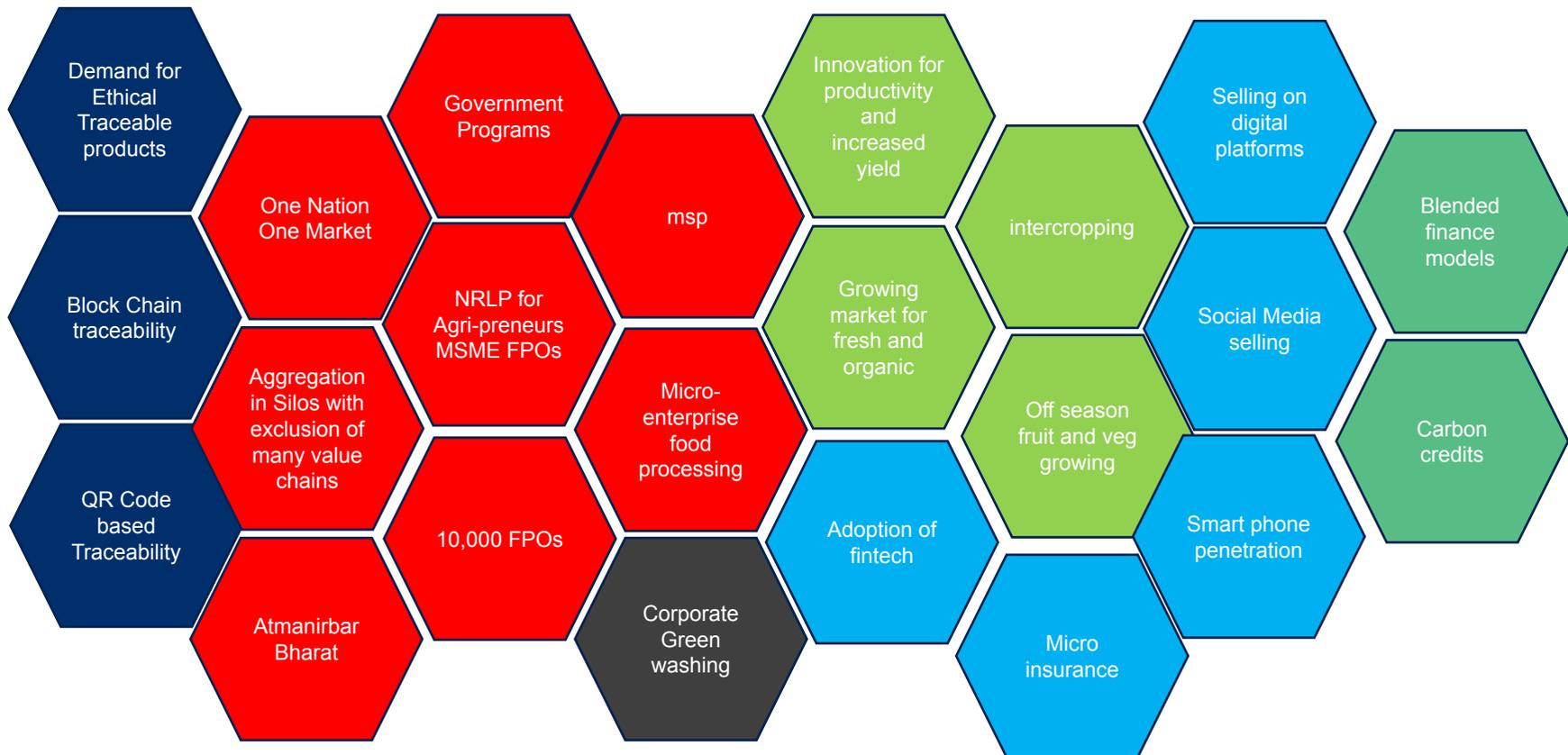
What we want to get from the Colive Network



What can we give the Colive network



What is happening in the sector



What are gaps in what's happening in the sector



5 year objective and Team

Objective: Create producer owned businesses with revenue of at least 100 crores across at least 5 value chains through value-added products in the next 5 years.

