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AGRIBUSINESS AND TRADE PROMOTION (ATP) QUARTERLY PROGRESS REPORT APRIL – JUNE 2009



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CARANA Corporation

**AGRIBUSINESS AND TRADE
PROMOTION (ATP)
QUARTERLY PROGRESS REPORT
APRIL – JUNE 2009**

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The author's views expressed in this publication do not necessarily reflect the views of the United States Agency for International Development (USAID) or the United States Government

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ACRONYMS

ACE	Audit Control & Expertise (Côte d'Ivoire)
AGRIS	Agricultural Research Information System
AIMS	Asset and Infrastructure Management Solutions
AMASSA	Association Malienne pour la Sécurité et la Souveraineté Alimentaires
ANOPACI	Association Nationale des Organisations Professionnelles Agricoles de Côte d'Ivoire
ANRO	Agriculture and Natural Resources Office
APFOG	Apex Farmers Organization of Ghana
APROSSA	Association pour la Promotion de la Sécurité et de la Souveraineté Alimentaires au Burkina
APLS	Association des Vendeurs des Produits Locaux de Sikasso, Mali
ATP	Agribusiness and Trade Promotion Project
CAADP	Comprehensive Africa Agriculture Development Programme
CIC-B	Comité Interprofessionnel des Céréales du Burkina Faso
CILSS	Le Comité Permanent Inter-états de Lutte contre la Sécheresse dans le Sahel
COFENABVI	Confédération des Fédérations Nationales des Filières Bétail Viande des Pays Membres de l'UEMOA
COP	Chief of Party
CORAF	Conseil Ouest et Centre Africain pour la Recherche et le Développement Agricole (also known by its acronym in English : WECARD)
CORPAO	Conférence Régionale sur les Perspectives Agricoles de l'Afrique de l'Ouest
COTR	Contracting Officer's Technical Representative
CSCRAO	Confédération des Conducteurs Routiers de l'Afrique de l'Ouest
CTO	Cognizant Technical Officer
DCA	Development Credit Authority
DCOP	Deputy Chief of Party
DMDA	Dawanu Market Development Association
ECOWAP	Economic Community of West African States Agricultural Policy
ECOWAS	Economic Community of West African States
FANR	Food, Agriculture and Natural Resources Directorate of the Southern African Development Community
FAO	Food and Agriculture Organization (United Nations)
FAOSTAT	The statistical database of the United Nations Food and Agriculture Organization (FAO)
FARA	Forum for Agricultural Research in Africa

FEBEVIB	Fédération de la Filière Bétail/Viande du Burkina Faso
FEPAB/UPPAH	Fédérations Professionnel Agricoles du Burkina Faso / Union Provinciale des Professionnels du Houet
FEPPASI	Fédération Provinciale des Professionnels Agricoles de la Sissili, Burkina Faso
FIAB	Fédération des Industries Agroalimentaires du Burkina Faso
FODEL	Fonds de Développement de l'Élevage (Burkina Faso)
GAPTO	Ghana Agricultural Producers and Traders Organization
GDA	Global Development Alliance
GREFA	Group de Recherche et de Formation en Agricole et Arboriculture, Sikasso, Mali
HAACP	Hazard Analysis Critical Control Point
IEHA	Initiative to End Hunger in Africa
IFAD	International Fund for Agricultural Development
IFDC	International Center for Soil Fertility and Agricultural Development
IFPRI	International Food Policy Research Institute
ISO	International Standards Organization
LTTA	Long-term Technical Assistance
M&E	Monitoring and Evaluation
MARKETS	Maximizing Agricultural Revenue and Key Enterprises in Targeted Sites – Nigeria
MELS	Meunerie et Emballage de Légumes Secs, Farine et Semoule de Céréales
MIS	Market Information System
MISTOWA	Market Information Systems for Traders Organizations in West Africa
MOU	Memorandum of Understanding
NANTS	National Association of Nigerian Traders
NEPAD	New Partnership for Africa's Development
ODC	Office of Development Credit
ONAC	Office National du Commerce Extérieur (Burkina Faso)
OpM	Operations Manager
ORBV/AOC	Observatoire Régional du Bétail/Viande en Afrique de l'Ouest et du Centre
ORO/AOC	Observatoire Régional de la Filière Oignon
PAFASP	Programme d'Appui aux Filières Agro-Sylvo-Pastorale (Burkina Faso)
PASIDMA	Projet d'Appui au Système Décentralisé du Marché Agricole du Mali
PAU	Politique agricole de l'UEMOA
PIVA	Partner Institutional Viability Assessment
PMP	Performance Monitoring Plan
PPP	Public Private Partnership

RATES	Regional Agricultural Trade Expansion Support Program – East and Southern Africa
RCO	Regional Contracting Officer
RESIMAO	Réseau des Systèmes d'Information de Marché de l'Afrique de l'Ouest
ROESAO	Réseau des Opérateurs Économiques du Secteur de l'Agroalimentaire de l'Afrique de l'Ouest
ROPPA	Réseau des Organisations Paysannes des Producteurs Agricoles de l'Afrique de l'Ouest
SAGIC	Senegal Accelerated Growth and Increased Competitiveness project
SITRAC	Société Industrielle pour la Transformation et la Commercialisation des Céréales, Burkina Faso
SME	Small and medium enterprise
SPS	Sanitary and Phytosanitary Standards
STTA	Short-term Technical Assistance
TCN	Third-country National
TH	Trade Hub (short for West Africa Trade Hub)
TIPCEE	Trade and Investment Program for a Competitive Export Economy - Ghana
ToT	Training of Trainers
UEMOA	Union Économique et Monétaire Ouest Africaine (also known under its English acronym WAEMU)
UCOVISA	Union des Coopératives du Vivrier des Savanes
UGCPA-BM	Union des Groupements pour la Commercialisation des Produits Agricoles de la Boucle du Mouhoun
UPADI	Union des Producteurs Agricoles du Québec pour le Développement International
USAID	United States Agency for International Development
VCDP	Value Chain Development Plan
WA	West Africa
WACIP	West Africa Cotton Improvement Program
WADF	West Africa Agribusiness Development Facility
WATH	West Africa Trade Hub Project

I. INTRODUCTION

I.1 BACKGROUND ON ATP FY09 ACTIVITIES

This progress report for the ATP project covers the period from April to June 2009, the second quarter in the second year work plan of the project. The project was awarded in April 2008 to a consortium led by Abt Associates and including CARANA, ACDI/VOCA and Ibex International. It was fielded in May-June 2008.

The project made substantial progress in the reporting quarter, as detailed later in the report. An overview of the project's objectives and outcomes completes this introductory section. The next section on the project's approach provides the basic context of the project to guide the reading of the report. The other sections are keyed to the activities of the four components, M&E, communications, and management of the project.

I.2 OVERVIEW OF PROJECT OBJECTIVES AND EXPECTED OUTCOMES

The Agribusiness and Trade Promotion (ATP) project's primary objective is to increase the value and volume of intra-regional agricultural trade in West Africa in order to contribute to achieving the six percent agricultural growth target set under the Comprehensive Africa Agriculture Development Program (CAADP) of the African Union's New Partnership for Africa's Development (AU-NEPAD), a framework for sustainable development drafted by African leaders. The Economic Community of West African States (ECOWAS) has developed its Agricultural Policy (ECOWAP) to implement the CAADP in its region.

With the ATP project, USAID/WA is focusing on selected activities where it can have a catalytic impact in supporting West Africans themselves to develop durable solutions to key constraints in intraregional agricultural trade. Helping them to do so will not only drive substantial increases in intra-regional trade during the project, it will also make them sustainable after the project ends. The ATP program will implement integrated activities and programming to contribute to the following outcomes:

1. **OUTCOME 1:** Significant reduction of the incidence of physical and policy-related barriers to moving agricultural and related commodities regionally in West Africa.
2. **OUTCOME 2:** Enhanced linkages among agricultural producers and agro-input suppliers, agro-processors and distributors.
3. **OUTCOME 3:** More effective advocacy by regional private sector and other non-governmental actors for regional and national policies in support of a conducive environment for increased regional agricultural trade.
4. **OUTCOME 4:** Improved efficiency of trade transactions and regional market access, in particular through the improvement of regional market information systems.

