



WEST AFRICA TRADE HUB

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WEST AFRICA TRADE HUB 2

FINAL REPORT

**WEST AFRICA GLOBAL COMPETITIVENESS HUB
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ACRONYMS & ABBREVIATIONS

AATC	African American Trading Company
ACA	African Cashew Alliance
ACET	Associated Commodities Exporters and Traders
AGCI	African Global Competitiveness Initiative
AGOA	African Growth and Opportunity Act
AIMS	African Investors Management Services
ALCO	Abidjan Lagos Corridor Organization
ARC	AGOA Resource Center
ASEPEX	<i>Agence Sénégalaise de Promotion des Exportations</i>
BOI	Bank of Industry, Nigeria
CAADP	Comprehensive Africa Agriculture Development Program
CBC	<i>Conseil Burkinabè des Chargeurs</i>
COCOBOD	Ghana Cocoa Board
COMESA	Common Market for Eastern and Southern Africa
COP	Chief of Party
CSO	Civil Society Organization
CY	calendar year
CET	Common External Tariff
DCA	Development Credit Authority
DfID	Department for International Development (U.K.)
DSI	<i>Département des Services Informatique</i> (Information Services Department), UEMOA
ECOWAS	Economic Community of West African States
EDIF	Export Development and Investment Fund
EGAT	Economic Growth, Agriculture & Trade
ERC	export-ready company
EPA	Economic Partnership Agreement
ESE	European Seafood Exposition
ETLS	ECOWAS Trade Liberalization Scheme
FOB	free on board
FTA	free trade area
FY	fiscal year
FP	focal point
GAMA	Ghana Apparel Manufacturers' Association
GDA	Global Development Alliance
GSMA	Global System for Mobile Communications Association
GS2010	Global Shea 2010
GSP	General System of Preferences
GTZ	<i>Gesellschaft für Technische Zusammenarbeit</i> (German Development Corporation)
HACCP	Hazard Analysis and Critical Control Point
HTS	Harmonized Tariff Schedule
ICT	Information and Communication Technology
IESC	International Executive Service Corps
IFC	International Finance Corporation

ITU	International Telecommunications Union
IRTG	Improved Road Transport Governance
MCC	Millennium Challenge Corporation
MOU	Memorandum of Understanding
NEPAD	New Partnership for Africa's Development
NEPC	Nigerian Export Promotion Council
NGOs	non-governmental organizations
OPA	<i>Observatoire des Pratiques Anormales</i> (French name for IRTG initiative)
OPIC	Overseas Private Investment Corporation
PCV	Peace Corps Volunteer
PEFIB	Private ECOWAS Financial Improvements Board
PPP	public-private partnership
PSI	Presidential Special Initiative
ROPPA	<i>Réseau des organisations paysannes et des producteurs agricoles de l'Afrique de L'Ouest</i>
RRTC	reduced road transport costs
RTIS	regional trade information system
SAGIC	Senegal Accelerated Growth and Increased Competitiveness
SIAO	<i>Salon International de l'Artisanal de Ouagadougou</i>
SIDIM	<i>Salon International du Design d'Intérieur de Montréal</i>
SME	small and medium enterprise
SOW	scope of work
SPS	sanitary and phyto-sanitary
SSATP	Sub-Saharan Africa Transport Program
TIC	trade and investment capacity
TIFA	Trade and Investment Framework Agreement
UBA	United Bank for Africa Group
UEMOA	<i>Union Economique et Monétaire Ouest Africaine</i> (West African Economic & Monetary Union—WAEMU in English)
USAID	United States Agency for International Development
USG	United States Government
USTR	United States Trade Representative
WAEMU	<i>See UEMOA</i>
WACIP	West Africa Cotton Improvement Program
WAMI	West Africa Monetary Institute
WAMZ	West Africa Monetary Zone
WAML	West Africa Market Links, Ghana
WASSDA	West Africa Sustainable Seafood Development Alliance
WTO	World Trade Organization

EXECUTIVE SUMMARY

Since 2007, the West African economy has steadily expanded, growing at an average rate of 5%¹. But the growth - largely driven by increases in prices of raw commodities - has varied from country to country. When hunger loomed in 2008-09, above-average harvests in landlocked countries, where hunger is most chronic, and regional economic growth averted an emergency. The role of economic growth in improving food security is most visible in the region's fastest growing economy – such as Ghana where hunger has been cut in half as incomes have grown. Across West Africa, more people have entered the middle class, according to the African Development Bank.

Economic development alleviates poverty, and increased trade from a more competitive West African economy translates to improved food security. The impacts of export-led economic growth led the U.S. Government in 2001 to enact the African Growth and Opportunity Act, eliminating tariffs to incentivize buyers and investors to source more than 6,400 products from 39 eligible African countries. The Trade Hub leveraged AGOA, putting capacity building, technical assistance and expert consulting—complemented by monitoring and evaluation and dissemination of international best practices—in the service of increasing exports addressing the broader constraints to trade.

A Trade Hub multiplier effect study conducted in 2010 examined the effectiveness of export-led economic growth in alleviating poverty. The study showed that increasing sales of raw cashew nuts, shea nuts, handwoven baskets and wood carvings at the village level led to significantly greater household income and created more jobs. Importantly, the impacts were greater when value addition took place regionally: in cashew, for example, sales of cashew nuts for local processing almost doubled the increase in household income compared to sales of cashew for immediate export.

A closer look at business sectors supported by the USAID West Africa Trade Hub tells a compelling development story. During the four-year life of project, the financial crisis froze exports of apparel and handcrafts while stalling activity in shea and specialty foods. To improve competitiveness in this context, the Trade Hub leveraged the development entrepreneurialism of value chain experts, and collaborated with public and private stakeholders within industries. Despite fierce competition in world markets, Trade Hub-assisted companies reported robust and sustained increases in exports. During the recessions of major economies, international buyers put a halt to sourcing from challenging SMEs from Africa. With Trade Hub assistance and with increased consumer demand for sustainable sourcing with a story to tell, exporters in West Africa developed new products that enticed new buyers to come and old buyers to return.

From FY2008 through 2011, the USAID West Africa Trade Hub surpassed targets on project indicators and achieved milestones set in annual work plans, directly related to the objectives set under the African Global Competitiveness Initiative:

- USD178 million in exports were facilitated from six nontraditional sectors, 188% above the target
- USD53.7 million in investments were facilitated in the sectors, 284% above the target
- USD8.8 million in loans were facilitated in the sectors, 120% above the target
- 3,244 private sector enterprises (1027 women-owned) gained skill and knowledge through trade shows, conferences and workshops involving 8,933 people (2,601 women)

¹ Source: UNECA Report on Economic and Social Conditions in West Africa and Prospects for 2010..

- 2 new major industry alliances were launched with broad stakeholder involvement
- Since 2007, bribes paid by drivers at numerous road checkpoints on trade corridors have decreased by 34% and delays decreased by 15%
- 16 AGOA Resource Centers now provide business services on exporting and disseminate international best practices to governments on export strategy are housed within West African host institutions
- 6 international brands were refined and promoted with stakeholders to raise visibility of nontraditional export sectors
- Key obstacles in the business and regulatory environment were identified and practical solutions recommended; a private sector-led Borderless Alliance was launched to address constraints to trade
- 36 companies improved their use of information and communications technology
- 2,882 companies made 9,909 direct international buyers linkages at 105 international trade events

In order to successfully compete, firms must have the right products at competitive world prices, and must know how to bring those products to market. Trade Hub technical assistance, capacity building and expert consulting improved targeted firms' productivity and efficiency. Constrained by an unfavorable policy environment and faulty infrastructure, the Trade Hub improved companies' business management acumen required to compete internationally. Enterprises grew by adopting more competitive business practices, improving their understanding of market trends, increasing innovation, improving design, adopting new or improved technologies, and developing stronger business links in value chains.

The Trade Hub connected stakeholders across value chains by building alliances, extending the impact of company-level technical assistance and capacity building (increasing company exports) and fostering and leveraging private sector influence on broader constraints to trade (addressing problems that no single company can resolve on its own). The African Cashew Alliance's technical assistance led to a doubling of cashew processing capacity in West Africa in five years, which has created thousands of jobs; at the same time, the ACA has focused policymakers on collaborating to address limited access to finance via an innovative cluster financing scheme. The Trade Hub helped increase the visibility of the ACA, the Global Shea Alliance, and in the final months of the contract the Borderless Alliance, through communications, value chain wide market linkages, stakeholder engagement and broad dissemination of international best practices.

Alliance building was complemented by and contributed to broad engagement of policymakers and exporting companies via a network of 16 AGOA Resource Centers across West Africa. The centers leveraged exporters' experiences to help governments develop national export strategies and maximize utilization and impact of AGOA preferences. The Centers were platforms for strategic discussions and activities, as well as practical solutions. The Trade Hub launched eight centers during the life of the project, including four "enhanced" centers to facilitate the elaboration of national export strategies.

In transport and trade facilitation, significant declines in bribery and delays at checkpoints along interstate corridors were the direct result of the Trade Hub's close collaboration with UEMOA on road governance. The launch of the Borderless advocacy campaign and the regional Borderless Alliance have led to sustained efforts to increase trade across West Africa, with more than seven policies implemented in favor of freer trade. An analysis of gaps in the implementation of the ECOWAS Trade Liberalization Scheme and a study of impacts of a Common External Tariff on state revenues put data-supported analysis and

recommendations in the hands of decision makers – leading to significant progress on establishing a free trade area in West Africa.

The Trade Hub's innovations in access to finance led to almost USD10 million in loans and USD31 million in investments to exporting companies. Initially, efforts focused on analyzing the legal and institutional barriers to increasing competitiveness of financing regionally and helping commercial banks understand opportunities for profitable lending in Trade Hub-targeted sectors, results were discouraging. A performance-based approach involving subcontractors from across the region delivered accelerated results, including the innovative Nigeria Cashew Cluster Finance Scheme.

The Trade Hub carefully reviewed environmental impacts of increased trade in the hand crafted wood and fish and seafood sectors and implemented screening practices and other activities with sustainability expert partners to mitigate impacts.

In apparel, leveraging connections within Africa with increasing wage pressures and logistical constraints exporting from China, West Africa attracted buyers and investors, resulting in a few lead companies re-starting business and investment.

The Trade Hub increased the business knowledge and skills of almost 1,000 women-owned companies, roughly a third of all companies assisted. In cashew, which is labor intensive, the majority of jobs created are filled by women; in shea, women exclusively collect shea nuts in rural communities and produce artisanal shea butter for export. Similarly, in apparel, roughly 90% of jobs go to young women; indeed, the apparel industry – the first truly global industry – has long been linked to advances in women's empowerment.

The Trade Hub has demonstrated that trade is, indeed, aid transforming lives directly and driving sustainable improvements. "Everyone I know wants a job," said one young Ghanaian apparel worker who now supervises workers at a factory that was opened with Trade Hub assistance. "I'm saving my salary and I'll be ready to start my own business. I know plenty of others who are going to pay for a new house and education – for themselves and their children. That gives me hope for the future."

BACKGROUND

USAID's West Africa Trade Hub was initiated in 2003 under the President's African Global Competitiveness Initiative (AGCI). The Trade Hub grew out of the African Growth and Opportunity Act specifically where policy makers realized that eliminating tariffs on goods from eligible African countries was not sufficient to make West Africa competitive. The Trade Hub's overall goal was to transform the West African economy by addressing the primary constraints to competitiveness – high transport and telecommunications costs, limited access to finance and consistent implementation of regional trade policies. These efforts are, in turn, driven by direct assistance to West African exporters to demonstrate the potential of companies across the region in six targeted sectors. The success of those companies demonstrates the potential of each sector to create jobs and increase incomes.

The Trade Hub used a demand-driven approach to facilitating exports and strengthening value chains, working from the market backward to identify how West African firms could improve their products and efficiencies to meet market requirements. By exposing firms to buyers and investors in global markets, the Trade Hub facilitated a better understanding among West African firms of market requirements, and then provided technical assistance to help those firms meet those requirements. Where constraints to competitiveness were not unique to one particular firm, the Trade Hub facilitated the formation and strengthening of industry clusters, alliances or trade associations that addressed common constraints. In addition to enabling collaboration between industry leaders on initiatives such as joint marketing campaigns, these alliances and associations provided platforms for engagement with policymakers on issues of concern to the private sector. They also provided a platform for collaboration with other industries of critical importance to their success, including the financial services, telecommunications and transport logistics industries. Industry clusters and alliances were promoted and strengthened through credible and visible international brands developed with stakeholders across an industry.

This report summarizes the work achieved over the life of the Trade Hub project, which worked in five components: Trade and Investment Capacity (Business), Transportation Infrastructure, Financial Services, Business Environment and Telecommunications Infrastructure. While the Business component involved working directly with companies in specific value chains, the other components cut across the value chains.

Dissemination of information was a key aspect of the Trade Hub project. The Trade Hub produced marketing and branding materials, maintained nine websites, three Facebook pages, three Twitter feeds and a YouTube channel; published a monthly newsletter with nearly 20,000 subscribers; and provided assistance to client companies as well as ensuring constant translation of Trade Hub generated reports and materials into French and Portuguese.² This library can be found on the website www.watradehub.com.

² Our websites are www.watradehub.com, www.agoatoolkit.com, www.africa-now.org, www.africancashewalliance.org, www.financetrade.org, www.globalshea.org, www.tastaffricanow.com, www.wassda.org and www.borderlesswa.com.

INDICATORS

Table 1: Trade Hub Performance Indicators

Indicator	Unit of measure	FY2011 (Oct 2010 – Sep 2011)			Life of Project (Oct 2007 – Sep 2011)		
		Target	Achieved	% Achieved	Target	Achieved	% Achieved
Trade and Investment Capacity							
Number of firms receiving capacity-building assistance to export from the Trade Hub ³	Number of firms	200	1,612	806%	825	3,244	393%
	Women owned firms	100	611	611%	200	1,027	514%
Number of Trade Hub supported capacity building events related to improving trade and attracting investments	Number of events	15	40	267%	72	107	149%
Number of participants in Trade Hub supported capacity building events related to improving trade or attracting investment	Number of people	1,000	2,603	260%	3,400	8,933	263%
	Number of women trained	500	606	121%	1,000	2,601	260%
Value of investment facilitated by the Trade Hub (USD) ⁴	Value of investments	4,000,000	31,740,180	794%	14,000,000	53,776,057	384%
Value of exports facilitated by the Trade Hub (USD)	Total value of exports ⁵	15,000,000	118,477,044	790%	USD62,000,000	178,491,502	288%
Number of jobs created attributable to Trade Hub support	Number of jobs	1,000	6,727	673%	4,000	9,957	249%

³ Companies are counted for each reporting period during which they receive technical assistance. Reported figures are cumulative for all quarters since October 2007

⁴ Data for indicators on the value of investment facilitated, new exports facilitated, and numbers of jobs created are collected from the export-ready companies the Trade Hub works with. The Trade Hub sends out questionnaires requesting information on indicators two weeks prior to the end of each quarter to all companies receiving technical assistance to collect data on investment, exports, and jobs, and reports on the total of their responses. The Business Technical Coordinators and the Monitoring and Evaluation Specialist save and file all information from individual companies and tally the information for reporting purposes. Further, the Trade Hub periodically validates the authenticity of data received from the responding companies by inspecting bills of lading for exports and conducting site visits to inspect new machinery purchased or new construction. Value of exports and investments are very conservative figures. They include products actually shipped to international buyers not pending sales and investments implemented not planned. All values are in U.S. Dollars.

⁵This value equals the total value of exports worldwide.

Table 1: Trade Hub Performance Indicators, continued

Indicator	Unit of measure	FY2011 (Oct 2010 – Sep 2011)			Life of Project (Oct 2007 – Sep 2011)		
		Target	Achieved	% Achieved	Target	Achieved	% Achieved
Transportation Infrastructure							
Has the government adopted improved transportation-related policies or plans this year as a result of USG assistance ⁶	Yes/No	Yes	Yes	N/A	Yes	Yes	N/A
Number of people receiving Trade Hub supported training in transportation-related policy and regulatory practices	Number of people trained	2,500	5,448	218%	8,500	19,849	234%
	Number of women trained	25	357	1428%	90	719	799%
Number of improved national transportation and logistics policies adopted this year as a result of Trade Hub assistance	Policy document	3	7	233%	7	13	186%
Percentage annual reduction in the number of barriers along priority West African trucking corridors ⁷	Number of barriers/checkpoint	12%	29%	242%	27%	14%	52%
Percentage annual reduction in average transportation & logistics costs (direct & indirect) for key exports using priority West African trucking corridors ⁸	Percent of cost	6%	2%	27%	16%	2%	10%
Business Environment							
Number of trade and investment enabling environment diagnostics conducted ⁹	Number of diagnostics conducted	0	2	N/A	17	8	49%
Number of consultative processes with private sector as a result of Trade Hub assistance ¹⁰	Number of consultative processes	20	9	45%	63	33	52%
Number of ECOWAS capacity building activities ¹¹	Number of activities	3	20	667%	4	22	550%
Finalization of the Common External Tariff	CET	CET completed	No	0%	CET Completed	No	0%

⁶ Ghana Customs committed to establish an express lane for ETLs compliant goods in transit and non-dutiable goods.

⁷ This is the average number of barriers across all corridors, weighted by the length of the corridor. Reduction for life-of-project is based on the three original corridors: Tema-Ouagadougou, Lome-Ouagadougou and Ouagadougou-Bamako. FY2011 figures are based on current 7 corridors.

⁸ This is the average reduction in the cost of transporting a 20-foot container from 2008 to 2010. The Trade Hub does not have the capacity to collect the data for yearly reductions in costs.

⁹ This is defined as studies, reports or analyses that identify or diagnose constraints for trade. Figures in this report vary from previous reports on account of this redefinition.

¹⁰ Consultative processes are Hub facilitate private-public dialogues or Hub consultations with the private sector. These processes are documented by questionnaires and other information provided by the Trade Hub's Business Environment Coordinator. Figures in this report vary from previous reports on account of this redefinition.

¹¹ This is defined as an activity supporting ECOWAS and Member States to build capacity on ETLs and Free Trade Area and Customs Union implementation. Figures in this report vary from previous reports on account of this redefinition.

Table 1: Trade Hub Performance Indicators, continued

Indicator	Unit of measure	FY2011 (Oct 2010 – Sep 2011)			Life of Project (Oct 2007 – Sep 2011)		
		Target	Achieved	% Achieved	Target	Achieved	% Achieved
Financial Services							
a. Mobile Banking							
Number of legal barriers and gaps identified and options to overcome them	Number of gaps	2	0	0%	10	7	70%
Number of alliances established between the US Government and private service providers	Number of signed MOUs	1	0	50%	4	2	50%
Number of countries that offer cross-border, cross-currency funds transfer services	Number of countries	1	0	0%	2	0	0%
b. Access to Finance							
Number of financial sector professionals trained on international standards this period with USG assistance	Number of participants	30	55	183%	310	194	63%
	Female participants	15	9	60%	150	40	27%
Number of alliances established with banks	Number of signed MOUs	2	1	50%	6	2	33%
Number of new banking products and services established by allied banks ¹²	Number of products	2	1	50%	6	8	133%
Number of loans made by allied banks to client ERCs ¹³	Number of loans	35	11	31%	105	28	27%
Value of new loans made to ERCs (USD)	Value of loans	3,000,000	4,758,513	159%	4,000,000	8,798,905	220%
Telecommunications Infrastructure							
Number of companies utilizing ICT value-added services	Company	25	19	76%	25	36	144%
Number of new ICT value added products and services being used by businesses	Product or service	10	8	80%	40	20	50%
Number of people trained in ICT value-added services ¹⁴	Number of people	100	203	203%	150	425	283%
	Number of Women	N/A	75	N/A	N/A	172	N/A

¹² Allied banks are banks that work frequently with the Trade Hub, and who have implemented financial products and services that enhance access to finance for export-ready companies.

¹³ Defined as loan funds disbursed to export-ready companies.

¹⁴ Providing 4 hours (half-day) or more of instruction to convey knowledge or impart training related to Trade Hub goals and objectives to relevant stakeholders.

Table 2: Country Summary Table (October 2007 – September 2011)

Country	# Trade Hub person trips	Value of exports facilitated USD	Value of investment facilitated USD	# Jobs added (# women)	Value of Inter-regional trade USD	# Companies received technical assistance (# women-owned)	TIC training (# women)	Transport Infrastructure: training (# women)
Benin	27	5,853,168	128,450	155 (128)	24,372	144 (40)	446 (93)	456 (25)
Burkina Faso	198	25,949,239	169,501	1,454 (1,261)	2,910,120	142 (54)	643 (239)	4,309 (71)
Cameroon	25	1,755,584	1,033,500	172 (148)	4,200	150 (51)	230 (52)	3 (2)
Cape Verde	4	0	0	0	0	17 (1)	94 (21)	0
Chad	0	0	0	0	0	2 (0)	3 (1)	0
Côte d'Ivoire	57	9,257,913	15,137,390	1,056	0	41 (13)	252 (88)	622 (23)
Gabon	4	0	0	0	0	47 (10)	126 (32)	0
Gambia	26	0	6,500	2 (2)	15,514	74 (31)	865 (315)	4 (2)
Ghana	145	90,907,553	6,183,923	1,835 (960)	1,074,270	918 (321)	1762 (570)	2861 (171)
Guinea	2	0	0	0	0	9 (3)	47 (21)	0
Guinea-Bissau	17	3,936,900	11,750	18 (0)	1,560	62 (17)	128 (14)	0
Liberia	11		1,860	0	0	58 (30)	325 (68)	0
Mali	117	2,957,172	39,156	26 (8)	9,597	488 (189)	768 (230)	4,262 (84)
Mauritania	6	0	0	0	0	26 (5)	146 (23)	0
Niger	8	39,698	0	0	0	7 (0)	236	92 (13)
Nigeria	82	9,130,659	30,314,748	4,851 (4,322)	0	640 (149)	1,507 (299)	147 (24)
São Tomé e Príncipe	0	0	0	0	0	0	0	0
Senegal	101	11,964,563	667,679	329 (268)	22,790	364 (107)	825 (423)	2,558 (198)
Sierra Leone	3	11,226,853	0	0	0	9 (3)	115 (26)	0
Togo	154	735,000	71,600	60 (40)	11,000	46 (3)	415 (86)	4535 (106)
Total	987	178,491,502	53,776,057	9,957 (7,137)	4,073,431	3,244 (1,027)	8,933 (2,601)	19,849 (719)



1. TRADE & INVESTMENT CAPACITY (BUSINESS)

From 2007 to 2011, the Trade Hub's Trade & Investment Capacity (Business) component provided 3,244 companies with technical assistance (1,027 women-owned) and provided capacity building training to 8,933 people (2,601 women). Exports were USD 178,491,502 from Trade Hub-assisted firms, and the Trade Hub facilitated USD 4,073,431 in regional trade. The Trade Hub also facilitated USD 53,776,057 in investments, and companies receiving Trade Hub technical support and assistance created 9,957 (7,137 women) new jobs.

The Trade Hub's business report is divided into AGOA and Market Linkages cross-cutting services assisting all sectors, and industry-specific training, technical assistance to firms, activities and results in each of the value chains. Gantt charts elaborate specific business strategy and objectives and show progress to date.

The multiplier effects of increased trade

The pressing challenge in development assistance programs is to make sure that donor efforts give rise to meaningful and sustainable improvements in the livelihoods of the poor. The African Growth and Opportunity Act (AGOA) seeks to enhance global market access for African products – especially to the United States. Many development experts consider enhanced trade to be the *sine qua non* of job and income growth on the African continent.

In 2010, the Trade Hub sought to measure the economic impacts of its activities in four of its targeted export sectors by determining the “multiplier effects” of increased sales of these sectors. The study revealed that income multipliers in West Africa lie between 1.58 and 2.43. This means that USD1,000 of sales of a basket maker, a wood carver, a cashew farmer or a shea farmer (important household income in its own right) produces additional household income in the local economy of between USD580 and USD1,430, depending on the product and the conditions in the local economy. Despite the empirical difficulties of measuring job creation in agricultural households, the study determined that for USD1,000 of sales, between 100 and 160 jobs are supported in the local economies where those sales occur.

Trade improves livelihoods. The Trade Hub's multiplier effect study illustrates the links: increased sales of handcrafts, for example, driven by trade on international markets, are an economic lifeline for people across West Africa. Jobs are created and incomes rise when sales increase. While the Trade Hub's Business component activities most directly lead to increased sales from these sectors, in fact all of the Trade Hub's activities impact sales of these goods at the village level. Indeed, the study determined that reducing transport costs for shea nuts coming from Mali could bring a 7-8% increase in shea prices to women producers in Mali. Overall, the study provides a compelling argument for the Trade Hub's primary objective to increase trade: increased trade alleviates poverty.

AGOA Services

Introduction

The African Growth and Opportunity Act (AGOA) provides duty-free and quota-free advantages to eligible sub-Saharan African countries on over 6,400 products. The USAID West Africa Trade Hub provides assistance in AGOA Services to trade-support institutions (TSIs) through AGOA Resource Centers (ARCs), export-ready companies (ERCs), and governments on export procedures and documentation and, at a higher level, sectoral export strategies to help countries take better advantage of AGOA.

Sustainable and systemic increases in countries' competitiveness rests on three pillars: creating an effective trade support mechanism, setting up export procedures which facilitate trade, and creating a public-private sector framework to implement sound strategies to promote exports. It is critical is that countries must own the process by defining and implementing their own procedures, as demonstrated by Liberia in its efforts to get the textile visa, as discussed below.

Initiatives and Results

Leveraging relationships to identify ERCs and building a sustainable network of TSIs through the ARC network

The Trade Hub has effectively implemented, trained, supported and coordinated 18 ARCs in the region – in Benin, Burkina Faso, Cameroon, Cape Verde, Chad, Gabon, Guinea Bissau, Liberia, Mali, Mauritania, Nigeria, Sao Tome e Principe, Sierra Leone, Senegal, Togo, and The Gambia. During FY2008-2011, AGOA Services expanded the ARC network by establishing new ARCs in Cape Verde, Liberia, Senegal, The Gambia and Togo, and it launched enhanced ARCs (eARCs) in Benin, Burkina Faso, Cameroon, Mali and Nigeria. The eARCs further strengthen the capacities of host institutions by integrating trade advisors who provide AGOA support into the institutions themselves, laying the foundation for a sustainable business advisory model throughout the region.

The Trade Hub provided extensive training to ARC Administrators and Trade Advisors at eARCs through many events organized by the Trade Hub to expose the network to sector intelligence and networking opportunities to support business and enhance exports from the region. The Trade Hub also published the AGOA Export Toolkit, accessible on CD-Roms and the AGOA website (www.agoatoolkit.com). The toolkit provides tools and resources targeting businesses exporting to the U.S. in the USAID Trade Hub's targeted sectors. The toolkit includes thousands of pages of in-depth and indispensable information on available resources and market research including market trends and landscape, and it offers guidance on marketing, trade show preparation, product design and innovation, writing a business plan and understanding export requirements and procedures. Over 3,000 stakeholders from across West Africa and beyond have received AGOA Toolkits at regional and international events.

In the project life of FY2008-2011, the ARC network provided technical assistance to 2,650 businesses and individuals (619 women). The Trade Hub also worked strategically with U.S. embassies, ministries of commerce, chambers of commerce, investment and export promotion agencies, and the United States Trade Representative (USTR), to train 2,192 stakeholders (405 women) in AGOA, export readiness capacity building and sector-specific activities. Stakeholders from Benin, Burkina Faso, Cameroon, Cape Verde, Gabon, Guinea, Liberia, Mali, Mauritania, Niger, Nigeria, Senegal, Sierra Leone, The Gambia, and Togo attended training activities.

ARCs also helped facilitate export deals. For example, the ARC in Douala, Cameroon worked closely with an ERC that recently shipped two 40-foot containers of handcraft products and a 40-foot container of specialty foods to the U.S. The containers are valued at USD 60,000 and USD 40,000, respectively. In Mali, the eARC worked with two home décor companies to facilitate the shipment of scarves, cushions and *bogolan* shirts valued at USD 6,860.

Leveraging institutional partnerships to set up Textile Cisas, Category 9 certifications and effective export procedures

During the life of the project, the AGOA Services component of USAID's West Africa Trade Hub worked with Liberia through the textile visa until it was approved. After receiving its textile visa, the Trade Hub worked closely with the government of Liberia set up its textile visa arrangement and facilitated Liberia's first ever shipment of apparel (1,500 T-shirt trial order) to the U.S. under AGOA. The Trade Hub worked extensively with the Ministry of Commerce and Industry and Liberia's Bureau of Customs and Excise to draft the textile visa and liaised with the USTR and U.S. Customs and Border Protection for approval. The whole process took for six months to complete and was followed by training for 13 officials from the Ministry of Commerce and Industry, Customs officers and customs brokers to ensure adequate documentation for the shipment to benefit from the duty-free advantages of AGOA.

The Trade Hub also worked strategically with the Ministries of Commerce from Benin and Burkina Faso to finalize the submissions of their Category 9 certifications to allow duty-free exports of hand-loomed articles under AGOA. This led to the approval of Burkina Faso's Category 9 certification, while Benin's approval is pending.

In total, twelve countries now have textile visa arrangements for exports of apparel to the U.S. under AGOA, and seven countries have Category 9 certifications for the export of hand-loomed articles. To help countries maximize benefits from the visa and certification, the Trade Hub held trainings on best practices regarding the administration of the textile visa and how to organized export procedures in the seaport and airport. In total, the Trade Hub trained 131 (27 women) Customs officers, Ministry of Trade officials, customs brokers, and fashion and apparel companies from **Benin, Burkina Faso, Cameroon, Liberia, Senegal and the Gambia**.

Finally, the Trade Hub worked with governments from Benin, Burkina Faso, Cape Verde, Ghana, Mali, Senegal, and Sierra Leone to define and implement national sectoral export strategies to boost exports.

Pushing the export strategy agenda forward

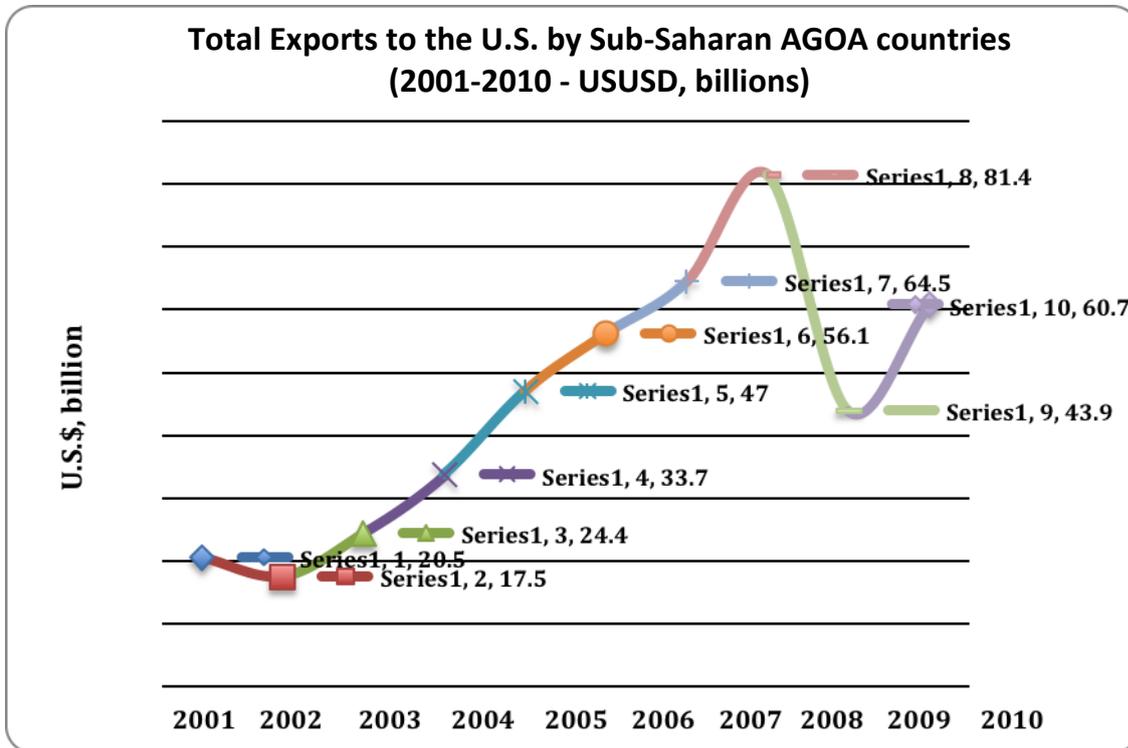
The USAID Trade Hub participated in four annual AGOA Forums—in DC, in DC and Kansas City, in Kenya, and in Zambia. The AGOA Forums are the highest-level discussion platform between the U.S. government and sub-Saharan African (SSA) countries on trade and investment. These represent opportunities for the USAID Trade Hub to highlight best practices in business technical assistance and export promotion to a wider audience. The Trade Hub has taken advantage of these platforms to network with delegates from Benin, Burkina Faso, Cameroon, Cape Verde, Chad, Gabon, Ghana, Liberia, Mali, Nigeria, Senegal, Sierra Leone, The Gambia, and Togo to push for the definition and implementation of export strategies.

The Hub also contributed to the nomination, training and technical assistance for the AGOA Women's Entrepreneurship Program (AWEP), launched by Hillary Clinton and the U.S. State Department in August 2010. AWEP has since collaborated closely with Hub experts to contribute to training programs conducted in Nigeria, Senegal, Zambia, and Washington, DC. XXX women and XX women-owned businesses benefited from these and other Hub assistance programs.

The Trade Hub successfully provided feedback to the government of Ghana for the definition of their National Export Strategy (NES), and is working with Benin, Mali and The Gambia to establish and implement their export strategies.

Analysis

AGOA, enacted in 2000, constitutes the most important trade legislation to foster trade between the U.S. and SSA. U.S. imports from Sub-Saharan Africa have steadily increased since the enactment of AGOA, jumping from U.S.USD20.5 billion in 2001 to U.S.USD60.7 billion in 2010, with a peak in 2008 of U.S.USD81.4 billion (see graph below).