Vertical	Vertical Lead	Vertical Support
Spices	Pradyut Sharma, Sesta	Navrun, Industree
NTFP	Anil Misquith, Accord	Ananya, Industree
Goat	Balakrishnan, Vrutti	Punar, Sewa Bharat
Bamboo	Ajay Kumar, JJK	Pawroosh, Industree
Herbal Wellness and Personal Care	Ram Subramaniam, SLI	Pawroosh, Industree

Overall Project Coordinator- Jinali (jinali@colive.org.in)

Overall Project Support- Pawroosh (pawroosh@industree.org.in)

Product Verticals have articulated specific needs for the journey of Incubation Growth Scale

PRODUCT VERTICAL	SUB-SEGMENTS	Horizontal Services needed (Capital, Channel , Capacity Bldg, Supply Chain ..)	Backbone institutions needed for critical needs
<p>P1 : Spices Sesta, SEWA B, Accord, SPREAD, BCI, SLI, Vrutti</p>	<p>Organic B2B (80%) including traceability. Turmeric , Chili, Cardamom, Ginger , etc. Niche B2C (20%)</p> <p>Turmeric, ginger, chilli, cardamom, clove, cinamon</p> <p>NE, western ghats, eastern ghats</p> <p>Start with incubation, understand markets first in 1st 100 days- market scanning</p> <p>Services- production - packing materials, waste management, sorting grading, aggregation, standardisation, working cap, capex</p> <p>Branding and packaging</p> <p>Institutional arrangement for branding, packaging</p> <p>Major players have substandard products in production</p> <p>Pure, organic, high quality</p>	<p>B.SPICE business plan including customers, investments, sourcing plans, talent and governance model , founding team and governance - within next 100 days.</p> <p>Need for innovation and traceability</p> <p>Retail distributors</p> <p>Consumer education</p>	<p>Spice hub</p>

PRODUCT VERTICAL	SUB-SEGMENTS	Horizontal Services needed (Capital, Channel , Capacity Bldg, Supply Chain ..)	Backbone institutions needed for critical needs
<p>P2 : NTFP Accord, SPREAD, Industree, BCI, JJK</p>	<p>1. Edible (Honey, turmeric, tamarind, mushroom, ginger, jamun, mohwa, fruits) 2. Wellness (Sal leaf, Sal seed oil, medicinal herbs, shikakai, Mohwa, amla, aro root). 3. Homegoods (Furniture, decoratives, construction materia)</p>	<p>Working Capital to handle price fluctuations and storage, supply chain, marketing, human resources, branding, skill development, loss of traditional values and practise, governance, challenges of collectives as whole, market research, newer market access, access to forest by the government officials</p>	<p>(1) Technology: Supporting technology for value addition. (2) Production issues: Storage space shortage, increased shelf-life, livelihood between seasons. (3) Tribal Challenges: Working in isolation, possibility of exploitation, low dependency on cash economy (4) Marketing: Understanding market needs and value-addition to similar standards</p>

PRODUCT VERTICAL	SUB-SEGMENTS	Horizontal Services needed (Capital, Channel , Capacity Bldg, Supply Chain ..)	Backbone institutions needed for critical needs
<p>P3 : GOAT Vrutti, SEWA B, ISAP, SPREAD, JJK</p> <p>50,000 women approx - 10 states Business Wise- Meat - 10 crore potentia</p>	<p>Input required for the Goat and the Output Female Goats & Male Goat for breeding, Infra needed for Goat rearing Sewa - Nurturing & Breeding , Rearing, Right feed, vaccination services, Goat feed, Growing the fodder for Goat and back end supply which is procured through agri producers CMS - Meat (major), Skin for Leather Comapnies - Bags, key chains, artefacts, shoes, Milk - Household requirements like soap, bodywash, scrubs, shampoo, handwash Food products Bones for fertilisers, ayurvedic medications Hoof, horns for accessories Baby goats</p> <p>Leather & Milk is niche Meat bulk Nurturing & Breeding - Bulk</p> <p>Local good meat for local consumers - local level as branded shops</p> <p>Goat Extract - Excellent manure</p>	<p>Capacity Building on goat rearing is required for Goat Rearer Awareness that Goat can be an asset Rearer should be aware of end to end - Capacity for value chain and the products Capacity Building for Specialised Professionals Capital - Infrastructure for rearing - Goat Resource Centre Technology for processing & preservation Insurance Capacity Building Supply chain: Vets & Specialised profession - Artificial Insemination Distribution -Bringing markets to GRC level Disease Control Technology from Health point of view & monitoring Market information, Platform for selling by products A support system to help the women overcome the threats from local brokers Govt Schemes and Programmes for Goat rearsers. Traceability of reares</p>	<p>Mobilisation of communities - SEWA, ISAP Goat Trust - capacity building, curriculum & content Govt scheme linkages - SEWA Marketplaces like Cult fit, liscious, Capital - CSRs ready tot fun livelihood projects Credit linkages - Traceability - Go for Live</p>