2. PROJECT APPROACH

2.1 TARGETED VALUE CHAINS

ATP prioritizes its specific interventions in its outcome areas to a limited number of selected value chains as a basis for identifying technical gaps and opportunities that will assist the entire agricultural sector. Value chains were evaluated against the following seven factors: (1) The product's importance in intra-regional trade; (2) Urban demand for processed or value-added product; (3) The form (current degree of processing) of the traded product; (4) The potential for adding more value; (5) The number of small farmers and other participants involved; (6) The degree of perishability; and (7) Transportability of the product.

On this basis, the ATP team selected the following value chains with the highest potential for intra-regional trade and associated trade corridors:

- **Cereals (especially maize):** This value chain encompasses a number of closely related products with similar supply chains, financing issues, and (to a lesser extent) growing areas. Of these products we initially emphasize maize, which has a wide number of uses: human consumption (as a starchy staple in many different forms), animal feed, and maize used in beer brewing. Human consumption and animal feed are especially important uses for maize in West Africa; demand for maize as a key source of poultry feed, in particular, is growing rapidly in this increasingly urbanized region; maize is also used in farm fisheries. Millet and sorghum are also important coarse grains in West Africa; significant intra-regional trade in these products occurs in response to rainfall patterns. The project's interventions in maize storage, warehouse receipt programs, processing, and trade could eventually benefit other grain value chains.
- **Ruminant livestock:** This value chain includes cattle, sheep, and goats that are assembled on the hoof in the supplying countries and trucked largely to coastal markets. This will remain the predominant form of long-distance transport of ruminant livestock for years to come in West Africa. We also include red meat (from this same ruminant livestock) as a potential part of this value chain. Based on our analysis, we believe it is time to re-examine the viability of slaughtering livestock in supplying countries and transporting the meat—in an unbroken cold chain—to the largest coastal cities, which have concentrations of higher-income consumers willing to pay a premium for high-quality chilled beef, lamb, and goat meat.
- **Onions and shallots:** These two closely related value chains are produced in semi-arid, Sahelian zones with good access to water. As counter-seasonally grown vegetables, onions and shallots are important cash crops for smallholders whose main (rainy) season crops are cereals or cereals intercropped with legumes. Onions and shallots have similar end uses, as flavorful ingredients in the sauces that figure importantly in regional cuisine (which tends to be heavy on bland starchy staples, either rice or various forms of gruel, *pâte* or *tô* made from coarse grains—millets, sorghum, maize—or tubers). Both products face similar storage and transport issues; improved drying and processing at the village level can extend the marketing season for both crops and can increase overall grower returns.

2.2 SELECTED TRADE/TRANSPORT CORRIDORS

Because of limited resources, the project has selected to work along the broad Central-West African corridors, through which Sahelian countries (Mali, Burkina Faso, Niger) trade with coastal

countries (Côte d'Ivoire, Ghana, Togo and Benin) in the project's targeted value chains. On this basis, ATP monitors trade flows and road harassment information along its commodity (onion, maize, and livestock) trade/transport corridors.



2.3 PARTNERSHIPS IN IMPLEMENTATION

ATP assists the regional inter-governmental organizations (ECOWAS, UEMOA, and CILSS) to work in synergy with WATH and other USAID projects in the region; and supports regional and national umbrella organizations of producers, processors and traders involved in the targeted value chains along the selected trade/transport corridors.

3. COMPONENT I: REDUCING BARRIERS THROUGH DIRECT SUPPORT TO ECOWAS AND UEMOA

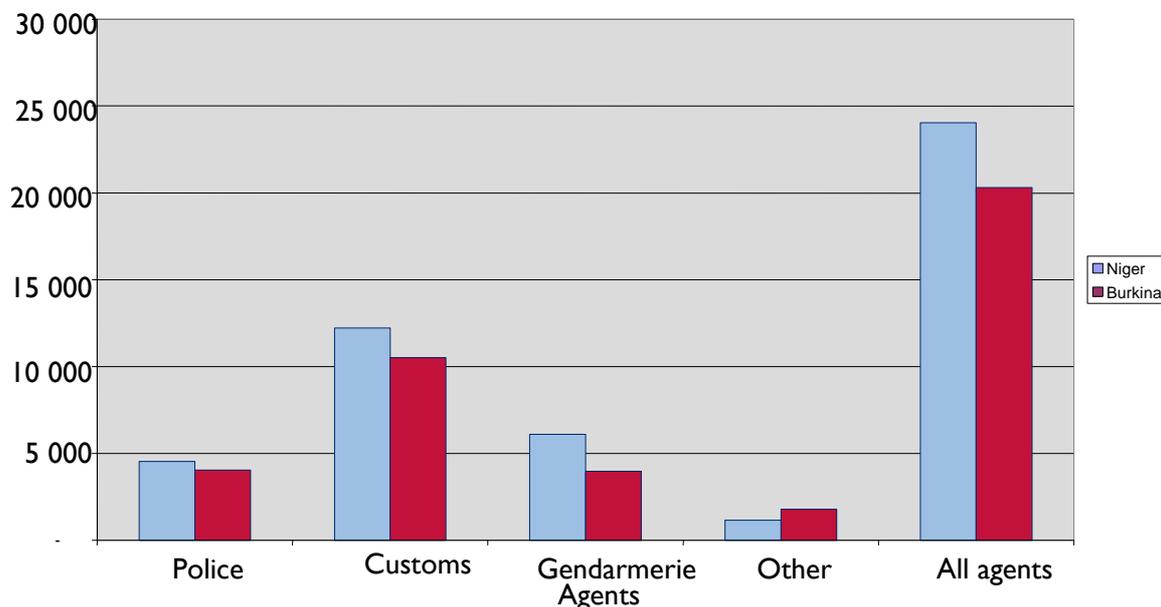
3.1 ROAD TRANSPORT

During the period under review, ATP continued the road harassment survey along the Niger-Burkina-Ghana onion trade corridor to allow a comparison with information collected in the previous quarter (taken as baseline). The Niger-Burkina-Ghana trade corridor sees trucks leaving Madaoua in Niger, crossing into Burkina Faso and, instead of heading to Ouagadougou, veering south-east to go through Koupéla and Bitou before crossing into Ghana at Kulungugu, near Bawku. From April to June 2009 ATP collected information from truck drivers making 75 separate trips. Truck drivers came across a total of 23 checkpoints from Madaoua, in Niger, to Bitou, in Burkina Faso (about 1,050 km), paying on average FCFA 23,000 (US\$50) per 100 km in bribes to uniformed officials: police agents, customs officials, and, in Francophone countries, gendarmerie agents (see the map below).

Following the TH road harassment methodology, bribes are defined here as illegal payments made to government agents, when these agents flatly refuse to deliver official receipts for monies that are known to line their own pockets. The road harassment methodology does not count as bribes the taxes, duties, and other charges for which official receipts are delivered, and for which payments are expected to provide funds to national treasuries. These official payments are not considered bribes even if some are illegal according to ECOWAS Free Trade provisions, and even if in many cases public officials do take bribes in return for making traders/transporters pay less (e.g., by assessing the charge on a lower value of import or export) than what they should pay according to the text of the measure being applied. Illegal, yet officially-sanctioned payments are the subject of the policy implementation gap analysis conducted by ATP this quarter (see policy section).

The average amount paid as bribes along the onion trade corridor in this quarter amounted to about 10% less than the average amount paid out in the previous quarter (see Figure 1 below). Truck drivers give credit to ATP for the information about the illegal nature of payments, which has emboldened them to stand for their rights, which is contributing to this decrease. All the same, illegal payments were higher in Niger than in Burkina Faso. Also, Custom officers collected larger amounts than Police or Gendarmerie agents (Figure 1).