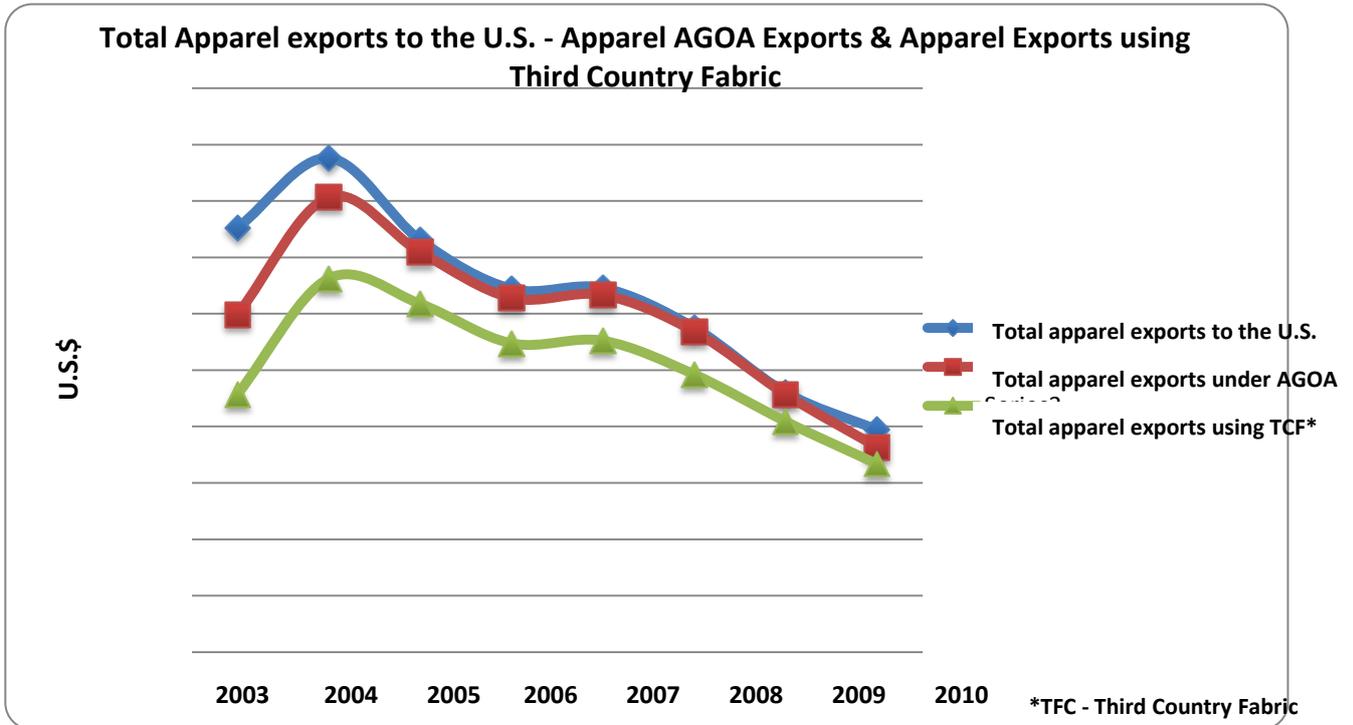


In 2010, U.S. imports under AGOA were USUSD 44 billion, 31 percent more than in 2009 as a result of a 33 percent increase in petroleum product imports. With fuel products excluded, AGOA imports were USUSD4 billion in 2010, an increase of 18 percent relative to 2009. U.S. imports under AGOA are becoming more diversified, with some products including jewelry and jewelry parts, fruit and nut products, fruit juices, leather products, plastic products, and cocoa paste growing quickly (see graph below).

	2007		2008		2009		2010	
	AGOA + GSP	% of Total Exports	AGOA + GSP	% of Total Exports	AGOA + GSP	% of Total Exports	AGOA + GSP	% of Total Exports
Agricultural products	271538	0.53%	250214	0.38%	290422	0.86%	418602	0.95%
Forest products	11562	0.02%	6762	0.01%	3323	0.01%	3337	0.01%
Chemicals and related products	308885	0.61%	428269	0.65%	263462	0.78%	366822	0.83%
Energy-related products	47674569	93.39%	61154766	92.30%	30295551	89.87%	40225878	90.87%
Textiles and apparel	1270589	2.49%	1138837	1.72%	918240	2.72%	730628	1.65%
Footwear	2175	0.00%	712	0.00%	494	0.00%	445	0.00%
Minerals and metals	796266	1.56%	1263964	1.91%	413129	1.23%	799479	1.81%
Machinery	29331	0.06%	23189	0.03%	23618	0.07%	13207	0.03%
Transportation equipment	588548	1.15%	1911828	2.89%	1436008	4.26%	1651458	3.73%
Electronic products	21324	0.04%	16941	0.03%	21912	0.07%	26673	0.06%
Miscellaneous manufactures	76596	0.15%	63346	0.10%	43141	0.13%	33407	0.08%
Total	51,051,383		66,258,828		33,709,298		44,269,935	

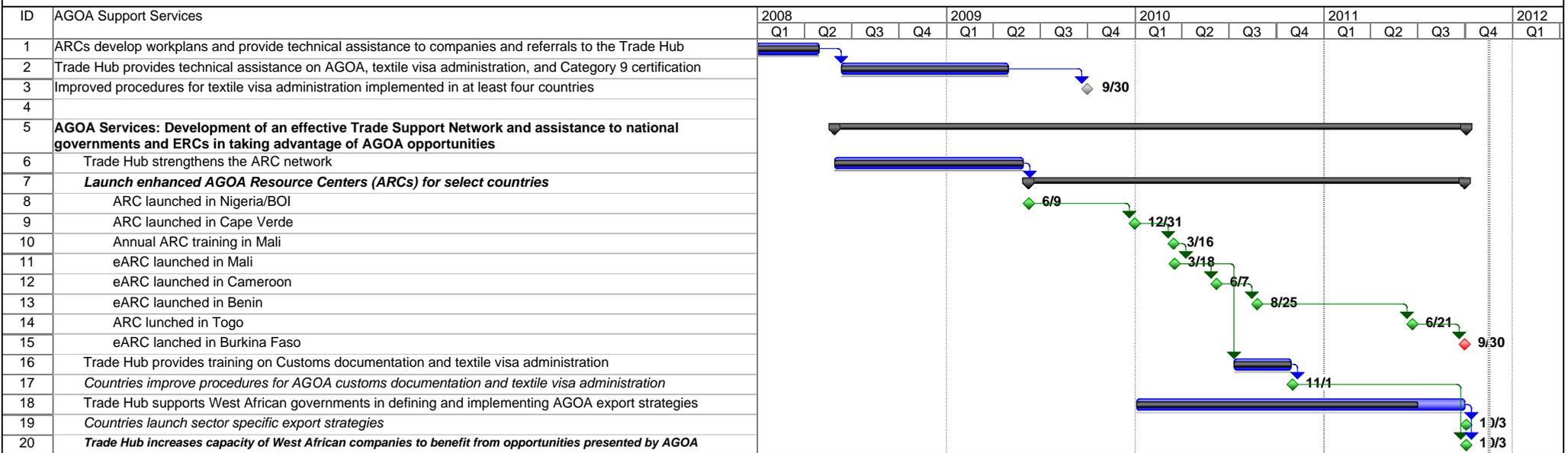
In 2010, Agricultural products exported doubled from 2008 to 2010, while AGOA textiles and apparel imports fell by 20% - likely due to the global economic recession. It is important to note the importance of the Third Country Fabric provision in apparel exports, as they account for 91 percent of AGOA apparel exports in 2010 (see figure and graph below)—and because the Third Country Fabric provision is slated to expire in September 2012.

	2003	2004	2005	2006	2007	2008	2009	2010
Total Imports of Apparel	1504499	1751787	1460738	1288409	1291701	1150694	921411	788809
(AGOA) Imports under the Trade and Development Act of 2000 (Total of items below)	1197081	1613554	1418388	1255641	1266203	1136952	913762	727167
9819.11.12 Apparel from foreign fabric made in a lesser developed country	914309	1325519	1235140	1094919	1104369	984818	817689	667133
Percentage Apparel exports using the Third Country Fabric provision	76.38%	82.15%	87.08%	87.20%	87.22%	86.62%	89.49%	91.74%



The results shown above give insight on best practices to drive sustainable and systemic change to boost countries' competitiveness and reap the trade benefits under AGOA. The Trade Hub fostered increased knowledge in the private sector and TSIs and created traction on the part of governments to work on national export strategies to take advantage of AGOA. It is through this approach and building new strategic partnerships that countries can develop their competitive base, and increase their market share.

AGOA Services Gantt Chart



Project: Trade Hub AGOA gantt chart 0
Date: Tue 11/15/11

Task		Summary		Rolled Up Progress		Project Summary	
Progress		Rolled Up Task		Split		Group By Summary	
Milestone		Rolled Up Milestone		External Tasks		Deadline	



1.2 Market Linkages

Introduction

Connecting producers in West Africa to buyers in world markets is a key feature of the USAID Trade Hub's approach to increase export-led growth. West African ERCs have much to offer foreign markets, however buyers' lack of awareness about product offerings and how to attain them has led to lost market opportunities. Participation in trade shows and buyer visits to exporting companies allows producers and buyers to connect to do business – and it also exposes each to the realities and needs of the other and the international market. In short, market linkages is not just about finding buyers – perhaps more importantly, it shows exporting companies what it takes to compete in international markets: packaging and labeling standards, marketing approaches, communications techniques, product presentation, etc.

The Trade Hub uses a three-pronged approach to attract buyers to West African companies and create lasting sustainable business partnerships. First, the Trade Hub organizes the participation of West African companies at international trade shows and business-to-business forums; the Trade Hub also facilitates buyer and investor tours to explore opportunities; and, finally, Trade Hub advisors and assistants conduct direct outreach to buyers. These activities have allowed West African companies to more successfully compete in international markets by giving them the information and the connections they need to expand markets. The market linkages team continues to increase West African recognition through professional branding and aggressive marketing campaigns in all sectors in collaboration with established industry partners.

Results

Over the course of the project, the Trade Hub provided technical assistance and training to 2,882 companies in 105 trade events, and created 9,909 direct links to buyers. The Trade Hub facilitated business deals, resulting in over USD178 million in total exports.

The Trade Hub developed industry branding and aggressive marketing campaigns in all sectors in collaboration with industry partners. Six industry brands were developed and managed: AfricaNow! (home décor and fashion accessories), Global Shea, Taste of Africa (specialty foods), Source Africa (apparel), African Cashew Alliance and the West African Sustainable Seafood Alliance. The Trade Hub mapped out a multi-channel marketing strategy for each brand, including branded websites, email blasts, industry publications, articles and ads, special events, campaigns, industry trade shows and buyer networking events. At major industry tradeshows, the market linkages team put together professionally designed and branded pavilions that helped elevate those brands to the world stage. They served as a signal to buyers that West African producers would deliver new levels of quality, scale, and accountability.

Development of the brands through a collaborative effort has contributed to success. Industry stakeholders, such as producer groups, export promotion agencies, other donor funded projects and international buyers, were involved in the design and marketing of the brands. As they gained increasing credibility in international markets, the brands were further adopted with many regional stakeholders as well who were not initially involved in their design. The African Cashew Alliance, Global Shea Alliance and Taste of Africa are now recognized pan-African brands supported by membership-based industry associations. By fostering ownership among stakeholders, the Trade Hub was able to build sustainability.

The Trade Hub's Market Linkages program was tailored to each sector's specific branding and marketing needs:

- The Trade Hub worked with the ACA to attract investment from the private sector, including trading companies, multinational retailers and food labeling companies in African cashew processing. As world demand for cashew kernels grew, with production quadrupling since 2000, so did the need to set industry standards for African cashew exporters. The ACA is now developing a Seal which will ensure a baseline of quality and sustainably processed cashew kernel. The ACA seal will control for quality, food safety, and social responsibility requirements for in African factories. Kraft and Intersnack retail brands are the champions of this ACA Seal promoting quality and sustainability standards via their own marketing channels. For example, Kraft's brand Planters, the largest producer of snack nuts in the U.S., launched "Naturally Remarkable," a new marketing campaign that emphasizes the impact of cashew sales on millions of farmers in Africa. The Kraft produced video was done with the support of the ACA and the Trade Hub.
- In the specialty food sector, the Trade Hub identified distribution channels in the U.S. for specialty food producers, educated producers on packaging and FDA requirements for entering the U.S. market. In addition, the Hub started working with West African exporters to solidify their presence in the EU market, particularly at the alternating SIAL and ANUGA shows. The Trade Hub also forged a closer partnership with the Senegal based Association of African Food Exporters (AAFEX) .¹⁶ AAFEX took the lead in organizing the 2010 SIAL tradeshow in Paris and was one of the co-sponsors of the Taste of Africa pavilion at the Fancy Food Show in Washington, D.C. Following the summer 2009 Fancy Food Show, interest in the Taste of Africa brand had spread well beyond West Africa. As of 2011, in addition to the joint efforts of the three regional USAID Hubs, the Western Cape Fine Food Initiative, a South African industry association, and DTI South Africa's export promotion council have joined AAFEX and are integrating the Taste of Africa brand into their promotional efforts. The partners have already committed to a joint pavilion in 2012.
- Home Décor & Fashion Accessories enjoyed high visibility in USAID's Trade Hub AfricaNow! pavilion at three primary trade shows (NY based International Contemporary Furniture Fair, NY International Gift Fair, Ambiente in Germany), facilitating West African companies linkages with distributors, retailers and catalogs. The Trade Hub also facilitated multiple buyer trips for retailers and importers to West Africa. The Trade Hub introduced the AfricaNow! network and collaboration strategy which involves using U.S. importers and distributors extensively along with targeted export ready companies. This strategy improves the relationships and successes U.S. buyers and West African exporters by facilitating access to quality West African products they need quickly and at competitive prices. This strategy also allows West African producers to fulfill smaller orders for the U.S. market – which previously would have been cost prohibitive due to high shipping costs. The Trade Hub has also worked with Africa-based consolidators and agents who take orders on behalf of producers and are able to consolidate the orders to reduce shipping costs for buyers.
- Through the Global Shea brand, launched in 2009, the Trade Hub has increased international exposure of shea and the Global Shea Alliance. At cosmetic ingredients shows, such as the New York State Society of Cosmetic Chemists, the Trade Hub and partners highlighted direct sourcing of African shea butter, a now well-established ingredient in the USD8.3 billion natural cosmetics industry. Through shows such as In-Cosmetics, the Trade Hub introduced new shea-based product lines. In addition to marketing shea as a cosmetics ingredient, the Trade Hub has been promoting shea as an edible cocoa butter substitute and healthy vegetable oil or fat at industry conferences. Through the annual industry conference hosted by the Global Shea Alliance, the Trade

¹⁶ AAFEX is a pan-African industry association of 90 agricultural and processed food exporters.

Hub has provided a forum for shea stakeholders from around the world to exchange lessons learned and to connect with service providers such as financial institutions and transporters.

- In the apparel sector, the Trade Hub has facilitated U.S. investment in West Africa. These investments would transform the fledgling garment industry. The Hub has worked to promote the industry in international trade shows such as MAGIC, linked West African exporters to international buyers, hosted apparel buyer visits to **Cameroon, Ghana, Liberia** and **Senegal**, in addition to the technical assistance and financial facilitation provided. Although West Africa is a large cotton producer, it imports most textiles for apparel production due to its lack of cotton spinning, weave/knitting facilities. Through investment in such facilities, West African apparel producers will be able to capture a greater percentage of the apparel value chain, employ more workers, and become more competitive in international markets. The Trade Hub has attracted buyers through its Source Africa brand, raising the profile of West Africa as an important sourcing destination; however this brand has not been used beyond the trade show marketing campaigns.

Core to the success of the Market Linkages strategy is building the visibility, capacity and competitiveness of local partners by leveraging industry alliances. For example, the Global Shea Alliance, with the Trade Hub assistance, was able to build an aggressive marketing and communications strategy increasing the transparency and credibility of the shea industry. In other industries, such as the specialty food sector, the Trade Hub has coached AAFEX on a market access strategy, including trade show coordination, outreach to buyers and marketing. AAFEX's level of engagement organizing joint trade shows with the Trade Hub has greatly increased over the years; Taste of Africa pavilions now showcase the products of West, South and a few from East Africa under one umbrella. The value of a cohesive marketing approach under the Taste of Africa brand has become clear to all partners, making both the brand and the industry alliances stronger and more sustainable.

The Trade Hub launched a European marketing strategy in four sectors—shea, handcrafts, specialty food, and cashews. Europe is a logical trade market for West Africa due to its population of 600 million (almost double that of the U.S.), solid middle class with significant purchasing power, strong familiarity with fair trade and sustainability concepts, large African diaspora and proximity to Africa. Europe is also home to the world's largest shea processors and some of the world's largest cashew processors. The strategy has involved gradually increasing presence at European trade shows and industry conferences, showing European buyers that and African products are competitive in the international market.

The Trade Hub has found that trade opportunities improve when importers link to larger retailers. In cases where the retailer does not want to source directly from Africa, and prefers to buy via an importer of African products, the Trade Hub has facilitated importer-retailer linkages. This is beneficial to the exporters, who can focus on production and leave inventory management, warehousing, and distributing to the importers.

In late 2009, the Trade Hub placed a Market Linkages Manager in the US to foster long-term relationships with buyers and investors, who would not necessarily consider West Africa as a sourcing destination, to capitalize on the gains made by West African ERCs at industry trade shows, to conduct onsite sales visits to buyers, and to increase export and investment results.

Analysis

The Trade Hub balances Africa's product supply by providing information about buyer and consumer demands for change, such as pricing, trends and innovations. In addition, through its marketing and branding strategy, the Trade Hub provides visibility and information about products and suppliers to markets in the U.S. and EU.

Over the past four years, global and industry trends, including the economic slowdown in major economies, have influenced the Trade Hub's market linkages strategy. As the focus of buyers turned to lowering prices, the importance of marketing differentiated and unique products increased. Thus, the Trade Hub helped companies market products that met standards in food safety, sustainability and natural/organics.

Food safety is becoming an increasing concern for international buyers. The ACA is already leading several initiatives to address this growing concern. Most notably, the ACA has developed a food quality and sustainability seal, the use of which will require processors to establish and maintain systems to ensure continuous compliance with quality and food safety controls. The seal was developed in close collaboration with the quality assurance departments of Kraft and Intersnack, which contributed funds for its realization. Processors and roasters that display the ACA seal will be able to command higher market prices.

The ACA also partnered with SAP Research to develop an innovative smartphone application to address growing concern over traceability. This initiative, known as "Virtual Cooperatives," assigns each farmer a barcode that is tagged to sacks of cashews at the farm. Since buyers are more likely to purchase a product that they can trace back to the source, this technology will translate to greater sales.

At the same time, U.S. and European consumers' awareness of the sustainability implications of their purchasing choices is at an all-time high. Natural, organic and fair trade products are in high demand. These choices often come with a higher price tag, but consumers' generally lower purchasing power in the last couple of years has motivated retailers to make sustainable and healthy products available at a more mass-market level.

The West African food and shea industries are positioned to benefit from those trends. There has been growing interest in naturally dried mango, baobab products, and Moringa. However, industries will need to improve packaging designs and increase product development to compete in the retail market. Sustainability is one of the core themes of the Global Shea Alliance. At tradeshow and conferences, the Global Shea Alliance has been promoting sustainable sourcing strategies and natural shea-based cosmetic formulations, most recently at the Sustainable Cosmetics Summit.

Sustainability is also a key theme for producers and importers in the AfricaNow! network. The Lacey Act, which prohibits trade in illegally sourced wood products, responds to consumer concern over materials used in production of home décor and fashion accessories. Consumers increasingly prefer the products that use Forest Stewardship Council (FSC)-certified wood, organic cotton, recycled plastic or fast-growing bamboo and grasses. For African suppliers, this is a valuable point of differentiation and value-addition that needs to be marketed in a more visible way. The Trade Hub's home décor and fashion accessories team has been working with producers to make this important leap to FSC-certified wood. This will also increase African competitiveness in comparison to imitations from Asian markets.

Ethnic consumer goods are trending into the mainstream in multiple industries. This is most visible in the food industry, where demand for ethnic food is no longer driven mainly by ethnic groups. Although demand for ethnic African food products is dwarfed by demand for Mexican, Kosher and Asian foods, rising trends indicate that African foods no longer need to be confined to niche markets. For African food to truly find a place in this growing market, more efforts will have to be dedicated to packaging, food safety compliance and product development.

In sectors such as contract apparel manufacturing with little product differentiation, price remains the key industry driver. The West African apparel industry has had a hard time competing with more efficient Asian rivals, but this competitiveness gap is starting to close. Rising labor prices in Asia are forcing leading buyers to diversify their apparel sourcing

strategies and consider Africa as a sourcing base. According to Li & Fung, a Chinese trading company, the average price of goods rose by 15% in the first quarter of this year. Bangladesh, India, and Vietnam have been experiencing similar trends, with wages in Bangladesh rising by 87% last year.

Focus on market linkages has boosted buyer confidence, regulatory issues that occurred over the course of the order cycle, and fostered new deals. The Trade has worked to generate industry-wide interest in West Africa by building and strengthening brands through social media, advertising, and event participation; high impact advertising opportunities; and joint marketing events with partners and businesses targeting expansion in Africa.

Trade Hub Brands

Brand	Sector	Trade Shows	Website
	Home Décor & Fashion Accessories	New York International Gift Fair, California Gift Show, International Contemporary Furniture Fair, Ambiente, Santa Fe International Folk Art Market	www.africa-now.org
	Specialty Foods	Anuga, (Germany), SIAL (France), Fancy Food Show	www.tasteafricanow.com
	Shea	Shea 2010 Conference, California & New York Cosmetic Chemists Suppliers Days, In-Cosmetics (Paris & Milan)	www.globalshea.com
	Apparel	MAGIC, South Africa Fashion Week, B2B	www.sourceafricanow.com
	Cashews	Anuga (Germany), SIAL (France), INC, AFI, Fancy Food Show, ACA Annual Conference	www.africancashewalliance.com

1.3 Sustainable Fish & Seafood

The fish and seafood sector in West Africa directly impacts more than 10 million people in coastal countries directly and millions more indirectly. Maintaining this natural resource is critical to the region's food security, and export to international markets is an effective manner to create jobs and earn income. However, the environmental impacts of overfishing have negatively impacted West Africa's fish and seafood sector. The USAID Trade Hub worked with stakeholders across the sector to establish the West Africa Sustainable Seafood Development Alliance to address primary sustainability issues and connect international buyers to companies utilizing sustainable practices.



In 2005, at the inception of the USAID Trade Hub's work in the sector, fish and seafood ERCs' primary challenge was linking to international markets. But the context has changed markedly as environmental pressures – and significant increases in illegal, unreported and unregulated fishing – have led to declines in West

Africa's fishing stock. A USAID Trade Hub Initial Environmental Evaluation in 2010 led to a broad shift in strategy to activities focusing exclusively on West African sustainable fishery projects to promote sustainable fish and seafood products with potential in international markets.

The Trade Hub now aims to build capacity in fisheries management by leveraging partnerships and market linkages. Overexploitation of resources and illegal fishing may lead to the extinction of many West African fish species without better management, but business creation from exporting is a powerful incentive to improve fishery management. And connecting companies that follow sustainable practices to international buyers creates a powerful incentive for others to follow such practices. The Trade Hub is facilitating partnerships and discussion of critical fisheries management and industry issues in the industry association West Africa Sustainable Seafood Development Alliance (WASSDA).

Potential buyers are ready to come to West Africa, but ecolabeling and certification of sustainable seafood products must be addressed to better penetrate the sustainable international markets. Thus, the Trade Hub is partnering and advocating with public and private sector organizations, including the ENDA REPAO (African NGO), Friends of the Sea, the Marine Stewardship Council (MSC), University of Rhode Island and World Wildlife Foundation (WWF) to bring ecolabels and certification to the region.

Results

Exports Facilitated

The Trade Hub facilitated exports of USD 22,643,705 from 2008 to 2011.

International buyers, investors and partners linked to West African sustainable sources

The Trade Hub assisted international buyers from the Netherlands in visits to the USAID Ba Nafa project in the Gambia and WWF's Kayar project in Senegal in order to help them assess the feasibility of a sustainability initiative. The buyer's delegation received an overview of several seafood companies' capacities in manufacturing practices, quality systems and production capacity, and they identified Senegalese fish companies that may

meet their required standards for potential partnership. Two seafood products appear appropriate for the Dutch market: sole and tuna. The buyers would seek certification by MSC, with the assistance of the Trade Hub, the Senegalese Export Promotion Agency (ASEPEX), WWF-Senegal, and the Senegalese Fishery Department.

The Trade Hub identified buyers and partners committed to sourcing sustainable West African fish and seafood at the Sustainable Seafood Summit in Vancouver, Canada in January 2011. The event attracted more than 700 participants and included 30 sessions featuring more than 100 speakers.

The Trade Hub identified potential buyers and investors at the European Seafood Exposition in Brussels in May 2011. The Exposition is one of the largest and most important exhibitions of fish and seafood worldwide. It brings together more than 1,600 companies and policy-makers from 140 countries. ASEPEX hosted the Trade Hub in its booth by providing space to display WASSDA banners and flyers. The Trade Hub presented WASSDA, identified companies which are willing to become members or to cooperate on sustainable seafood issues, and met with key partners who are willing to help establish the relevance of an eco-labeling scheme for Africa. Buyers, major certifying bodies (Marine Stewardship Council, Friends of the Sea, third party certification bodies), NGOs, institutions (European Commission Trade Policy in Fisheries; and buyers discussed developing an appropriate label for West Africa region.



WASSDA activities

The Trade Hub discussed ongoing sustainable fisheries initiatives in the sub-region and presented challenges facing the sustainable seafood sector in Senegal at a MSC workshop.

Makhtar Thiam presented WASSDA's activities at a two-day regional workshop organized by ENDA to launch a Network on Fishery Policies in West Africa (REPAO), which will consist of fisheries stakeholders from all parts of the value chain (artisanal, industrial fishers, processors, wholesalers, government agencies, intergovernmental and non-governmental institutions, development partners etc.). More than 100 participants from 15 countries (Benin, Burkina Faso, Cape Verde, Côte d'Ivoire, Ghana, Guinea, Guinea Bissau, Liberia, Mauritania, Niger, Nigeria, Senegal, Sierra Leone, The Gambia, and Togo) attended the meeting. The challenges and opportunities of ecolabeling for artisanal fisheries in West Africa was the main issue discussed during the forum. It was agreed that the main constraints are lack of statistical data on catch volumes and ecosystem impacts and cost.

Makhtar Thiam attended the Ministerial Conference on Fisheries Cooperation among African states bordering the Atlantic Ocean (ATLAFCO), an intergovernmental fisheries cooperation organization, in December 2010. The two-day meeting in Saly (Senegal) called for the

establishment of a network of women in the fisheries sector. About 70 participants, including institutional representatives of 22 member states and women working in the fisheries sector, laid the foundation of the network. The great challenge facing the network will be to strengthen cooperation toward achieving sustainable development and enhancing the well-being of the organization's members. The Trade Hub is developing synergies and partnership with this new women's network in the sustainable seafood area.

The Dakar Trade Hub Team met with Executive Secretary Charles Bakundakwita and Project Coordinator Marie Madeleine Gomez Ndong of the West African Association for the Development of Artisanal Fisheries (WADAF) to discuss ongoing projects and initiatives in the fisheries sector in West Africa and possible synergies in the field of artisanal sustainable fishery in June. WADAF highly appreciated the Trade Hub's approach and accepted an invitation to become a full member of WASSDA and would like to participate in the WASSDA/Trade Hub's proposed workshop on certification.

Thiam met with Dougoutigui Coulibaly, secretary-general of the Senegalese Association of Fishing Companies and Ship Owners (GAIPES), and WASSDA members after Senegalese small-scale and industrial fishers accused the Senegalese government of "selling off" Senegal's fishery resources by allowing foreign trawlers to fish small pelagics in Senegalese waters, causing loss of resources and negative local impacts. The association is demanding that the Minister of Maritime Economy withdraw 22 licenses allegedly granted to Belizean, Comorian, Mauritian, Russian, and Ukrainian trawlers.

Thiam attended a meeting organized by the Senegalese Ministry of Fisheries Department of Fishing Surveillance to define a four-year national plan to combat illegal, unreported, and unregulated fishing in Senegalese waters, as recommended by FAO's International Plan of Action to Prevent, Deter, and Eliminate Illegal, Unreported and Unregulated Fishing.¹⁷ Over 40 civilians and military participants attended the June meeting. Department Director Matar Sambou is keen to share and discuss this issue with WASSDA members.

Developing synergies with USAID's fisheries projects in Senegal

The Trade Hub discussed marketing of sustainable fish and seafood via WASSDA and the process to obtain MSC certification of The Gambia's sole fishery with Karen Kent, the University of Rhode Island's costal resource manager. This would be the first MSC certification in West Africa. The USAID Ba Nafa Project is making important strides towards meeting the MSC eligibility and is currently planning to validate a co-management plan with The Gambian government and The Gambian Sole Fishery Co-management Committee (NASCOM) in December 2011. MSC and the Trade Hub are trying to facilitate the interest of international buyers for sole when it will be certified. The Gambian sole will be the first MSC certified product of West Africa.

The Trade Hub worked with USAID COMFISH Project in Dakar in March to discuss priorities concerning activities through September 2011 and promote synergy.¹⁸ The USAID/COMFISH project joined WASSDA as a member to work on certification issues. In July, the Trade Hub participated in a USAID COMFISH workshop on fisheries management and selection of priority stocks. The Trade Hub will help identify products that have a potential to be certified for international market. More than 50 participants representing fishermen, supporting agencies and organizations, and national and international experts participated in the workshop.

¹⁷ <http://www.fao.org/fishery/ipoa-iuu/en>

¹⁸ USAID Collaborative Management for a Sustainable Fisheries Future in Senegal (COMFISH) is a five-year, USUSD 11 million project that will set up sustainable management units (choice of stocks and species of fish by populations), improve local management of fisheries (fishing areas) and build capacity among institutions and stakeholders in the Senegalese fishing industry. It will coordinate with USAID Ba-Nafa project in The Gambia

Progress toward certification and ecolabeling

In addition to working with USAID's Ba Nafa and COMFISH projects on certification and ecolabeling, the Trade Hub is developing synergies with other partners to promote sustainable projects and facilitate certification and new seafood ecolabels in Africa. The international market is increasingly demanding ecolabeled products including major labels such as (MSC), and Friend of the Sea, but the introduction of these labels requires considerable financial resources that only governments with the help of development partners are able to support.

Eco-Mark Africa (www.ecomarkafrika.org) is the first Pan-African and cross-sectoral eco-labeling mechanism promoting intra-African and international trade as well as adaptation to and mitigation of climate change. EMA is committed to developing an ecolabels in the forestry, agriculture, fisheries and tourism sectors. The secretariat of EMA requested WASSDA-member ENDA REPAO to participate in setting standards for the ecolabel, and the Trade Hub has worked with ENDA to achieve this goal. ENDA is planning a workshop in FY 2012 to establish the relevance of an eco-labeling scheme for Africa in which it aims to identify an appropriate label for the West Africa region in addition to major international labels MSC and Friend of the Sea (perhaps WASSDA as a label?), identify funders and donors to support certification in West Africa, assess possibilities to use the certification to fight against illegal, unreported and unregulated fishing.

Below a list of potential candidates of certification.

COUNTRY	PROJECT	SPECIES	STATUS
Cape Verde	Cape Verde's National Fishing Development Institute (INDP)	Lobster	In development with MSC
Gambia	Ba Nafa (USAID)	Sole	MSC pre-assessment done
Mauritania	MSC/WWF	Octopus	In development
		Mullet	
Senegal	Wula Nafa (USAID)	Shrimp	Village-based, using traditional methods
	WWF/ Department of Fisheries	Hake	Feasibility study already done
		Deep Shrimps	Certification study already done
	ENDA	Octopus	Local initiative / MSC
Gabon	Marine reserve Project	Shrimps	Study of feasibility underway

Analysis

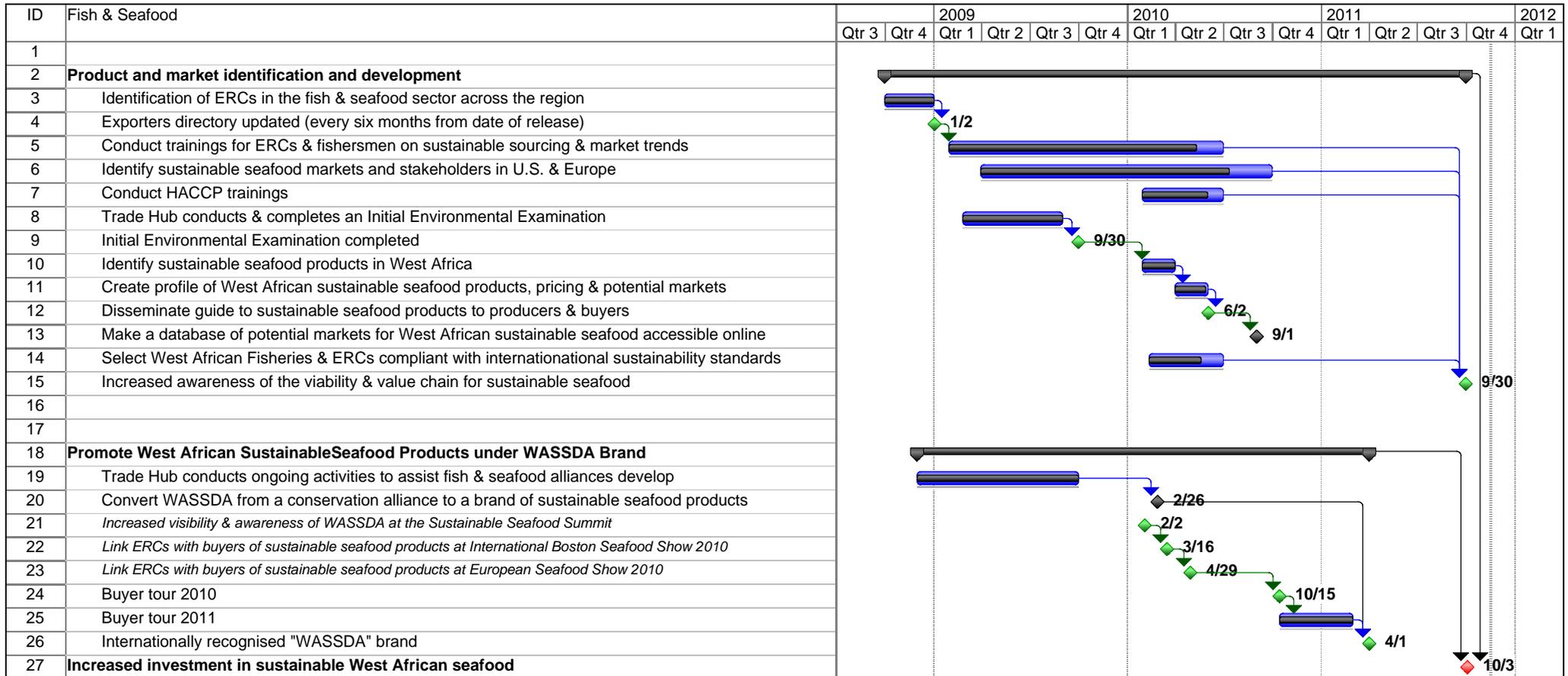
The main challenge to West African fisheries is lack of monitoring and surveillance. Easy illegal, unregulated and unreported fishing depletes stocks and threatens food security in the region. According to the latest FAO report on the situation of fisheries in the world, the status of some species of deep-sea fish raises serious concerns, as over 70% of stocks are fully exploited, overexploited or depleted. According to a study commissioned by the UK's development assistance, these trawlers cost Africa about USD 1 billion a year.

At the producer level of the value chain, illegal fishing is growing among artisanal fishermen and inciting protests against perceived government inaction. The scarcity of stocks is increasing the price and making legal export of sustainable fish and seafood to international

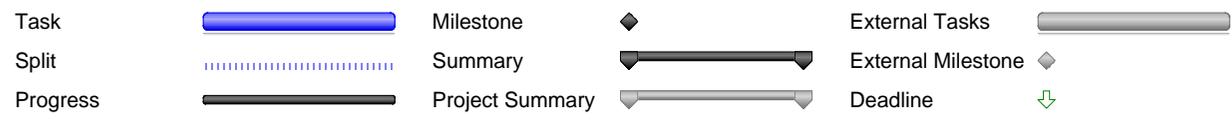
buyers more difficult. Companies and institutions are beginning to organize to address illegal fishing, but have yet to do so productively.

The MSC Development Programme is promoting stakeholder awareness in developing countries and involvement in the MSC to develop country fishery information. WWF's programs in the sub-region also present opportunities for the artisanal sector to speak out and effect change. Market-oriented studies are also presenting opportunities to increase the sustainability of certain fisheries. For example, Wildlife Conservation Society Gabon is conducting a feasibility study on sustainable coastal shrimp in the Congo Basin Coast (CBC) for export to international markets.

