Market Intelligence

Market Intelligence brings together strategic information on future crops, market segments, and trait priorities aligned with the needs and preferences of farmers, agri-business, and consumers. It forms part of CGIAR's new Research Portfolio, delivering science and innovation to transform food, land, and water systems in a climate crisis.
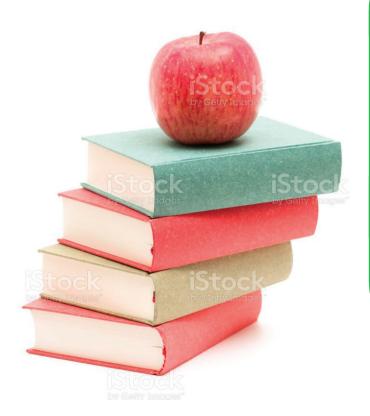
Objective

The CGIAR Initiative on Market Intelligence aims to maximize CGIAR and partners' returns on investment in breeding, seed systems, and other Initiatives by creating a collaboration hub to develop institutional standards for inclusive and impact-driven market segmentation and product profiling, and developing a global platform for sharing market intelligence and investment prioritization. Reliable and timely market intelligence enables stronger demand orientation and strengthens co-ownership and co-implementation by CGIAR and partners.

The Challenge

Decisions on how to invest scarce resources in CGIAR genetic innovation systems have been predominantly supply-driven, and therefore potentially out of sync with the demands of smallholders, consumers, and agro-industry. The turnover of improved crop varieties developed by CGIAR and its partners has been slow. Farmers may not be well informed about varietal options available to them, or reluctant to experiment with new varieties. Small-scale seed businesses lack incentives to actively promote new varieties given weak demand. Little is known about the drivers of varietal replacement and product substitution, and the role of downstream market actors such as traders, processors, and consumers in this process.

There is clear recognition of the need for demand- and data-driven processes to guide genetic innovation systems, but efforts to advance this remain incomplete and fragmented within CGIAR. Current target product profile design is strongly biased toward agronomic and stress tolerance traits, with little systematic identification and integration of traits that contribute to wider social impact.

AT A GLANCE

Primary CGIAR impact area: Gender Equality, Youth & Social Inclusion

CGIAR science group: Genetic Innovation

Focus countries: Global

Works toward sustainable development goals: No poverty; Zero Hunger; Good Health and well-being; Gender Equality; Responsible consumption and production; and Climate action

Activities

Initiative activities fall into five main areas:

Market intelligence

This part of the project focuses on collecting data to map global and regional challenges across CGIAR's five Impact Areas and translating them into priorities for genetic innovation by identifying current and future drivers of demand for crops, seed and traits, as well as variation of demand by gender, age, and social group. Considerations include: farmers (production systems, priorities, risks); agro-industry (production requirements, supplier engagement, by-products); and consumers (tastes, nutrition, costs, convenience).

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" This area of activity is generating intelligence on what drives farmers, consumers, and private-sector decisions to adopt new varieties

Target product profile design

CGIAR researchers are working with regional stakeholder teams – including breeders, social scientists, food scientists, nutritionists, gender specialists, agronomists, and climate specialists – and using the market intelligence generated by the Initiative to design gender-intentional target product profiles (TPPs) for each market segment. These TPPs capture key traits and characteristics of new varieties needed by farmers, processors, and consumers, with a special focus on gender equality and social inclusion.

Behavioral intelligence

This area of activity is generating intelligence on what drives farmers, consumers, and private-sector decisions to adopt new varieties, and supports other Initiatives in identifying cost-effective and inclusive strategies for accelerating varietal uptake and turnover. This includes actionable evidence on how to: (i) influence consumers' and farmers' decisions regarding product substitution and variety replacement; and (ii) encourage the private sector to invest in marketing new varieties and products that contribute to gender equality, healthier diets, and social inclusion.

Pipeline investment cases

Cases for investment are being developed for breeding pipelines guided by target product profiles and tailored to specific market segments. Metrics are being developed to analyze the return on investment of CGIAR breeding pipelines, with the aim of developing recommendations for the prioritization of, and optimal level of, investment in each pipeline.

Institutional scaling and monitoring, evaluation, learning and impact assessment (MELIA)

A collaboration hub bringing together all CGIAR Genetic Innovation Initiatives and partners is working to deliver scaling mechanisms for the adoption of institutional standards and processes in market segmentation and gender-intentional target product profile design, and to support rigorous evaluation of impact across all five CGIAR Impact Areas.

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Outcomes

Proposed three-year outcomes include:

- At least three transdisciplinary teams across CGIAR and partners in prioritized regions are empowered in co-implementation of market and behavioral intelligence, and co-design of product profiles.
- At least 10 CGIAR partners in prioritized regions adopt institutional standards and processes for market segmentation and product profile design, sharing of market and behavioral intelligence, and monitoring of outcomes.
- At least five seed suppliers, food companies, and NGOs in prioritized regions use market and behavioral intelligence from the Initiative in strategic decision-making.
- At least three research leaders and investors make investment decisions using pipeline investment cases and the Initiative's Investor Dashboard. Increased availability of information and transparent, holistic analyses of high-impact opportunities attract increased investments in under-invested and new-opportunity market segments.

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INITIATIVE ON Market Intelligence

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