FIGURE I: ILLEGAL PAYMENTS (FCFA PER 100 KM) ON NIGER-BURKINA ONION TRADE CORRIDOR



ATP provided a comprehensive analysis of this data (including tables, and graphs) to UEMOA to include in its road governance report. The OPA (*Observatoire des pratiques anormales*) report is now a joint product of UEMOA, Trade Hub, and ATP (see map below). UEMOA is quite pleased with the value-chain perspective taken by the ATP project in its road harassment work, and is eagerly awaiting ATP's forthcoming work along the other value-chain trade/transport corridors. ATP's work complements Trade Hub's work, which is not commodity-specific and considers only major roads linking capital cities in the Sahel to ports in coastal countries. For example, within Burkina Faso, ATP's Niger-Burkina-Ghana onion trade corridor does not follow the Ouagadougou to Ghana-border road of the TH's Ouagadougou-Tema corridor. Similarly, the TH's Bamako-Ouagadougou-Tema corridor is not the same as ATP's Mali-Burkina-Ghana livestock trade corridor because the latter originates in Ségou, not Bamako, and takes different roads inside Burkina to cross into Ghana.

Thus far, however, UEMOA has simply combined ATP's data set with the TH's to produce averages. However, as additional information is added about the other commodity trade corridors, ATP expects UEMOA to provide a more complete picture of road harassment, which will allow one to compare and contrast bribes and delays suffered in the transport and packaging of perishable products as opposed to those in the transport of other types of merchandise, mostly in containers. Along the way, ATP will be producing sets of maps to illustrate its work on its commodity trade/transport corridors.

IMPROVED ROAD TRANSPORT GOVERNANCE (IRTG): 8th REPORT 1st APRIL – 30th JUNE



The official measure on axle load limit (11.5 tons per axle) is now a serious issue in West Africa. The measure has been adopted by all ECOWAS member states years ago, but has not been implemented until recently. Niger appears to lead the way in this implementation and has recently built two more axle load checkpoints, at Niamey-Aviation and at Dosso, and is building a fourth one at Birnin n’Konni. Ghana has also started checking axle load limit in two other points in addition to the one on the Tema Motorway. UEMOA has provided Togo and Benin with funds to build axle load limits checkpoints.

This axle load limit affects all trucks, but impacts ATP’s products in specific ways. Transporters of perishable products don’t have the luxury of arguing and postponing payment for the overload when caught: they have to comply or lose the whole shipment. To comply with the measure, onion transporters are now forced to carry fewer bags (i.e., only about 200 bags of 120 Kg) than before (350-450 bags).

All the same, it appears that many Ghanaian trucks continue to pay the overload charge, not because they are overloaded with merchandise, but because they have been reinforced and modified to carry additional tanks of gasoline (much cheaper in Ghana) for the round trip Ghana-Niger. At any rate, traders must now scramble to find ways to compensate for the lower truckload volume, e.g., by increasing the rotation of trucks and incurring increased transport cost. ATP will continue to monitor the situation, as it has implications on the volume and value of intra-regional agricultural trade.



3.2 TRADE AND AGRICULTURAL POLICY-RELATED BARRIERS: AGRICULTURAL AND TRADE POLICY PRIORITIES FOR ATP

ATP policy work during the period under review was hampered by conflicting agendas, which prevented the part-time Policy Advisor to interact effectively with ECOWAS officials. ATP, however, carried out a major policy-related activity as planned, i.e., the Trade Policy Barriers Assessment. This assessment aims at determining the gap between the provisions of the regional policies and the rules and procedures that are applied in reality. The assessment is to help ATP firm up the selection of priority issues that directly affect participants on the ground, and put together more effective capacity building and advocacy programs.

ATP and TH collaborated in this policy implementation gap analysis, and will later produce a joint study report combining materials from their works. ATP concentrated on studying the private sector's experiences and perspectives on trade policy barriers to the free movement related to ATP's agricultural products. The TH covered the experiences and perspectives of public sector agencies and officials.

An ATP field mission visited Burkina Faso, Ghana, Niger, and Mali from May 5 to 17. Using questionnaires, group consultations and individual interviews, and direct observation of the treatment of transported merchandise at borders and along the inter-state routes, it gathered data on the application of ECOWAS policies on free movement of persons, goods, and vehicles. Through interactions with the executives and members of the regional union organization (ORO/AOC), regional livestock confederation (COFENABVI), regional truck drivers association (CSCRAO), and the Burkina Faso national cereals and cowpeas association (CIC-B), the study identified policy implementation gaps related to tariff and non-tariff barriers, as applied to ATP's value chains as follows:

- i. **Livestock trade** is subject to tariff barriers, such as export taxes in Burkina Faso (Fonds de Développement de l'Élevage—FODEL --tax) and Niger; transit fees from both Burkina Faso and Ghana on Malian livestock in transit through Burkina to Ghana; and value-added tax (VAT) for Malian livestock trucked (but not trekked) into Senegal. Livestock is also subject to non-tariff barriers, such as the export authorization required by Governors of regions in Mali

2. **Onion trade** is subject to tariff barriers, such as export tax in Niger (in the form of an exorbitant “statistical tax,” which incidentally does not lead to any statistics being generated), and, according to some traders, import duty on onions from Niger in transit through Burkina to Ghana.
3. **Maize trade** is subject to non-tariff barriers, such as the seasonal export bans imposed by Benin, Burkina Faso, Mali, and Togo.

Road harassment, in the form of illegal payments/bribes and delays, and difficulties in the transfer of funds across countries are non-tariff barriers affecting all value chains.

Mali's Livestock Export Authorization Wastes Exporters' Time and Money

In the mid-2000s, Mali experienced spikes in meat prices in Bamako and other cities, and the Government thought it could lower prices by making livestock export more difficult. Thus, it decreed in 2007 that livestock traders needed to obtain an authorization from the Governor of the region from which they wanted to export animals to neighboring countries. The measure was intended as a deterrent (the authorization was supposed to be free of charge), and the measure was to be temporary.

However, as the story has been repeated so many times all over the world, the measure proved far easier to impose than to dispose of. Today, livestock exporters are still required to obtain an authorization and wasting valuable time (10 to 15 days) in the process. To further add to the injury, traders are also required to pay a charge for the “free” authorization. The charge is applied arbitrarily, as it varies from region to region. What was initially a non-tariff barrier is now shaping into a tariff barrier, both of which are illegal according to ECOWAS free trade arrangements.

ATP will make it a priority to work with Malian and regional livestock associations, as well as with UEMOA and ECOWAS, to lobby the Malian government to repeal this measure. A success in this advocacy effort can well embolden value chain participants to take on governments in the region to repeal similar measures elsewhere and in the other ATP's value chains.

On the basis of the above findings, ATP proposes to develop, in partnership with regional organizations, governments and operators in the ATP value chains, interventions on the following policy priority issues:

- eliminate trade restrictions and controls (e.g. seasonal restrictions on trade in cereals; authorization required in Mali to export livestock);
- eliminate disguised export duties and taxes (e.g. Burkina Faso's FODEL export tax; Niger's high statistical tax on exports);
- eliminate duties and taxes on regional imports (e.g. Burkina's import duty on onions from Niger; Senegal's assessment of VAT on cattle imports from Mali);
- improve regional road transit arrangements (transit fee levied by Burkina and Ghana on Mali's livestock exports);
- improve regional payments system (cross-border bank transfers for ATP traders);

The report on the Trade Barriers Assessment will be finalized during the next quarter. The above recommended policy priorities would be developed into specific activities to constitute the core of ATP policy interventions to be undertaken in partnership with ECOWAS and WATH. Building on ATP's value chain work, this would facilitate more effective implementation of these regional policies within the ATP countries, and serve as a practical basis for ATP assistance to ECOWAS in enhancing

policy implementation at the regional level. The study also identified a number of investment opportunities that ATP could pursue with other partners and stakeholders to upgrade market and road facilities, for more efficient performance of the ATP traders and transporters.

4. COMPONENT 2: BUILDING LINKS THROUGH SUPPORT FOR REGIONAL ASSOCIATIONS

4.1 STEPS IN ATP VALUE CHAIN WORK

The Agribusiness and Trade Promotion project has a well thought-through process in its value chain work to promote intra-regional trade and contribute to the improvement of productivity. These steps are as follows:

- Step 1: Submit to validation by USAID and key partners (particularly ECOWAS and UEMOA) the project's choice of its three key value chains (maize, onion/shallot and ruminant livestock/meat), on which it is to concentrate its efforts on the ground.
- Step 2: Undertake a thorough assessment of the value chains, through literature review and field studies in the countries concerned by its selected corridors.
- Step 3: Submit to validation by key value chain stakeholders the value chain assessments, so that all can review the findings of the assessments and suggest, in a participatory way, the priority actions for the development of the value chain.
- Step 4: Prepare value chain development plans on the basis of the validation of the assessments, and identify action plans for implementation, in close collaboration with partners.
- Step 5: Implement the value chain development plans, with ongoing monitoring of implementation progress and periodic evaluation.