WASSDA and the Trade Hub have developed excellent relationships with stakeholders in the fisheries sector and are thus in a position to facilitate the emergence of local stakeholder voices in sustainable fisheries management. WASSDA and the Trade Hub can also bring together private sector stakeholders from throughout the value chain, NGOs and governments to create synergy, share information, and develop a sustainable value chain from fisheries management to marketing.



Project: Fish and Seafood 10-12-10
Date: Tue 11/15/11





1.4 Cashew and the African Cashew Alliance (ACA)

Introduction

At the New-York Fancy Food Show in July 2007, the ACA booth in the USAID West Africa Trade Hub pavilion featured African cashew brands as well as a large jar of a U.S. retailer private-label product with the words “Indian Cashews.” When visitors to the booth were surprised, the Trade Hub market linkage manager explained that Africa produces 35% of the world’s raw cashew nut crop, so the cashews in the jar may well be African.

Four years later, Africa’s share in the world crop has grown to 45% -- a 100% increase since the early 2000s – and cashew processing in Africa has grown by 200%. The world’s largest cashew buyers have joined the ACA in a bid to source more processed cashew from Africa. Buyers are developing new products enabling them to buy from smaller processors in Africa, making joint-venture investments with African entrepreneurs, pre-financing working capital and supporting a food safety, quality and sustainability program for cashew processors. The world’s largest cashew traders and processors from India, Vietnam and Brazil agree that “Africa is cashew’s future.”



In four years, the ACA has facilitated more than USUSD110 million in kernel and raw nut exports and USUSD58 million²⁰ in new investments in cashew processing. This has helped create more than 10,000 new jobs, mainly for women in rural parts of Africa.

In 2006 in Guinea-Bissau, USAID West Africa Trade Hub co-founded the ACA together with 22 private and public stakeholders from East and West Africa and consuming countries, including the U.S. and EU. Today the ACA unites more than 110 cashew farmer groups, traders, processors, importers, financial institutions, public agencies and retailers in a shared vision: a competitive African cashew industry that provides benefits to the value chain – from farmer to consumer. Private sector cash contributions to the ACA’s budget have increased from USD9,500 in 2007 (9% of total) to USUSD 377,000 in 2011 (37% of total).

Housed and sponsored by the Trade Hub from 2006-2009, the ACA brought African stakeholders from throughout the value chain together with international players at industry conventions and by creating its own annual conference showcasing the growth of the African cashew sector. Cashew business people from Africa were able to learn from each other and strike business deals with international buyers at these events. In 2009, the Bill and Melinda Gates Foundation launched the African Cashew Initiative (ACi), a USUSD50 million four-year project aimed at growing cashew farmer income, cashew processing and the ACA’s capacity as an industry body. Major U.S. and European businesses, all of whom are ACA members, support the project through financial contributions, investments and purchasing commitments.

The West Africa Trade Hub’s technical assistance, communications and market linkage expertise – combined with strong leadership and buy-in from African cashew business people – have been key to the ACA’s success. Every two years, ACA members elect five African cashew business people and two international investors in cashew processing in Africa to the Executive Committee, the ACA’s highest decision-making body. Cashew stakeholders in Africa’s cashew producing countries also create National Committees as

²⁰ The ACA reported figures for investment and job creation exceed the Trade Hub’s indicators because the ACA has a broader geographical scope than the Trade Hub.

platforms for public and private stakeholders to engage with the cashew industry in their country. Their representatives participate in the ACA's governance through the ACA Steering Committee.

The ACA Executive Committee has developed an ambitious agenda for the near future: more than 100,000MT additional processing capacity in Africa by 2015. This means up to USUSD80 million in new investments, USDUS160 million in additional income (according to a USAID study on the multiplier effect of cashew exports), and a more lucrative market for more than 350,000 cashew farmers. Furthermore, the ACA aims to strengthen its partnerships with national cashew associations in cashew-producing countries and grow private sector contributions to the ACA. The ACA quality and sustainability seal program, launched in 2011 in cooperation with Kraft Foods and Intersnack (Europe's largest snack-maker), was designed to improve the competitiveness of African cashew processing and develop marketing opportunities for African cashew. According to projections the seal program alone would improve cashew related farmer income by 8%.

Results

Market linkages for export growth and investment pay off

Before 2007, few consumers or retailers knew that raw cashew nuts are grown in Africa, and even fewer were aware that investments into processing in Africa were growing. Today, African cashew has established a growing presence in international markets thanks to the promotion efforts of the ACA and the USAID West Africa Trade Hub at major industry events. Between 2007 and 2011, kernel exports have increase by 1000% in volume, with West Africa representing more than USUSD40 million in sales.



Presentations at conventions, such as the Association of Food Industries (AFI), the Peanut and Treenut Processors Association (PTNPA) and the International Nut Council (INC) sensitized between 400-600 participants per event to the opportunities in Africa. Exhibition booths at international food fairs, such as the Fancy Food Show (New York), ANUGA (Cologne, Germany) and SIAL (Paris, France) presented African cashew to an audience of up to 150,000 visitors per event.

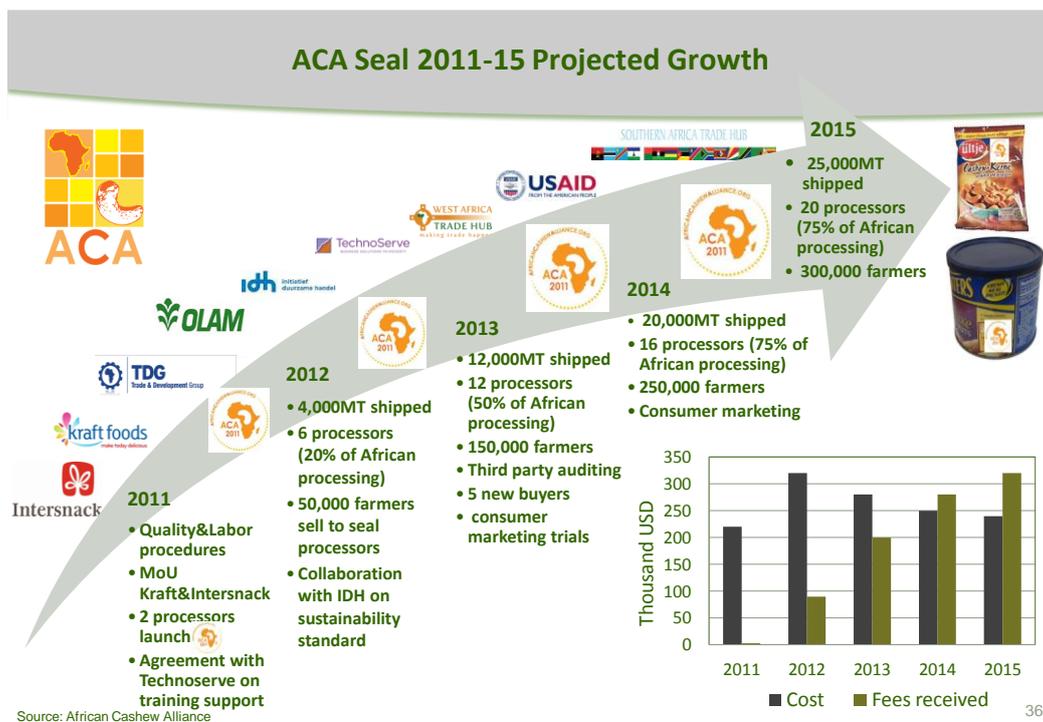
Cashew retailers, roasters, importers, brokers and investors have found various ways of supporting the growth of the industry through the ACA. In 2010, a U.S. retailer launched a new cashew product that uses more cashew grades and thus supports the growth of cashew processors who are smaller and thus cannot produce huge quantities at particular grades. Senior executives of the retailer had attended the ACA conference and been on several of the more than 37 buyer and investor trips to West Africa organized by the ACA. As a result, the executives understood and found a solution to the challenge faced by many cashew processors in Africa of having to market containers with multiple cashew grades. Other buyers partnered with cashew processors by pre-financing working capital or pursuing joint venture investments in cashew processing units.

Snack giants commit to ACA quality and sustainability brand for African industry

"Kraft is committed to purchasing high quality cashews and the ACA seal approval helps us reach this goal," Chris Nubern, Nut Purchasing Director at Kraft Foods, said after he signed a Memorandum of Understanding (MoU) with the ACA President and Intersnack, one of his largest competitors, at the ACA Annual Conference in Banjul, the Gambia in September

2011. Under the MoU, these two snack giants committed to buying ACA seal-approved cashews, produced in compliance with international food safety, quality and labor standards. In addition, both pledged USUSD50,000 each in annual ACA contributions to support cashew processors in complying with the seal requirements.

The program is the first of its kind in the world. It is a first step towards a mainstream quality and sustainability standard for the cashew industry based on the ACA Business Code of Conduct adopted by participants of the ACA Annual Conference in Maputo, Mozambique. Because the program is expected to be fully financed by processor and buyer fees for implementation and marketing rights by 2015, the seal will ensure that ACA can provide assistance and services with regards to international standards to the African industry on a sustainable basis.



Gates Foundation supports sector with USUSD50 million project

Increasing the income of 150,000 cashew farmers by 50% is the main goal of the Bill and Melinda Gates Foundation's four-year project in Benin, Burkina Faso, Côte d'Ivoire, Ghana and Mozambique. Gates launched the African Cashew Initiative (ACi) in 2009 at its regional base in Accra. The Trade Hub, ACA and partner companies mobilized significant private sector support for the project, assisted in launching operations and continue to closely engage with the ACi. Managed by German International Cooperation (GIZ) and with Technoserve, Fairmatch Support (a Dutch NGO) and ACA as implementing partners, the ACi is the world's largest cashew development project with cash and in-kind contributions from most of ACA's founding members. Under the ACi, GIZ and Fairmatch Support trained more than 150,000 farmers on yield and quality improvements and helped 15,000 farmers to organize into groups. ACi also provides training and technical assistance to cashew processors as they grow their business.

Worldwide recognition

Brazil, India, and Vietnam, the three largest cashew processing and buying countries in the world, had held talks on establishing a global cashew forum before 2007, without a place for Africa at the table. But by 2011, ACA was not only nominated into this Global Cashew Taskforce at the International Nut Convention (INC) in Budapest, Hungary in May, it also

hosted its first meeting during the ACA Annual Conference in Banjul, The Gambia on September 22. It was a historic day for the international nut business: the first time the world's largest cashew business players sat across the same table to discuss the issues of concern to the global industry.

Under the leadership of Carlos Costa, ACA President 2006-2010, ACA had participated in an initiative at the 2007 Madrid conference of the INC, hosted talks at its 2009 conference in Abidjan and participated in numerous consultations in 2010 and 2011. The Taskforce is expected to focus on developing a global cashew standard and researching and promoting the health benefits of cashew. Promoting the health benefits of cashew would further increase general demand for cashew nuts and thereby grow the cashew industry more, including for the 10 million smallholder farmers growing cashew in Africa.

ACA conference: the leading international cashew event

The ACA annual conference has established itself as the biggest annual international cashew event in the world, growing from the initial conference in 2006 of 50 participants to 360 participants in 2011.

As a key starting point for most buyers and investors doing business in African cashew, the conference has attracted an increasing number of participants, sponsors and international experts. The 2011 conference, for example, featured contributions from 60 international experts and more than 300 meetings set up by ACA to match potential business partners.

The event is now fully financed by participant fees and industry sponsorships. The 2011 conference saw the debut of the first World Cashew Expo, an exhibition of cashew processing machinery manufacturers, packaging suppliers and service providers to the industry.

“For us, everything started at the 5th ACA annual conference in Maputo in September 2010. We travelled to Ghana in February 2011 for the first time, and today with the help of ACA, the Brazilian industry has bought more than 50,000MT of cashew nuts in West Africa. In our opinion, this has increased farmer income by 20% from previous years,” said Shalin Behal from Iracema, one the biggest processors in the world and an ACA member.



Attendance at ACA annual conferences, 2006-2011

Strong technical assistance and service offer grows industry

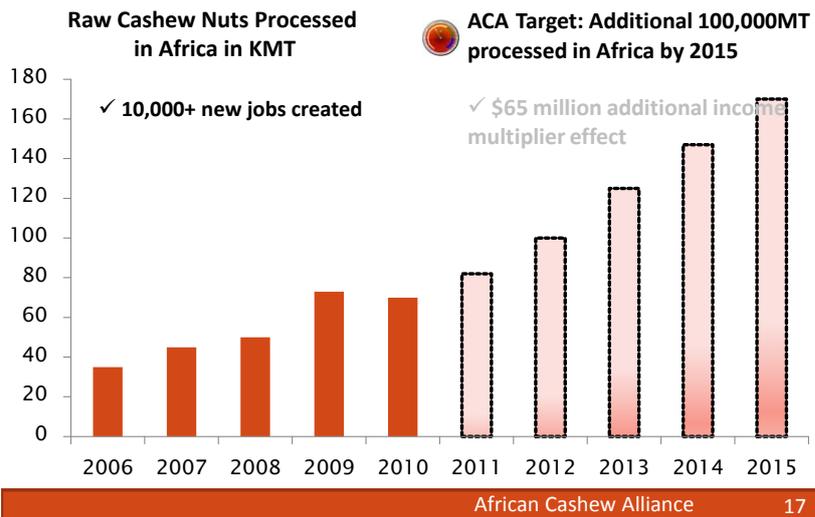
More than 30 processing companies in Benin, Burkina Faso, Côte d'Ivoire, Ghana, Guinea-Bissau, Nigeria, Senegal, The Gambia and Togo have benefitted from the ACA's technical

assistance offer. In FY2011 alone, the ACA and Trade Hub team mobilized more than USD1.4 million in working capital financing for three cashew processors. In addition, ACA member companies from Benin, Côte d'Ivoire and Ghana assisted by the Hub since received USD3.5m in financing due to technical and access to finance support of the ACi project.

A further USD14 million for investments in additional capacity are standing by following the signing of a MoU

between ACA, USAID and the ECOWAS Bank for Investment and Development. Such deals became possible because the Trade Hub and the ACA were able to offer a comprehensive support package to both processors and financial institutions. ACA provides technical support and training to processors, educates financial institutions on the cashew potential and market trends, provides purchasing commitments from buyers while the Trade Hub's finance experts train bankers on the cashew financing cycle and assist processors in developing bankable business plans.

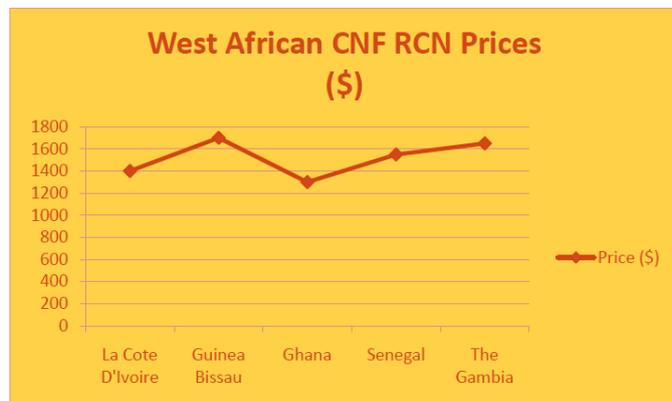
Processing Has Doubled in Africa since 2006...



"I want to say a big thank you to all of you for your professional inputs, advice, constant follow up and visitation. With this development I believe the story of Abod Success will change for the better, and we shall make all of you proud."
Tunde Odunuga of ABOD Success, Nigeria

More 2007-2011 highlights

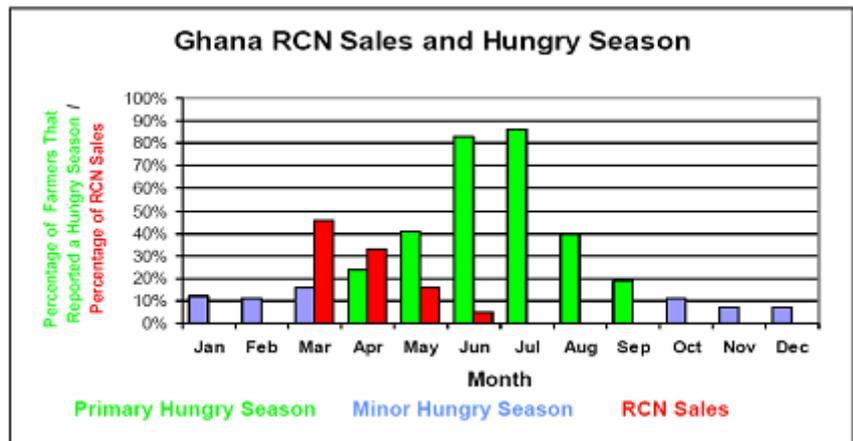
- ACA National Committees elected in Benin, Burkina Faso, Côte d'Ivoire, Ghana, Guinea-Bissau, Nigeria, Senegal and The Gambia
- Partnership agreements on information exchange and investment promotion with Cashew Board of Tanzania, Cashew Nut Processors Association of Tanzania and Mozambican Cashew Processors Association (AICAJU)
- Weekly updates on cashew nut and kernel prices are sent to ACA members. An example if information provided is shown in the graphic on the right.
- 11 newsletters disseminated to database of 2,700 cashew contacts, 35% annual growth in website visits from 2009-2011
- ACA's Youtube, Twitter and Facebook pages feature video clips, photos and updates on cashew business in Africa



Analysis

Expanding cashew industry can benefit millions

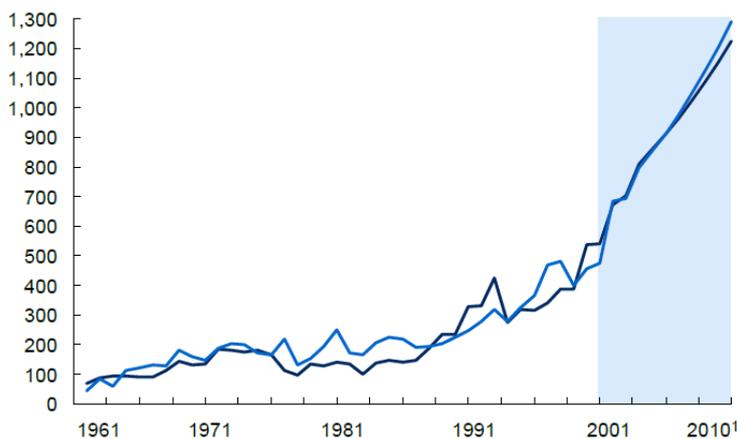
The cashew industry can help reduce poverty for almost 1.5 million farmer households, or more than 8 million people, in West Africa who supplement their incomes with cashew. Value addition through processing provides a further, more stable, transparent and lucrative market for more than 60,000 farmers in West Africa and has created 3,500 more new jobs since 2007. Evidence also suggests that cashew significantly contributes to food security, since farmers sell the crop during the 'hungry months' of the year, the time when other food crops have not yet yielded and farmers need cash to buy food and pay for health and education expenses. The annual calendar at the right shows the months in which rural families report hunger juxtaposed with cashew-selling months. It is clear that cashew sales come at a crucial time for these households.



Global demand for cashew kernel has seen a sharp increase over the past ten years, documented in the figure below. The long-term upward trend in raw nut prices is leading farmers to plant more cashew trees in West Africa, thus increasing their earning potential.

The global cashew demand in terms of volume and value have grown strongly over the last decades

Global exported kernels index
1961 = 100



Source : Mwombeki Baregu, Consultant to the World Bank, Presentation at the 2010 ACA Conference

Based on data from the USAID-West Africa Trade Hub Multiplier Effect study, increasing the share of cashew nuts processed in Africa from 10% to 50% would generate more than USD200 million in additional incomes for people in rural Africa as a result of the multiplier effect of jobs and incomes on the local economy.

There has been a general consolidation trend in agro-processing in recent years. Additionally, an increase in demand for cashew, in particular from countries using cashew as an ingredient, has narrowed the price differential between whole and broken kernels. Both these trends are in favor of large-scale mechanized cashew shelling plants in Africa, such as recently opened units in Côte d'Ivoire, Ghana and Nigeria (for more information, see www.youtube.com/africancashewa).

Recommendations

ACA and the cashew industry have both grown tremendously between 2007-11, but both experience and emerging trends highlight continued needs for a strong business association and market-based support programs such as the Trade Hub. A successful agro-processor must have expertise in crucial areas: a technical understanding of cashew processing, a grasp of trading, international and local raw cashew nut and cashew kernel market dynamics and financial management skills. Many of Africa's raw cashew nut traders, processors and investors still continue to need ACA's expertise, links to networks of buyers, traders and processors and Trade Hub technical assistance on accessing and managing finance.

Furthermore, ACA and the Trade Hub should continue to pursue initiatives that benefit the industry as a whole. For example, Ghana continues to attract investments in cashew processing because of its improving business environment, although the country's cashew crop is relatively small. Reducing transport and infrastructure costs and removing regional trade barriers (through the implementation of ECOWAS trade protocols) is essential for securing the raw material supply for such processors – and improving the farmers' return on the crop.

On the market-side, initiatives such as the Global Cashew Task Force and the ACA quality and sustainability seal will help grow the market for cashew worldwide and demand for cashew processed in Africa in particular. This will benefit the entire value chain – from farmer to consumer.



CASE STUDY

Increasing capacity and confidence

Co-founded by the USAID Trade Hub, the African Cashew Alliance has built a vibrant, robust African cashew industry.



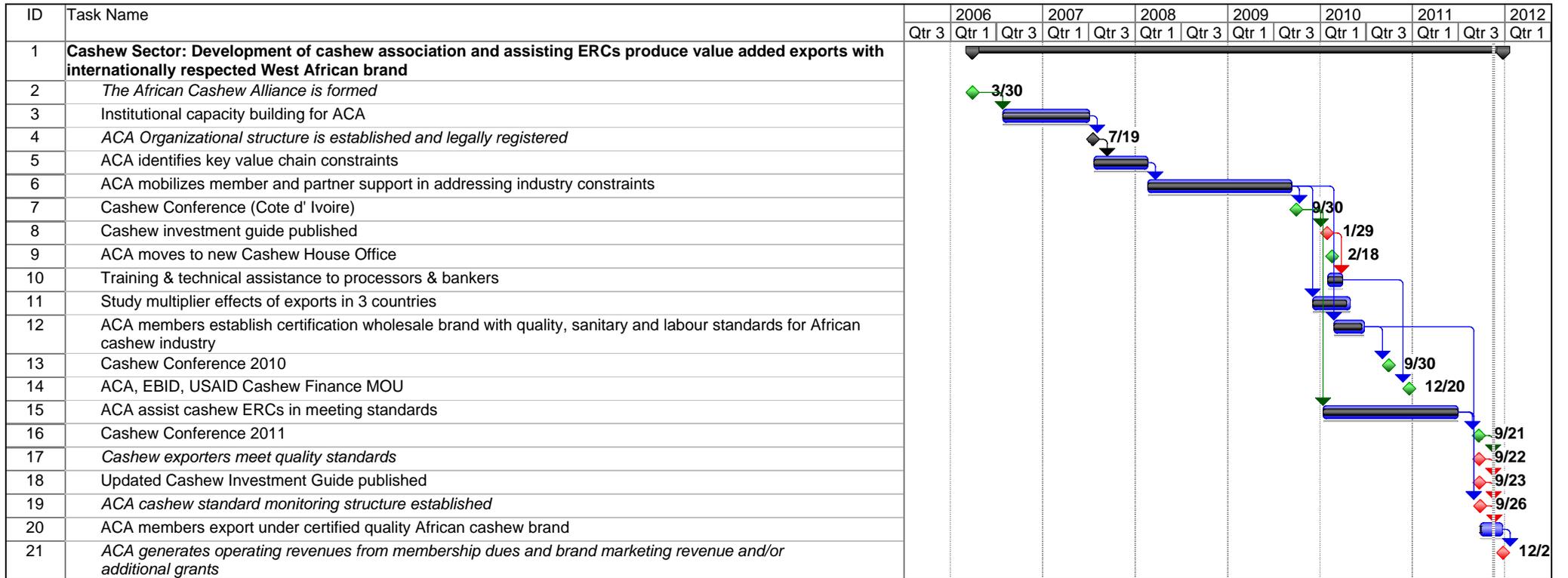
USAID West Africa Trade Hub

At its annual conferences, the African Cashew Alliance connects hundreds of companies, service providers, equipment manufacturers and others to build the industry.

CHALLENGE With an estimated annual production of 850,000 metric tons (more than one-third of the world total), West Africa is the largest global producer of raw cashews. However, only about 10% of the crop is processed locally; the rest is shipped to India and Vietnam for separation into kernels and re-export around the world. The problem was two-fold: more processing capacity and increased buyer confidence in the processed kernels in Africa – the industry could not have one without the other.

INITIATIVE Co-founded by the USAID West Africa Trade Hub in 2005 by 22 organizations, the African Cashew Alliance – now with more than 100 members – has helped to expand processing capacity, improve quality and promote African cashews in national and global markets. When Connecticut-based International Marketing Systems (IMS) received an order to source cashews for a top U.S. retailer, the company looked to India, Vietnam, Indonesia, Brazil and, for the first time, Africa as possible suppliers. Through the ACA, the Trade Hub arranged factory tours in Ghana, Nigeria and Cote d'Ivoire, and encouraged IMS to attend the ACA's annual conference. After meeting with local processors and other key players throughout the value chain, IMS felt confident in the West African firms' ability to meet its sourcing needs.

OUTCOME International Marketing Systems is now sourcing approximately 70% of its cashew kernels from Africa, and expects that figure to increase to 85% in 2012, representing a total of 30 containers per year (about 480 MT). By connecting IMS with the right people and demonstrating the strong industry support represented by the African Cashew Alliance, the USAID Trade Hub was able to reduce the company's perceived risk of sourcing from the region and successfully position West Africa to compete against more established cashew suppliers. With its abundant supply of raw cashews, increasing processing capacity and powerful industry leadership through the ACA, Africa is well situated to be a global leader in the cashew sector in future years.



Project: Cashew 07-13-10 Date: Tue 11/15/11	Task		Milestone		External Tasks	
	Split		Summary		External Milestone	
	Progress		Project Summary		Deadline	



1.5 Shea

More than four million women in rural West Africa support their families and assure the education of their children through the sale of the shea nuts they collect, whether destined for export processed into butter for local consumption or export to international markets. The value of shea nuts and butter, a uniquely African product, has increased by over 1,000% over the last ten years as new business models, investments and in-region value addition are developing to meet the growing international demand for shea products. The increased demand has led to new businesses and this in turn has led to new jobs. There are now more companies operating at every level of the shea value chain. The Trade Hub's 2005 industry study was instrumental in presenting the opportunities and the challenges facing the sector; several companies cited the study as critical to major investment decisions. The challenges were clear: Women stood to earn more income from sales of shea nuts and butter if quality improved; exporters of artisanal shea butter needed to connect with international buyers; and, above all, the industry needed greater connectedness to leverage resources and information.

From 2008 to 2011, tThe Trade Hub implemented activities in each area: workshops provided technical assistance to women on quality issues for nuts and butter that resulted in USD44,142,952 in exports of shea butter, shea nuts and shea-based cosmetics ; XX companies participated in XX international trade events connecting with XXX international buyers; and, a broadly representative industry alliance – the Global Shea Alliance – was launched with the world's leading buyers, major retail brands, women's groups, shea business leaders and others from across the region and around the world, more than 120 paying members. These stakeholders are now cooperating to promote the shared value of shea by establishing quality standards, promoting the industry in international markets, and advocating for policy that will promote their industry.



Results

Global Shea Alliance launched

Intent on promoting shea in global markets and establishing standards for the sustainability of the industry, stakeholders representing virtually every aspect of the shea value chain formed an international alliance during the industry's annual event in Accra, Shea 2011: Sustainable Solutions. Stakeholders included the world's largest buyers of shea nuts and shea butter, traders, processors, service providers and non-governmental organizations from across West Africa and around the world. 28 companies signed a declaration to form the international alliance. They also elected a seven-member Executive Committee from across the value chain to provide strategic direction to the Alliance for the next two years.

Global Shea, the internationally recognized brand developed by stakeholders in 2009, will be used to represent the alliance on an interim basis. Stakeholders elected to house the alliance’s secretariat at the USAID West Africa Trade Hub on an interim basis.

The objectives of the alliance are to: promote shea internationally, establish shea quality and shared value standards and support advocacy for the shea industry. Through these objectives, the GSA aims to increase the benefits of the shea industry for all stakeholders, including helping raise the income of rural women in Africa – one of the most important stakeholders in the shea value chain.

The elected Executive Committee mandated the secretariat to conduct a member needs assessment survey to give the executive committee a better understanding of where to focus their efforts. More than half of the GSA membership, 63 respondents, returned the survey and said the Alliance’s top priority should be to promoting shea, establish quality standards and advocate for support.

Annual shea conferences connect stakeholders

The Global Shea Alliance’s foundations were laid at international conferences organized by the Trade Hub with sponsors across the industry. Beginning in 2006 in Abuja, the annual conferences

brought hundreds of stakeholders together to share information, discuss primary issues and network in order to do more business. Stakeholders formally announced their intent to develop an alliance at the 2010 conference held in Bamako, Mali. In 2011, international



shea industry stakeholders converged in Accra, Ghana for the sector’s fifth annual conference. Shea 2011: Sustainable Solutions featured the launch of the world’s first international private sector shea alliance – the Global Shea Alliance – and expert information on virtually every aspect of the shea industry. Participation in the conferences steadily grew over the four years of the project. More than 400 stakeholders participated in the 2011 event.

Women’s groups that collect shea nuts, the world’s major buyers of nuts and butter, researchers, civil society, public sector officials, service providers, financial institutions and transport companies all attended the event. The conference facilitated connections, information exchange and business among stakeholders from across West Africa and around the world. The B2B section provided a platform for business owners to connect with people they need to grow their businesses.

The conferences led to increased business and stakeholder-led initiatives to exchange information and experiences. Following the Global Shea 2010 conference, 13 Malian industry stakeholders conducted an exchange visit to Ghana, co-coordinated by KIT and the Trade Hub. The delegation, including processors and marketing and technical advisors of 10 shea cooperatives, visited shea processors and women’s groups, allowing them to better understand the sub-regional trade system and discuss production techniques. The Malian processors are now using roasting techniques they learned about in Ghana and one company subsequently participated in the in-cosmetics trade show in Milan, Italy, with Trade

Hub support. Following Shea 2011: Sustainable Solutions, the conference in Ghana, KIT and the Trade Hub organized an exchange visit of Malians to Senegal.

Forging partnerships towards industry growth

The Trade Hub leveraged its connections across sectors and components by bringing together the African Cashew Alliance, the Global Shea Alliance, ECOWAS and UEMOA, and other institutions. This cross-sector/cross-institution collaboration culminated in a road map to implement activities to address sector issues in August 2011. More than 50 stakeholders, including the leadership of the two alliances, discussed core issues affecting the value chains during the two-day meeting.



Major international players in both sectors, including Wilmar and Olam, The Body Shop and AAK participated, too, demonstrating that ECOWAS is heeding calls to involve the private sector in economic development initiatives, stakeholders said.

The meetings are informing the ECOWAS Initiative for Export Promotion and Enterprise Competitiveness for Trade (ExPECT). ExPECT's ultimate goals are to improve the competitiveness of lead value chains and build capacities for regional and global market competition.

National shea advocacy events

Across West Africa, the Trade Hub and the Global Shea Alliance have provided assistance to national shea associations, increasing their effectiveness, improving their visibility and extending their influence on policy.

In **Benin** in 2011, 150 stakeholders convened for the country's first national shea conference and elected national and representative committees that will organize "Shea 2012: Shared Value," the annual two-day industry conference set for April 2012. Export promotion agency ABePEC (Agence Béninois de Promotion des Echanges Commerciaux), GIZ and Fludor—with additional support from the Global Shea Alliance and the Trade Hub—sponsored the conference, exhibition and round table discussions to move the already vibrant Benin shea industry forward. The event sought to organize Benin's shea sector, increase the nation's competitiveness, promote and increase shea production, and improve access to the international market. Gilles Adamon from Natura, a Trade Hub-assisted company, was elected as the president of the committee.

In 2010 and 2011, the Trade Hub assisted the Shea Network **Ghana**, helping the organization organize three forums to promote the development of the national industry. The forums brought together public and private sector stakeholders to deliberate on government's intervention in the sector. Members and regional focal organizations have adopted the network's constitution and elected a board of directors.

In **Nigeria**, stakeholders elected a new executive committee for their National Association of Shea Products of Nigeria in January 2011 with the support of GIZ, Jacob Shinka of Meena Agro Oil Ltd. noted, and the group hopes to host Nigeria's first National Shea Convention

later this year. Government has set up a technical committee to promote and develop the industry. In June 2011, Madame Zainab Ibrahim Kuchi of the Daralkuchi Group, a member of the Alliance's Executive Committee, became a federal minister, delegating her duties to a subordinate.

In **Mali**, following the Shea 2010 conference opened by the Malian Prime Minister with over 300 participants and an expo, the Trade Hub and Global Shea Alliance continued to see the growth and strength of the National Shea Federation (FNK), along with the election of two Malian business leaders to the Alliance's Executive Committee. Additionally, training was provided to over 50 industry players in January in collaboration with the ARC Coordinator and l'Agence de Promotion d'Investissement (API). In August, the Trade Hub facilitated a high level visit of the ONE campaign to shea associations in rural Mali, profiling AGOA opportunities and women's entrepreneurship. Kajole of Mali participated in In-Cosmetics in 2011 and has now obtained organic certification to meet market opportunities.

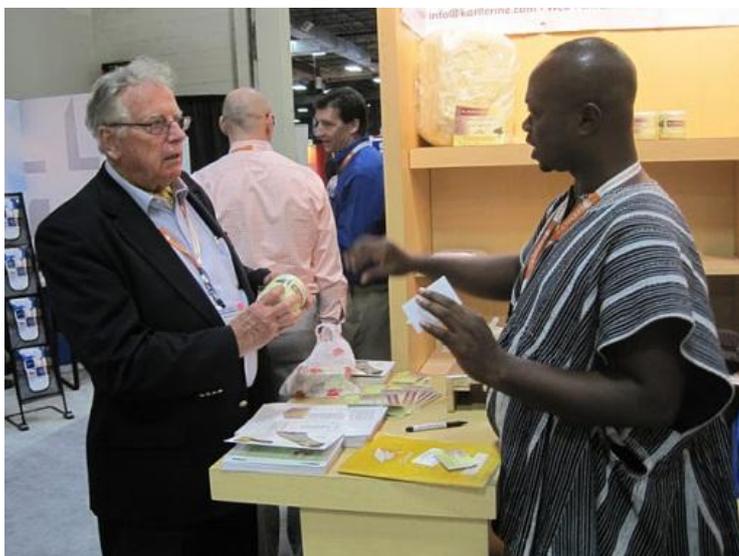
In **Burkina Faso**, the Trade Hub collaborated with the Table Filiere de Karite (TFK) in two national shea workshops. In 2011, Madame Mamounata Velegda, a member of the Alliance's Executive Committee, was elected president of TFK.

Connecting the industry – Linking buyers and sellers

The Trade Hub facilitated visits from several international and regional investors to ERCs in order to conduct assessments of their ability to supply large volume orders.

Linking ERCs to the international market through trade shows

The Trade Hub assisted more than 20 companies in participating at 12 international trade events – connecting to approximately 3,000 international buyers. In addition to finding buyers, trade show participation allowed exporting companies to see firsthand the demands they must meet in order to compete in international markets. Producing quality products in appropriate and attractive packaging were just two of the areas companies indicated as particularly important.



The USAID West Africa Trade Hub facilitated the participation of several shea ERCs to attend international trade shows, with a particular focus on introducing West African finished-product companies to the international market.