PRODUCT VERTICAL	SUB-SEGMENTS	Horizontal Services needed (Capital, Channel , Capacity Bldg, Supply Chain ..)	Backbone institutions needed for critical needs
<p>P4 : BAMBOO IF, JJK</p>	<p>JJK - (atleast 5,000 registered bamboo artisans in 5-7 clusters in Jharkand - JJK works with 150 - 50% of whom are marginal farmers having land of less than 5k sqft) Hollow, Slender Variety of Bamboo in Jharkand, Turi Community (7-10 clumps grown in backyard patches), same families that grow the bamboo are artisans Woven products: Tokris and winnowing baskets, flower vase, photo frame, mats, storage baskets for grains, straws and other cutlery IF 1000 Hectares, 7500 farmers 90% to mass market (industrial uses- building material, pandals and shamianas, paper, bio-fuels, rayo, <i>bamboo fiber</i>, <i>aggarbati sticks</i>, bamboo board making, bamboo composites, bamboo shoots, bamboo rhizome, bamboo powder for fillers for injection moulding, bamboo board furniture and bamboo flooring, scaffolding poles) Charcoal - cosmetics 10% for value added craft and other products (baskets, tokris, moulded products like mats etc) Shimoga: Tulda & Burma varieties of Bamboo Goat cooked in the bamboo culm, mutton bamboo biryani</p>	<p>IF: Collectivisation of farmers, technical assistance and knowledge when it comes to species, varieties and their fit to different applications Infrastructure: Land, Machinery for composites / board making, Forest stewardship and licenses and compliance Nurseries for saplings Institution building (Farmers are directly a part of FPO's, separate institutional structure for the artisan endeavours) PFS players yet to be finalised Industrial market linkages across the value chain including byproducts and waste JJK: Forward and backwards market linkages (jharkraft, nabard organised fairs have helped but more support needed, village haat also exists), corporate market linkage lacking support with logistics and transportation, efficient packing for transportation, support with CFC setup, dies and other basic machinery, training on QC etc, board of director level mentor for FPOs, design interventions, basic machining, farmside treatment of bamboo</p>	<p>Reliable nursery with guaranteed plant material Stronger technical SMEs Farmers FPO's (5 fpos of 2 farmers each supplying 10% of their output to 18 200 member women PC's who are in turn supported by 3 BECs which will provide production support mentoring marketing support, Infrastructure (CFC's, machining capability etc) Forest Stewardship Council certifications for compliance for plantation and commons land</p>

PRODUCT VERTICAL	SUB-SEGMENTS	Horizontal Services needed (Capital, Channel , Capacity Bldg, Supply Chain ..)	Backbone institutions needed for critical needs
<p>P5: Wellness SLI, Srishti Manipal, BCI, SEWA B</p>	<p>BCI-Super 5- wheat, sesame seeds, peanuts, jaggery, bengal gram- school kids Trying to make it completely organic Iron deficiency- tests before after Prototype stage Honey wax- moisturizer, balms, prototype SLI- wellness capacity building (wellness consultants) Herbal cosmetics 30 enterprises across Tamil Nadu Nutrition- beverage- barley, wheat, ragi, rice, millets+ fry, grind, mix powder, 2-3 months shelf life Jaggery+ Millets based food supplement - iron deficiency- Spirulina protein supplement- cow urine as fertilizer Lemon juice+ spirulina or capsules Needs humidity and a tank to grow Cleans water while growing in unclean water Increases O2 for Covid Myanmar, Bangladesh, Sri Lanka are other producers Grows in not so clean water- it cleans water MSME, FSSAI certification Cosmetics 60 different types of herbs-Link skin to herbs Facecream, soap, powder, hair oil, shampoo, face wash,</p>	<p>BCI: market- rural markets but no sales, trying to introduce in urban but no sales- so trying to move into biscuits Do not have capacity to do R&D Issue with marketing is lack of professionals Unreliable RM sourcing</p> <p>SLI: Getting into aggregation in a market place Awareness on spirulina absent in indian consumer Sri Lanka removed spirulina smell and kept properties China has made electricity out of spirulina, India not close Seaweed- they havent piloted- tech available</p> <p>Nutrition beverage, supplement- no one is scaling- lack of standardisation, each has a different brand, change of standard from lot to lot, testing inadequate for nutritional benefit, GST is an issue for cost of filing RM sourcing</p> <p>Cosmetics- shelf life very low, self use and not for sales, lack of adequate packaging,</p> <p>lack of community ownership for both cosmetics and nutrition</p>	

Next 100 days : Action Points

- Priority product and geography focus areas , with anchor orchestrator entities.
 - Define the formal roles and institutional support to enable aspirations
 - Network “gives and gets” to enable each network member to feel suitable value addition from the collaboration
 - Clear definition of Industree, CD and CO-LIVE’s roles in journey
-