Steps 1 and 2 were completed in FY08, except for the livestock value chain assessment, which took place in September-October 2008. Step 3, validation of the value chain assessment, was the main activity for the October-December 2008 quarter.

4.2 ELABORATION OF VALUE CHAIN DEVELOPMENT PLANS

Value Chain Development Plans (VCDPs) serve as guidelines for ATP value chain activities. They offer a basket of options for providing technical and financial support to enable the strengthening of value chains at the regional level, and increase of intra-regional trade in targeted agricultural products. Each VCDP covers a 3.5-year period, from the initial value chain assessments from October 2008 to March 2012 (to allow time for evaluation).

During the period in review, ATP's value chain leaders, working closely with other technical staff, completed the VCDPs for livestock/meat, maize, and onion/shallot. Feedback comments from key partners (requested during the January-March quarter) were received and taken into account to ensure stakeholders buy-in into ATP's value chain activities.

ATP's partners in the VCDPs include UEMOA, CILSS, the *Programme d'Appui aux Filières Agro-Sylvo-Pastorales* (PAFASP Burkina Faso / World Bank), the *Association Malienne pour la Sécurité et la Souveraineté Alimentaires* (AMASSA), the *Association pour la Promotion de la Sécurité et de la Souveraineté Alimentaires* (APROSSA, Burkina Faso), the *Confédération des Fédérations Nationales de la*

Filière Bétail/Viande des pays membres de l'UEMOA (COFENABVI), and the Observatoire Régional de la Filière Oignon / Afrique Ouest et Centre (ORO/AOC).

ATP's partnering with AMASSA, APROSA, COFENABVI, and ORO/AOC also covers MIS and trade data collection activities. With PAFASP/World Bank project, ATP held several meetings and developed a strong collaboration, which led to several concrete joint activities, as will be detailed later in the report. CILSS provided valuable feedback to ATP at the design stage of its VCDP.

ATP also consulted with UEMOA to ensure synergies with their value chain work. In April, ATP attended the launching of the *Comité Consultatif Régional des Filières Agricoles* organized by UEMOA. Through this workshop and other meetings, UEMOA confirmed the complementarities between ATP's efforts and UEMOA's work on selected value chains (including maize and livestock). UEMOA is particularly interested in ATP's experience in its pilot warehouse receipt program in Ghana, as it intends to set up a regional commodity exchange platform (*Bourse*). UEMOA is also interested in ATP's efforts regarding the establishment of a regional maize network, harmonization of grades and standards, and access to agro-inputs.

The three VCDPs (for livestock, maize, and onion) were completed and are being implemented (see next section). The value chain development plans are evolving documents that will be regularly updated to take into account new opportunities and challenges. The multi-annual action plan will be updated yearly, along with the annual action plan for the fiscal year.

4.3 DEVELOPMENT AND IMPLEMENTATION OF A CAPACITY-BUILDING PLAN FOR REGIONAL ORGANIZATIONS

ATP has made considerable progress in this area during the period under review, as detailed below.

Partner Institutional Viability Assessments (PIVA) for apex organizations. The PIVA is a tool designed by USAID to analyze the institutional performance of a partner organization and to identify key areas of improving the partner's performance capacity to reach sustainability. The PIVA is structured along six core competency areas (governance and leadership; operations and management systems; human resource development; financial management; program and service delivery; and external relations and advocacy), and 116 possible criteria, from which field projects typically select a subset for use in evaluation. ATP added a competency area (entrepreneurship), selected a total of 59 criteria that are most relevant to the critical needs of its partners, and facilitated members of the organizations scoring themselves against these elements to develop a benchmark scoring matrix that includes current scores, as well as target scores. The same exercise will be repeated yearly to measure performance improvements, based on the baseline initial PIVA scores, and take corrective actions if needed.

- **The PIVA for the regional onion organization (ORO/AOC)**, undertaken from April 21 to 23 in Niamey, Niger, was administered to 25 participants, representing onion stakeholders from Benin, Burkina Faso, Côte d'Ivoire, Ghana, Mali, Niger, and Togo. The initial scores highlighted that during the next 12 months efforts should mainly focus on three priority areas: (i) development of human resources within the organization; (ii) improvement of services offered to members; (iii) improvement of the organization's financial management. Further to the PIVA workshop, ATP drafted a MoU to formalize its partnership with ORO/AOC, to be finalized in the next quarter. (See: « *Atelier Régional d'Evaluation Interne de l'ORO/AOC : Le Project ATP Renforce les Capacités d'ORO/AOC* », http://www.republicain-niger.com/index.asp?affiche=News_Display.asp&articleid=5316.)
- **The PIVA for the Ghana Agricultural Producers and Traders Association (GAPTO)**, undertaken from May 12 to 14 in Kumasi, Accra, was administered to 36 GAPTO members working in ATP target value chains: maize, onion, and livestock/meat. Participants were urged to be honest and truthful in evaluating the current GAPTO

situation according to the seven PIVA competency areas. The initial scores highlighted the need for GAPTO to focus its efforts during the next 12 months on three priority areas: (i) governance of the organization; (ii) improvement of the organization's financial management; and (iii) improvement of external relations and advocacy system. (See: "Agricultural producers, traders build capacity... At USAID-sponsored PIVA Workshop in Kumasi" <http://www.modernghana.com/news/216477/1/agricultural-producers-traders-build-capacity-at-u.html>.)

Capacity building activities in the livestock value chain were carried out in Burkina Faso and Mali, with impact on other countries.

- **Facilitation for the establishment of a new regional livestock / meat company.** Taking ownership of opportunities to boost intra-regional trade identified during discussions with ATP, COFENABVI decided to establish a regional company called *Africaine des Viandes et Services*, and sought ATP's assistance to that effect. The company headquartered in Abidjan, Côte d'Ivoire, with a capital of 16.5 million FCFA (US\$ 35,870)¹, aims at trading quality meat within the West African region. It comprises 33 shareholders (11 from Burkina Faso, 11 from Côte d'Ivoire, and 11 from Mali), and a 9-member Board of Directors. The registration process is under way and the recruitment of the CEO has started. ATP assisted COFENABVI in the organization of the general constitutive assembly held in Bobo Dioulasso, Burkina Faso, on May 27. ATP will continue its technical support to the company during its start-up phase, mainly by facilitating business linkages with buyers in coastal markets, such as PROSUMA (a trade company supplying 9 branded-stores and 33 individual supermarket outlets) in Côte d'Ivoire.
- **Training-of-Trainers on cattle fattening.** In June, ATP prepared two Training-of-Trainers courses on cattle fattening, which plan to train 50 stakeholders (25 each in Burkina Faso and Mali). In turn, the 50 participants are expected to facilitate cascading training courses at the grassroots level. The World Bank projects in Burkina Faso (PAFASP) and Mali (PCDA) showed interest in partnering with ATP for this activity and further cascade training programs. More detail will be provided in the next quarterly report on the implementation of this capacity building activity.
- **Butcher Training-of-Trainers planned in Burkina Faso and Mali.** In May ATP organized a working session with the abattoir of Ouagadougou, FEBEVIB, butchers and livestock traders' organizations. Although upgrading the sanitary standard of the abattoir is clearly a pre-requisite for promoting export of red meat to Ghana and Côte d'Ivoire, it was agreed that ATP's assistance should first focus on building technical capacities of butchers. During the next quarter the abattoir of Ouagadougou and ATP will develop together ToRs for a training-of-trainers course for butchers, which will take place both in Burkina Faso and Mali.
- **MoUs with COFENABVI.** ATP drafted a MoU with COFENABVI In order to formalize its partnerships with this organization and expects to sign it in the next quarter.

Capacity building activities in the maize value chain were mainly centered on grades and standards.