Leveraging science for better shea

Research on shea continues to identify issues critical to its sustainable cultivation across Africa. The Trade Hub has involved scientist members of the Innovkar shea research project in each of the shea industry conferences and in 2011 co-sponsored the project's final conference in Ouagadougou, Burkina Faso. The Innovkar project studies management and use of shea resources in Africa. Trade Hub Shea Advisor Dr. Peter Lovett has helped lead Innovkar's research efforts. Among other things, the research has provided stakeholders with the data and analysis to drive advocacy for policy that protects and promotes shea as a critical resource. The latest research shows that shea parklands are under threat from other uses and require closer management, and that new technology is now available to gauge

the quality of shea nuts and shea butter in the field, which could significantly contribute to the Alliance’s efforts to establish objective quality standards.

Vigorous and robust shea industry is rapidly expanding

The industry’s growth since USAID Trade Hub assessed the shea sector seven years ago has been dramatic – thousands of jobs have been created and millions of dollars in revenue generated. A key to this transformation was information exchange and networking, fostered by USAID Trade Hub-assisted industry trainings and conferences. The Trade Hub’s shea supply chain studies published in early 2005 were also important, stakeholders said.

Ongoing and planned construction and renovation of shea processing units in Burkina Faso, Ghana, Mali and Nigeria are signs of the transformed shea industry. For example, Sekaf Ghana Limited’s Shea Butter Village in Tamale, Northern Region, Ghana, is a hub of activity today, engaging 150 women daily. Eugenia Akuete, CEO and Founder of Naasakle Ltd. and President of GSA, started processing 1,000 pounds of shea nuts, but now produces more than three tons of shea butter per month. “Collaboration between all stakeholders - private industry, small or big, community-level support for the women, market players, NGOs and others - is part of what the Global Shea Alliance hopes will create a strong and vibrant shea industry for the benefit of all stakeholders,” she said.



“The shea industry today is vigorous and robust,” said Santosh Pillai, Managing Director/West Africa at Wilmar International and GSA Executive Committee member. The company today processes tens of thousands of tons of nuts annually in Tema, Ghana, home to the country’s largest port. “We expect this positive growth to continue and see the industry delivering returns to stakeholders at all levels, which is key to its future.”

Analysis

There appears to be progression towards a period of consolidation and compliance at the end of an unprecedented period of growth for the shea, as evidenced in the table below showing estimated shea investments since FY2007. Still, there is evidence of continuing growth in the sector, and diversification of products and players continues.

City, Country	Firm	Supply chain capacity (max. SETs p.a.)	USUSD invested since 2007	Investment comments
Bohicon, Benin	Fludor Benin SA	18,000	USD15,000,000	Estimate - awaiting Info
Bobo, Burkina Faso	Burkarina	3,000	USD3,000,000	Est. including warehousing, processing, marketing, etc.
Burkina Faso	SAREPTA	3,000	USD1,500,000	Unknown
Buipe, Ghana	Produce Buying Company	40,000	USD10,000,000	Investment made & under construction
Buipe, Ghana	The Pure Company	3,000	USD6,000,000	Active 2010 - but currently idle
Savelugu, Ghana	Shebu Industries Ltd	12,000	USD80,000	Active 2001 but latest expansion stage incl.
Tamale, Ghana	AAK	150,000	USD15,000,000	Purchase of KI, office, lab, weigh-bridge, Benin
Techiman, Ghana	Ghana Nuts Ltd	40,000	USD20,000,000	Active
Tema, Ghana	Ghana Specialty Fats Ltd	60,000	USD20,000,000	First announcement 2006 - total USDUSD25 million +
Tema, Ghana	Revy Trust	10,000	USD3,000,000	Active 2011
Tema, Ghana	3F Africa	60,000	USD15,000,000	Active 2010
Guinea	Regent International	5,000	USD85,000	Developed supply chain and added new machinery
Mali	SIKA	20,000	USD750,000	If deal completes...
Nigeria	Shea Radiance	1,000	USD12,000	Added new equipment
Various	Various	10,000	USD1,000,000	Estimate of certification-related investments, e.g. organic, fair-trade, kosher, halal, etc
Totals		435,000	USD110,427,000	

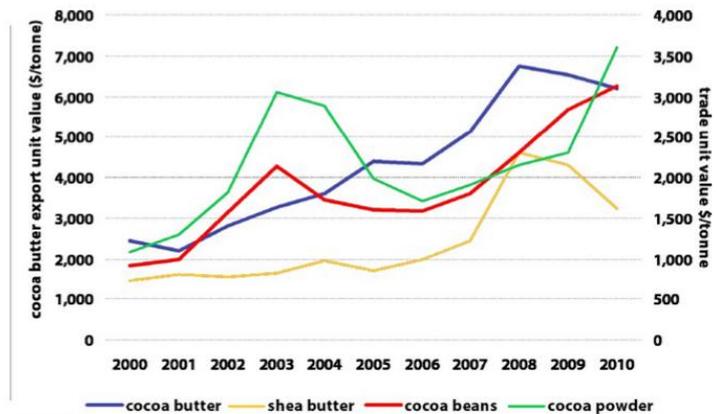
As the prices for cocoa butter and for shea decrease, shown in the figure to the right, it appears that a key issue is price; and price is determined by supply and demand, i.e. Quality @ Quality @ Price.

In 2000, the cocoa butter price was low and both farm-gate and FOB shea nut and butter prices were low as well. Yet the western world was paying high prices for both whole shea butter (whether hand-crafted or industrially extracted) and fractionated stearin (industrially produced for use in making cocoa butter equivalents and improvers). The shea industry was

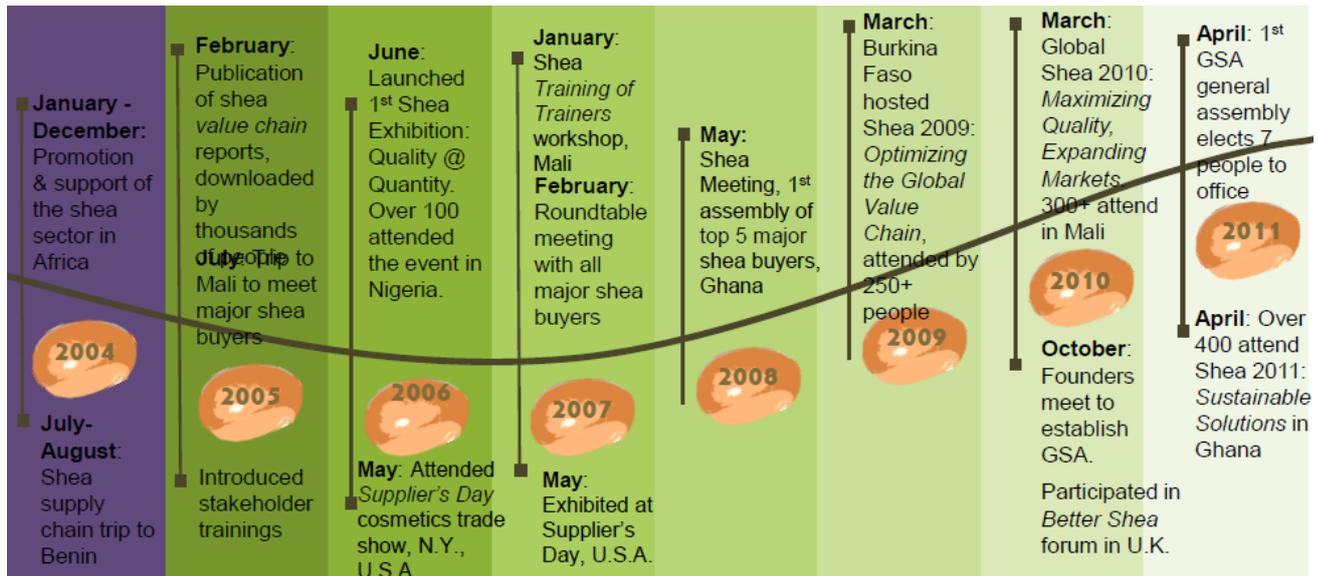
disorganized, opaque and controlled by a limited oligopoly of international traders. Projects were making very limited headway to increase exposure for quality hand-crafted butter, and perception of the industry was in disarray.

The Trade Hub work on shea began in 2005 with publication of a series of supply chain reports that contained clear, accurate information on the sector, including volumes, and focused attention on sheanut quality). The Trade Hub forged partnerships with a range of stakeholder organizations including Peace Corps, SNV, GIZ and held trainings for both exporters and producers across the region. In 2006, the first international conference was held in Abuja, attended by less than a hundred people but with key presentations by influential firms and persons. Thousands of stakeholders read the reports and attended trainings.

Shea butter prices have followed cocoa butter prices downwards



At the same time as improving quality, building capacity and increasing export readiness, the Hub facilitated access for shea clients to international tradeshow and conferences—including Natural Products Expo West, New Jersey Society for Cosmetic Chemists, In-Cosmetics, and Sustainable Cosmetics Summits—causing shea to go global. Prices at source sky-rocketed, demand outstripped poor harvests and the supply chain revealed significant (but still insufficient) improvements in quality in Mali and Nigeria, as producers realized they were not providing the required raw material to buyers. For example, boiled sun-dried nuts are highly desired, while smoked or raw-dried nuts are perceived as low quality and thus attract low prices. Unfortunately, this was happening at the same time as prices on western markets collapsed. Existing buyers brought prices down in reaction to cheap supplies flooding the market. Interest in shea was high, but this frustrated many as their attempts to quickly develop profitable businesses based on cheap and opaque sourcing methods met providers of high quality and efficiently sourced material in the market. Supply chain transparency and organization suddenly became key to finding effective markets. To respond to market context, the Trade Hub began researching certification, improving quality, and providing assistance to link with producers. The road to an alliance was beginning, as shown in the figure below.



West African politics woke to the shea industry as multi-million dollar investments came into the region. Traders occupying the middle ground in the supply chain and who had previously enjoyed full control of the sector (buying cheap and selling high) were found to be impeding the industry. With little value addition, some international firms circumvented traders and reached out to cooperatives of rural women for larger proportions of the crop's value in return for improved quality. Speculation became the order of the day, and fears grew about a reversal of de-regulation precedents. Associations of traders called upon governments for assistance. Meetings with major stakeholders revealed a willingness to come together and share the same table in order to resolve generic issues in the industry. The sector was communicating, cross-cutting issues were being identified and the shea industry started to get organized.

Trials to source quality sheanuts directly from rural women groups were given air-time as international converters called for bulk quality and described a willingness to pay premiums – unfortunately early ideas flopped as premiums provided were collected to enable large volume purchases, and the actual premium quality crop was mixed in to increase average quality. Demand went through the roof with a low 2007 harvest as prices exceeded USUSD800 per ton for shipments leaving port in April 2008. Buying strategies quickly became more varied and for the first time in over 15 years, government-linked companies started an early buying campaign in June-July 2008 paying over USUSD500 per ton farm-gate. However, global financial markets then crashed, and they were not able to sell the nuts. This market crash led to low demand for shea nuts and crushed the prices of shea nuts to below USUSD250 at farm gate.

Stakeholders discussed the issue of quality and price during Global Shea 2010: Maximizing Quality, Expanding Markets in **Mali** and decided to form an industry alliance to deal with such issues. The USAID West Africa Trade Hub began the process of forming the Alliance based on this groundswell of support, as the first global alliance of all shea stakeholders across the value chain and global geography.

During Shea 2011: Sustainable Solutions, the Vice President of the Republic of Ghana, U.S. Ambassador to Ghana, Brazil Ambassador to Ghana, and other officials formerly launched the Global Shea Alliance, encouraging stakeholders to support the alliance to help develop the industry. The secretariat, in consultation with the executive committee, has established a five year vision for the GSA. This vision (attached as annex) will guide the GSA – and the Trade Hub – for the next five years.

Recommendations

- The Trade Hub should continue to support and assist the Global Shea Alliance as it develops into an autonomous body to represent industry stakeholders
- The Trade Hub should support the Global Shea Alliance as it pursues its three primary goals: establishing quality standards, advocating for improved policy and promoting shea worldwide
- The Trade Hub should continue to support research on the management of shea and its uses
- The Trade Hub should continue to support companies as they seek to connect to international buyers
- The Trade Hub should expand its shea work to the food industry, the final destination for most exported shea



CASE STUDY

Building a sustainable shea industry

The USAID Trade Hub brought shea stakeholders together to build a dynamic industry.

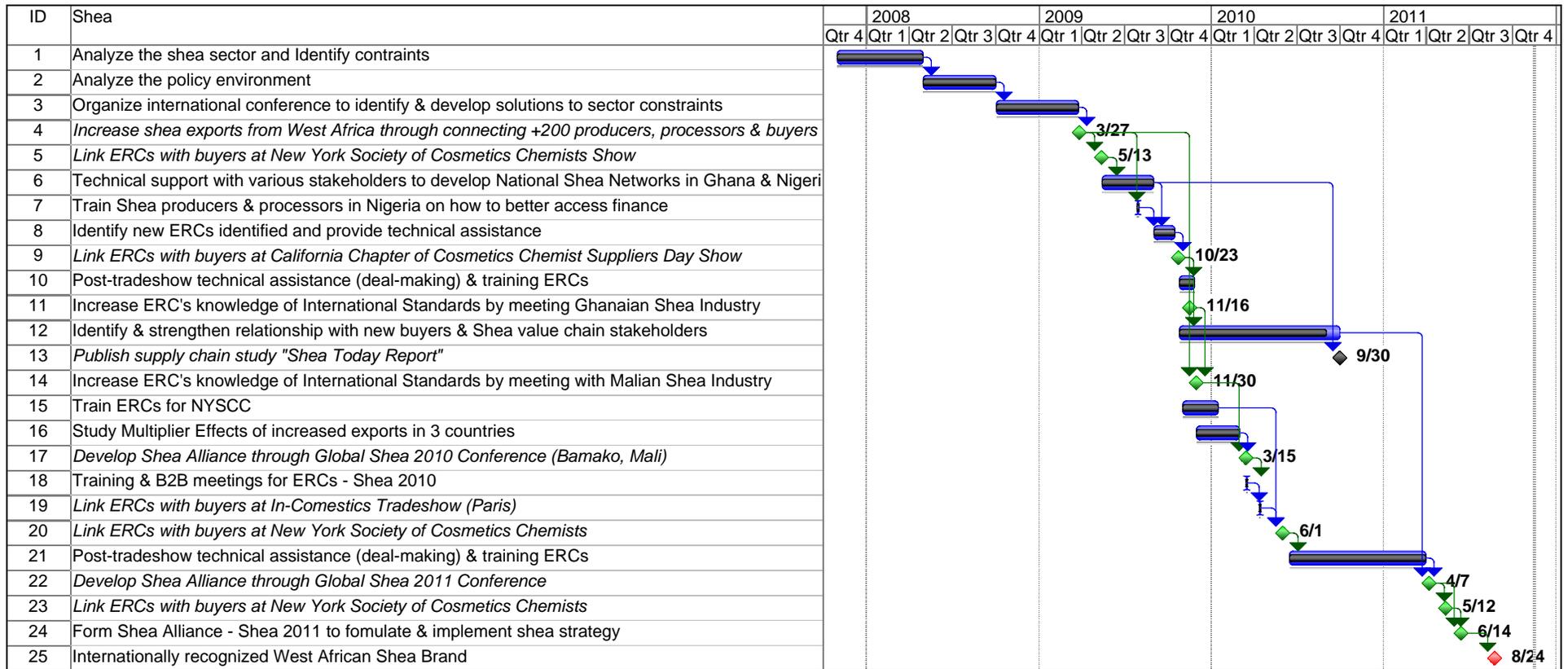


The Executive Committee of the Global Shea Alliance represents all aspects of the industry, which has emerged as a powerful engine of economic growth and development.

CHALLENGE Shea butter is a valued and functional ingredient in the world's food and cosmetics industries. More than 50,000 tons of shea stearin – shea butter – are used annually in foods worldwide; at least 10,000 tons more are used in cosmetics. As the trees grow only in sub-Saharan Africa—with production concentrated mainly in eight West African nations—they represent an exclusive opportunity for economic growth in the region. A 2005 USAID Trade Hub study of the shea value chain, coupled with outreach efforts at industry conferences and trade events, demonstrated the sector's potential. However, the disconnected nature of the industry resulted in missed opportunities for value addition and prevented all stakeholders from realizing maximum gains.

INITIATIVE Following a series of trainings, tradeshows and other technical meetings with key stakeholders, in May 2008, the USAID Trade Hub brought the top five shea buyers from around the globe together. In October 2010, more than 50 stakeholders representing all aspects of the industry initiated the Global Shea Alliance (GSA). The Alliance creates shared value by working to improve the quality of the trees, nuts and resulting butter; promoting shea internationally at trade events and through the publication of R&D studies; and encouraging advocacy efforts on national, regional and international levels.

OUTCOME The Global Shea Alliance—led by a seven-person executive committee, including five West Africans of which four are women—now boasts over 140 paying members. The Alliance is helping to ensure the value is shared from producers to consumers by addressing key issues – promoting shea internationally, establishing quality standards and advocating to government on policy. The potential is enormous: in just five years, value added capacity in West Africa has increased 10-fold – export values have increased from \$20 million to over \$100 million. For the estimated four million women who harvest the crop from naturally growing shea trees throughout West Africa, that represents more money for education, health care and other benefits for their families.



Project: Shea 10-13-10 Date: Tue 11/15/11	Task		Milestone		External Tasks	
	Split		Summary		External Milestone	
	Progress		Project Summary		Deadline	



1.6 Home Décor & Fashion Accessories

Introduction

Home décor and fashion accessories have varied and complex value chains that are difficult to document statistically. USAID Trade Hub has been committed to this sector as a multi-country direct AGOA beneficiary and it creates income for thousands of households in both rural and urban communities. It is often the income used to send children to school or get medical care. Nearly every farmer in every rural community across the region has an artisanal skill, and many proactively seek to supplement their income through those skills. Those who are successful can earn more through artisanal activity than through farming.

However, impact on first-stage producers far down the value chain from fabulous, finished, exported products is often unreported because it is difficult to document. To measure such impact, the Trade Hub published a study on the Multiplier Effects of exports in this industry that helped quantify the value chain impacts of artisanal activity.

The Trade Hub's strategy has increasingly broadened the sector's access to international markets while at the same time streamlining inputs in order to reduce costs in getting product to market and increase incomes in West Africa. Three significant challenges in this sector are the need for 1) professional export agents who can balance international demands with the informal nature of artisanal activity, 2) trend- and technically savvy product development inputs to create marketable products at competitive pricing, with strong enough margins to sustain growth, and 3) convincing international buyers that West Africa offers a credible and attractive sourcing opportunity.

Prior to this contract, Trade Hub analysis indicated that market access was a major sector constraint, so the Trade Hub brought West African producers to U.S. trade shows, where companies were able to learn the realities of the international market. Many of those companies proved to be great at export production, but they lacked agent or marketing skills.

The Trade Hub's strategy evolved to focus on the professionalism of exporters. Many companies evolved with Trade Hub assistance. Several export agents from target countries have emerged, and have graduated to become independent vendors at major international tradeshows. Each of these companies works with hundreds of producers whom they

One indigo jacket, seven tiers of employment

Once the cotton season is over, farming women relax together and spin their cotton into thread. Weavers, most often male, weave the threads into long strips on a foot loom. Someone else then sews the strips together to form a cloth. Dyers dye the cloth with locally grown indigo or other natural dyes. A different woman specializing in imported hot-bath dyes does the lining fabric, and then a tailor sews the jacket. Finally an export agent markets the finished product to international clients, and the jacket is sold around the world.



represent at trade shows. They have worked out viable distribution systems in the countries where they are marketing, and are models for other rising companies.

In 2009, the Trade Hub created the AfricaNow! brand and our strategy evolved to focus on strengthening the professional capacity of export agents and assisting them both in market-focused activities as well as building collaboration opportunities with numerous production companies. This forward and backward linkage strategy increases efficiency in the value chain, reduces costs, allows for greater product design flexibility, and strengthens the image for the sector.

One driving force for sustainable growth in this sector is to support independence. In 2010, the Trade Hub initiated a program to support companies with experience and capacity to show independently at trade shows. The Hub also designed B2B programs that leverage business relationships that will last well after the project, by linking producers to exporters, exporters to buyers, financial institutions to vendors, designers to producers, financial consultants to companies, and more.

Results and highlights

AfricaNow! brand development

Establishing a West Africa brand was one of the key deliverables for the project. In 2009 AfricaNow! was established and over the following two years it has grown. In February 2011, AfricaNow! was launched at Ambiente, the world's largest and most important home décor trade show and marketing event. The Trade Hub chose to locate the AfricaNow! booth in the wholesale wing of the show, where large importers are the target client and minimum orders are containers, and which is prohibitive for smaller boutiques – a plus for African companies, many of whom cannot sustain the distribution challenges presented by selling to small shops. This event was a turning point for the AfricaNow! brand. AfricaNow! created a buzz throughout the entire show, buyers waited three deep to talk to the exporters. Major import buyers from Brazil, France, Germany, Italy, Japan, Mexico, the U.S., and more flooded the booth. Not one asked, “are they capable?” West Africa was seen as an equal player with competing vendors from across the globe.

AfricaNow! now signifies quality and professionalism. This is important because for decades “handicrafts” conjured up the first- or second-tier producer making a single product – a great story, but it does little to inspire buyer confidence. The Trade Hub has met its objective to



Success Story: Xarala from Senegal

Xarala, an export company from Senegal, participated in a number of Trade Hub-sponsored trade shows in the U.S. but experienced moderate growth. When the Trade Hub created a strong AfricaNow! presence at Ambiente, the world's most important home décor trade event, the Trade Hub invited Xarala and encouraged it to represent other West African producers. Owner Clarisse Djionne presented numerous collections, yielding magnificent success with major orders to Italy, France, Holland, Italy, and the U.S.

Xarala is now establishing a distribution system in the U.S. to facilitate its new venture to exhibit at the New York International Gift Show in January 2012. Xarala has established itself as a leading Senegalese export company in Europe and the U.S. Xarala represents the kind of growth in professionalism and independence that the Trade Hub has been working towards and which the AfricaNow! brand represents.

move the image of the African crafts sector into the 21st century by presenting professional African export companies with the competence to produce and deliver effectively to the international-buying community on a par with competitors from around the globe.

The AfricaNow! brand is built on collaboration, including buyers, vendors and producers. Throughout the different trade events and through the AfricaNow! website (www.africa-now.org) it has grown in stature to stakeholders across the value chain. The brand drives all our activities, from product design to accessing markets.

Sector collaboration

The Trade Hub has created strong collaboration networks throughout the sector. For example, the Trade Hub assists companies to collaborate with each other to meet the demands of large importers, regionally to be able to fill containers and achieve scale, with agents, buyers, and producers. The Trade Hub recognizes that if business is not win/win, it will not be sustainable.

In addition, The Trade Hub collaborates with other institutions working in the same field or with similar goals, such as country specific export-promotion councils, chambers of commerce, donor organizations and projects. Over the life of the project, the Trade Hub has collaborated with the other African trade hubs, other sector projects and organizations such as Design Africa, CBI, TFO, ATA, ATAG, WACIP, ECOWAS, SIAO, DNA, DTI and more.

In 2011, the Trade Hub collaborated with the Danish program DCCD to help launch Design Network Africa (DNA) to engender pan-African collaboration and exchange. Cross-continental partnerships have begun. One major exporter and designer in South Africa is forging a partnership with a major exporter in Ghana and a leading designer in Mali. The Hub served as the coordinator for West Africa.

This collaboration is the foundation of alliance building.

Product design and development

The Trade Hub has increased exports across the region through market-oriented product development facilitated by the Hub's in-house team and international experts. More than 50 companies have received product development inputs, and most have had repeated and ongoing sales as a result. All product inputs are market-driven and associated either with specific buyer requests or linked to particular markets.

The Trade Hub's product develop inputs have been geared to helping companies gain access to a greater market spectrum. Historically, industry specialists believed that African companies could not compete in mainstream markets. However, the ethnic niche (masks) or musical instrument markets comprise a small portion of the entire décor market. The only way to for ERCs to achieve economies of scale is to compete in the mainstream market. African producers cannot compete with China on price alone, but Africans making quality, hand-made products can compete in many market streams on quality and design.



The Trade Hub discovered this fully recycled cane lion and similar products and introduced them to major U.S. buyers in 2009. This artisan who was selling from a street corner in Accra has grown to exporting container orders to U.S. import/retail companies and continues to increase capacity, and number of employees.

Access to finance

Access to finance has traditionally been virtually nonexistent to the sector. The Trade Hub assisted Geolicrafts, a major Ghanaian export company, to access funds from Grassroots Business Fund (GBF) to grow his business, as described in the text box.

Focusing on sector champions is one of our key strategies in leading growth in the sector. As Geolicrafts successfully grows, financial service providers see additional opportunities.

Increased international buyer interest

The Trade Hub has had a three-pronged strategy to generate buyer interest in West Africa: buyer trips, trade show participation, and direct buyer linkages.

Buyer trips for the large direct retail importer as well as the smaller importer who has a cadre of large buyer clients are effective in creating interest – and orders. The Trade Hub has serviced or supported up to 20 buyer trips a year.

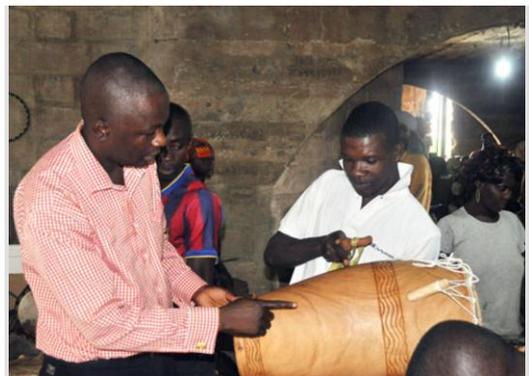
Trade shows effectively stimulated buyer interest. Ambiente caters to the large wholesale buyer and has drawn much interest, as described in the introductory section for this sector. At the New York International Gift Fair (NYIGF), the Trade Hub shifted focus from bringing producers to the show to supporting import distribution companies. The AfricaNow! network in at NYIGF has grown to fifteen exhibiting companies, who have grown their portfolio of West African products.

Direct buyer linkages takes a number of forms, and it is most effective when linked with product development inputs. Many buyers have said that product development is key for keeping them interested in a country or vendor, which the Trade Hub has responded to with increase assistance to targeted exporters.

Environmental practices

Based on the July 2009 USAID/WA screening of FY 2010 work plan of Trade Hub activities in support of the Home Décor & Fashion Accessories sector, an Initial Environmental Examination (IEE) was conducted in April 2010 to identify and mitigate potential adverse environmental effects of Trade Hub support for this sector.

The IEE found that Trade Hub technical assistance in product development, improved quality and production management, facilitated trade shows and buyer trips and access to finance did not by themselves have direct adverse effect on the environment, yet they had the potential to increase volume trade and result in increased use of materials, whose uncontrolled or unrestrained use could impact negatively on the environment. This was especially true considering that West Africa is known for illegal harvest and trade in plants, wood and animals, some of which are endangered or threatened with extinction.



Geolicrafts Success Story

Geolicrafts, led by visionary George Akologo, started with three employees in 2003 making drums, musical instruments, baskets and artisanal items. Geolicrafts, committed to running a green and socially conscious business, received technical assistance from the Trade Hub. After introduction from the Hub, the Grassroots Business Fund awarded Geolicrafts an initial Purchase Order-based loan and then a \$100,000 loan to grow their business and a technical assistance grant to hire a full-time accounting specialist.

By 2010, Geolicrafts supported nearly 100 full-time and 50 contract employees through sales that have doubled and profits that have tripled in the past three years. Further, Geolicrafts has created a national and regional collaboration strategy whereby his company will represent smaller producers in the region, giving them the opportunity to access international sales through his marketing efforts.

The Trade Hub thus focused on encouraging enterprises to appropriately source and improve preparation of raw material. It guided the elimination of illegally sourced materials from supply chains, increased sustainable harvest/collection of raw materials, and decreased the amount of waste from processing. The Trade Hub also ensured it supported only those enterprises that use environmentally sound practices by conducting due diligence screening of enterprises using its environmental and legal questionnaire (Annex 1) to assess the type of material used and determine the training required to ensure companies practice sustainability and legality in material sourcing.

The Trade Hub distributed questionnaires to 65 ERCs in seven West African countries regarding the type of materials they use and how they are obtained. The Trade Hub also conducted training in **Ghana** and in **Burkina Faso** to explain the questionnaire and assist ERCs in completing them. Responses indicated that ERCs needed guidance on regulations on material sourcing in their respective countries so the Trade Hub developed a Fact Sheet on Legal and Environmental Guideline (Annex 2) to educate on legal sourcing. Responses of the questionnaire also showed that ERCs largely used non-commercial timber sourced from farmlands to produce handicrafts. They excluded CITES listed plants (see Annex 2) from their production chain, but they did not keep sufficient records to trace materials to their sources.

The Trade Hub screened 29 companies in Ghana and provided training (Annexes 3 & 4), including 16 ERCs contributing to the 2011 Pier 1 order and thus allowing for monitoring the legality of the supply chain, a requirement for exporters to fill the order. The Trade Hub conducted legality training for 52 handcraft producers, exporters, buyers and six ARC advisors at SIAO 2010 in Burkina Faso. The Trade Hub also conducted field visits and site-based trainings on clean production processes, the Lacey Act and declaration forms to show how legal sourcing of materials should be conducted.

Analysis

The Trade Hub has proactively worked to implement best practices garnered through lessons learned. Following are descriptions of key strategies developed and the challenges they have addressed.

Export agents

The Trade Hub put a greater emphasis on working with export companies, or agents, who represent smaller companies and producers to the international market since many artisan production companies were unable to meet the demands of international buyers. Large buyers are more apt to deal with single agents who collaborate with the various producers. This collaboration is particularly important because a number of key production countries are landlocked, such as Burkina Faso and Mali. Exporters can more easily consolidate container shipments with regional products. Export agents also cast a wider net into the artisanal production community, bringing far more producers and products to the market than could individual production companies.

Focusing on trade show participation with the strongest potential impact

Since most U.S. trade shows target smaller retail shop owners who often do not manage direct imports and who demand ongoing in-country customer service, the Trade Hub has shifted focus to larger shows that target large wholesale importers as the client base, such as Ambiente, which caters to American, European and Asian wholesale importers. This shift has been a key development in furthering buyer confidence through presenting African exporters in a more professional environment.

NYIGF continues to be an important showcase for raising the profile of the AfricaNow! Brand in the US, but the Trade Hub should not bring companies to the same trade show where their clients are exhibiting their products or where distribution to smaller retailers is a

complex business to manage. In response to these constraints and the opportunities, the Trade Hub revised its strategy to make AfricaNow! a resource center showcasing West African products in the show and informing buyers about the strong sourcing opportunities in West Africa at NYIGF. This new strategy has inspired strong collaboration among the Trade Hub and U.S. importers and helped build the importance of AfricaNow! in the buyer community.

Sustainability and independence

Building the AfricaNow! brand to represent professionalism has been very important because many buyers had questioned the capacity of West African exporters to meet their demands. The Trade Hub shifted its branding strategy to center more on exporters than smaller producers. The Trade Hub worked with producers to build their professional capacity to meet expectations. Some major retailers have begun buying from Trade Hub client companies again in spite of sluggish retail sales.

West African companies previously assisted by the Trade Hub have exhibited independently at targeted international trade shows and met major buyers on an individual basis. This shift is key to sustainability because not only do companies grow and prosper; they also become models for the budding entrepreneurs in the sector.

Widening market access

Historically, mass-market buyers have been the target market for the artisanal sector in West Africa. Though these buyers can order in quantity, the Trade Hub saw that middle- and high-end markets could also be significant buying partners for West African exporters. As these buyers are more design-led, working with them offered a wider range of product possibilities and the possibility to bring more diverse production companies to international markets.

Capacity Building

The Trade Hub has targeted capacity building so that companies are better prepared to meet the market demands. These inputs have included market driven product development, marketing and promotional materials, website development, training in sustainability and legality issues, access to finance, and AGOA.

Recommendations

In future contracts, the Trade Hub recommends:

1. Emphasize capacity building in the form of coaching rather than large training sessions. A strong emphasis on product design focused on multiple market streams and categories, with sound costing and pricing strategies and efficient production methodologies. This is essential for any company to be truly prepared to capture a sustained presence in the international market.
2. Prioritize B2B market. This low-cost initiative is the most efficient and effective way to achieve sustainable and significant sales results while at the same time creating enduring B2B relationships.
3. Build collaboration among buyers in other international shows through an AfricaNow! resource center/showcase that will both foster strong collaboration for the network and increase awareness of AfricaNow! and West Africa as a resource and sourcing opportunity. This will increase sales for African companies while not adding the significant expense of participating in trade shows.
4. Coach more companies on independent trade show participation in niche shows that are appropriate to their specialty, if there are the appropriate distribution operations available.
5. Identify other major wholesale trade show opportunities where it would make sense to have an AfricaNow! booth.



USAID | WEST AFRICA

FROM THE AMERICAN PEOPLE

CASE STUDY

Addressing a key need in home décor

Identifying and building capacity of export agents has connected small producers to international buyers.



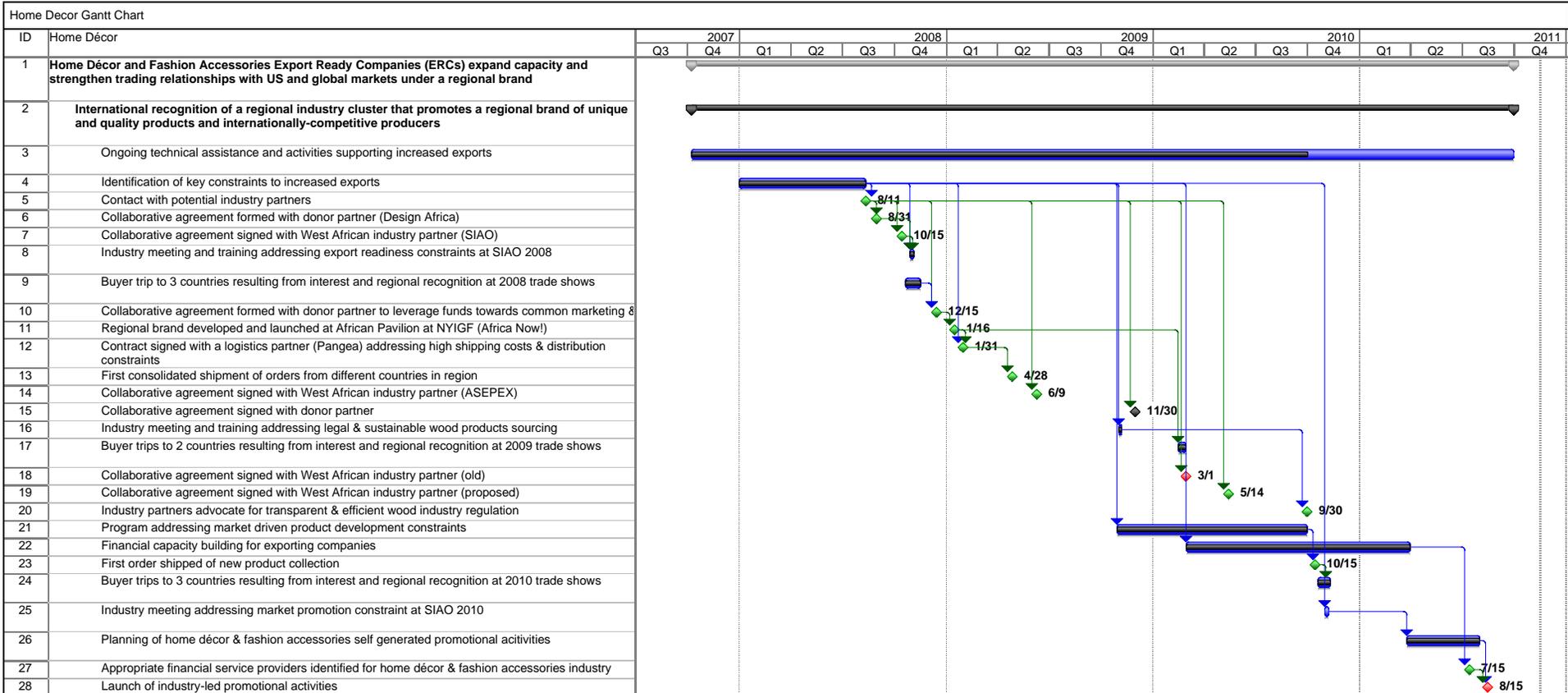
USAID West Africa Trade Hub

With Trade Hub assistance, Clarisse Djionne of Senegal's Xarala, has filled a critical gap between producers and buyers.