- **Maize grades and standards.** During the period under review, the MIS specialist and maize value chain leader gathered different documents that provide information on market preferences for cereal/maize standards and grades in the region. This included documents from the World Food Program through its Peace for Progress initiative, grades from processors (including Nestlé), elements collected during the maize value chain assessment, and results of the commodity categorization conducted by the ATP MIS specialist in the

¹ US\$1 = FCFA460

region. This set of cereals/maize grades constitutes baseline market preferences. During the last quarter of FY09, ATP will create a virtual regional network of maize stakeholders and partners, share the baseline set with them and ask for their feedback. A regional workshop may be planned in FY10 to discuss this issue. Through this approach, ATP is not only building capacities among stakeholders on grades and standards that exist in the region, but is also paving the way for harmonized grades and standards. This will also facilitate the implementation of the pilot warehouse receipt program in Ghana.

- **Pilot maize input scheme in Burkina Faso.** In June, CICB organized in Bobo-Dioulasso, Burkina Faso, a stakeholders' workshop to discuss the evaluation of the CICB 4-year pilot initiative called "*opération intrants*," initiated in 2005 and aimed at increasing farmer access to agro-inputs. Under this initiative, the interprofession provides its producer members with cereal fertilizers and cleaning equipment. Cooperative marketing is an integral aspect of this pilot. ATP actively participated in the discussions on next steps and will discuss further with CICB and other partners (such as the World-Bank PAFASP project) the possibility of supporting CICB in elaborating a 5-year business plan detailing appropriately the technical, organizational and operational management of the scheme, and particularly its financial viability. ATP sees this pilot initiative as promising, as it improves farmer access to inputs, stimulates cooperative marketing, and consequently allows for an increased production of quality cereals that respond better to processing needs.
- **MoUs with CICB.** ATP drafted a MoU with CICB in Burkina Faso and for its leadership in the region in order to formalize its partnerships with this organization, and expects to sign it in the next quarter.

Capacity building activity in the onion value chain dealt with onion seed trials.

Participants of the regional validation workshop of the onion value chain regional assessment (Accra, November 2008) identified the short marketing season for onion as a key constraint to competing with European onions imported during the September-December period. Along with improved storage facilities and practices, farmers' better access to onion varieties that can be harvested during the rainy season could expand the marketing season of onion. This is more the case in Burkina Faso than in Niger, where onion can be produced in the Agadez region during the rainy season.

Therefore, ORO Burkina Faso solicited assistance from ATP to organize seed trials of new onion varieties. ATP partnered with the West Africa Seed Alliance (WASA) to identify and obtain new varieties. A total of four (4) varieties were made available to ORO Burkina Faso: PREMA 178, and 3 hybrid varieties (GVS 36175, GVS 36234, and GVS 36180). In June ORO Burkina Faso and ATP organized field visits to identify trial plots and organize the follow-up with agricultural officers. It is expected that an agreement will be reached with ORO Burkina Faso in early July, to conduct the trials.

4.4 BUILDING LINKAGES AND SUPPORTING TRANSACTIONS

Market Facilitation. ATP has posted one part-time market facilitator in Accra and another in Abidjan and is negotiating to post a full-time market facilitator in Cotonou, Benin. The MF's work is fully integrated with ATP's other activities: value chain development, capacity building for advocacy, public-private partnership, market information, and monitoring and evaluation of trade flow. The MFs provide viable inside information on agricultural intra-regional trade flowing into key consuming markets.

Success Story:

ATP Facilitates Burkina Faso's Livestock Trade to Nigeria

Whether you are selling stock on Wall Street or cattle in West Africa, the sale cannot be made without a buyer. Increasing your exposure to the market is one of the best ways to find a buyer, and traders in the town of Fada N'gourma, Burkina Faso, know this to be true. In hopes of tapping into the export market, Fada N'gourma's Association of Fatteners and Exporters of Livestock sought assistance from USAID's Agribusiness and Trade Promotion (ATP) project, which works to increase the value and volume of trade of livestock, onions/shallots, and maize in West Africa, to access the regional livestock market.

ATP helped the Association to prepare for its participation in the town's annual Agricultural, Livestock and Forestry Fair, where buyers from Benin, Niger, and Nigeria would be. ATP encouraged the Fada N'gourma producers to show heavier animals at the fair, which was held in April 2009, to pique the interest of the Nigerian buyers, who tend to prefer larger-sized animals. Nigeria is a sought-after market as cattle sold to Nigerian buyers bring an additional FCFA 50,000 (US\$109) per animal of equal size than when sold locally in Burkina Faso.

To ensure the Fada N'gourma sellers were properly exposed, ATP formally presented to the buyers at the fair the different types and qualities of meat available for export from Fada N'gourma and brought together 55 buyers and 70 sellers who attended the fair, enabling them to easily connect with one another. During the following week of the fair, a first shipment of 300 cattle heads, representing an amount of 105 million FCFA (US\$228,261) was made to Nigerian buyers who later paid by wire transfer via ECOBANK. To further strengthen market linkages between these and other traders, ATP is currently providing training in business and contract negotiations, creating a more professional business environment that promotes confidence on both sides of the transaction and can lead to more sales.

With ATP's assistance, the Association is now selling 200 cattle a week to Nigerian livestock buyers who attended the fair. The ongoing contract, which ATP helped to facilitate, is boosting the volume of exports from Fada N'gourma and increasing exporters' profits by more than 1 million FCFA (US\$2,174) per week. In one year, that translates into more than \$1 million in new profits.

Regional trade of cattle benefits livestock traders as well as boosts incomes along the value chain, helping to reduce poverty and increase food security for the region. Traoré A. Karimou of the Association said, "Before the fair, we didn't have many buyers. ATP played a major role in bringing us together with buyers in Nigeria." Indeed, since ATP's assistance, cattle exports from Fada-N'Gourma to Nigeria in the period under review show an increase of 64% over the same period in the previous year.

Burkina Faso – Côte d'Ivoire livestock and onion business linkages. Livestock and onion exports from Burkina Faso to Côte d'Ivoire have slumped during Côte d'Ivoire's political unrest, but its potential remains high. To help revive these exports, ATP partnered with the World-Bank-funded PAFASP in Burkina Faso to assist the *Office National du Commerce Extérieur* (ONAC, Burkina Faso) in the organization of the trade promotion week for Burkina Faso products in Côte d'Ivoire (Abidjan, April 24 – 30). ATP co-financed rail transport of livestock (45 of 109 cattle and 200 of 350 sheep) and covered the cost of the animals' veterinary services, while PAFASP covered rail transport of onions. During the promotion week, ATP facilitated a half-day session (aired on the national TV channel) on the challenges of livestock and meat trade between Burkina Faso and Côte d'Ivoire. ATP also facilitated business linkages and negotiations between Ivorian buyers and members of the *Fédération de la Filière Bétail/Viande du Burkina Faso* (FEBEVIB). All the animals (350 to 500 kg each) were sold, for a total over FCFA 70,000,000 (US\$152,174), and business linkages were established in the process. The event highlighted, however, the great challenge to export meat from Burkina Faso to Ivorian markets, as meat prices on Ivorian markets are not that much higher than those in Sahelian countries. ATP plans to support FEBEVIB members to strengthen their capacities in cost

analysis and strategic planning to become more competitive on the Ivorian market. As for onions, sales at the event totaled FCFA 7,931,500 (US\$17,242).

Despite the weaknesses in logistics (e.g., the non-adapted venue) and inadequate promotion by ONAC, over 97% of the participants said they would like to participate in the next, 2010 event. (See « Filière bétail : Le projet Atp /Usaid s`engage en faveur des acteurs nationaux » <http://news.abidjan.net/h/330286.html>, <http://fr.allafrica.com/stories/200905110255.html>)

The Esoko platform helped build linkages between maize processors and traders. During the quarter under review, the company *Meunerie et Emballage de Légumes Secs, Farine et Semoule de Céréales* (MELS) sought assistance from ATP to meet its many challenges and grow its business (see text below).

Success Story

ATP Facilitates Linkages for Business Growth in Maize.