CHALLENGE West African designers and producers of home décor are among the most skilled in the world. However, companies have had difficulty accessing international markets because buyers have little confidence in sourcing from Africa. Wholesalers importers want efficiency, and look to order from one exporter who will consolidate purchases from multiple producers. There are few capable export agents to serve as a single contact for buyers, and who can manage finances, quality control, and shipping and packing .

INITIATIVE The USAID West Africa Trade Hub works with Export-Ready Companies (ERCs) to build their capacity as agents for international buyers. Technical inputs include product development, costing and pricing strategies, strengthening production capacity, access to finance, and trade show preparedness. Clarisse Djionne of Eberis Stuido attended several U.S. wholesale trade shows with her furniture collections. With ongoing coaching from the Trade Hub, Clarisse recognized the potential in serving as an export agent. She then launched Xarala, a consolidating export agency working with production companies across the region.

OUTCOME At the 2011 Ambiente trade show in Frankfurt, Germany—the world's largest and most important home décor trade event—Xarala represented nine West African production companies, and as a result of this one show, she is exporting their products on a regular basis to the U.S., Italy, France and the Netherlands. The Trade Hub assisted Xarala in getting space for an independent booth the most important décor show in America, the New York International Gift Fair. In order to professionally service this market Xarala has set up a distribution center in greater New York. Xarala is an example of the power of entrepreneurship that the Trade Hub supports and encourages. Industry-wide, the Trade Hub's efforts to promote professionalism across the value chain have resulted in West African collections sold to mainstream retailers in the U.S. and Europe such as Pier 1 Imports, West Elm, Anthropologie, Viva Terra, National Geographic Retail, and Cost Plus World Market.



Project: Trade Hub Apparel Gantt char
Date: Tue 11/15/11

Task: [Blue bar] Progress [Grey bar] Summary [Black bar] External Tasks [Light grey bar] Deadline [Green arrow]

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1.7 Apparel

Introduction

Manufactured apparel became one of the world's first truly global industries, as the initial supply chain took cotton from the U.S. to mills in England. Women's employment maintains a crucial link to the apparel industry, since women fill many of the jobs in apparel factories. The resulting economic empowerment has supported the women's movement and has led to social empowerment in many countries. And this empowerment extends across society: studies have shown that no under-developed countries have emerged from poverty without an apparel sector.

Today, companies in China dominate the industry, using cotton from around the world to produce garments for international markets. However, the African Growth and Opportunity Act (AGOA), enacted in 2000, created incentives for international buyers that have led to interest in West Africa as a sourcing destination.

A 2007 USAID Trade Hub study of the sector in West Africa assessed the sector's strengths and weaknesses country-by-country, looking at 21 criteria, including the number of sewing machines installed, government attitude to sector investment, investment incentives, access to factory space, etc. The second part of the study analyzed opportunities and offered recommendations. Ghana emerged as the most favorable investment destination from this analysis.



U.S. Ambassador Donald Teitelbaum and Ghana Minister of Trade and Industry Hanna Tetteh open the 1888LuckyMills apparel factory in Tema in 2010.

Shortly after the study, Lucky 1888 Mills, an American-Pakistani joint venture made an exploratory investment trip to Ghana, citing the study as reason for the visit. Lucky 1888 Mills followed up with multiple visits in 2008/09, which eventually led to a multimillion-dollar investment to establish a factory in May 2010. Commercial export production commenced in March 2011. The company now has two buildings and anticipates employing 500 people by June 2012, up from 300 in December 2011 and exporting about five containers of garments per month to the U.S.

Despite the opportunities in West Africa, global demand was decreasing due to the financial crisis of 2008-2009. During 2008/09 international retailers and brands cut

back on orders and reduced the number of vendors they were dealing with and then discounted prices to attract consumers. The latter is reflected in the price points they asked garment manufacturers to meet. Exports from Ghana dropped by 45% in 2008 compared to 2007, for example. At the same time, a change in Ghana's national government led to a temporary halt in important facilitative activity as new ministers slowly embraced their respective portfolios. In effect, government support for the sector diminished.

In 2009, Cameroon and Ghana launched industry associations. For Ghana the advantage of a garment manufacturing association was short-lived, as no consensus on office bearers and vested interests took hold. They were unable to develop a united plan for the way



forward. The global economic downturn resulted in many companies retrenching workers and relying on a much smaller local market, also straining the ability of GAMA to effectively function as an association.

From 2010, the West African apparel industry showed signs of improving, as buyers were re-evaluating Africa as a new sourcing frontier for a variety of reasons, including increases in the costs of doing business in China. West African companies were able to take advantage of this opportunity due to USAID Trade Hub assistance for companies to participate in Magic apparel trade shows and business-to-business (B2B) events in South Africa. However, lack of access to finance in the Ghanaian garment sector prevented companies from exploiting this change in context to the fullest.

The Trade Hub responded to market changes by modifying its technical assistance strategy to target support to the most export-ready apparel manufacturers in need of technical assistance. This new approach paid dividends almost immediately, as one company obtained orders for 2012 based on completion (with Trade Hub technical assistance) of initial/trial orders in 2011. Access to finance also played a crucial role for that company's success.

Access to finance remains the number one obstacle to West African manufacturers at a time when market conditions are in Africa's favor, despite the global financial slowdown.

In Ghana, technical assistance aims to strengthen the capacity of two “champion” apparel factories by enhancing the skills of their management teams and technical staffs. The selected manufacturers, one of which is operated by a woman entrepreneur, are now models/mentors for other West African manufacturers and, over the long term, they will be able to sub-contract orders to smaller manufacturers. The apparel team is in the process of tying up strategic partnerships with the BDS Fund, the Ministry of Trade and Industry of Ghana and the Export Development Fund. This strategy to strengthen the capacity of two lead/champion firms correlates closely to the Government of Ghana National Export Strategy (NES) and could create considerable synergies and also sustain this strategy going forward.²⁴

Results

- The USAID Trade Hub’s attendance at MAGIC in February 2011 enticed three additional buyers to visit West African apparel manufacturers, leading to orders for some companies and the beginning of an additional investment from the U.S. However, the new U.S. investor did not pay attention to Trade Hub apparel cash-flow projections and warnings, consequently seriously underestimating the timing for shipping the first orders. A key lesson learned is that although initial indications provided “sufficient” orders and capital resources for the investment to take place, due diligence should have delved deeper into the company’s financial resources for its first-year start-up expenses.
- The June 2011 B2B event in South Africa connected West African companies to potential sourcing partners for raw materials and trims. Increasing the presence of West African manufacturers and regional suppliers to visit vendors in West Africa will shorten lead times, increasing the competitiveness of West African manufacturers.
- A company in The Gambia that attended Magic and the B2B is in the process of expanding production capacity and is seeking the Trade Hub’s technical assistance in the process.
- A potential investment initiative led by a woman entrepreneur is being evaluated for Sierra Leone. She has visited 1888 Mills and other Ghanaian manufacturers as precursor to the investment. Training is scheduled at the 1888 Mills factory in FY 2012.
- Investments made in Liberia and Mali in 2010-11 are continuing export activities.
- The 1888 Mills investment continues to gather momentum, as it has began using a second building and training an additional 250 employees (to reach the 500 required to attain full production in FY 2012). The orders for this are already in place.
- The strategy that commenced in FY 2011 to champion two Ghanaian apparel manufacturers with professional technical teams who will build the capacity of

²⁴ This proposal also dovetails with the final draft NES report (1)_9-9-11, Export Development Profile: Textiles and Garments, in terms of issues addressed (training of workers in the technology of mass production) and planned outputs (training factories established, a cadre of trained trainers developed to be available to the industry to provide training service, high technology manufacturing techniques and procedures introduced and manufacturing and marketing skill upgraded in the industry). It is thus conceivable that the Ghana’s Ministry of Trade and Industry could own and implement this project for the duration of the NES’s five years.

local teams – increasing the sustainability and competitiveness of the industry in West Africa – will be in full force in FY 2012. The poor performances of the current champion company in Cameroon will continue to be monitored closely. The company is exploring additional financial avenues to get the factory back on its feet to take on the additional orders the buyer still has in hand.

Analysis

Despite exports dropping from USD7.8 million in 2007 to USD0.45 million in 2009 during the global financial crisis of 2008-09, the apparel industry in West Africa has seen recent signs of a revival, particularly in 2011. As indicated earlier, sourcing from China and some other Asian countries are becoming problematic in terms of costs, specifically hefty wage increases, increased transport costs and reliability of supply issues. This has led a number of U.S., and EU, buyers to take a closer look at what Africa can offer and is being “touted” as the new sourcing frontier. Although the economic woes in the U.S. continue and are being exacerbated by the debt crisis in the EU, the outlook for sourcing from Africa – and West Africa – appears to have improved. Ghana, in particular, will see a considerable increase in exports to the U.S., even if starting from a low base.

Access to finance remains the biggest hurdle of manufacturers in West Africa. The apparel team has tried to overcome this hurdle by securing Cut-Make-Trim (CMT) orders, rather than full-package orders, which are generally preferred by major retailers/brands. Despite these efforts, a number of companies are still not able to source adequate working capital, causing them to lose the technical team capable of completing relevant orders. Buyers in turn lose confidence in the factories.

The apparel team has orders in hand, but no factory has a full technical team to place those orders with. In this context, the USAID Trade Hub began looking at other ways to improve companies’ performance and engaged in discussions with the BDS Fund, a World Bank initiative that assists in financing on a 50/50 basis. If the initiative is accepted by the BDS Fund, the Trade Hub will facilitate bringing in a qualified technical team to train two local champion factory teams. By the end of the ten-month training period, the two factories should have a competent technical team capable of completing orders with consistency of quality, competitive prices and on-time deliveries.

At the same time, the apparel team will create synergies with Ghana’s NES, as its strategic plan includes a revolving credit line for raw materials and working capital based on confirmed orders. This would be a first step in addressing the access to finance hurdle.

Other possible improvements for access to finance in the apparel sector are a) to develop a pilot-financing program with a Trade Hub commercial bank partner and b) assist buyers in utilizing specific pre-financing tools when securing future orders that would ensure a smooth and on-time delivery. The impact of two companies running full-order books with sufficient working capital to see them through multiple orders will also serve as a wake-up call to the currently closed factories with 2,000+ idle sewing machines. Those companies could benefit from subcontracted orders and having their technical staffs trained at the champion factories.

With seven factories and 2,000+ currently idle sewing machines, the future Trade Should develop an apparel buyers and investment guide for selected countries to promote the huge capacity available in West Africa at competitive manufacturing costs (similar to Bangladesh's) and featuring duty-free access to the U.S. under AGOA.



Boxes of work uniforms waiting to be sealed and loaded onto a container.



CASE STUDY

Consulting, assistance create jobs

The USAID Trade Hub's multi-faceted efforts helped investors launch a multi-million dollar apparel factory.



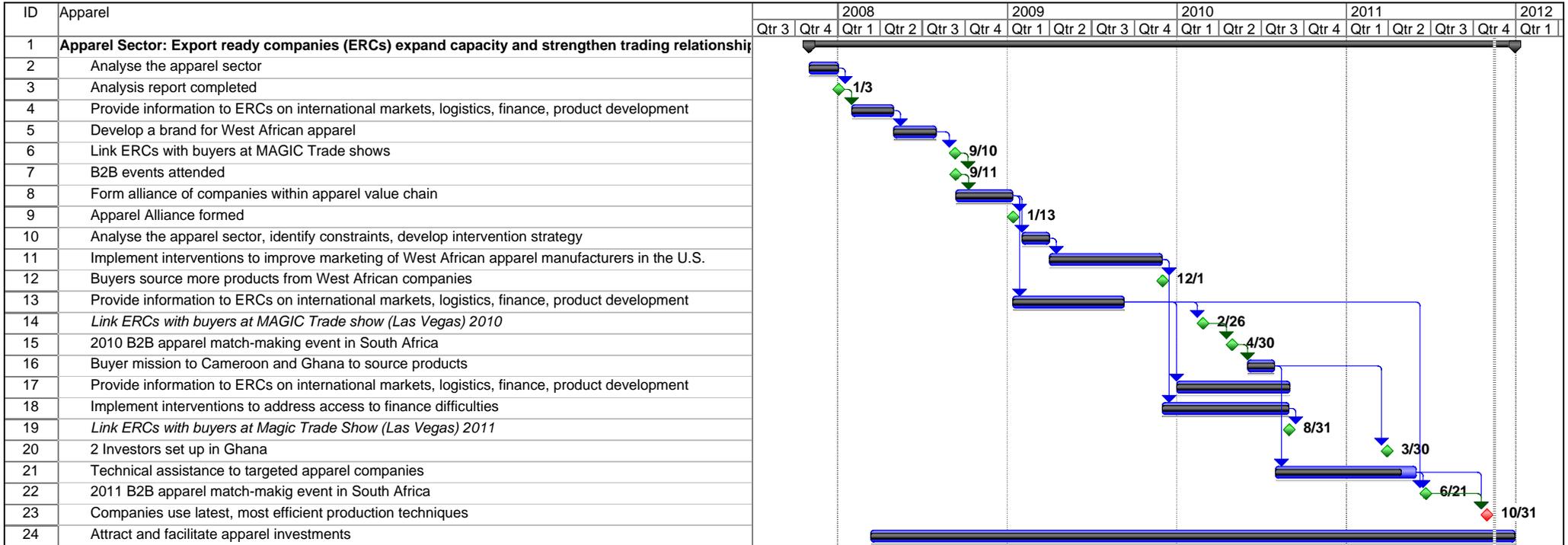
USAID West Africa Trade Hub

Helinda Tetteh, 24, is one of hundreds of young women now employed in the factories launched with USAID Trade Hub technical assistance and expert consulting.

CHALLENGE Duty-free status accorded to apparel under the African Growth and Opportunity Act (AGOA) makes the apparel sector one of West Africa's most promising industries. Foreign investment—which brings much-needed capital as well as technical expertise critical to global competitiveness—is key to sector growth and development. However, a lack of assistance from government agencies to help foreign firms understand the benefits of AGOA and set up operations to take advantage of these trade preferences and other investment incentives had resulted in several failed projects. To counteract the perceived high risk of doing business in Africa, USAID needed to communicate the potential of the apparel sector and provide hands-on assistance to prospective investors.

INITIATIVE The Director of Global Strategy for 1888 Mills, a U.S.-based manufacturer of bath, bedding, commercial apparel and kitchen textile products for clients such as Walmart and Costco, first became interested in Ghana as a potential manufacturing site after reading an analysis of the West African cotton value chain produced by the USAID West Africa Trade Hub. Over the course of the next four years, staff from the Trade Hub engaged in a multi-faceted effort to foster the company's investment in the sector, explaining the benefits of AGOA, arranging meetings with the necessary public and private sector stakeholders, providing practical business information and resolving a variety of logistical and procedural issues, from the issuing of visas to the completion of legal paperwork.

OUTCOME Lucky1888Mills, as the joint venture is called, opened its new factory in Tema, Ghana, in May 2010 with 80 workers, 85% of whom were women. The company opened a second facility next door in August 2011, and now boasts 279 employees (95% women) who produce three containers per month of institutional garments such as hospital scrubs, lab coats and chef uniforms for export to the U.S. An example of how AGOA was intended to work, the venture also represents global companies' growing confidence in investing in Africa.



Project: Apparel Gantt 08-20-09 Date: Tue 11/15/11	Task		Milestone		External Tasks	
	Split		Summary		External Milestone	
	Progress		Project Summary		Deadline	



1.8 Specialty Foods

Introduction

In the past four years, consumers around the world have discovered West African foods: the specialty foods produced by Trade Hub assisted companies - including jams, jellies, sauces, dried fruits and vegetables, cereals (gari, maize, millet, etc.) oils, and other items – are crossing from niche ethnic foods markets into the mainstream. Hundreds of thousands of farmers are directly and indirectly impacted by the success of these products in international markets.

The USAID Trade Hub worked with 72 specialty food companies (40% women-owned) that together generated USUSD 2,000,000 this year, an increase from last year (USUSD 500,000). The specialty foods sector also includes developing large-scale agro-processing of food ingredients in West Africa.

At the outset of the project, West African specialty foods were virtually unknown in mainstream international markets. African diaspora communities in Europe and the U.S. were the primary sources of market demand for products that were exported in functional if unattractive packaging. Many staples of West African diets were not exported at all from the region because they did not meet international standards for food safety and labeling, among other things. Products that were exported could only be found in niche boutiques serving diaspora communities and market knowledge was limited where it existed at all. Further, limited access to finance prevented companies from expanding production. Producers were disconnected not only from international markets but from one another, too.



The Trade Hub's technical assistance and expert consulting addressed these challenges,, specifically enabling companies to improve the quality of traceability systems, implement international standards for hygiene, address food safety issues, improve production processes, assess and access certification schemes, and improve their packaging, labeling, marketing and branding. The Taste of Africa brand, launched in collaboration with specialty foods companies, service providers, the USAID Southern Africa Trade Hub and other institutional partners, has increased the visibility of West African foods.

Many of the specialty foods companies' products were already on the niche ethnic market in 2007; Trade Hub assistance has broadened awareness of these products. With Trade Hub assistance, companies participated in international trade shows, including the Salon International de l'Alimentation (SIAL) and the Fancy Food Show, connecting to hundreds of international buyers.

The Trade Hub developed strong partnership with similar institutions in Africa to promote a unique identity for African products through the "Taste of Africa" branding. The presence of a large number of African companies in the same pavilion has attracted a greater number of visitors during these events.

New ingredients like baobab powder and baobab oil generated great interest in the international market. The Trade Hub worked with food research institutes in Ghana and Senegal and industry experts to develop new products to compete in international markets.

Results

International Buyers, investors and partners linked to West African companies

With Trade Hub assistance and support, and in collaboration with industry partners, including the Association Afrique Agro Export (AAFEX), the African Cashew Alliance and the Senegalese Export Promotion Council, West African companies exported USD 7,122,901 in specialty food products.

Exporters improve packaging and labeling

Attractive packaging and labeling that meet international standards are critical to the success of specialty foods products in international markets. The Trade Hub connected companies to technical experts and graphic designers to respond to these issues. Close collaboration with the U.S. Department of Agriculture (USDA) facilitated companies' access to information and assistance necessary for addressing these issues. Three Trade Hub-assisted companies received USDA Cochran Fellowships, which gave them direct access to agricultural training opportunities in the U.S. addressing agricultural trade, agribusiness development, management, policy, and marketing.



Incubator Project in progress, new product developed and funded

The Trade Hub assisted stakeholders in initiating an incubator project to develop new products for U.S. and European markets. With the help of U.S. consultant Jim Thaller several Ghanaian and Senegalese companies have many promising new products in the works. In Ghana the three companies involved (Home foods Processing and Cannery Limited, Ebenut and West-West) have already finalized new products which are ready to showcase. Many more companies are in the process of fine-tuning new product lines. For instance, "Baobab des Saveurs," of Senegal is taking advantage of the recent GRAS

certification of baobab for use in cereal products by developing a new line of baobab cereal bars.. The Trade Hub facilitated the approval of a USUSD 15,000 grant from USAID-Senegal / PCE to fund the first phase of product formulation, which includes nutritional analysis, building machine prototypes, developing packaging, and final product taste tests. While many West African companies have attempted to add value to commodities by developing and packaging new products, often times efforts and money have been wasted because the products are out of touch with consumer trends or packaging does not meet foreign rules and regulations. However, this multi-step approach addresses every bottleneck that has blocked products from getting to market. It ensures new products are in line with market demands, packaging meets foreign requirements, and production is safe and efficient. With product development complete, companies can focus their time on financing, growth, and getting payback for their value add with actual added sales.

Partnership and networking

Through the Taste of Africa brand, the Trade Hub has developed partnerships and connected stakeholders via international trade shows, training workshops and stakeholder communications. At an International Symposium on Urban and Peri-urban Horticulture (UPH) in Senegal organized by FAO, for example, the Trade Hub connected to more than 200 participants from 39 countries addressing issues related to UPH: characterization of UPH, production techniques, training and organization of producers, pest control, water management, food safety, supply and marketing, project implementation and city to city cooperation. The SOUPHA (State of Urban and Peri-Urban Horticulture in Africa) was launched. The symposium allowed specialty foods exporters to address the issue of local food systems centered on cities to ensure food and nutrition security for urban dwellers with the objective of the right to food, in greener, more resilient cities regarding crisis and disasters.

The Trade Hub team connected Lundin for Africa, a Canadian private foundation that supports agribusiness growth in West Africa, regarding provision of technical assistance to promote the growth of SMEs. Lundin deploys grant and impact investing funds in Africa and recently seeded the West Africa SME Growth Fund (target USD25M) to provide high potential businesses with financing and business support through a technical assistance (TA) facility.

The Trade Hub worked with the U.S. Department of Commerce's Office of Africa of International Trade Administration to prepare AAFEX's participation in the next Fancy Food Show. AWEP intended to take advantage of this event to organize meetings with U.S. companies, including workshops, and site visits.

Technical assistance in food safety and product development

Baobab des Saveurs received a Novel Food approval to export dehydrated baobab pulp to Europe, making them the third company in the world to obtain this agreement and consequently the second company in Senegal authorized to Europe. The Novel Food legislation requires that any food or food ingredient that has no history of "significant" consumption in the European Union prior to 1997 must be authorized according to the Novel Food legislation, Regulation (EC) No 258/97 of the European Parliament and of the Council. Exotic vegetables and fruits like baobab, which have a long history of safe use outside of the European Union, fall



The baobab tree produces fruit rich in vitamin C and other nutrients.

within the definition of a novel food. Consequently, each of these food products must undergo a safety assessment prior to being marketed.



A USDA workshop included managers of three Trade Hub-assisted specialty foods export-ready companies.

Training for Women Entrepreneurs

Thirteen women business owners from Angola, Benin, Burkina Faso, Cameroon, Chad, Congo, Democratic Republic of Congo, Gabon, Mali, Mauritania, Rwanda, Senegal and Togo attended received training from the Trade Hub on Opportunities for Trade and Marketing under AGOA at a two-day training program organized by Vital Voices for members in the Africa Women's Entrepreneurship Program (AWEP). The majority of the entrepreneurs manage agribusiness and food processing companies.

Analysis

Growing interest from the international market for new ethnic products presents an incredible opportunity for African businesses with unique products and ingredients to increase market share. Consumers are also increasingly looking for healthy and organic products. Many traditional products being produced only in Africa are both organic and healthy, as is the case of cereal and products such as millet, maize, sorghum, athiekie, gari, plantain, and baobab, etc.

African companies saw these trends in person in dozens of supermarket visits while at international trade shows, and they also saw potential for new products for the international market. ERCs compared their products with international standards and developed plans to increase competitiveness by conquering hurdles around product safety, certifications, labeling, etc.

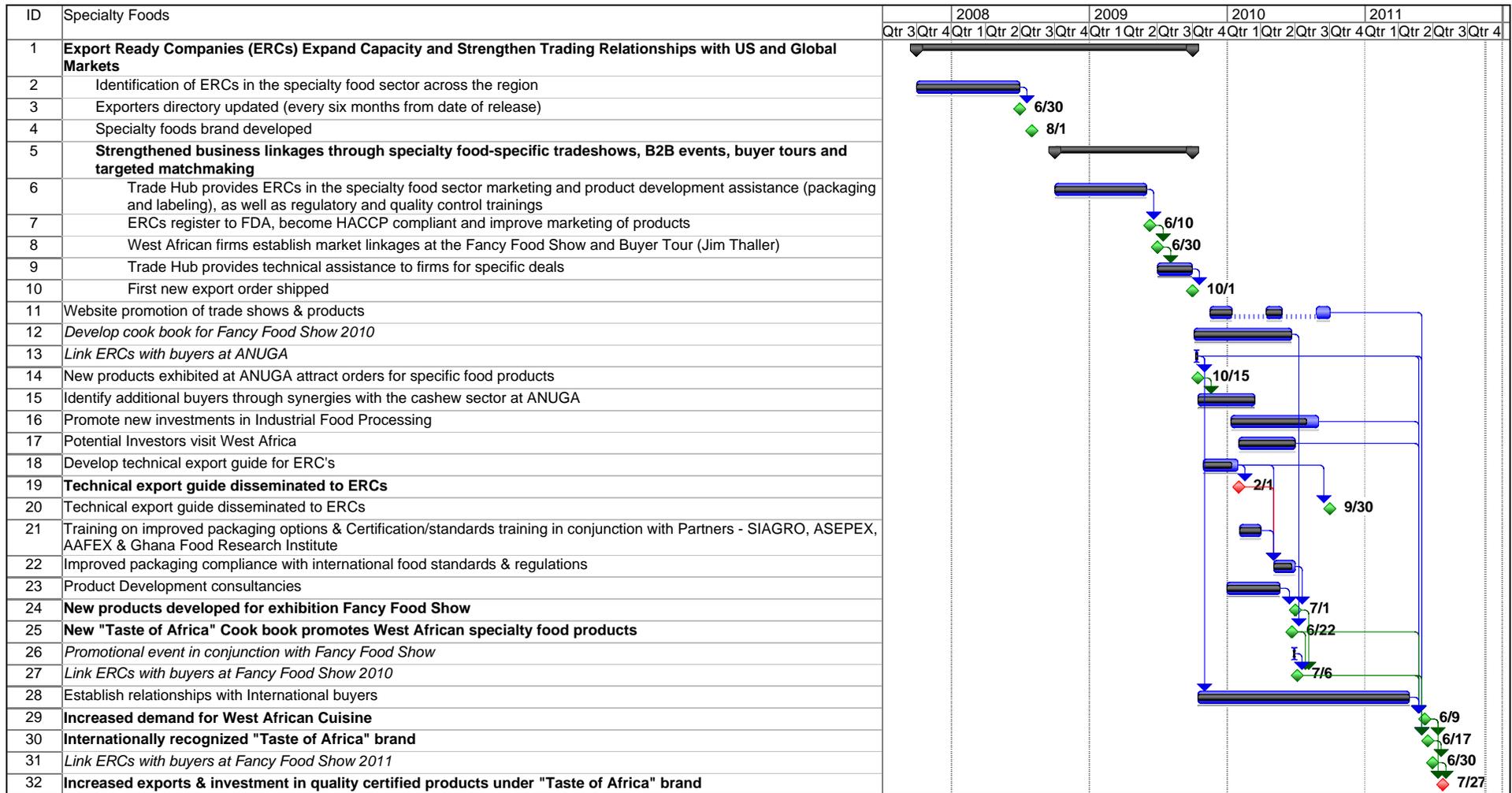
Previously, large international firms came to Africa to secure raw material production for export. Having seen the added value potential and market opportunities, Africans are entering the field of food processing and agro-business. The Trade Hub has helped ERCs in this sector to develop local processing capabilities and thus generate more value locally. This strategy will most benefit women, who dominate the sector in Africa.

Companies that work with the Trade Hub who have improved the presentation of their products and linked with buyers and partners have achieved some market penetration. Such companies are now focusing on sustaining and expanding production, while the Trade Hub has focused on priming these companies as leaders that will impact the entire value chain. Two examples of successful companies follow. Interestingly, women run both companies.

Zena Exotic Fruits became a Trade Hub client in 2007, when it successfully sold jams in Senegal and occasionally in France. The Trade Hub provided an array of training and technical assistance in production, food safety, labeling, etc., and connected them with a U.S. distributor. Zena now regularly exports pallets of jam to the U.S. and are expanding their range of products. Demand is so high that they are working on funding to expand and securing supply of raw materials in quantity and quality throughout the year.

Free Enterprise Works Services processes cereals, and had been focusing on the informal ethnic market in Europe. With Trade Hub assistance and other support agencies, the company began to export a container of products every month to Italy. Revenues from these exports enabled Free Enterprise to build a larger processing facility that meets international standards and plays a key role in food security of urban populations, in terms of food availability and increased employment, mostly of women. They are also expanding in the domestic market: coordinating with a buyer to establish a "100% African" supermarket in Africa, containing processed products only from Africa.





Project: Specialty Foods 10-13-10 Date: Tue 11/15/11	Task		Milestone		External Tasks	
	Split		Summary		External Milestone	
	Progress		Project Summary		Deadline	



2. FINANCIAL SERVICES

Access to Finance and Mobile Money

Introduction

The most commonly cited challenge for exporters in West Africa is access to finance. In Senegal, one report indicated that as many as 80% of companies' loan applications to commercial banks were rejected. The reasons for this are many and elude easy resolution. The Trade Hub's efforts to address the issues have evolved as new experiences lead to new insights on the root causes – and what can be done to address them.

The Trade Hub initially focused on increasing knowledge and skills of export-ready companies in basic concepts of finance: Financial workshops were conducted, focusing on basic inputs such as efficiency, ICC trade terms, basic terminology, financial statements, simplified break-even and cost-plus pricing techniques. Additional workshops focused on Technical Barriers to Trade, such as packaging, labeling, and shipping constraints, as did workshops on sanitary and phyto-sanitary constraints. Understanding these constraints helped bankers and ERCs minimize delays in payments.



Exporters' primary obstacle is access to finance.

Initial experiences revealed that commercial banks were woefully unaware of the opportunities in non-traditional export sectors and had little motivation to enter into marketing, targeting and analyzing the risks in those sectors. At that time the banks were taking advantage of: (1) government financing through the high Treasury bill rates (25%-30%); and (2) import sector activities which were primarily related to fee generating services such as managing cash-flows and issuing letters of credit. Large cash crops, mineral or oil activities were financed largely by overseas financial institutions. Local banks relied on fee generating services and financing government as opposed to credit extension.

The awareness of the shortcomings of the banking sector led the Trade Hub in 2008 to design an interactive ERC Access to Finance program with Ecobank and USAID. This program brought exporters and bankers together with the objective of increasing trust through dialogue. The series of workshops were held by IESC over a period of four months in 2008. Albeit the results in terms of increased lending were mediocre, (1) the bankers had

the willingness to learn about the sectors, (2) trust was built between the bankers and ERC managers, and (3) the need for further dialogue and sensitization became apparent.

The 2008 financial crisis also resulted in the creation of the Global Trade Finance Program by the IFC. The GTF program was set up to guarantee cover to the major international confirming banks of Letters of Credit issued by selected African banks. The program kept trade flows operational in a period when the confirming banks were not in a position to accept African risk. The Trade Hub collaborated with IFC by bringing ERCs to the table with the bankers demonstrating the positive impact of facilitating dialogue between bankers and exporters.

Efforts to sensitize the banks and bring them together with the ERC managers continued in 2009. The Trade Hub sponsored three conferences (shea, finance and cashew); significantly, the major regional banks – Ecobank, Stanbic and UBA – co-sponsored the events and participated in the conference activities. The A2F breakout sessions at the conferences led ERCs to appreciate the need for good governance, transparency and traceability as the base elements of best business practices; raised awareness among bankers of opportunities for collection services and pre-export finance; led buyers to provide support for pre-export financing through financial instruments such as confirmed Letters of credit; and introduced new impact investors and alternative sources of finance to opportunities to invest and finance non-traditional exports from West Africa.

These efforts supported other calls for regional alliances, which improve the probability of gaining access to finance through association with buyers and access to technical assistance.

In spite of the positive shift towards inclusion by the bankers and the ERCs into the banking sector through expanding branch banking, ATMs and mobile banking in the collection of deposits and money transfer, the extension of credit to the non-oil, non-traditional banking sectors was not taking place at a pace necessary to support growth.

Performance-based approach

The USAID Trade Hub introduced an innovative performance-based model to facilitate financing. Three subcontractors (AIMS, CATEK and CFS) are remunerated according to their success at facilitating financing for exporting companies in Trade Hub sectors. This approach responds to the challenge of lack of access to finance which results from:

- Prioritization of risk mitigation over project potential when evaluating financing opportunities by commercial banks
- Lack of capacity by ERCs to present bankable projects
- Lack of capital adequacy to purchase essential machinery or raw materials necessary to meet buyer demand

The approach uses the following integrated and mutually reinforcing components to achieve results:

- Trade Hub provides technical assistance to develop quality products and links them with end markets
- Finance subcontractors work intensely with companies to prepare business plans, financial statements, and other documents necessary generate a bankable request for financing. Meetings between companies and potential creditors are facilitated
- Finance subcontractors work directly with banks and other financial institutions to familiarize them with the industries in which the ERCs work so that they understand the risks, opportunities and unique aspects of each particular business environment

Mobile Money

The Trade Hub also sought to assist traders in reducing costs and improving efficiency by assisting banks and telecommunications companies to develop a mobile money transfer service to make regional payments. However, a comprehensive review of the legal frameworks in three countries revealed that such a system would require considerable additional framework development in West Africa.

A mobile money transfer system seemed particularly well-suited to the West African context: significant growth in the use of mobile phones across Africa has been nothing short of spectacular. In 2000, African use of cell phones was limited to 1.7 people per 100; by 2009, the rate was 37.3 per 100 people, according to the World Bank. Innovative uses of the technology have expanded access to information of all kinds and access to services as well. In East Africa, the launch of M-Pesa by Vodafone and Safaricom in 2003 demonstrated the immense potential of mobile phones to increase access to financial services. Using mobile phones to provide these services for traders promised a variety of benefits; doing so would:

- Create an electronic record of financial activity, which could be used in applications for loans
- Improve security by reducing the risk of theft inherent in high-value cash transactions
- Significantly lower costs and increase efficiency

Results

Access to Finance

In Access to Finance, the performance-based approach has effectively opened access to finance to export-ready companies. Under the new approach, 20 ERCs have received a total of about USD 7 million in loans. This unique approach which includes widespread communication of both the process and its successes has had a broader impact as well:

- Beneficiaries of financing more easily qualify for repeat short-term lending
- Financial institutions are more comfortable evaluating opportunities in the non-traditional sectors and are making deals with other businesses in the same industries
- Other lenders are now reaching out to export-ready companies to offer them financial services

The performance-based approach also encourages the sub-contractors to seek innovative ways to identify ERCs that have the capacity to provide basic financial information and cooperate actively in the development of bankable requests.

- Cluster Financing: A model that can be reproduced in other parts of the region and in other sectors:

The Nigerian Cashew Cluster Financing Scheme brought together: (1) the oversight of the Trade Hub, (2) the Technical Assistance and market Linkage of the African Cashew Alliance, (3) the coordination and financial advisory service of AIMS, (4) Regional Financial Institution (EBID); (5) local development bank (NEXIM and Bank of Industry), (6) a local commercial bank (Ecobank) and (7) three cashew processors.

The members of the cluster have gained: (1) access to finance for raw materials and working capital; (2) successfully utilized and appreciated collateral management as a risk mitigators; (3) improved communications and confidence with the bankers creating an innovative collaboration between the members, NEXIM and Ecobank to share charges on assets.

- Banker Exporter Initiative (BEi):

This initiative was created in response to the need to identify clients in Nigeria and is transferable to all of the countries in the sub-region.