Meunerie et Emballage de Légumes Secs, Farine et Semoule de Céréales (MELS) is a processing company based in Ouagadougou. MELS produces maize flour, semolina (couscous), with grits and bran as main by-products. To expand its operations, the company recently acquired, from China, sophisticated equipment with processing capacity of 100 tons a day, and storage capacity of 550 tons, but currently operates at only about 32 tons a day, with a milling efficiency ranging from 40 to 65%. The company faces difficulties in procuring required quantity of cereals that meet its quality standards, because it has only one main supplier of both white and yellow maize - Alhaji Tera – who is a major cereal trader/exporter based in Bobo Dioulasso, Burkina Faso.

MELS, which currently uses artisanal and inadequate labels and packages, because the industrial labels and packages available from Burkina Faso and Ghana are unattractive and expensive, also faces challenges relating to marketing of its products as a result of limited marketing and distribution outlets, and also poor packaging. Due to these challenges, it takes MELS approximately 2 months to process and sell off its processed products from 2,000 tons of cereals. This has caused the company to diversify packages from 50 kg bags to 1 kg, 5 kg, 15 kg, and 25 kg packages in order to reach a wider range of consumers, and also increase its market share, but not without considerable production cost increase.

USAID's Agribusiness and Trade Promotion (ATP) project worked closely with MELS in two key areas to address the company's challenges and promote its growth, by building business linkages and exposing MELS to the bids/offers, profiles, and SMS alert features of the Esoko platform. ATP linked MELS with the *Compagnie de Distribution Internationale* (CDI), an international distribution company in Ouagadougou, Burkina Faso, and facilitated the purchase of 1,000 tons (worth 150 million FCFA or US\$ 326,087) of maize by MELS from CDI. ATP is currently facilitating an agreement that would make it possible for CDI to sell MELS's products (maize flour and semolina) under CDI's brand-name by supporting activities aimed at improved technology, packaging, branding and positioning of products to allow CDI help MELS sell more products in attractive packages. ATP is also putting CDI and SITRAC (another major cereal processor in Burkina Faso) in contact for the same purpose.

5. COMPONENT 3: BUILDING CAPACITY FOR PRIVATE-SECTOR ADVOCACY

ATP's strategy for building capacity for private sector advocacy is based on three pillars: (i) organizational strengthening of key partner organizations, (ii) empowerment and capacity building of partner organizations in the elaboration of an advocacy strategy and action plan, and (iii) creation of advocacy platforms that will act as pressure groups to implement advocacy activities at both national and regional levels. During the quarter under review, ATP facilitated an advocacy workshop for maize, and has initiated preparation of a similar advocacy workshop for the livestock stakeholders, which is expected to take place during next quarter.

Maize regional advocacy workshop. In the case of maize where no regional network exists yet, stakeholders attending the maize validation workshop (Accra, November 2008) have chosen CICB as the lead organization to work toward such a network. In February 2009 CICB submitted a proposal to ATP to organize a regional capacity building workshop on advocacy. ATP considered this training as a catalytic event that could bring together maize regional stakeholders and engage them in a concrete collaboration around an activity of common interest. During the quarter under review, ATP assisted CICB in the organization of the regional workshop, with the following theme: "Connecting stakeholders – Paving the way for a common advocacy to reduce barriers to maize trade in the region: Stakes and challenges!" The workshop took place in Ouagadougou, June 8 to 12, and gathered 34 cereal stakeholders (including 11 women) from 7 countries (Benin, Burkina Faso, Côte d'Ivoire, Ghana, Mali, Niger, and Togo) representing all stages of the value chain, from producers to processors to traders and consumers. (See: « *Commerce Régional du Mais : Les Professionnels Céréaliers d'Afrique de l'Ouest Pour la Levée des Contraintes* » http://www.sidwaya.bf/sidwaya_08-06-09/eco-dev_2.htm.) The Minister in charge of Agriculture in Burkina Faso opened the meeting, which consisted in the following main sessions:

- Exchanges on the experiences of each private organization participating in the workshop, regarding maize trade barriers, advocacy and lobbying
- Training course on advocacy and lobbying, alternating theoretical presentations, role playing, discussions, and group works
- Elaboration of a regional advocacy draft action plan

At the end of the workshop, the participants made a declaration in which they:

1. adopted the regional advocacy action plan for maize;
2. committed to set up a regional network of the maize value chain stakeholders, to coordinate and assist in national and regional initiatives to improve intraregional trade of maize; and



Valérie Hounsounou, maize focal point in Benin

3. agreed on focal points for the implementation of the advocacy plan (CICB being designated as the lead at the regional level, and 7 organizations being identified at the national levels).

Communiqué of The First Regional Exchange and Partnership Meeting of Cereal Professionals in West Africa.

By way of responding to the need for effective dialogue among the different actors of the maize value chain, cereal professionals from 7 (seven) West African countries organized a regional exchange and partnership meeting in Ouagadougou from June 8 to 11, 2009.

This meeting, which was organized by CIC-B with support from the ATP project financed by USAID on the theme "Common advocacy to remove trade barriers related to the commercialization of maize at the regional level: Issues at stake and challenges!" was aimed at finding regional solutions to problems related to the commercialization of cereals, especially maize.

This four-day meeting helped the participants to:

- Build their capacities for advocacy and lobbying;
- Identify the barriers that impede maize intraregional trade ;
- Adopt mechanisms to implement a regional dialogue and action plan for the sustainable development of the maize value chain to stimulate its trade in the region.

After the meeting, the participants (from Benin, Burkina Faso, Cote d'Ivoire, Ghana, Mali, Niger, and Togo) adopted the following:

- An advocacy plan to enhance trade of local commodities and by-products, especially maize;
- The creation of a regional network of maize value chain stakeholders to assist in the implementation of the national and regional advocacy processes and in the maize trade promotion in the sub region;
- The setup of national focal points for the implementation of advocacy and lobbying action plans.

On this account:

- At the regional level: CIC-B was mandated by the participants to coordinate the different advocacy and lobbying actions decided during the meeting.
- At the national level: the following structures and people were mandated to facilitate the implementation of the advocacy plan:

BENIN: PNOPPA-B : Contact person : Valérie HOUNSOUNOU

BURKINA FASO: CIC-B: Contact person: Soumaila SANOU

COTE D'IVOIRE: ANOPACI (UCOVISA): Contact person: Jeanne COULIBALY SEKONGO

GHANA: APFOG: Contact person: Nashiru KADRI

MALI: CNOP: Contact person: Keffa DIARRA

NIGER: AFCEN: Contact person: Fadima MARCEL

TOGO: CPC-Togo: Contact person: André Yawo TOKPA.

Back in their respect countries, the participants of the meeting are committed to the implementation of the decisions taken at the Ouagadougou workshop.

Ouagadougou, June 11, 2009

The participants

The participants praised ATP's assistance in facilitating the collaboration of maize stakeholders at the regional level and in strengthening their advocacy capacity through quality training courses. Through grants and technical assistance, ATP will support CIC-B and national focal points in fine-tuning the advocacy action plan and implementing it.

6. COMPONENT 4: PROMOTING EFFICIENCY OF REGIONAL VALUE CHAINS

6.1 MARKET INFORMATION SYSTEM

6.1.1 PARTNERSHIP IN MIS

ATP's partnership with Esoko Ghana, AMASSA, APROSSA and ANOPACI, was firmly established during this quarter and even went beyond the initial MIS work. For example, the project supported AMASSA (Afrique Verte Mali) to organize a workshop on "Expectations of MIS in agricultural production" attended by 27 participants, including six (6) women. In Ghana, ATP invited Esoko-Ghana to attend its warehouse receipt program workshop, organized in Kumasi. Esoko can be expected to play an important role in this program by providing, in addition to the MIS services developed in partnership with ATP (prices, bids/offers, contacts, alerts), critical information on stocks flow in and out of warehouses and on the location of their warehouses.

In Bamako, Mali, ATP and AMASSA attended the workshop on regional markets indicators, organized by CILSS in collaboration with the region's national public MIS. ATP and CILSS are working on a MOU that will formalize a partnership to share information and collaborate in activities of common interest. ATP will provide assistance to CILSS in the organization and operation of the CORPAO (*Conférence Régionale sur les Perspectives Agricoles de l'Afrique de l'Ouest*). These events will serve to strengthen linkages among value chain participants through bids/offers negotiated during the events and posted on Esoko for a larger exposure to clients and suppliers.