The BEi was in response to the exporters and bankers who attended the GTFP/Hub workshop in January 2010. The need to expand that process was emphasized by the endorsement of the initiative by the Nigerian Export Promotion Agency, The Abuja Commodities and Securities Exchange, the Central Bank of Nigeria, Nigerian Export Import Bank, Niger State Export Promotion Council and Bank of Industry.

In 2011 two BEi meetings were held in collaboration NEEP xxx ERCs and xx bankers in participation. Businesses were identified and are working with the bankers and AIMS to develop bankable requests for financing raw materials and working capital.

Mobile Money

The Trade Hub analyzed the legal framework for providing mobile money transfers (MMT) across West Africa, finding that:

1. Domestic MMT is legally possible *within* each of the three jurisdictions studied (Ghana, Nigeria and Senegal), albeit under different legal requirements.
2. Cross-border MMT: There is at present no regional framework specific to MMT other than an agreement in principle to facilitate the free flow of capital. As a result, MMSPs operating across the region must ensure compliance with national law in each jurisdiction.

Analysis

Shift of Paradigm in West African Financial Sector

Major events in 2007-2009 led to a paradigm shift in the West Africa financial sector. This shift dovetailed positively with the A2F efforts the Trade Hub. Simply put the commercial banks had access to deposits throughout the region which meant a greater appreciation of the cash-flows generated by regional businesses. Investors and other alternative sources of financing emerged competing in African Markets partially as a result of the Financial Crisis. The Millennium Challenge and Food Security Policy shifts impacted the agricultural sector and raised awareness of the potential of non-traditional exports generated from these rural areas. Here is partial list of major events that impacted the region and created a more favorable environment for access to finance between 2005 and 2011

- The restructuring of the Nigerian Banking system was completed and the Nigerian Banks flush with capital set up branch banking throughout the region, creating platform for clearing and settling on a regional basis;
- Electronic payment Switches were created resulting in ATM's and credit/debit cards were issued;
- The research by USAID/Carana revealed the importance of remittances to the financial well-being of West Africa Economies estimating that over US 10 Billion was being remitted annually to West Africa from overseas;
- The potential of mobile banking entered the scene as Safaricom reported success of inclusion of the non-banked into the formal economy. The mobile phone operators aggressively sought to copy the Safaricom experience throughout Africa;
- The Remittances Conference was held in Accra (sponsored by the Trade Hub) and resulted in a Hub Mobile Banking component dedicated to understanding and recommending changes to the regulatory environment in order to create a level playing field for mobile banking;

- USAID published guide to Mobile Banking recommending the roles of the stakeholders involved: banks, governments, equipment suppliers, mobile phone operators, and international institutions. This was disseminated to the stakeholders as a framework document;
- The regulators in West Africa agreed on a Bank-driven model in consideration of deposit taking regulations and consumer protection;
- The Central Banking authorities through WAMI agreed on convertibility amongst the West African currencies. Ecobank introduced the regional debit card for remittances and a fast transfer for trade settlements based on this convertibility. UBA was soon to follow;

The Central Banks set policy to only use Treasury Bills mop up liquidity in the banking system and the interest rates paid on treasury bills dropped significantly.



CASE STUDY

Overcoming the obstacles to finance

An innovative multi-faceted approach is helping exporters overcome their biggest obstacle.



USAID West Africa Trade Hub

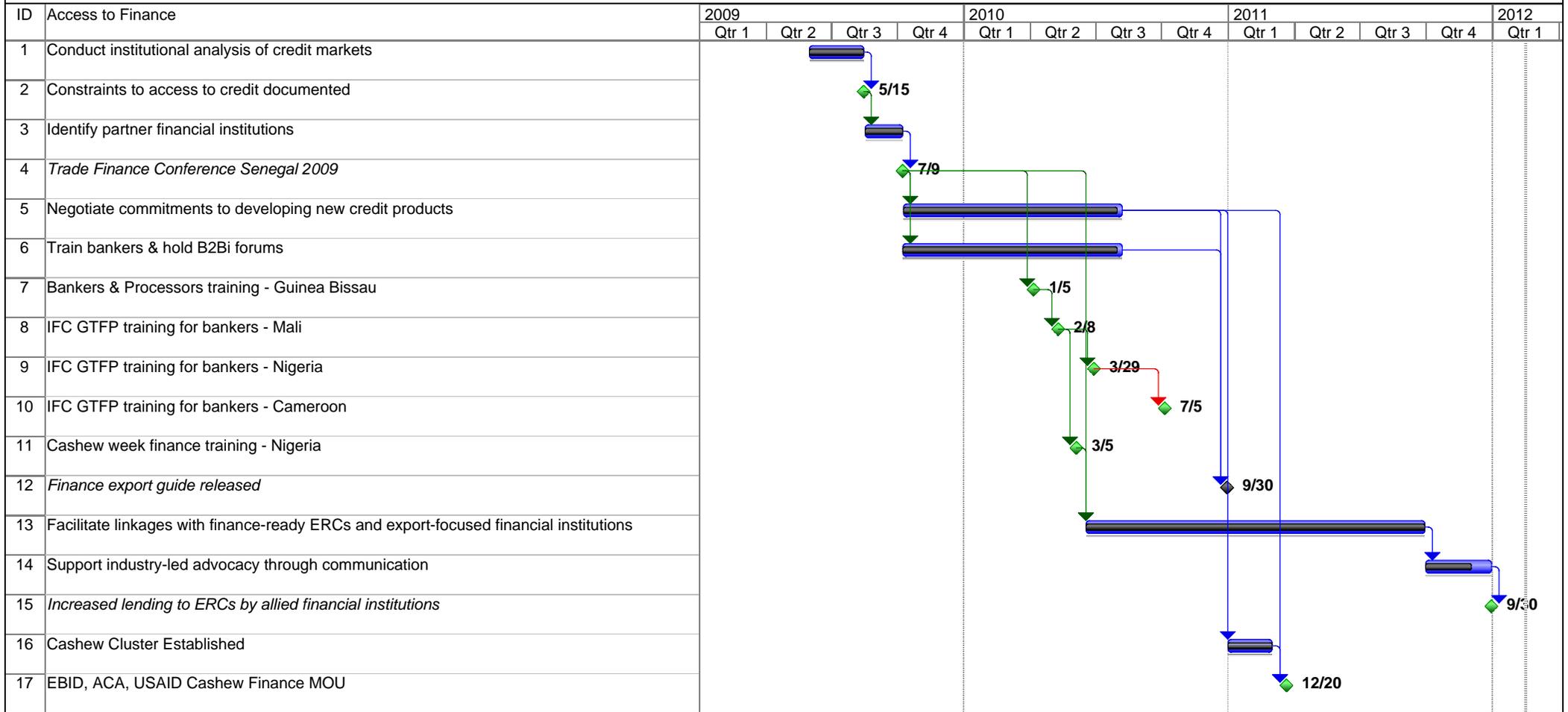
Helping companies address specific technical issues while connecting them to financial services and accompanying them in making applications to institutions has markedly improved access to finance.

CHALLENGE As in many developing countries, export-ready companies (ERCs) in West Africa are often constrained by a lack of access to credit: Commercial banks—which tend to prioritize risk mitigation over project potential when evaluating financing opportunities—are disinclined to invest in non-traditional or unfamiliar industries, and companies frequently lack the capacity to present bankable projects. Although the USAID West Africa Trade Hub successfully facilitated links with international buyers interested in sourcing from West Africa, many companies are unable to meet the demand because they lack the capital to purchase essential machinery or raw materials. To close this gap, the Trade Hub needed to find a new way of connecting producers with financial institutions.

INITIATIVE The USAID Trade Hub introduced an innovative performance-based approach to facilitate financing. Three subcontractors are paid in accordance with their success at facilitating financing for companies in Trade Hub sectors. The approach integrates sector technical assistance, financial services and relationship management with financial institutions to achieve results.

OUTCOME Under this new platform, 11 companies have received a total of about \$7 million in loans. The initiative has created more than just one-time deals: All of the beneficiaries of one subcontractor's services, for example, have received repeat short-term lending from the institutions that they were initially linked with through the program. The unique approach—and the widespread communication of both the process and its successes—has had a broader impact as well, with other lenders now independently reaching out to the ERCs and offering to work with them. In addition, the financial institutions working with the subcontractors have started making deals with other businesses in the same industries now that they are more comfortable evaluating opportunities in these sectors.

Access to Finance Workplan



Project: A2F Gantt Date: Tue 11/15/11	Task		Milestone		External Tasks	
	Split		Summary		External Milestone	
	Progress		Project Summary		Deadline	



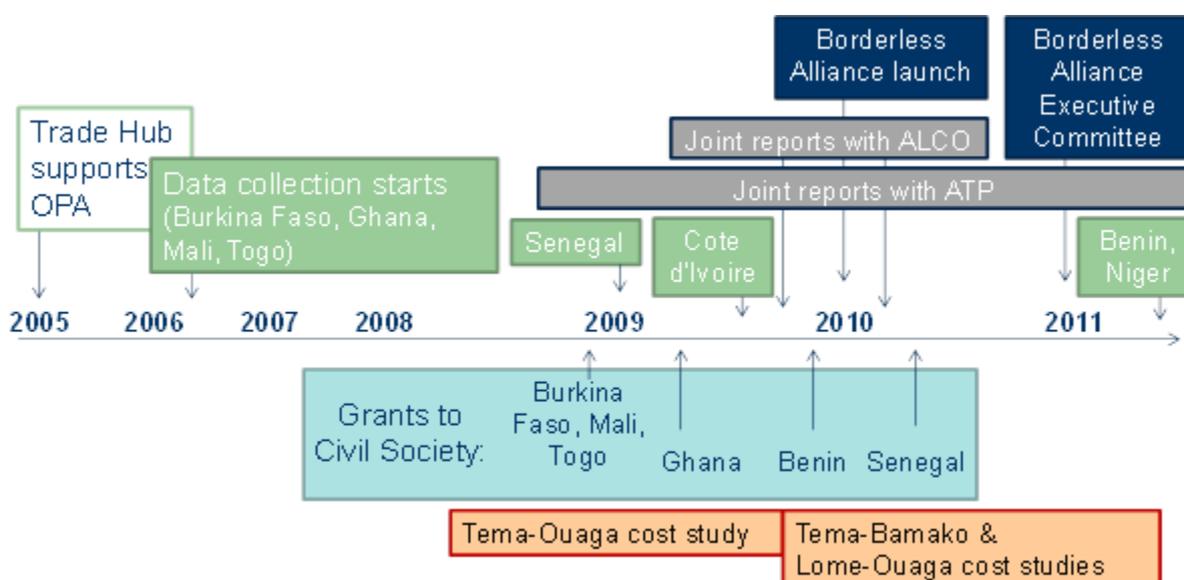
3. TRANSPORT INFRASTRUCTURE

Introduction and Overview

Efficient and cost-effective transportation and logistics services are fundamental to a competitive export economy. Functional infrastructure, in turn, is the foundation for those services. Policy – based on accurate and reliable data and thorough analysis – facilitates public and private sector investment and governance initiatives that ultimately reduce costs and increase efficiency. In West Africa, transport is costly and inefficient, severely impairing the region’s competitiveness. The Trade Hub sought to reveal, through study and analysis, the root causes of the high costs and inefficiency, and provide recommendations to stakeholders to solve them.

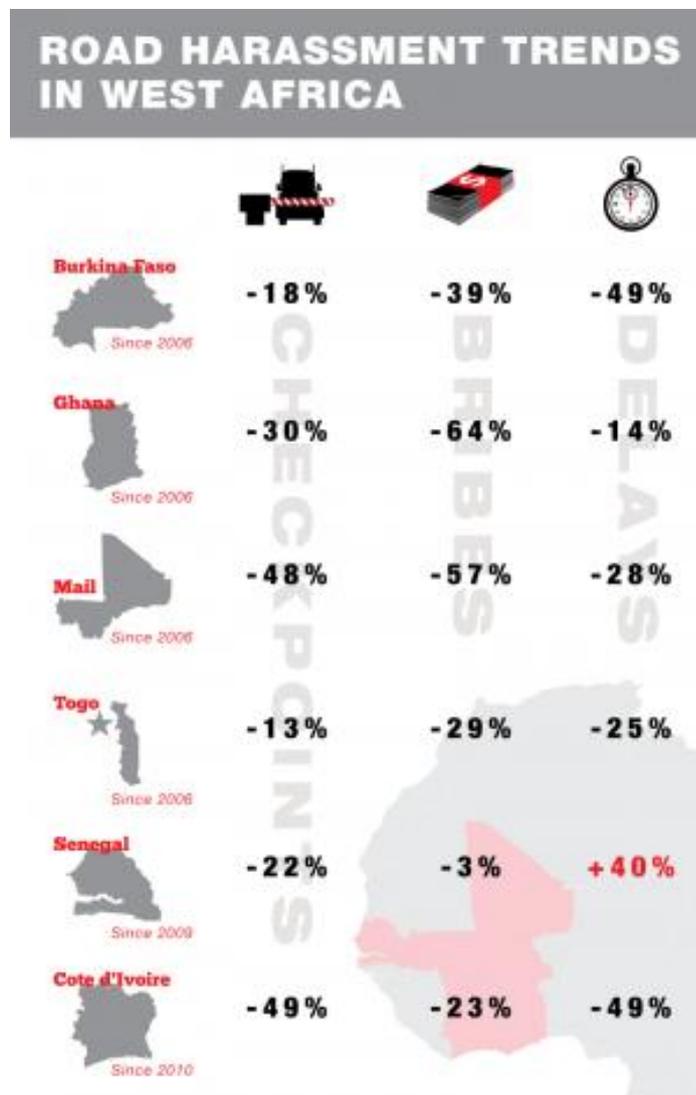
At the outset, these high costs were attributed largely to “road governance” – the delays and bribery associated with numerous road checkpoints on primary trade corridors. In 2006, the Trade Hub started collaborating with the regional body UEMOA to publish quarterly reports on checkpoints, bribes and delays on corridors in four countries to inform policymakers and drive private sector operators’ advocacy efforts for their elimination. The reports were broadly disseminated, leading to greater awareness of the issue, and the initiative today covers six countries with 3 additional UEMOA countries in the process of being added. However, in 2008 the Trade Hub’s first comprehensive study of transport costs identified a variety of other policies and procedures that were driving the region’s high transport costs and long delays (engendering uncertainty) in the movement of goods even more than the ubiquitous checkpoints. Further studies – on regional transport policy, implementation of axleweight rules and the structure of the trucking market – pointed to ineffective policy and policy implementation as root causes. These causes are considerably more complex – and questions of policy, not infrastructure; in fact, poor roads are no longer the primary problem for transport in West Africa – policy to protect roads from deteriorating is. The linking by donors of infrastructure investment to policy implementation illustrates this realization. Consequently, the Trade Hub disseminated data and analysis and mobilized stakeholders to develop and implement policy that address the primary drivers of the high costs and lead to effective investment in infrastructure.

The diagram below shows the 2005-2011 timeline for milestones under the USAID Trade Hub key transport-related initiatives.



Results

- Transport component initiatives have raised awareness of the importance of free trade and the deleterious effect of corruption and delays. Concretely, bribes along corridors monitored by the road governance project decreased significantly in every country since 2006, from 29% in Togo to 64% in Ghana, as shown in figure X.²⁸ Indicators have declined in every country. Although not conclusive evidence, indicators are significantly higher in countries that have been recently added (Cote d'Ivoire and Senegal); this suggests that the activities of the governance initiative has had a significant impact on the problem. The Trade Hub has steadily improved the quality of the reports, implementing "data cleaning" activities to address specific data collection issues and redesigning the report to present its findings more clearly and effectively.
- At roadshows, workshops and trade events (shea conference, cashew conference, SITRAO, etc.), the Trade Hub increased the knowledge of 19,849 (719 women) exporters, transporter and other stakeholders on transport and logistics issues relevant to exporting to international markets.
- The Trade Hub's transport studies have led to new policies and implementation of old policies across West Africa. The most impactful involves the African Development Bank, which now ties its investments in infrastructure to policy implementation initiatives. In Ghana, the Customs Commissioner directly ordered a prohibition on informal agents at the Ghana-Burkina Faso border who harassed drivers for bribes (so-called "Goro Boys"). Removal of Customs, Police and Gendarme checkpoints in Togo, Agreement between Mali and Senegal Chambers of Commerce to the use of a common Inter-State Road Transit logbook, Reduction in delays along Tema-Ouagadougou corridor due to drastic reduction in random Police checkpoints, Designation of 33 authorised checkpoints by Cote d'Ivoire Ministry of Interior, Mobilization of Cote d'Ivoire government agents to fight road corruption.



²⁸ The baseline in the graph is the initial value when a given country was introduced into the initiative. Data in Burkina Faso, Ghana, Mali, and Togo started to be collected during the 4th quarter 2006. Senegal was included during 3rd quarter 2009 and Côte d'Ivoire was included during 1st quarter 2010. Current data correspond to 2nd quarter 2011. It should also be noted that the political situation in Cote d'Ivoire is not yet fully normalized, which makes data collection less reliable

- The Borderless advocacy campaign, launched in 2010, and the Borderless Alliance, launched in 2011, have empowered stakeholders to engage directly with policymakers. The advocacy campaign was a primary element of civil society organizations' awareness raising efforts. Cumulatively, the awareness raising efforts led to X hours of TV reporting on the issue and X hours of radio; XXX articles were published. The message of the need to remove trade barriers, consequently, reached millions of West Africans.

Communications and Advocacy

Media played an essential role in the visibility of USAID's Trade Hub transport work in the region. The transport team worked closely with selected media in the advocacy process. Road governance news stories include newspaper articles, electronic media reports, and radio and television broadcasts.

FY 2010

Media per Country	Mali	Burkina Faso	Togo	Ghana	Senegal	Cote d'Ivoire	Benin	Niger	Total
Newspaper articles	15	7	11	8	10	5	8	7	71
Radio broadcasts	10	8	25	8	9	10	15	4	89
Cumulative Radio time (minutes)	30	24	75	15	28	21	45	12	250
TV broadcasts	4	4	3	4	3	2	2	1	23
Cumulative radio time (minutes)	12	30	15	10	14	7	8	2	98

FY 2011

Media per Country	Mali	Burkina Faso	Togo	Ghana	Senegal	Cote d'Ivoire	Benin	Niger	Total
Newspaper articles	30	2	30	6	44	Na	Na	8	120
Number of radio broadcasts	14	3	19	6	34	Na	Na	1	77
Cumulative Radio time(minutes)	80	8	409	60	302	Na	Na	13	472
TV broadcasts	4	2	9	5	18	Na	Na	4	42
Cumulative radio time(minutes)	18	4	142	103	113	Na	Na	30	280

Analysis

As the second phase of the Trade Hub began in 2007, the transport component primary objective was to remove unnecessary and costly impediments to the movement of trucks and cargoes along West Africa's primary trade corridors. The Trade Hub-UEMOA collaboration on road governance has made significant strides toward that goal – significant declines in checkpoints, bribes and delays have been achieved. Data collection and

communications and advocacy efforts raised awareness of the problem and mobilized stakeholders to act. Steady improvements in the methodology as well as the results led UEMOA to expand the initiative as well. The broad dissemination of results and innovation of new means to communicate them, such as national reports, extended the reach of the initiative – and its messages. A variety of media and information dissemination methodologies have been used to reach the different categories of stakeholders, including Borderless-branded, easy-to-read guides for drivers (and transporters and uniformed officers), regional reports for high-level policy-makers and other stakeholders, national reports for heads of uniformed services, websites, maps, technical leaflets, mass emails, Tradewinds newsletter articles, Powerpoint presentations, posters, pens, truck-sized bumper stickers, etc. An ongoing challenge in this multi-stakeholder context is to find the right balance between standard reports that are relatively easy to produce and highly customized information pieces that address stakeholder-specific needs and trigger the right decisions.



The Trade Hub supported transport stakeholders in advocacy meetings with decision makers, such as with Members of Parliament in Ghana pictured here.

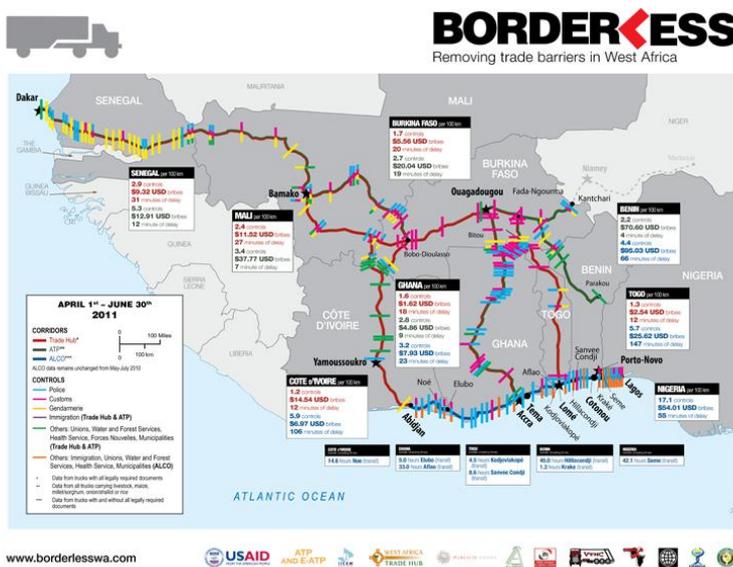
Comprehensive transport cost studies similarly expanded the Trade Hub's – and stakeholders' – awareness and understanding of many other causes of inefficiency and cost. Stakeholder uptake of this awareness and understanding was amplified by the innovation of the Borderless advocacy campaign; the Borderless Alliance reflected buy-in at the highest levels, as leading regional companies signed on to the effort. Working groups formed to pursue the implementation of specific recommendations in the Tema-Ouagadougou report eliminated unnecessary costs and sources of delays, and collaboration led to the identification of other issues and devising of solutions. The collaboration on these issues was based on strong relationships cultivated over many meetings and workshops, and leveraged the Trade Hub's work in its other component areas: transport stakeholders, for example, participated in annual conferences of the African Cashew Alliance and Global Shea Alliance. The cross-collaboration built trust and the Trade Hub gained credibility.

The Trade Hub's work on axleweight issues, including the publication of a study of the implementation of the rules in Ghana, similarly built relationships and credibility – and helped stakeholders recognize the value of investing in the enforcement of the rules – a road built to last 15 years in Burkina Faso was minefield of potholes within two years due to damage from overloaded trucks. But there was significant pressure from transporters on government to abandon the rules: The significant reduction in the amount of freight that trucks were allowed to carry resulted in an almost immediate increase of about 50% in freight rates. When Ghana implemented axle-load controls ahead of UEMOA countries, the Tema port experienced a loss of transit traffic, primarily to Lomé port, from July 2009 through 2010.

The wider application of axle-load controls in the region and associated reports of corruption at weighbridges and harassment of driver instigated the Trade Hub's involvement in the education of drivers on existing load limits, applicable fines, etc. This has been achieved primarily through the production of Truck Drivers' Guides, written in collaboration with National Transport and Transit Facilitation committees. This initiative started in Ghana and has since expanded to Burkina Faso, Mali, and Togo. The Truck Drivers Guides are an effective tool to mobilize transport stakeholders in these countries and strengthen the Trade Hub's relationships with the national facilitation committees.

The transport costs studies have highlighted several common issues on West African corridors that require the involvement of the regional economic communities:

- The need to liberalize trade, especially with respect to bilateral freight-sharing agreements and queuing systems
- The need for customs connectivity to minimize repeated data entry of documentation and reduce delays and corruption opportunities at border crossings
- The inefficiency of customs convoy and escort systems
- The need to find a regional solution to the electronic tracking of cargo to replace the customs convoys



A critical and enduring challenge to sustainably reducing transport costs is the design of effective reform measures. Governments have announced many initiatives during the past four years to remove trade barriers and reduce road checkpoints, but few of them have resulted in lasting improvements, primarily due to the difficulties in translating good intentions and policies into effective procedures.

Two other challenges to reducing transport costs influence project strategy:

- The involvement of local public and private sector stakeholders and civil society will lead to change and ensure the sustainability of the project, but it can be difficult to arrange in terms of travel and coordination between actors who may lack resources and whose mandates are not necessarily clearly defined.
- Since the Trade Hub is restricted in its ability to influence important actors like politicians, police, customs or ports, it is critical to help the emerging Borderless Alliance position itself to influence decision makers.

The Trade Hub's work across the region mobilizing stakeholders, working with multiple partners and building collaboration has led to a broad consensus on how to implement further necessary policy improvements and innovations. In September 2011 ECOWAS and UEMOA, with the European Union, USAID, and the World Bank, agreed to jointly endorse and support a West African Transport & Facilitation Observatory to build on the current Road Governance Initiative by a) expanding technically and geographically to cover all ECOWAS

countries and b) expanding in scope to cover not only road transport governance but also ports, border crossings and inland terminals, regional as well as transit trade, traffic flows and fleet composition and utilization.

A Transport & Facilitation Observatory directly addresses the issue of sustainability of the Trade Hub's collaboration with UEMOA on road governance. But it also holds great promise for addressing issues beyond road governance that are as important – and probably more important.

Recommendations

In spite of Trade Hub and partner efforts, inefficiencies and corruption persist on roads, at ports and inland terminals. Also, not only corruption and illegal practices prevent West Africa from being efficient and competitive; many perfectly legal practices, such as customs escort and convoys of transit traffic, increase costs, delays and uncertainty and encourage corruption.

The ECOWAS and UEMOA regional trade and transport facilitation program is a joint initiative in which ECOWAS has been the lead on ALCO's work on the Abidjan-Lagos corridor and UEMOA is the lead agency for the USAID Trade Hub's Road Governance Initiative work on all other transit corridors, including Ghana. Consequently, the initiative has focused on UEMOA priority corridors.

As the initiative continues to expand and work toward its goal of regional integration, there is a need to include non-UEMOA countries like Guinea, Liberia, Nigeria, Sierra Leone and The Gambia. Significantly, ECOWAS and UEMOA made a joint commitment during the most recent Steering Committee in September 2011 to ensure efficient coordination and the success of a West Africa Transport and Facilitation Observatory. Also encouraging is the expressed willingness of ECOWAS to lead the sustainability process of the Observatory and strong expressions of support and interest from the European Union, the World Bank and the African Development Bank.

USAID funding's volatility puts the survival of coherent, systematic transport initiatives at risk. Therefore, in a response to a request by the 2010 Road Governance Steering Committee meeting, the Trade Hub financed a study and co-organized a workshop with UEMOA, including the participation of the African Development Bank, ECOWAS, the European Union and the World Bank to recommend a sustainable way forward. Recommendations include:

- Ensure the continuity of the Road Governance Initiative within a West African Transport and Facilitation Observatory with a specialized institutional status in both regional economic communities, ECOWAS and UEMOA
- Progressively increase the content and geographical scope of transport monitoring and dissemination/advocacy
- Request financing from ECOWAS and UEMOA internal resources, as well as from donors such as the African Development Bank, European Union, USAID, World Bank, other multilateral and bilateral partners, private and civil society organizations and foundations
- Establish a steering commission to guide the institutionalization of the West Africa Transport and Facilitation Observatory

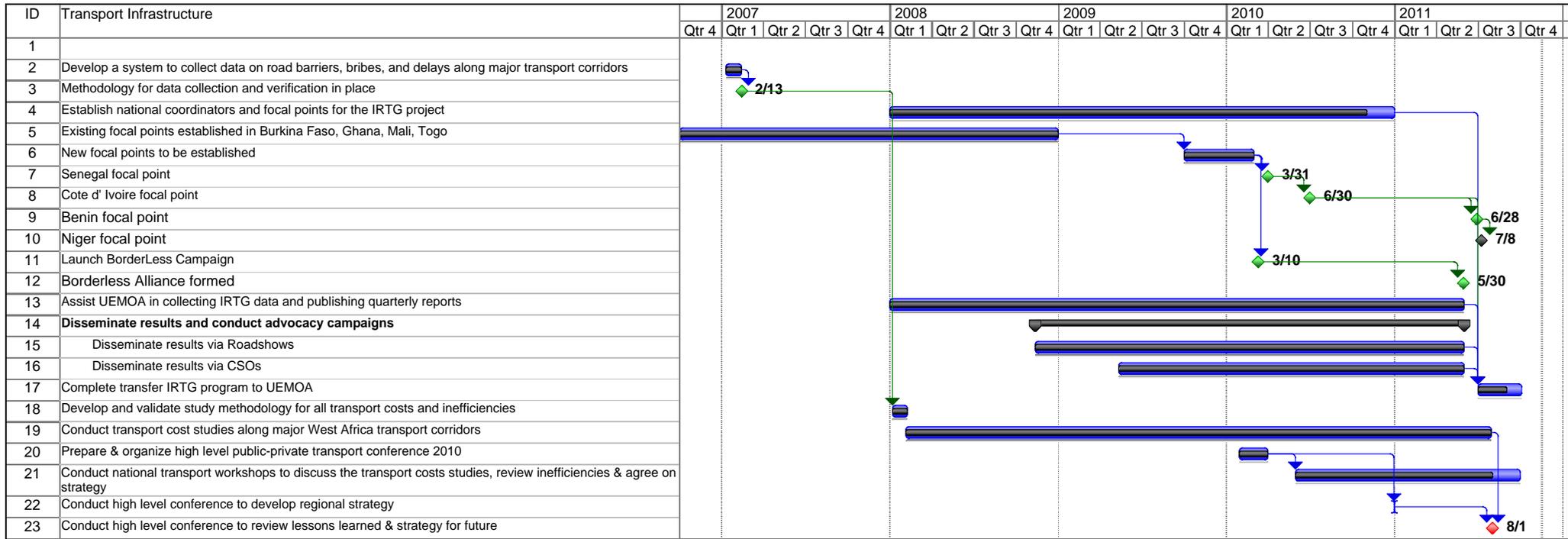
Regarding the technical aspects of the road governance initiative, given that data such as itinerary, travel time, the location of stops, delays mileage and speed can be tracked by GPS, the Trade Hub proposes that follow-on contracts explore how to make use of this technology to improve and enrich the road governance initiative. Ghana Customs tracks such information through GCNet for transit trucks traveling from Tema to Paga, and Mali has conducted a pilot project on GPS tracking of both trucks and buses. GPS tracking is not only

a powerful management tool for transportation companies but also frequently mentioned by customs authorities as a condition for abolishing the costly and inefficient convoys and escorts. Partnering with relevant institutions and applying better technology may also lead to another breakthrough in data quality improvement.

Also important to ensure a smooth process is a reliable and flexible information system that can host, process and quickly validate enough data.



The Trade Hub's transport costs studies have identified key impediments to the free movement of goods and vehicles across the region and how they elevate the region's transport costs.



Project: Transport Infrastructure 10-13 Date: Tue 11/15/11	Task		Milestone		External Tasks	
	Split		Summary		External Milestone	
	Progress		Project Summary		Deadline	



4. BUSINESS ENVIRONMENT

Overview

The USAID Trade Hub's strategy for improving West Africa's business environment was to work closely with ECOWAS on implementation of long-standing agreements to move toward a full customs union. In particular, the Trade Hub focused assistance on finalization of a community-wide common external tariff and improved implementation of the regional free trade area, known as the ECOWAS Trade Liberalization Scheme (ETLS). Implementation of these agreements would go a long way toward harmonizing and simplifying the rules of trade across the region, creating greater certainty and reducing clearing times, particularly at internal borders, for companies trading goods across the region. From an export competitiveness perspective, the implementation a functional CET and ETLS would reduce supply chain costs for firms with regional production and processing platforms, allowing those companies to realize previously unattainable economies of scale. It would also support more efficient flows of raw and finished goods destined for regional markets, particularly the agricultural commodities that are critical to the region's food security.

At the start of this phase of the Trade Hub in 2007, both the CET and the ETLS were stalled, with little progress having been made in the previous decade. Extended deadlines for tariff harmonization had been missed repeatedly and ETLS protocols related to trade in goods and transport were largely being ignored. Furthermore, ECOWAS had a weak understanding of the nature and causes of implementation problems, or how to move forward in moving Member States to final agreement on the CET and enforcement of the ETLS protocols.

The core activities of the Trade Hub aimed at boosting ECOWAS capacity for regional trade policy coordination included:

1. Building the analytical capacity of the trade department of ECOWAS, including modeling of trade flow and revenue impacts of tariff level adjustments.
2. Coaching on management of trade policy negotiations with Member States, focusing on development of the ECOWAS Commission's role as provider of objective information on the costs and benefits of new trade agreements.
3. Assessing, with ECOWAS, the level of implementation of ETLS protocols by Member States and widely disseminating the resulting findings.
4. Identifying, through stakeholder engagement, priority initiatives that ECOWAS could undertake to improve ETLS implementation along selected corridors on a pilot basis.

The engagement with ECOWAS met capacity constraints on the part of the Commission at several points, which required the Trade Hub to proceed with some activities in spite limited direct ECOWAS participation. For example, the ETLS Gap Analysis activity, which examined the level of Member State implementation of the protocols, was largely carried without the involvement of ECOWAS staff. While they were consulted on the design of the surveys and approved the Trade Hub's approach, they were unable to field a researcher to support and learn from the process of carrying out the surveys.

These exercises proved useful nonetheless, as post-analysis consultation with ECOWAS led to new ways of thinking about their role in the trade policy coordination process and ultimate adoption of the tools developed by the Trade Hub (West Africa Tariff Simulator, ETLS Gap Analysis) as core elements of the ECOWAS toolkit. Following consultations, ECOWAS also endorsed all of the findings from the CET and ETLS studies and has been working closely with the Trade Hub on converting recommendations into live activities. Still, significant capacity gaps at the Commission remain and this has meant slow movement on Business Environment activities throughout the life of the project.

The inertia of direct activities with ECOWAS and the results of the ETLs gap analysis, which revealed problematically low levels of private sector knowledge and organization with respect to regional trade policy, led the Trade Hub to expand its approach. In addition to building capacity within ECOWAS, the Trade Hub supported a private sector-led advocacy campaign to reduce obstacles to regional trade under the Borderless banner. This included the launch of a website (www.borderlesswa.com) and establishment of an alliance of key companies trading goods throughout the region.

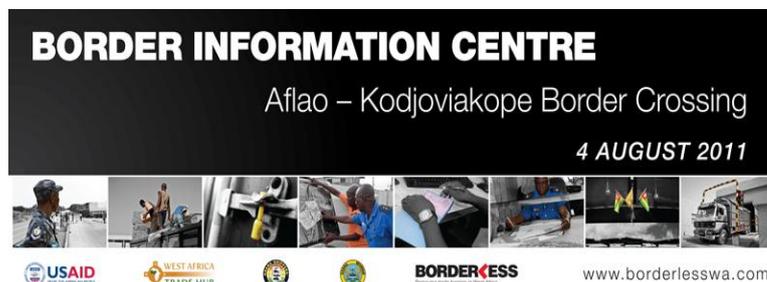
Activity highlights from the Trade Hub's 4-year business environment efforts include:

Common External Tariff (CET) study and West Africa Tariff Simulator (WATS)

In 2009, the Trade Hub submitted to ECOWAS a study of the Common External Tariff, with a partial equilibrium model (WATS) that allowed Member States and ECOWAS experts to evaluate the impact of different tariff scenarios on trade flows and revenues. The study and the WATS model guided discussions between ECOWAS and Member States that led to consensus on a five-band structure of external tariffs, with the highest set at 35%. This was much lower than the 50% (or higher) sought by some Member States.

Border Information Centers

On August 4th, 2011, the Trade Hub launched a Border Information Center at the Ghana-Togo border (in the cities of Aflao and Kodjoviakopé, respectively) to provide information to the private sector on their rights and compliance requirements under regional trade rules. This concept grew out of a recommendation in the ETLs Gap Analysis embraced by ECOWAS. The Center was launched in collaboration with the Ghana Shippers' Authority and the Abidjan-Lagos Corridor Organization (ALCO), as well as Customs services from both Ghana and Togo.