Judy Payne of USAID's ICT team visited ATP and Esoko and provided ATP with feedback on its partnership with Esoko. She recommended that the partnership be strengthened. Indeed, ATP is working closely with Esoko, which has been evolving its business to provide a more diversified mix of services through Internet and mobile phones, including business development services (BDS) beyond MIS. ATP supports Esoko's vision to build franchises, but both agree that AMASSA, APROSSA and ANOPACI are not yet at that stage. Judy Payne also urged ATP to show performance results in terms of transactions (bids/offers), in addition to the number of users of the Esoko platform. It's a recommendation ATP intends to implement.

6.1.2 ATP MIS ACTIVITIES

During the period under review, ATP carried out the following activities:

- **Product characterization.** There should be no ambiguity over the products' characteristics for which prices and bids/offers information is provided on the Esoko platform. To ensure this, ATP worked closely with its partners and value chain participants to come up with clear criteria that define ATP's products (onion, maize, livestock) in a way that speaks to the needs of value chain participants. Onion and maize products proved much easier to categorize than livestock, because the latter had not been covered before by Esoko (Tradenet). ATP and its partners have settled on four key criteria to categorize cattle: age, gender, plumpness, and weight. (Small ruminants are simply categorized as sheep and goats). Esoko is working to introduce these changes in its platform, taking into

account the need (i) to limit to 20 characters in naming a product and (ii) to translate previous information into the new format.

- **Facilitation of bids and offers.** ATP participated in the APROSA-sponsored cereal exchange (bourse de cereals) in Burkina Faso and facilitated business contacts at this event. Some 992.5 tons (including maize, other cereals and local products) were transacted for a total value of about USD 222,300. Similarly, ATP worked with CILSS to plan for the next CORPAO (following the one in Abuja, which ATP also attended). ATP is translating these close working relationships with APROSSA and CILSS into planned activities to strengthen, broaden, and coordinate the various cereal exchanges (in Burkina, Mali, and Cote d'Ivoire) and the CORPAO. ATP expects these efforts to yield the following results: (i) a who's who list in intra-regional trade; (ii) organization of working sessions to sensitize value chain participants; (iii) better organized agricultural products exchanges (*bourses agricoles*); and (iv) monitoring of bids/offers transacted.

6.1.3 MIS DISSEMINATION

Esoko Networks is making market information available to ATP's beneficiaries under the old Tradenet.biz platform, while working to complete the transition to its new platform, including with the new product characterization. The platform provides prices, bids/offers, profiles of traders, and alerts as well as publication from newspaper articles and documents on agricultural trade. Value chain participants can also access APROSSA's and AMASSA's publications, e.g., newsletters on the reviews of the food situation (*Point sur la situation alimentaire*), manual on the cost of transport and information, and orientation manual on cereal import and export in Mali. In return, the information on bids and offers is provided to value chain participants in a special section of the Afrique Verte's bulletin "*Paysan du Sahel*". ATP's market information provided on Esoko Networks is also broadcast on radio in Burkina Faso, Mali and Côte d'Ivoire, through MOUs signed between AMASSA, APROSSA, and ANOPACI with local radio stations.

6.1.4 CHALLENGES

ATP is working with Esoko and the other MIS partners (and has planned a retreat next quarter) to overcome the following challenges:

- Esoko has found difficult to readily integrate the new product characterization in its platform, as it has both to ensure that the information is easily captured (less than 20 characters) and that the new data are made compatible with past information.
- The transitioning of Esoko Network's platform is taking longer than anticipated.
- Some of the agents recruited to collect market information needed more training than anticipated because of their low level education or lack of comfort with mobile phone operation.
- More systematic monitoring of bids and offers needs to be put in place, including working the newly recruited market facilitators into the process.
- ATP's MIS coverage remains limited to four countries out of its seven countries of interest,

Information provided on Esoko Networks, April-June 2009

	Prices	Offers	Contacts
Mali	1,139	45	30
Burkina Faso	1,836	55	84
Cote D'Ivoire	2,293	12	8
Ghana	10,666	1,420	3,226

Statistics include data collected on markets and products, which serve to make Esoko platform attractive to large number of users

and two key countries, Niger and Benin, are not covered. The limited coverage diminishes the attractiveness of the Esoko platform for a large number of users dealing in the non-covered countries.

- ATP is working with Esoko and value chain participants to think of a viable business model by which individual or groups of users would be able to pay for the license to get access to Esoko platform.

6.2 MOBILIZATION OF ADDITIONAL FINANCE THROUGH ACCESS TO CREDIT AND THE DEVELOPMENT CREDIT AUTHORITY (DCA)

During the period under review, ATP carried out an Access to Finance STTA to develop a three-year plan to mobilize additional finance for value chain participants. The review looked at the possibility of initiating a DCA for FY09, and after consultation with USAID determined that conditions were not in place for such an activity this year. ATP will continue working with USAID's Office of Development Credit (ODC) to help establish the conditions for the initiation of a DCA in FY10.

6.3 MOBILIZATION OF ADDITIONAL FINANCE THROUGH WAREHOUSE RECEIPTS

Pilot warehouse receipt stakeholders' workshop. ATP selected Ghana for the pilot program further to ATP's warehouse receipt pilot study conducted in January 2009. Ghana is well positioned to implement a successful pilot warehouse system because of the lessons learned from previous trials conducted by the Natural Resources Institute (NRI) and TechnoServe, and because it has a business environment conducive to market solutions over government management. Ghana has a long history of financing inventory of cash crops such as cocoa, and food imports such as rice. And the dynamic entrepreneurs in the countryside only need a transparent regulatory system, benchmark standards, and training to operate at the professional level required in a warehouse receipt system. The ATP project selected Ghana for implementing a pilot warehouse receipts program for these reasons with the longer-term goal of replicating warehouse receipts in the Francophone countries where there is some experience with inventory credit schemes, but with a different approach. In order to ensure there would be no duplication of efforts, the ATP project consulted with USAID/Ghana and the TIPCEE program, both of which encouraged ATP to proceed with the program.

On June 16-17, ATP held a workshop in Kumasi, Ghana, with the following objectives:

- Discuss warehouse receipts and what is involved in setting up a sustainable working warehouse receipt program.
- Discuss the concerns, constraints and possible solutions around setting up a warehouse receipt program.
- Establish stakeholder interest in a warehouse receipt system in Ghana.
- Draft a stakeholder endorsed action plan laying out the activities that need to be done to have a warehouse receipt program up and running.

Over 30 stakeholders from the government, development partners, and private sector (farmers, traders, processors, and industry service providers such as banks, inspection companies, insurance brokers etc.) participated in the meeting. The welcome address was given by Dr Michael Wyzan, Senior Agricultural Policy Advisor of USAID, and the COTR for E-ATP, and the opening speech by

the Minister of Agriculture's representative, Mr. George Badu-Yeboah, Ashanti Regional Director of the Ministry of Food and Agriculture (MOFA). (See: "USAID initiates grain warehouse receipt system in Ghana... Holds action planning programme for 40 stakeholders." <http://www.modernghana.com/news/223376/1/usaaid-initiates-grain-warehouse-receipt-system-in-.html>).

Key conclusions from the workshop are as follows:

- A Task Force was established along with a Task Force Steering committee to work with ATP to develop a private sector driven warehouse receipt program.
- An industry based regulatory company will be established by the Task Force with the assistance of the project which would manage the regulatory issues surrounding a warehouse receipt system that will ensure depositors, buyers, insurance companies, and banks feel secure with the warehouse receipt process.
- Steering committee, Task Force and ATP developed an action plan laying out the activities that need to be implemented to have a warehouse receipt program up and running.

Field visits of warehouses. Following this workshop, a familiarization tour to some warehouses available in the Techiman and Ejura area was organized, end June, for members of the Steering Committee. At least two of the warehouses visited showed adequate facilities available to implement the program. The members of the Steering Committee also noticed that traders and warehouse owners/managers were enthusiastic about the program; the report and recommendations will be finalized in July. This tour prepared the official warehouse inspection mission commissioned to review the caliber of warehouses that are available for the pilot and report back to the Steering Committee.