The Center was launched in collaboration with the Ghana Shippers' Authority and the Abidjan-Lagos Corridor Organization (ALCO), as well as Customs services from both Ghana and Togo. The launch of the center on both sides of the border is an innovative cross-border initiative to encourage dialogue between both countries in resolving trade issues at the border.



ECOWAS intends to expand the Border Information Center based on the success of the pilot. Ghana is supporting pilot evaluation through provision of data from the Ghana Community Network System (GCNET). Before the opening of the Center, the average processing time³⁰ at Aflao for a sample of 21 consignments was 12.5 hours.

By the end of the contract, the Center had trained 130 public and private stakeholders on both sides of the border on best practices for import, export and transport along the corridor. The Center also disseminated over 1,000 publications, including guides for cross-border trade, informational posters, and truck stickers driving the Borderless message.

In terms of process improvement, Center staff identified delays in the clearance process for vehicles seeking a Temporary Vehicle Import Permit (TVIP), which creates delays in the

³⁰ "Processing time reflects total time it takes Customs to clear the consignment once Customs receives the information and enters it into GCNET. This does not reflect queuing time before Customs.

clearance of goods. Based on the Center's proposal, a separate desk for the TVIP is being established to alleviate congestion in cargo clearing.

Formalization of Private sector-led Borderless Alliance

Borderless, a vision for freer trade in West Africa, was launched in March 2010 by the Trade Hub in partnership with ALCO and the World Bank. Based on widespread excitement and enthusiasm for the Borderless advocacy campaign, it then evolved

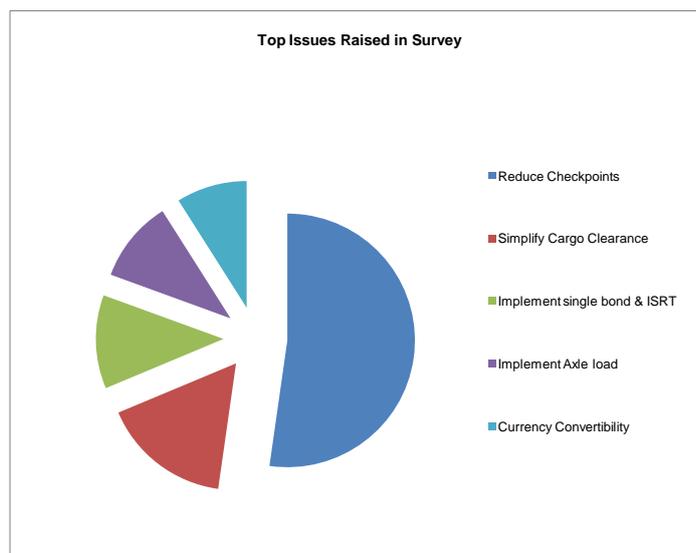


into a multi-stakeholder and private sector-driven alliance that advocates for best practices to increase trade in the region. The Alliance was formed through consultative processes held with an interim executive committee composed of a group of international companies involved in production, logistics, transport and trading, including Unilever, DAMCO logistics – a subsidiary of Maersk, Blue Skies, Bollre Africa Logistics, Tarzan and West Africa Market Links.

On November 9th, 2011, the Trade Hub hosted 44 representatives from **Burkina, Cote d'Ivoire, Ghana, Nigeria, and Togo** from regional and international companies trading in West Africa at the Borderless Alliance Stakeholder's Forum in Accra. Through consultation with these companies, the Trade Hub built the interest of companies across the region to develop a private sector-driven advocacy platform. The Alliance is sustainable platform for advocacy on:

- Elimination of unnecessary barriers to trade and transport within West Africa;
- Simplification and harmonization of procedures for the movement of people and goods; and
- Smart investment in critical infrastructure for efficient trade and transport. See Annex - Communiqué

Prior to hosting the regional Forum, the Trade Hub conducted an online survey of stakeholders in 20 trade and transport policy issues identified as recommendations in Hub studies. The survey results reveal that the top priority for for the 106 survey participants was the removal of checkpoints. The survey also revealed that companies are advocating for policy changes with policy makers on a one-on-one basis rather than in groups. The Borderless Alliance will help individual members amplify their message through leveraging the efforts of others.



Express Lanes

Following evaluations carried out by the Trade Hub for the ETLG Gap Analysis and the Regional Agricultural Trade Policy and Transport Study, one major recommendation put forward by the Trade Hub and endorsed by ECOWAS was to expedite clearance of ECOWAS origin goods. The Trade Hub held consultative processes with officials in **Ghana** and **Togo** to create "Express Lanes" that would reduce delays in clearance of those goods. The key elements and benefits of the Express Lanes include:

- Reduced costs and delays in clearance procedures

- Minimal documentation
- Mutual recognition of phyto-sanitary certificates
- Enhanced food security through faster trade in agricultural goods

Following the Trade Hub-sponsored consultations, Ghana Customs approved the pilot of an Express Lane at Aflao. See Commissioner's memo in Annex. The Commissioner has also allocated a physical space designated for this purpose.



Trade Hub team in consultation with border agencies on viability of express lane at Aflao



Area designated by Ghana Customs for express lane pilot at the Togo border

Open, Expedited Trade (OET) Study

Private companies in ECOWAS wish to expand to capture larger and more profitable sub-regional markets, as described in the table below, documented in Annex (OET Study).

MOTIVES FOR REGIONAL SALES (Indexed by rank. High number is strongest motivation.)						
Larger Market	Overall Market	Profitable Market Segments	Corporate Regional Strategy	Economies of Scale	Prepare for Future Production	Diversify Market Risks
48		37	25	21	16	14

However, in spite of the twenty-year presence of ETLs, many companies in the sub-region have plans to increase regional trade but have not exploited potential opportunities. Moreover, due to the onerous and costly conditions prevailing along trade corridors, many

leading, dynamic producers and transporters have made deliberate, corporate strategic decisions not to export or trade within the region or to countries considered more troublesome (e.g., Nigeria). Some of these companies have also decided to adopt a single-country market strategy (invest to sell to country-specific market) or serve markets from production platforms abroad (from Asia or Latin America) – even while recognizing that these approaches are short-sighted and do not take advantage of economies of scale.

The Trade Hub’s OET study examined why Member States, generally and individually, have not been promoting ETLs and how to effectively advocate for ETLs adoption and implementation. The OET looked at some of the basic hypotheses underlying arguments for and against open regional trade and tested them with stakeholders:

Trade Hypotheses	Responses and Findings
Intra-regional trade is currently important for the sub-region	It is currently not important for the sub-region. With some exceptions (e.g., beef cattle, some vegetables, some fast-moving consumer goods), products of African origin do not cross borders.
Revenues derived from cross-border trade represent a significant part of countries’ budgets	ETLS-derived revenues (formal and informal) are insignificant for larger economies (Nigeria, Ghana) but are relatively significant for trading economies (Togo, Benin). ³¹
Faster and cheaper movement of goods will increase consumer demand	Surveys tell us that price and timeliness drive consumer and producer demand in the sub-region.
Increased demand promotes investment	Companies repeat their readiness to invest to meet growing demand.
Investment will propel private sector profits and development impact	This is a proven model experienced in emerging economies.
Increased private sector sales will ultimately result in higher tax revenues to the host countries	This is the case in emerging countries, assuming that proper fiscal institutions and instruments are in place.
Increased tax revenues will offset temporary losses to national states revenues arising from OET	Experience of sustainable, emerging economies show that liberalization of trade generally trumps customs revenues driven models.

As part of the study, the Trade Hub was graciously provided customs revenue data by the Government of Ghana, supporting evaluation of the impact of implementing ETLs on actual revenue collection. For example, in 2010, Ghana’s ETLs-import revenues accounted for only 2.4% of total Customs revenue, showing that improved implementation of the ETLs should not pose a threat to total national revenue (Source: Ghana Customs). Further, according to the ECOWAS Commission, Ghana never requested compensation for losses incurred from duty-free treatment of ECOWAS products while the ECOWAS Compensation Scheme for ETLs was functional through 2008, indicating that the ETLs Free Trade Area for regional goods in Ghana could be fully implemented with minor losses to government revenue.

The OET study was undertaken to help ECOWAS, the Borderless Alliance and Member States engaged in informed, evidence-based discussions on the costs and benefits of implementing the ETLs and generally moving toward deeper regional integration.

³¹ ETLs-related import revenues in 2010 accounted for 2.4% (1.5% without the Import Excise Tax on cigarettes) of Ghana’s total Customs Revenues.

ECOWAS training series for ETLS National Approval Committees

In September, the ECOWAS Customs Directorate held the first in a series of trainings for the ETLS National Approval Committees (NACs), which are responsible for reviewing applications from companies to benefit from the duty-free scheme. This was another key recommendation of the ETLS Gap Analysis that was endorsed by ECOWAS. The trainings aim to build the capacity of committee members to identify criteria for products to receive ETLS approval and help resolve other operational issues the NACs currently face.³² Importantly, ECOWAS designed the trainings to reduce delays in the approval process, which currently varies from country-to-country although the protocol stipulates that committees must meet every 90 days.

The Trade Hub facilitated the first set of trainings in partnership with GIZ. The trainings included a mock-ETLS approval committee meeting consisting of Cape Verde, Guinea, Guinea Bissau, Liberia and Sierra Leone, where members were given a hypothetical dossier to determine whether or not the product should receive approval and on what basis. This initial set of trainings is expected to form the basis of a long-term ECOWAS initiative to build their Member State-level presence and capacity.

ISRT Implementation kicks off in Senegal

While work at a regional level is essential, bilateral and corridor specific activities are essential to demonstrate implementation and advance measurable improvements in trade fluidity. Following the Mali-Senegal cross-border conference held in May 2011, Senegal established a monitoring committee to oversee implementation of the prioritized recommendations in the last quarter. On July 1st, Mali and Senegal established a system to implement the ISRT Guarantee Scheme through their chambers of commerce, a key recommendation from the ETLS Gap Analysis. Implementation of the system would provide for the customs guarantee for transit traffic between the two Member States. If fully implemented, this will contribute significantly to cost-reduction along the Dakar-Bamako corridor.

Influencing regional trade for food security

The Trade Hub's study focusing on agricultural trade policy and transport barriers to effective regional integration and the problems of poverty and food insecurity attracted great interest from partners and supported the launch of key activities like the Border Information Centers and Express Lanes. The study recommended the following priority interventions and informs broader strategies that address regional agricultural trade towards the alleviation of food insecurity. Key policy recommendations of the study follow in the table below.

³² Rules of Origin – Criteria for ETLS Approval: As provided in the ECOWAS Protocol A/PI/I/03 Relating to the Definition of the Concept of Products Originating from member-states of ECOWAS, the Rules of Origin for Trade Liberalization Scheme goods are as follows:

- i. Local Content. The goods have been wholly produced in member states with a minimum of 60% raw materials content in accordance with the provisions of Article 3 of the Protocol;
- ii. Change in Tariff Classification. The goods are not wholly produced in member-states but their production requires the exclusive use of materials which are classified under a different tariff sub-heading from that of the finished product;
- iii. Value Added. The goods are not wholly produced in member-states and their production requires use of materials which have received a value-added of at least 30% of the ex-factory price of the finished goods.

Recommendation	Implementation Components	Benefits
Agricultural Trade Platform	Establish Joint Border community roundtables with ECOWAS and private sector participation	Cooperation among border actors resulting in increase trade efficiency
Border Community Roundtables	Train public and private sector representatives on rules (ECOWAS/UEMOA)	Greater transparency and implementation of rules Supports effective implementation of all other recommendations for addressing policy constraints
Border Information Campaign	Border information centers with signage and information on trading rules (noted above), equipped with internet, staffed with trained local personnel to assist with completion of documentation	Freer movement of staples and livestock across borders
Express Lane	Expedited customs clearance for all duty-free agricultural products of ECOWAS origin, in compliance with ETLS	Reduction in transaction costs/delays and customs clearance time for agricultural goods Minimal documentation Mutual recognition of SPS certificates Enhanced food security

Results

The result of the Trade Hub's Business Environment activities has been a significant shift in the level and quality of public-private dialogue on regional integration and some initial successes in moving that agenda forward. Some of the notable outcomes of these

1. **Realignment of Nigeria's tariff rates** – in consultation with ECOWAS, Nigeria revised its published tariff rates to conform to the 5 bands envisioned for the final CET. This translates into a significantly lower average tariff applied to goods entering the Nigerian market and is perhaps the most important stepping stone to communitywide adoption of the CET and eventual notification to the WTO.
2. **Launch of the private sector-led Borderless Alliance** – the Alliance serves as a platform for advocacy efforts to achieve effective policy change and implementation. With a limited and ineffective sanction and oversight capacity, ECOWAS alone will be unable to prompt action by Member States on policy reform. The Borderless Alliance is an important tool for both the private sector members and ECOWAS as they seek to jointly realize the regional integration agenda.
3. **Validation of the ETLS Gap Analysis findings** – both the ECOWAS Commission and, later, key representatives from 13 ECOWAS Member States reviewed validated the findings and recommendations of the Gap Analysis, recommitting to full implementation of the ETLS. This provides the high-level policy support for ECOWAS, private sector and donors to build from in establishing the information and monitoring systems that will make the ETLS function for traders.
4. **Launch of a pilot ECOWAS Border Information Center** – housed at the Ghana-Togo border, public and private sector partners are supporting a concrete initiative to improve

the implementation of ETLs protocols through information and education. The pilot Center is expected to serve as a model for replication throughout the region.

5. **Approval of a pilot express lane at the Ghana/Togo Border** – the express lane concept emerged from the Trade Hub’s targeted study on obstacles to the free flow of agricultural commodities throughout the region. Express lanes would speed the flow of trucks hauling goods of ECOWAS origin, reduce overall congestion at the borders, and make it easier for customs to manage the separate procedures associated with those goods. Ghana Customs approved the establishment of the first such express lane at the Aflao border.

Analysis

Recent Trade Hub surveys reconfirm private investors’ perception that times have never been better or more promising for investment in Sub-Saharan Africa, including the ECOWAS region. Investors point to growth in market demand driven by rising populations, country and personal wealth and urbanization; policy and regulatory reforms; shifts toward democracy and democratic institutions; crowding out of investment opportunities in “competing” emerging markets in Latin America and Asia; and global demand for Africa’s products, including agriculture, mineral and fuel products.



However, output from West African firms has not kept pace with local, sub-regional and global demand. As a result, with the exception of mineral and fuel products, SSA and ECOWAS’s imports continue to grow (most notably for capital and consumer goods and food). Still, as the ETLs Gap Analysis and other Trade Hub studies have affirmed, private sector companies in the region – both foreign and indigenous – want to expand to exploit regional market opportunities.

A critical step toward realizing those opportunities is reduced costs of regional trade through implementation of measures like the ETLs. Improving the implementation of the ETLs will require strong political will to make improvements, information dissemination to both public and private sector, and frequent and effective coordination between agencies responsible for ETLs implementation in Member States.

Every policy decision will produce winners, who can best advocate for change because they will benefit from harmonized processes, freer trade and access to regional markets. This reality has led to the creation of the Borderless Alliance, a promising start to a sustained and impactful private sector push for freer movement of goods.

ECOWAS also has a critical role to play in supporting Member States in implementing the protocols and monitoring their progress. The Trade Hub has given ECOWAS some of the tools that they need to fully realize this mandate. The results of that engagement are seen in increased public-private dialogue on regional integration and important first attempts at more active education and oversight in the Border Information Centers and express lane activities.



CASE STUDY

Reducing the costs of doing business

The USAID Trade Hub built stakeholder collaboration to tackle complex issues affecting regional trade.



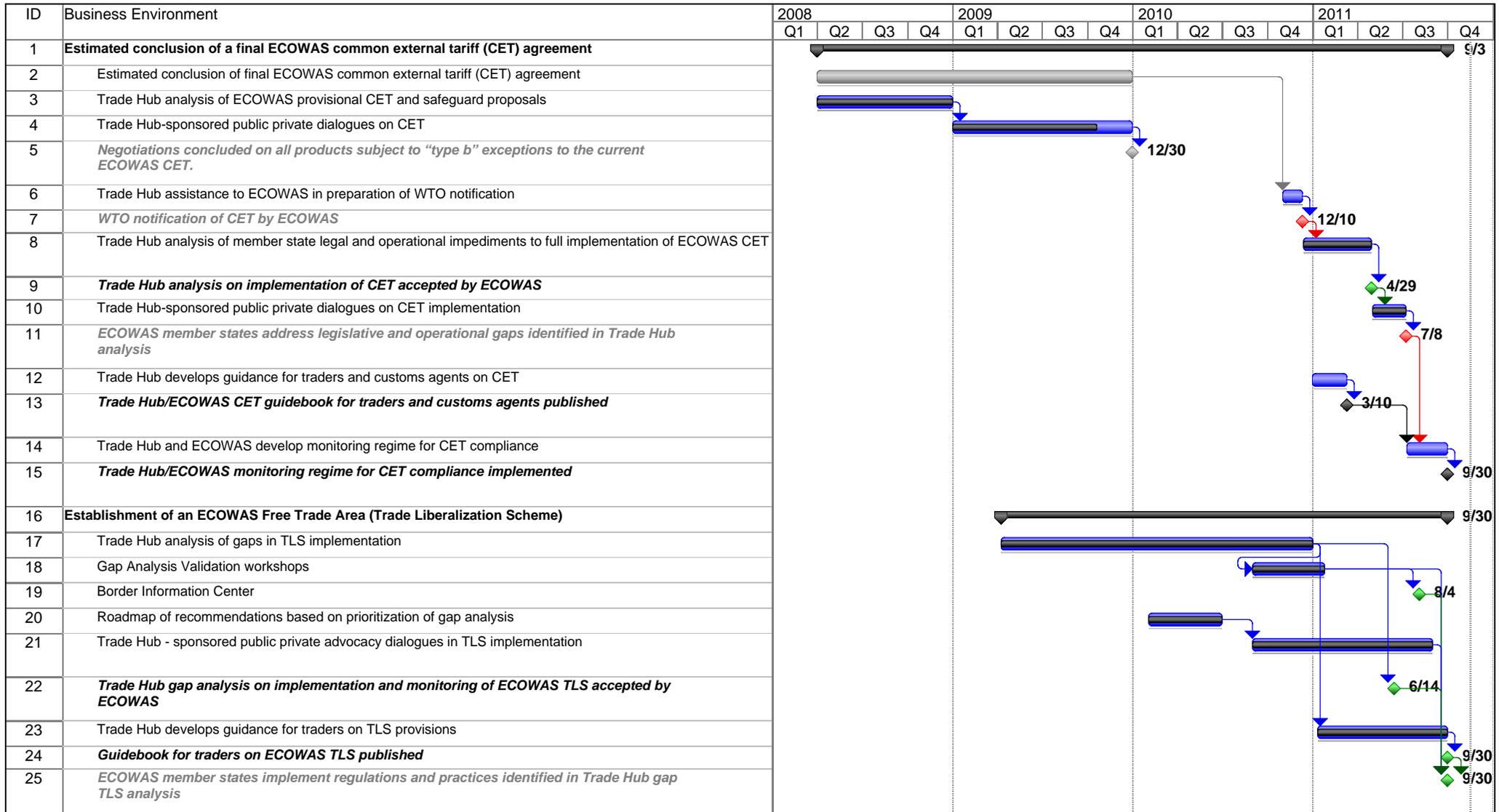
USAID West Africa Trade Hub

Moving goods across West Africa is time-consuming and difficult. The Trade Hub brought stakeholders together to improve the implementation of regional trade rules – and reduce the costs of doing business.

CHALLENGE The ECOWAS Trade Liberalization Scheme (ETLS) ensures the free movement of goods, persons and vehicles within the region with an eye toward reducing the costs of doing business and increasing regional and international trade. Twenty-one years after its birth, however, the ETLS has yet to be put into practice as it was intended. Although most participating countries have adopted the necessary legislation for harmonized regional integration, they have fallen short in the actual implementation of ETLS protocols with respect to the free movement of goods and vehicles. Lack of information on the underlying reasons for the shortcomings was stalling progress; the parties needed to understand the real issues and join together to reach a consensus on priority action items.

INITIATIVE The USAID West Africa Trade Hub analyzed gaps in ETLS implementation in 8 of 15 ECOWAS Member States and then facilitated dialogue among ECOWAS, the States, and private sector companies. Stakeholders developed an action plan to address the key problems: limited awareness of ETLS protocols, lack of enforcement and consistency of application at borders, and high levels of harassment due to the complexity and duplication of procedures.

OUTCOME Broad consensus among stakeholders regarding poor information and lack of harmonization led to a joint effort to establish a pilot Border Information Center at the Ghana-Togo border. The USAID Trade Hub partnered with ECOWAS, the Ghana Shippers' Authority and the Abidjan-Lagos Corridor Organization to launch the center. The Center assists border agents and traders by disseminating information (providing trade forms and detailed import/export process guides), offering customized support (including one-on-one assistance both in-person and via toll-free telephone hotlines) and administering training (offering workshops on best practices for importing, exporting and transport). A result of stakeholders' joint effort, the Center is a concrete first step toward realizing the goal of a fully functioning Free Trade Area in West Africa.



Project: Business Environment 11-17-11 Date: Tue 11/15/11	Task		Milestone		External Tasks	
	Split		Summary		External Milestone	
	Progress		Project Summary		Deadline	



5. TELECOMMUNICATIONS INFRASTRUCTURE

Introduction

Information Communication Technology (ICT) has the potential to dramatically increase exporter competitiveness and bring the global market to exporters' doorsteps. Obtaining adequate ICT tools, as well as affordable, reliable and fast Internet connectivity are seen as key factors for using ICT to increase business. The USAID Trade Hub aims to put practical ICT capabilities in the hands of export-ready companies' in targeted sectors.

In FY2011, the USAID Trade Hub ICT team continued its strategy of providing expert consulting to assist companies in overcoming pressing ICT issues, streamlining their business processes using ICT, increasing ICT capacity through training and mentoring, and disseminating information about how companies in West Africa can use ICT to become more competitive. The work built on previous years' results by strengthening the ICT capacity of industry leading companies, demonstrating the benefits, and providing the means for other exporters to imitate these successes.



Results

Expert consulting

Google Africa was a key partner in the Trade Hub's ICT activities.

During the project, the ICT team worked closely with 37 Ghanaian companies from five sectors to maximize the impact of resources. The USAID Trade Hub assessed these companies would benefit most from ICT interventions. Many of these exporters received site visits to help determine their specific ICT needs and streamline their use of technology.

In 2008, the USAID Trade Hub developed eBizBox, a carefully selected package of software and hardware tools and services, targeting the specific requirements of small and medium sized exporters. As a results, the ICT team facilitated purchases of 20 solutions to 24 companies, ranging from accounting software, to laptops, to domain registration and hosting services. To assist with adoption and reduce abandonment of these new tools, the ICT team ran a helpdesk that offered these businesses technical support five days a week for 8 months.

Undoubtedly, there were unreported purchases from companies outside of the shortlisted companies, and these numbers do not reflect the uptake of free software and website services that were an integral part of many workshops, and which were enthusiastically adopted. Feedback indicates that many ERCs have integrated some of these free technologies, e.g. Skype, into their business processes to such an extent that they no longer see them as noteworthy.

Additionally, the USAID Trade Hub has distributed hundreds of ICT toolkit CDs, containing appropriate free ICT software, at conferences and events throughout the region. By providing downloaded and targeted software, installable from one CD, the barriers to identifying and downloading these tools were reduced.

Exporters trained in the use of appropriate ICT

Over the last 4 years, the ICT team trained 425 business people, including 172 women, from 7 countries (Benin, Burkina Faso, Ghana, Mali, Nigeria, South Sudan and Togo).

Exporters consistently reported that lack of knowledge was a significant constraining factor in adopting ICT, and so this was an important area to tackle. In 2010 after incorporating feedback, the ICT team released an updated version of the ICT software and hardware bundle, eBizBox II, with an increased emphasis on training and internet-related products. The training complimented the ICT tools providing exporters with the skills to take advantage of productivity gains provided by the ICT tools.



The direction of the training was guided by background knowledge acquired through online questionnaires, site visits, training evaluations, and roundtable discussions with exporting companies. Ongoing feedback from exporters during

consulting visits and training sessions provided the basis for training material development and ensured the topics were highly tailored and pertinent.

Training sessions were practically oriented, and topics included: basic accounting using Excel, PC maintenance and backup, online marketing, social media, using Google Sites, website development, communication efficiency, digital image management, and how to join the USAID Trade Hub supported online portal.

Feedback from exporters was overwhelmingly positive, and attendance rates highlighted the interest in gaining this capacity.

Dissemination of information

Addressing a lack of information regarding appropriate ICT for small and medium sized enterprises in West Africa was a major role for the USAID Trade Hub.

To reach a large audience on a small budget, the ICT team posted advice, links and training material to the ICT blog (www.watradehub.com/ict). The blog acts as a reference source for those that attended trainings and presentations, and as a resource for companies that were unable to attend. Since February 2010, when website monitoring began, visitors have viewed over 2,250 pages and spent more than 100 hours viewing the ICT blog.

As part of its overall communications strategy, the USAID Trade Hub also released articles focusing on ICT and promoting the successes of companies using them in monthly newsletter, Tradewinds. With subscribers of close to 17,000, Tradewinds increased the audience numbers receiving key ICT messages considerably. This reach was extended further in April 2011 with a [video interview](#) for online African technology newsletter, Balancing Act, describing some of the ICT solutions available to ERCs in West Africa.

And in September 2010, the USAID Trade Hub organized the Technology for Exporters Conference, bringing together fifty-two exporters and ICT suppliers from five countries (Benin, Burkina Faso, Côte d'Ivoire, Nigeria, and Togo) to address key ICT issues faced by exporters, develop solutions to common problems and learn how to adopt new technologies.

The ICT team also took advantage of exporters' presence at conferences and events organized by the USAID Trade Hub, by giving presentations and training at popular events such as Shea 2010, SIAO 2010 and Shea 2011. The ICT team increased exposure to wider audiences by presenting and taking part in panel discussions at externally organized events such as the Commonwealth Telecommunications Organisation's Annual Connecting Rural Communities Africa Forum in 2009 and 2010.

Analysis

In the last four years, the big change in ICT infrastructure in West Africa is the increase in the number of undersea cables linking the region to Europe and the rest of the world. The Glo-1 and Main One cables ended the monopoly of the SAT3 cable, provided greater bandwidth, and increased the redundancy of connections to and from West Africa. The impacts of the new cables have enabled business to access cheaper and more reliable broadband. With additional fiber optic links with still greater capacity due to come online in the next two years, the availability of cheaper and faster broadband in West Africa is expected to continue to grow.

With the increased capacity and availability of broadband has come a new challenge for businesses: they are now faced with the difficulty in selecting the best internet service for their needs. In Ghana, internet service providers (ISPs) have not rushed to pass on reduced bandwidth costs to consumers. Furthermore, obscure pricing and unclear service commitments result in an array of confusing plans that are difficult for

non-technical consumers to compare. To address this the ICT team put together an [online guide to choosing an ISP](#) and a [report comparing the ISP options in Accra, Ghana](#). The Trade Hub hopes that this transparent display of packages and costs will stimulate competition between ISPs, encourage reduction in prices and encourage them to display their packages in a user-friendlier manner.

Similar to the boom in bandwidth options, the growth in freely available ICT tools and services provides an opportunity for ERCs to improve their productivity at no or very low cost. However, new tools can lead to new challenges, and with increased ICT uptake, exporters need to be wary. For example, a company can damage its brand with one mouse click by spamming would-be buyers, or through the misuse of simple website development tools by creating unprofessional, user-unfriendly websites.

Identifying appropriate technologies requires experience, and in most cases testing in the field. New technologies become available constantly, but many of these are not suited to the environment or needs of West African exporters, or there may be a superior rival product. In a search for the most appropriate ICT tools, the ICT team tested many: some did not pass the pilot stage as they were judged to be inappropriate, e.g. Slimtrader.com, Esoko, while others still have potential, e.g. Amazon Fulfillment. Future work should continue to identify the software and hardware that offer the most value to ERCs.

West African ICT vendors and service providers do not cater specifically to small and medium sized enterprises, but instead provide ICT equipment and services on a supply-driven basis. Reliable and capable ICT service providers, as well as competent technical support are hard to find. There appears to be limited capacity among ICT suppliers, and a lack of service culture, with poor to non-existent after-sales support. These flaws are not restricted to the ICT sector and attempting to improve this situation is a major undertaking. The most effective strategy involves tackling this from both the supply and demand side, and this is what the Technology for Exporters conference organized by the USAID Trade Hub in 2010 attempted to do. This conference highlighted the small and medium business market segment, and encouraged exporters to talk to suppliers about their needs and the service gaps they experienced. While this worked to increase awareness for the suppliers involved, it was at a limited scale.

Before the situation can improve, the demand needs to exist, and before this occurs exporters need a clearer understanding of what is available and must expect a level of service much greater than is currently provided. However, a prerequisite of reaching this point is for ERCs to learn to value ICT more.

The ICT team faced challenges when attempting to increase adoption due to ERCs assigning low priority to using ICT—even when aware of the benefits and with a stated interest in ICT. This can be explained by a combination of the competing demands made on a small business, a comfort gap with using new technology, and a resistance to change common to any organization. The best way to address this is to continue to reduce barriers to adoption, by promoting easy-to-use, compelling ICT solutions, and demonstrating the successes of industry-leading companies through effective use of ICT.

The demonstration effect and scaling-up

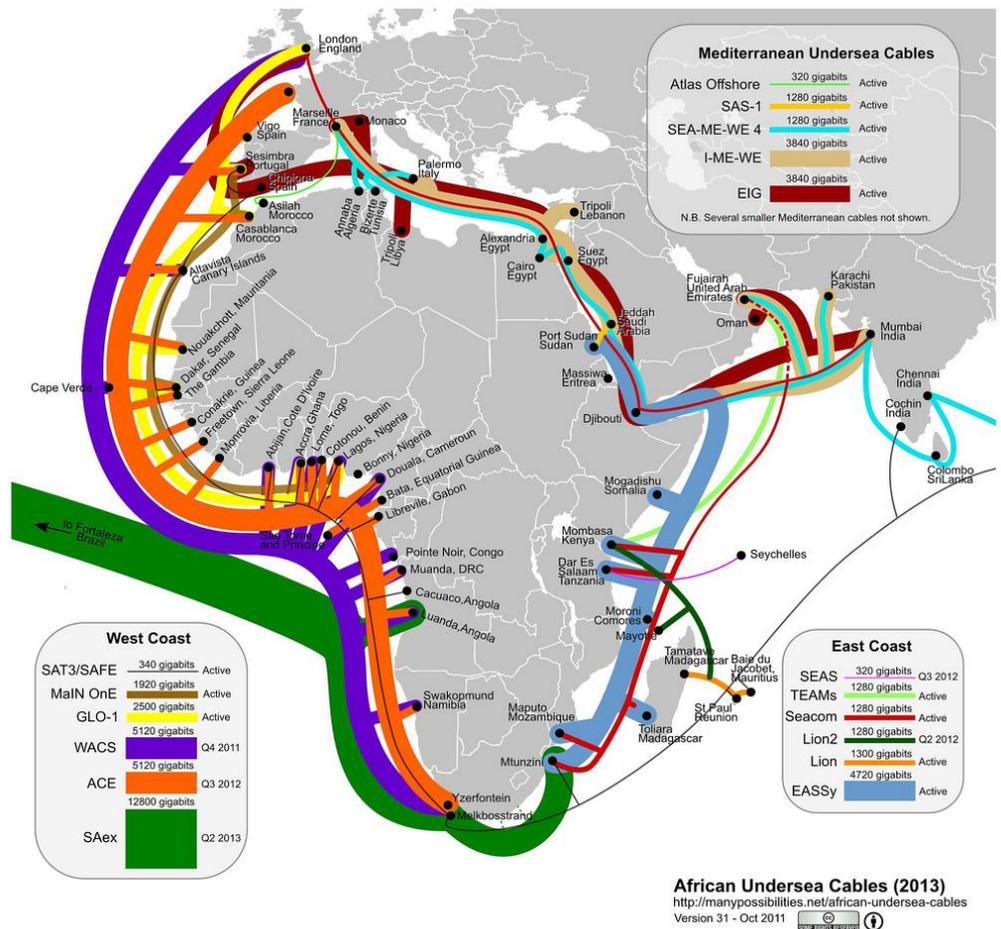
The core group of exporters that the ICT team focused on gained considerably from increased business productivity and greater visibility online. These exporters now use software for their business accounts to help them to understand their finances, spreadsheets to improve the accuracy of their pricing, and free web services to manage their social media presence.

With the dissemination of these success stories, other companies can see and hear about their successful use of ICT, and realize that they must adopt more ICT to stay competitive. As a result the impact of the USAID Trade Hub's work in the ICT sector is far greater than the direct impacts on the individual companies. Publicizing the successes has the potential to work well as long as the tools and training are available for other companies to imitate.

To further multiply impacts, the USAID Trade Hub leveraged partnerships for conference sponsorship, trainers, and discounted ICT products and services for ERCs, e.g. Google Ghana supplied trainers for workshops in Google Sites and other tools. Partners in the ICT sector included AfricanCraft, BusyInternet, Compu-Ghana, Esoko, Ghana-India Kofi Annan Centre of ICT Excellence, Google Ghana, Intel, K-Net,

MTN, MyConfigSys, University of Maryland and Communications Cooperative International, and Zebra Solutions.

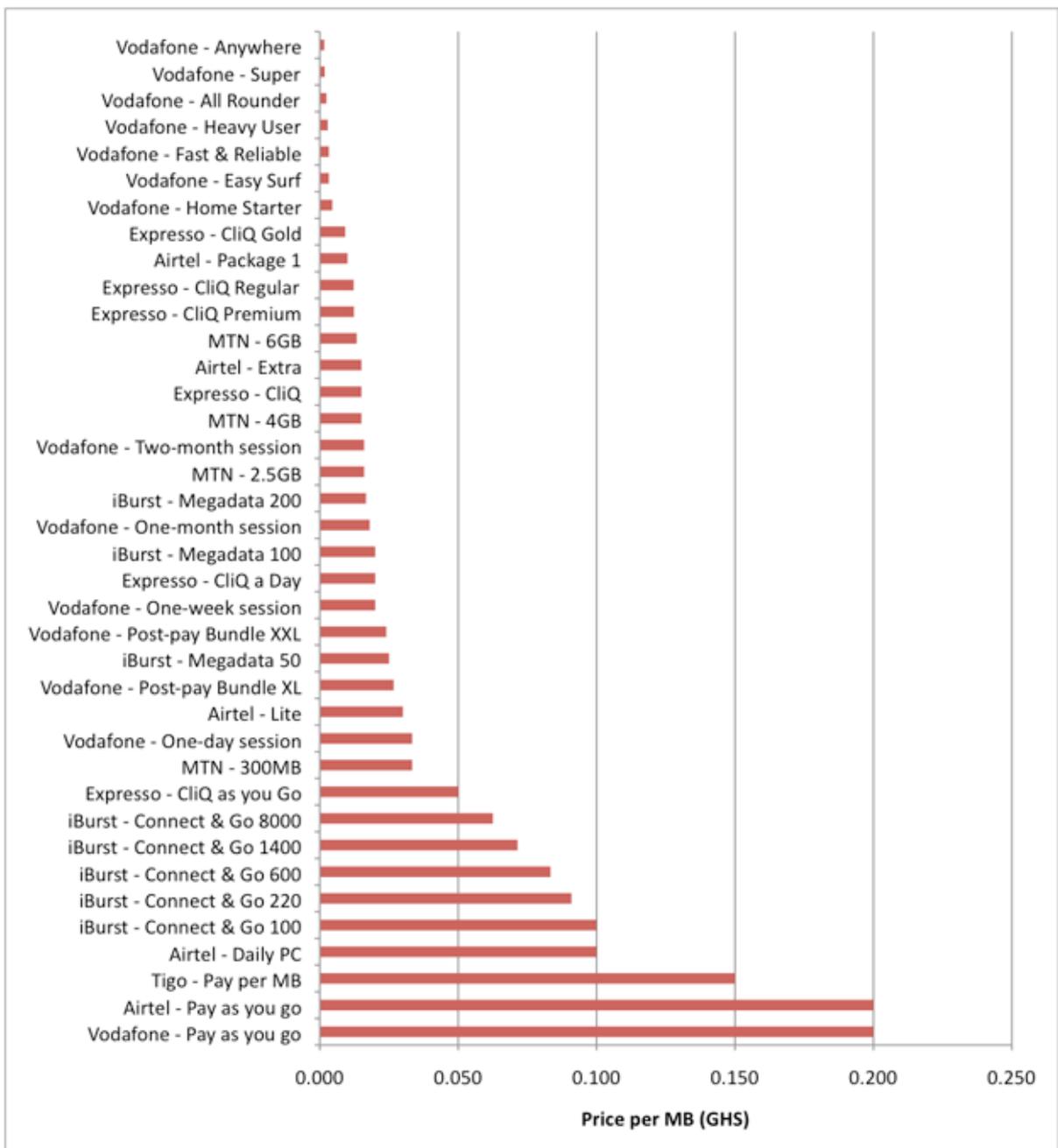
Unfortunately, a promising partnership between USAID and Intel to facilitate investment by internet service providers in more cost-effective broadband internet services for business customers, was derailed after Intel experienced budget constraints and was forced to reduce involvement. And in 2008, the ICT team had to abandon a WiMax pilot study that formed a key partnership activity, after a new government in Ghana cancelled WiMax spectrum allocations.



There is still potential to find effective partnerships with the ICT private sector. Encouraging users to adopt new tools, such as those offered by Google is a win-win

situation for both exporters and the ICT sector: the ERC gains through improved productivity; the ICT company gains through a new user on their platform.

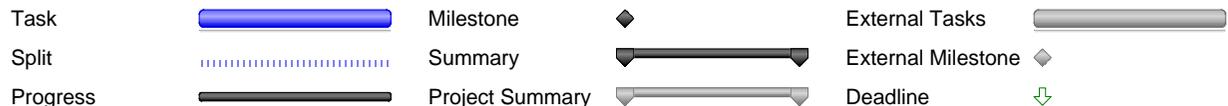
Another benefit from developing partnerships is the potential for sustainability beyond the project lifetime. For example, the USAID Trade Hub commissioned an online portal (network.africancraft.com) which was designed and built by U.S. non-profit OpenEntry and is now run by U.S. company AfricanCraft. Currently, the portal displays 215 products from 34 vendors, and is promoted and managed wholly independently from the USAID Trade Hub. Future efforts should endeavor to identify and take advantage of more of these synergies.



A Trade Hub analysis of bandwidth costs in Ghana helped exporters choose the service best suited to their needs.

ID	Telecom Infrastructure	2009				2010				2011					
		Qtr 2	Qtr 3	Qtr 4	Qtr 1	Qtr 2	Qtr 3	Qtr 4	Qtr 1	Qtr 2	Qtr 3	Qtr 4	Qtr 1	Qtr 2	Qtr 3
1	USAID/Intel Alliance - Broadband Connectivity and Utilization Activity														
2	Trade Hub conducts targeted client ICT needs analysis														
3	Trade Hub completes client ICT profiles														
4	Product development for broadband-enabled application packages														
5	Client-level testing of broadband-enabled application packages														
6	Refinement and pricing of broadband-enabled application packages														
7	Distribution and training for selected Hub clients on broadband-enabled application packages														
8	Improved access of ERCs to existing ICT products, services & training														
9	Survey ERCs ICT resources & access to ICT needs & compare with 2008 data														
10	Update eBizBox offering in partnership with private sector (old)														
11	Update eBizBox offering in partnership with private sector (proposed)														
12	Disseminate revised eBizBox offering (old)														
13	Disseminate revised eBizBox offering (proposed)														
14	Provide ERCs with ICT solutions to reduce major operating inefficiencies														
15	Conduct site visits to determine key ICT interventions for select ERCs in targeted sectors (old)														
16	Conduct site visits to determine key ICT interventions for select ERCs in targeted sectors (proposed)														
17	Apply ICT solutions to pilot ERCs (old)														
18	Apply ICT solutions to pilot ERCs (proposed)														
19	Evaluate success of new ICT solutions, document successes, and assess possibility to duplicate solutions sector-wide (old)														
20	Evaluate success of new ICT solutions, document successes, and assess possibility to duplicate solutions sector-wide (proposed)														
21	Workshop for service providers and ERCs to present ICT opportunities and solutions for ERCs in targeted sectors (old)														
22	Workshop for service providers and ERCs to present ICT opportunities and solutions for ERCs in targeted sectors (proposed)														
23	Provide ERCs with easy access to industry specific ICT training														
24	Collaborate with partners to develop 1 or 2 pilot business ICT training & service center(s) (old)														
25	Collaborate with partners to develop 1 or 2 pilot business ICT training & service center(s) (proposed)														
26	Business ICT training centre available for ERCs in Accra (old)														
27	Business ICT training centre available for ERCs in Accra (proposed)														
28	Train staff from ICT centers and computer equipped ARCs; Benin, Burkina Faso, Nigeria (old)														
29	Train staff from ICT centers and computer equipped ARCs; Benin, Burkina Faso, Nigeria (proposed)														
30	Workshop for ERCs on ICT Applications for business														

Project: Telecom 11-13-2009
Date: Tue 11/15/11



FY 2011 ACTIVITIES: OCTOBER 2010– NOVEMBER 2011

Activity	Date	Location	Contact person
Trade Investment Capacity			
KIT/ Mali Tour of Ghanaian Shea industry	October 4–8, 2010	Tamale, Buipe, Techiman, Accra, Tema - Ghana	Kafui Djonou, Peter Lovett
Shea Alliance Founders Meeting	October 11, 2010	Accra - Ghana	Aaron Adu, Peter Lovett, Kafui Djonou, Roger Brou
Planning meeting with SIAO	October 10-12, 2010	Ouagadougou, Burkina Faso	Elaine Bellezza, Joe Lamport
Natural Product Expo East	October 14-15, 2010	Boston, MA	Mutale Chilangwa
Bankers' training	October 14-16, 2010	Lome, Togo	Christian Dahm, Finance Team
National Food and Agriculture Show (FAGRO)	October 12-17, 2010	Accra, Ghana	Christian Dahm, Xenia Defontaine
SIAL: <i>Salon International de l'Alimentation</i> www.sial.fr	October 17-21, 2010	Paris, France	Elitza, Makhtar, Christine, Roger
eARC Training and Stakeholder Meeting	October 17-23, 2010	Douala, Cameroon	Abou Fall
Sustainable Cosmetics Summit www.sustainablecosmeticssummit.com	October 18-20, 2010	Paris, France	Peter Lovett, Roger Brou
Sustainable Cosmetics Summit	October 18-22, 2010	Paris, France	Peter Lovett, Roger Brou
Buyer visit (Triballinks & Snob Stuff)	October 18 - 28, 2010	Bamako, Mali	Elaine Bellezza
Buyer visit (Jamtown, CharityUSA)	October 27 – November 1, 2010	Accra, Ghana	Elitza Barzakova
Buyer Trip	October 29-December 5, 2010	Douala, Cameroon Accra/Tema, Ghana	Joop de Voest & Hanna Amichia

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SIAO: <i>Salon International de l'Artisanat de Ouagadougou</i> www.siao.bf	October 29- November 7, 2010	Ouagadougou, Burkina Faso	Handcrafts and Communications teams, Elitza Barzakova, Roger Brou, Karen Gibbs
Buyer visit (Tribal links, Snobb stuff, Jamtown, Mbare, CharityUSA, Image Nation)	October 29 – November 7, 2010	Ouagadougou, Burkina Faso	Elaine Bellezza, Emmanuel Odonkor, Megan Rhodes
eARC Training at SIAO 2010	October 31- November 5, 2010	Ouagadougou, Burkina Faso	Abou Fall
World Cocoa Foundation meeting	November 1-3, 2010	Abuja, Nigeria	Aaron Adu
The Gambia Cashew week	November 2-5, 2010	Banjul, Gambia	Xénia Défontaine, Sunil Dahiya, Roger Brou, William Larbi
Buyer visit (Jamtown)	November 5 - 9, 2010	Bamako, Mali	Elaine Bellezza
Kraft Planters Rebranding Launch www.planters.com	November 8, 2010	New York, NY, USA	Xenia de Fontaine
Buyer Visit - Shea Butter	November 11- 17, 2010	Accra, Adidome and Tamale, Ghana	Aaron Adu
Fashion Designers' Workshop	November 30- December 1, 2010	Accra, Ghana	Lorie Brock, Jacques Betsy, Judd Welsh, Hanna Amichia
AGOA workshop (AWEP/ Vital Voices)	December 2-5, 2010	Abuja, Nigeria	Elaine Bellezza
Regional partnership research trip	December 6, 2010	Accra/Tema, Ghana	Abou Fall
Foreign JV investor trip	December 12- 15, 2010	Accra, Tema	Hanna Amichia
Product development, selection and approval	December 10 - 17, 2010	Dakar, Senegal	Elaine, Clarisse
AGOA & ERC Shea and Home Décor Training	January 23-28, 2011	Bamako, Mali	Abou Fall, Vanessa Adams

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Sustainable Seafood Forum	January 15-18, 2011	Vancouver, Canada	Makhtar Thiam Leah Quinn
Product Development Consultancy with Ghanaian Companies	January 4-26, 2011	Accra, Ghana	Elaine Bellezza, Cheick Diallo
Buyer Visit (Robbie Stewart)	January 10-13, 2011	Senegal	Elaine Bellezza, Makhtar Thiam
Buyer trip	January 16 - 19, 2011	Dakar, Senegal	Makhtar Thiam
PTNPA Annual Conference	January 15-18, 2011	Las Vegas, NV	Christian Dahm, Kees Blockland
New York International Gift Fair	January 27– February 4, 2011	New York, USA	Elaine Bellezza, Elitza Barzakova, Roger Brou
Apparel Buyer Trip & Technical Assistance	January 18-25, 2011	Cameroon	Jacques Betsy
Ghana Cashew workshop	February 3, 2011	Accra, Ghana	Yayra Amezdoro, Xenia Defontaine
Magic	February 14-16, 2011	Las Vegas, NV	Jean Pierre Rousseau, Elitza Barzakova, Jacques Betsy
Ambiente	February 11–15, 2011	Frankfurt, Germany	Elaine Bellezza, Roger Brou, Elitza Barzakova
Kaju India	February 19-21, 2011	Kolam, India	Carlos Costa, ACA
Burkina National Workshop	February 24, 2011	Banfora, Burkina Faso	Mohamed Ouedraogo, ACA
Buyer trip (Swahili)	February 17-24, 2011	Bamako, Mali	Elaine Bellezza
AGOA Customs Documentation and Textile Visa Training	February 22-26, 2011	Monrovia, Liberia	Abou Fall
Cotton Business Forum & factory visits	February 22-26, 2011	Douala & Yaounde, Cameroon	Joop de Vost, Karen Radji, Olivier Dimala (eARC Cameroon)

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Buyer Visit (Matthieu Chatin)	February 19-27, 2011	Accra, Bolgatanga, Ghana	Emmanuel Odonkor
NYIGF Buyer follow up (Bamboula, Mbare, Jamtown, Global Exchange, Our World, Tribalinks)	February 24-March 3, 2011	Bamako, Mali	Elaine Bellezza
1888 Mills opening and factory JV evaluations	March 7-12, 2011	Accra & Tema, Ghana	Joop de Vost, Hanna Amichia
Buyer visit Support (TK Maxx)	March 11-12, 2011	Accra, Ghana	Elaine Bellezza, Emmanuel Odonkor
Follow up from Ambiente with Exporter Xarala, New Producer Visit/Buyer Trip (Chatin)	March 13-17, 2011	Senegal	Elaine Bellezza
Initial Environmental Examination implementation Training	March 14, 2011	Accra, Ghana	Gustav Adu, Elaine Bellezza, Emmanuel Odonkor
Buyer Visit (Home Goods)	March 24-27, 2011	Accra, Ghana	ATAG, Trade Hub
Biofach	February 16-19, 2011	Nuremburg, Germany	Elitza Barzakova
In-cosmetics www.in-cosmetics.com	March 29-31, 2011	Milan, Italy	Kafui Djonou, Roger Brou, Elitza Barzakova
Benin cashew day	March 31, 2011	Cotonou, Benin	Boris Houenou, ACA
Journée du Cajou au Benin	March 31–April 1, 2011	Cotonou, Benin	Boris Houenou
Global Shea Alliance First General Assembly, Shea 2011: Sustainable Solutions, B2B, Exporter Training, Exhibition and Field Trips	April 4–9, 2011	Accra, Tema & Northern Regions, Ghana	Elitza Barzakova, Mutale Chilangwa, Stephanie Diakité, Kafui Djonou, Peter Lovett and Organic Monitor Consultant Joseph Hunwick
CENTA Annual Convention	April 7–8, 2011	London, UK	Christian Dahm
Mathieu Chatin Buyer Trip	April 10–17, 2011	Dakar, Senegal	Elaine Bellezza, Makhtar Thaim

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Association of Food Industries Annual Convention	April 28–30, 2011	Naples, Florida	Christian Dahm, Elitza Barzakova, Jim Giles
Shea Butter Buyer Visit	April 29–May 2, 2011	Bolgatanga, Paga & Tamale, Ghana	Aaron Adu
American Oil Chemists' Society Annual Convention	May 2–5, 2011	Cincinnati, OH	Elitza Barzakova
European Seafood Exposition – Networking	May 3–5, 2011	Brussels, Belgium	Makhtar Thiam Roger Brou
New York Cosmetic Chemist Suppliers Day	May 10–11, 2011	Edison, NJ	Elitza Barzakova, Mutale Chilangwa, Peter Lovett
Apparel Technical Assistance	May 10–21, 2011	Douala, Cameroon	Jacques Betsy
Sustainable Cosmetics Summit	May 12–14, 2011	New York, NY	Elitza Barzakova, Peter Lovett
International Contemporary Furniture Fair (ICFF)	May 14–17, 2011	New York, NY	Elaine Bellezza, Elitza Barzakova
Visit to Major EU Shea Buyers and Processors	May 18–20, 2011	Sweden, Denmark & Holland	Roger Brou, Peter Lovett
International Nut & Dried Fruit Congress	May 20–21, 2011	Budapest, Hungary	Christian Dahm, Roger Brou
INC Annual Congress/ World Cashew Task Force set up	May 20–21, 2011	Budapest, Hungary	Carlos Costa, Christian Dahm
Workshop on MSC Certification	May 25–26, 2011	Dakar, Senegal	Roger Brou, Makhtar Thiam
Handcrafts Workshop	May 28–June 4, 2011	Douala, Cameroon	Emmanuel Odonkor
FDA Food Safety Modernization Act	June 6, 2011	Washington DC	Leah Quin
ARC Launch Togo	June 16–22, 2011	Lomé, Togo	Roger Brou, Abou Fall, Karen Radji
B2B Apparel Meeting	June 20–21, 2011	Cape Town, South Africa	Joop de Voest

Sustainable Foods Summit	June 23–24, 2011	Amsterdam, Netherlands	Peter Lovett
ACA Conference promotion event in Guinea Bissau and Technical assistance	July 11-14, 2011	Bissau, Guinea-Bissau	Xenia Defontaine
ACA Conference promotion event in Senegal	July 26-28, 2011	Dakar, Senegal	Xenia Defontaine
Technical Assistance Visit	July 18-21, 2011	Tchamba, Togo	Sunil Dahiya
Grassroots Business Fund visit	July 25-28, 2011	Accra, Ghana	Elaine Bellezza, Emmanuel Odonkor
Global Shea Alliance Executive Committee members visit to Vice-President of Ghana	August 1, 2011	Accra, Ghana	Executive Committee and Secretariat staff
Collaborative meeting with ECOWAS EXPECT initiative	August 1-2, 2011	Accra, Ghana	Christian Dahm
NYIGF	August 13-18, 2011	New York, USA	Elaine Bellezza, Jean-Pierre Rousseau, Emmanuel Odonkor
Meetings with COCOBOD's Shea Unit	August 18, 2011	Accra, Ghana	Aaron Adu, Roger Brou, Peter Lovett
Cashew Technical Assistance Visit	August 22-25, 2011	Lagos, Nigeria	Sunil Dahiya
Benin national shea event preparation and participation	August 30–September 2, 2011	Cotonou, Benin	Aaron Adu, Peter Lovett
Senegal National Committee Relaunched	September 8, 2011	Ziguinchor, Senegal	Xenia Defontaine
Technical Assistance Visit	September 13–16, 2011	Banjul, The Gambia	Sunil Dahiya
6th ACA Annual Conference	September 19–22, 2011	Banjul, The Gambia	Christian Dahm, Xenia Defontaine, Sunil Dahiya
Foodnews' <i>Sustainability in the Food Supply Chain</i> , in London	September 21-22, 2011	London, UK	Peter Lovett

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SAP media tour	September 2011	Accra, Walewale and Tamale, Ghana	Aaron Adu
MOFA workshop Promoting Perennial Crops in Ghana	September 2011	Accra, Ghana	Aaron Adu
Apparel Export Order Completion Trip	August 27-September 9, 2011	Douala, Cameroon	Hanna Amichia and Jacques Betsy
Shea Buyer Tour	August-October 2011	Accra, Ghana	Vanessa Adams, Aaron Adu
Buyer Trip	September 5-6, 2011	Accra & Tema, Ghana	Hanna Amichia
Nigeria national shea stakeholders forum preparations	September 12-16, 2011	Abuja, Nigeria	Aaron Adu
Buyer Trip (Mbare)	September 8-23, 2011	Dakar, Senegal and Bamako Mali	Elaine Bellezza
Designer Conference	September 24-28, 2011	Johannesburg, South Africa	Elaine Bellezza, Emmanuel Odonkor
Bob Coleman trips	September 23-26, 2011	Dakar, Senegal	Elaine Bellezza, Amanda Cassiday, Emmanuel Odonkor
Ghana's multi-stakeholders shea forum in Bolgatanga (SNV and Shea-Network)	September 29-30, 2011	Bolgatanga, Ghana	Aaron Adu
Swahili buyer trip	September 18-October 2	Dakar, Senegal	Elaine Bellezza, Amanda Cassiday, Emmanuel Odonkor
INNOVKAR dissemination conference	October 24-26, 2011	Ouagadougou, Burkina Faso	Aaron Adu, Roger Brou, Peter Lovett
Investor fact finding trip	September 26-30, 2011	Accra & Tema, Ghana	Hanna Amichia
GSA Executive Committee bi-annual meeting	October 27, 2011	Ouagadougou, Burkina Faso	Aaron Adu, Roger Brou, Peter Lovett

Shea Buyer Trip	October 2011	Ouagadougou & Leo, Burkina Faso , Northern and Central Ghana, Accra and Tema, Ghana	Aaron Adu, Peter Lovett, Leslie Shages
Financial Services			
Trade Hub and AFDB/Making Finance Work 4 Africa Partnership Agreement	October 5, 2010	Accra, Ghana	Vanessa Adams, Roger Brou, Stephanie Diakité
EBID/BOAD Bankers Training	October 14-16, 2010	Lome, Togo	Roger Brou, Christian Dahm, Jean-Guy Biley, Sunil Dahiya
Nigeria Cashew Cluster Scheme Planning	October 25-29, 2010	Lagos, Nigeria	Judson Welsh, Sunil Dahiya
SIAO A2F Workshop	October 31, 2010	Ouagadougou, Burkina Faso	Roger Brou, Stephanie Diakite
Trade Hub/Root Capital Collaboration Agreement for financing support to Trade Hub A2F Clients	October 31, 2010	Ouagadougou, Burkina Faso	Roger Brou, Stephanie Diakité
A2F Intermediation and Support Mandates Enacted by Trade Hub A2F clients	October- December, 2010	Ouagadougou/Leo, Burkina Faso , Dakar, Senegal , Bamako, Mali , Bissau, Guinea Bissau	Stephanie Diakité
Cashew week A2F	November 3-4, 2010	Banjul, The Gambia	Roger Brou, Xenia Defontaine, Sunil Dahiya
Financial Technical Assistance Visits for Ken Atlantic and Buetec	December 2-4, 2010	Douala, Cameroon	Judson Welsh
EBID-USAID-ACA MOU official Signing Ceremony	December 20, 2010	Lome, Togo	Roger Brou, Christian Dahm, Brinton Bohling
Nigerian Cashew Cluster Financing Scheme	January 13-14, 2011	Lagos, Nigeria	Judson Welsh, Roger Brou, Christian Dahm
Guinea Bissau Cashew Cluster Financing Scheme	February 19-27, 2011	Bissau, Guinea- Bissau	Roger Brou, Stephanie Diakité, Sunil Dahiya

Guinea Bissau Cashew Bank meeting	May 2–8, 2011	Bissau, Guinea Bissau	Stephanie Diakite
Senegal UBA Meeting	May 9–10, 2011	Dakar, Senegal	Stephanie Diakite
Nigeria Cashew Cluster Meeting	May 26–27, 2011	Lagos, Nigeria	Judson Welsh
Togo ERCs Meeting	June 22, 2011	Lome, Togo	Jean–Guy Biley
Access to Finance Technical Assistance	July 16-20,2011	Lomé & Tchamba, Togo	Jean-Guy Biley
BOAD/ AECOM Workshop on Crop Insurance	July 20-22, 2011	Lomé, Togo	Jean-Guy Biley
Guinea-Bissau Cashew Financing Technical Assistance	August 8, 2011	Bissau, Guinea-Bissau	Stephanie Diakite, Xenia Defontaine
Finance Trainings at ACA Conference	September 19-22, 2011	Banjul, Gambia	Roger Brou, Jean-Guy Biley, Stephanie Diakite
Bankers-Exporters Initiative Trainings	September 12-16, 2011	Abuja & Lagos, Nigeria	Judson Welsh, Aaron Adu
Access to finance technical Assistance	August 11-18, 2011	Douala, Cameroon	Judd Welsh
Transport Infrastructure			
Ouagadougou-Abidjan verification trip	October 12–24, 2010	Burkina Faso, Cote d' Ivoire	Seydou Ilboudo
Launching of advocacy campaign in Senegal	October 15, 2010	Dakar/Tambacounda, Senegal	Lacina Pakoun
SSATP Annual meeting 2010	October 18–21, 2010	Kampala,Uganda	Amadou Ba, Christel Annequin
Tema-Ouagadougou verification trip	October 29–November 10, 2010	Burkina Faso, Ghana	Patrick Kpenou
Meeting with UEMOA	November 4–5, 2010	Burkina Faso	Niels Rasmussen, Amadou Ba
Roadshow	November 11, 2010	Tema, Ghana	Niels Rasmussen, Amadou Ba, Lacina Pakoun, Patrick Kpenou, Aline Adamou

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Ouagadougou-Bamako-Dakar verification trip	November 19– December 8, 2010	Burkina Faso, Mali, Togo	Seydou Ilboudo
Roadshow	November 25, 2010	Lome, Togo	Lacina Pakoun, Patrick Kpenou
Roadshow	November 25, 2010	Sikasso, Mali	Amadou Ba, Seydou Ilboudo
Lome-Ouagadougou verification trip	November 25– December 5	Burkina Faso, Togo	Patrick Kpenou
Grants-supported Advocacy Campaign Monitoring	November 26, 2010	Togo	Kwesi Osei-Kusi, Lacina Pakoun, Patrick Kpenou
Grants-supported Advocacy Campaign Monitoring	November 26, 2010	Mali	Jane Owiredu- Yeboah, Amadou Ba, Seydou Ilboudo
Roadshow	December 2, 2010	Dakar, Senegal , Ouagadougou, Burkina Faso	Amadou Ba, Lacina Pakoun, Patrick Kpenou, Seydou Ilboudo
Roadshow	December 9, 2010	Cote d'Ivoire	Amadou Ba, Patrick Kpenou
Abidjan-Bamako verification trip	December 10– 19, 2010	Cote d' Ivoire, Mali	Patrick Kpenou
Niamey-Cotonou corridor update trip	December 12– 21, 2010	Benin, Niger	Seydou Ilboudo
Meeting with UEMOA and CBC conference on trucking liberalization	February 1-5, 2011	Burkina Faso	Niels Rasmussen, Amadou Ba Christophe Bruyas
CSO Close-out (MECAP)	February 7-10, 2011	Lome, Togo	Lacina Pakoun, Kwasi Osei-Kusi
Meeting with Uniformed services and Ghana National Insurance Commission	February 11-13, 2011	Accra, Ghana	Lacina Pakoun
Strategic Advocacy meetings and grant campaigns closeout	February 14-19, 2011	Dakar, Senegal	Amadou Ba, Jane Owiredu-Yeboah

SSATP Regional Economic Community meeting 2010	February 14-19, 2011	Kigali, Rwanda	Niels Rasmussen
Borderless Road Show	February 22, 2011	Kayes, Mali	Amadou Ba, Ometere Omoluabi
Lome-Ouagadougou verification trip	March 1-7, 2011	Burkina Faso, Togo	Seydou Ilboudo
Meeting with Ghana Parliament select committee on road and transport	March 3, 2011	Accra, Ghana	Bright Gowonu, Afua Eshun
Borderless Road Shows	March 6-11, 2011	Cinkasse-Tsevie, Togo	Lacina Pakoun, Christophe Bruyas
Tema-Ouagadougou verification trip	March 2-12, 2011	Burkina Faso, Ghana	Patrick Kpenou
Mali-Senegal Cross Border preparatory meeting	March 14, 2011	Dakar, Senegal	Amadou Ba, Jane Owiredo-Yeboah
Policy meeting	March 17, 2011	Accra, Ghana	Kwasi Osei-Kusi, Lacina Pakoun
Ministry of road and highways transport meeting	March 18-20, 2011	Koforidua, Ghana	Afua Eshun
Borderless Road Show	March 24, 2011	Bittou, Burkina Faso	Lacina Pakoun, Ryan Yingling
Bamako-Dakar verification trip	March 8 - 24, 2011	Burkina Faso, Mali, Togo	Seydou Ilboudo
ECOWAS meeting on axle load regulation	March 28-31, 2011	Accra, Ghana	Niels Rasmussen, Amadou Ba
Parliamentary Select Committee on Roads & Transport visited the Paga, Kulungugu and Missiga	May 3, 2011	Paga, Kulungugu & Missiga, Ghana	Bright Gowonu
Tema–Paga Caravan	May 16–19, 2011	Bolga, Tamale, Techiman & Kumasi, Ghana	Bright Gowonu, Kwasi Osei–Kusi, Niels Rasmussen
Formation of BORDERLESS Alliance	May 30, 2011	Accra, Ghana	Vanessa Adams, Sola Afolbi, Bright Gowonu, Niels Rasmussen
West African Transport and Facilitation Observatory	June 15, 2011	Accra, Ghana	Niels Rasmussen

Focal point set-up in Benin	June 26–30, 2011	Cotonou, Benin	Christophe Bruyas
Meeting on Togo Drivers Guide	June 26–July 3, 2011	Lomé, Togo	Aline Adamou, Roland Zouzou
ECOWAS Workshop for National Facilitation Committees	July 5-7, 2011	Cotonou, Benin	Sola Afolabi and Niels Rasmussen
15th report dissemination	July 13, 2011	Bamako, Mali	Christophe Bruyas
15th report dissemination	July 20, 2011	Dakar, Senegal	Christophe Bruyas
Road Governance Initiative Meetings with UEMOA and other Stakeholders	September 7-8, 2011	Ouagadougou, Burkina Faso	Rasmussen, Afolabi
Meetings with UEMOA; General Assembly of Landlocked Countries Shippers' Councils Association	September 14-17, 2011	Ouagadougou, Burkina Faso	Niels Rasmussen
Focal points training	September 26, 2011	Lomé, Togo	Christophe Bruyas
6th OPA Steering Committee meeting	September 27, 2011	Lomé, Togo	Niels Rasmussen
OPA sustainability workshop	September 28-29, 2011	Lomé, Togo	Niels Rasmussen
Meeting with National Facilitation Committee regarding a Drivers' Guide to Mali	July 14, 2011	Bamako, Mali	Afua Eshun
Borderless Alliance Interim Executive Committee Meeting	June 6, 2011	Accra, Ghana	Bright Gowonu
Borderless Alliance Interim Executive Committee Meeting	September 13, 2011	Accra, Ghana	Bright Gowonu
Borderless Alliance Interim Executive Committee Meeting	August 15, 2011	Accra, Ghana	Bright Gowonu
Business Environment			
ECOWAS Experts Meeting – ETLs Gap Analysis	November–December, 2010	Abuja, Nigeria	Ometere Omoluabi, Harold Pohoresky
ECOWAS Experts Meeting – ETLs Gap Analysis	November–December, 2010	Abuja, Nigeria	Ometere Omoluabi, Harold Pohoresky

ECOWAS Aid-for-Trade Meeting	January 19-21, 2011	Abuja, Nigeria	Vanessa Adams, Ometere Omoluabi
Ghana-Togo Border Information Center Assessment/Ghana Shippers' Authority	February 9, 2011	Aflao, Ghana	Abou Fall, Ometere Omoluabi, Patrick Kpenou
Togo ETLS Gap Analysis Validation	February 10, 2011	Lome, Togo	Abou Fall, Ometere Omoluabi
Abidjan-Lagos Trade and Transport Facilitation Program Seminar on Single Window Concept	February 10, 2011	Accra, Ghana	Jane Owiredu Yeboah
Benin ETLS Gap Analysis Validation	February 21-23, 2011	Cotonou, Benin	Ometere Omoluabi, Jane Owiredu Yeboah
Kayes National Transport Workshop & Mali-Senegal Trade and Transport Ministerial Preparatory meeting	Feb 27–Mar 4, 2011	Kayes, Mali	Amadou Ba, Ometere Omoluabi
Togo-Burkina Border Information Center Viability Assessment	March 6 -7, 2011	Cinkasse, Togo	Jane Owiredu Yeboah
ATP/ECOWAS Regional Agribusiness Association Advocacy Workshop	March 7-10, 2011	Abuja, Nigeria	Ometere Omoluabi
ECOWAS/UEMOA meeting on harmonisation of Trade Liberalization Schemes	March 28–31, 2011	Lome, Togo	Sola Afolabi, Peter White, Abou Fall
Ghana-Burkina Joint Committee on Bilateral Cooperation – Trade, Transport and Investment Sub-committee	March 29–31, 2011	Accra, Ghana	Jane Owiredu Yeboah, Ometere Omoluabi, Lacina Pakoun, Bright Gowonu
Senegal-Mali Prime Ministerial Meeting	May 20–21, 2011	Kayes, Mali	Vanessa Adams, Sola Afolabi, Aminata Guisse, Ometere Omoluabi
Kidira Border Information Center Assessment	May 23–24, 2011	Diboli, Mali and Kidira, Senegal	Sola Afolabi, Aminata Guisse, Ometere Omoluabi

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Borderless Roundtable Event	May 30, 2011	Accra, Ghana	Aline Adamou, Sola Afolabi, Christel Annequin, Lydia Osei, Kwesi Osei-Kusi, Niels Rasmussen
Approved Economic Operator World Bank Validation Workshop	May 31–June 1, 2011	Accra, Ghana	Christel Annequin, Niels Rasmussen, Bruce Thomsom
UNECA–ECA Ad Hoc Expert Group Meeting on Supporting the Establishment of inter–REC Free Trade Areas	May 31–June 1, 2011	Addis Ababa, Ethiopia	Ometere Omoluabi
Return visit to Aflao and Lome with Border Information Material and Togo Ins	June 7–8, 2011	Aflao, Ghana and Lomé, Togo	Lisa Bruno, Jane Owiredu–Yeboah, Bruce Thomson
ECOWAS/ USAID Trade Hub High Level Expert Meeting	June 13–14, 2011	Accra, Ghana	Vanessa Adams, Sola Afolabi, Bright Gowonu, Ometere Omoluabi, Lydia Osei, Bruce Thomson
Logistics Planning for Border Information Launch	June 27–29, 2011	Aflao, Ghana and Lomé, Togo	Evans Klutse, Lydia Osei
ECOWAS Customs Connectivity Meeting	June 29–30, 2011	Lomé, Togo	Sola Afolabi, Jane Owiredu–Yeboah
ECOWAS Commission Consultative Process on ETLIS Roadmap	July 18-19, 2011	Abuja, Nigeria	Sola Afolabi, Ometere Omoluabi
Border Information Center, Ghana and Togo	August 4, 2011	Aflao, Ghana and Lome, Togo	Vanessa Adams, Sola Afolabi, Evans Klutse
Viability Aseessment for Express Lane Pilot at Ghana-Togo border	August 17, 2011	Aflao, Ghana	Sola Afolabi, Ometere Omoluabi, Evans Klutse
Forum with Ghana-Togo Border Agents on Express Lanes	August 25, 2011	Lome, Togo	Sola Afolabi, Ometere Omoluabi, Evans Klutse

Border Information Center Stakeholder Training, Ghana	September 20, 2011	Aflao, Ghana	Sola Afolabi, Ometere Omoluabi, Afua Eshun, Evans Klutse
ETLS National Approval Committee Training	September 26-29, 2011	Abuja, Nigeria	Ometere Omoluabi
Trade Hub Consultative Meetings with ECOWAS Strategic Planning Unit and USAID West Africa	September 30, 2011	Abuja, Nigeria	Brinton Bohling, Sola Afolabi, Ometere Omoluabi
UEMOA Meeting with Customs on WTO Notifications	October 26-28, 2011	Ouagadougou, Burkina Faso	Ometere Omoluabi
World Bank Meeting on Regional Trade Facilitation and Transport Observatories	October 29-30, 2011	Ouagadougou, Burkina Faso	Ometere Omoluabi, Niels Rasumussen
Border Information Center Stakeholder Training	November 2, 2011	Lome, Togo	Sola Afolabi, Evans Klutse
Telecommunications Infrastructure			
ICT Training	November 4, 2010	Ouagadougou, Burkina Faso	Ben Coleman, Albert, Biga
ICT Revision & Application training	March 29, 2011	Accra, Ghana	Ben Coleman
ICT Training at Shea 2011	April 4–7, 2011	Accra, Ghana	Albert Biga, Ben Coleman

ATTACHMENTS

Trip and consultancy reports can be found in Annex 1 to this quarterly report, and the following documents are being distributed as separate attachments to this quarterly report:

1. Partnerships Table
2. Trip reports
3. Tradewinds Stories
4. 16th IRTG Report
5. Draft Impact of Open, Expedited Trade on Private Sector Investment in ECOWAS Region Study
6. Draft RRTC – Lomé- Ouagadougou Report
7. Draft Truck Driver's Guide for Mali
8. Border Information Centre package
9. Borderless Alliance Statutes
10. Borderless Alliance Stakeholders' Forum Communiqué
11. ACA newsletter
12. ACA GSA ECOWAS Collaboration Meeting Agenda
13. ACA Conference Graphics
14. Wood Products Environmental Impact Assessments
15. GSA second newsletter
16. Shea 2011 Conference Advert
17. New York International Gift Show Graphics
18. World Bank Transport Observatory Meeting
19. WTO/ UEMOA Customs Meeting Report
20. Senegal-Mali ISRT
21. CEPS Commissioner's response to Express Lanes and Tracking
22. AGOA Resource Centres Contact Sheet