6.4 MOBILIZATION OF ADDITIONAL FINANCE THROUGH LEVERAGE

Public Private Partnerships. The Value Chain components seek to create linkages between value chain actors by supporting producer organizations and other actors, such as buyers and processors, through Public Private Partnerships (PPPs). By PPPs ATP favors a wide range of partnerships that involve all kinds of value chain actors; most often, ATP will serve as the "public" element of the PPPs. Some possible areas of partnership include providing technical assistance, grants, and agreements for input supply. In April, an ATP consultant met with project partners in Ghana, Burkina Faso, Benin, Côte d'Ivoire and Niger, to outline potential PPP business opportunities in the maize value chain and onion value chain, identifying the best opportunities and defining next steps for ATP collaboration. In May, another consultant had a similar assignment, focusing on the livestock value chain in Burkina Faso, Côte d'Ivoire, and Ghana. The field visits were conducted based on the information gained from the value chain studies and validation workshops, where high potential partners and stakeholders were identified. The approach to the meetings was to discuss the PPP concept and try to gain an understanding of what each party could contribute (e.g., technical assistance and training) and what the potential gains were for each party. The two top priority PPPs identified are:

- A partnership between the Burkinabe maize processing company SITRAC and ATP in umbrella form. This processing company needs to develop partnerships with maize suppliers in neighboring countries, as it is looking to sell into new markets and is currently in the process of setting up another processing unit to expand its capacity to be able to fill orders. ATP drafted a MoU with SITRAC to expand market linkages, transfer of technical knowledge and assist with production contracts (whereby there is increased support for farmer organizations, increased access to production inputs especially fertilizer, and increased use of improved maize seed). Partnerships between SITRAC and producer organizations, such as ANOPACI (Côte d'Ivoire), would be added on as they are developed.

- A partnership among the *Société Ivoirienne de Promotion de Supermarchés* (PROSUMA) in Côte d'Ivoire, COFENABVI and ATP, to promote and facilitate trade in chilled meat and livestock from Sahelian countries to Côte d'Ivoire. PROSUMA currently supplies meat for 19 supermarkets. The World-Bank PAFASP project in Burkina Faso has enthusiastically confirmed its interest in collaborating with ATP to assist COFENABVI members in a test shipment of chilled meat from Burkina Faso to PROSUMA in Côte d'Ivoire. The test is currently under discussion between the two projects and would be a first action under the PPP agreement.

The challenge for ATP in developing successful PPPs is not only to bring parties together and act as a catalyst but also to provide market information, business guidance, and, where it is critical, technical know-how. The next steps will be to start implementing the high potential PPPs and provide targeted market linkage assistance. During the last FY09 quarter, ATP will focus its efforts on the SITRAC and PROSUMA PPPs.

Partnership with CropLife. During the period under review, ATP also drafted a MoU with CropLife Africa Middle-East, which is the association (affiliated with CropLife International) representing the plant science industry in the region. CropLife is already very active in Africa, through its national member organizations, to its partnership with different technical partners (such as IFDC), and through a Cooperative Agreement with USAID to develop and organize training courses on Integrated Pest Management (IPM). The ATP/CropLife MoU aims mainly at (i) organizing joint IPM training-of-trainers courses to address protection of maize and onion during cropping and post-harvest, and (ii) facilitating business linkages between ATP partners (such as farmer organizations) and professional agro-input suppliers affiliated with the CropLife network. The MoU will be signed in July 2009.

Contacts with IFDC. During the April-June quarter, ATP also had contacts with IFDC to identify joint training programs on soil fertility issues for maize and onion. Targets (in terms of countries and number of beneficiaries) have been identified and will be finalized as soon as IFDC has a clearer idea of its future activity programs.

ICRISAT grant. During the second quarter of FY09, ICRISAT sent ATP three proposals on onions regarding: (i) a genetic improvement of two *Violet de Galmi* lines; (ii) a rainy season cropping trial focused on best practices other than on seed varieties; and (iii) a passive solar storage trial. After review of the proposals, ATP confirmed its interest in the rainy season and storage trials, as both should contribute to expand the onion marketing season. From March to May, ATP and ICRISAT fine-tuned the proposals and prepared a grant document. On June 26, ICRISAT informed ATP that they cannot finalize the grant proposal due to staff restructuring and manpower issues that would affect the follow-up of the trials. While the rainy season trial cannot take place anymore due to the start of the rains, ATP and ICRISAT are discussing alternate solutions to run the storage trial.

7. PROJECT COMMUNICATIONS ACTIVITIES

Communications efforts to establish the knowledge and visibility of the project across the region were improved in the quarter under review. The media, both national and regional, played an important role in supporting project communications efforts, and communicating project activities to stakeholders and the general public across the region. Information on the project gained a wider reach across the region than in previous quarters because new relationships were built and more media outlets were used.

7.1 RELATIONSHIP BUILDING WITH STAKEHOLDERS

As the project continued its relationship building efforts, it provided communications support to highlight its collaboration with key stakeholders across the region. The relationship with the media, which are key stakeholders to the project, was deepened across the region, particularly in Burkina Faso and Ghana, but also in Niger where new media relationships were established to support ATP communications efforts. ATP reinforced its relationship with Africable, a regional TV network, which provided coverage and airing of ATP project activities across French-speaking West African countries.

New relationships were also developed with other stakeholders through collaborative activities, including the PIVA workshops organized in Niger for ORO/AOC in Niger, and in Ghana for GAPTO. Similar communications relationships were also built with projects, such as the World Bank-funded *Programme d'Appui aux Filières Agro-Sylvo-Pastorales* (PAFASP) and *Comité Interprofessionnel des Céréales du Burkina Faso* (CIC-B) in Burkina Faso.

A collaborative relationship was also developed with ATM FM, a radio station in Abidjan, and *L'Evenement*, a newspaper in Niger, with the aim of effectively carrying ATP news and information to its stakeholders and the general public in these countries. ATP also reinforced its relationship with the Trade Hub, which is now referencing ATP in its newsletter, Tradewinds. ATP will sustain this relationship to benefit both projects. Measures have also been put in place to establish relationships with related ministries in Ghana, including the Ministries of Food and Agriculture, Trade, and Interior to secure their buy-in of ATP project activities, particularly in the area of advocacy and implementation of policy measures.

7.2 PRODUCTION AND PUBLICITY

During all project activities and visits, communications support materials, such as brochures, banners, and fact sheets were produced and distributed to support communications on ATP and its activities in order to deepen the knowledge and visibility of the project. Before or after most project activities, orientation sessions were held with the media to equip them with information on the project and its funding agency.

Press releases and articles, and TV coverage were used to give publicity to ATP activities in Burkina Faso, Ghana, Cote d'Ivoire, and Niger. In Niger, at the ORO/AOC PIVA exercise, the project and USAID were given favorable publicity on national radio and television, as well as in the print media - a result of the presence of two state ministers (*Ministre du Développement agricole*, and *Ministre chargé de la Compétitivité nationale et de la Lutte contre la Vie chère*) at the opening and conclusion of the workshop. The trade week event in Abidjan co-sponsored by ATP generated considerable publicity, including on TV. In Ghana, the GAPTO PIVA exercise was introduced by the regional Director of

the Ministry of Food and Agriculture of the Ashanti region, and concluded by the Director of Trade and Industries of the Ashanti region. The opening ceremony was also attended by the Kumasi Metro Director of the Ministry of Food and Agriculture and two agriculture officers. The COP was given time on national TV to present the project and introduce the workshop. Similarly, in Burkina Faso, the maize advocacy workshop in Ouagadougou, was introduced by the Minister of Agriculture, which resulted on wide media coverage.

7.3 MEDIA ACTIVITIES/COVERAGE

Media coverage and publication of project activities between April and June were very favorable. Project activities were covered by both private and public print and electronic media in the respective project activity countries, and also across French West African countries in the region in some cases by a regional TV network, Africable, and also by Tele Sahel in Niger. Official newspapers also provided knowledge and visibility of the project particularly in Burkina Faso, Ghana, and Niger.

7.4 DOCUMENTATION

Documentation of project activities including still pictures, video shots, and newspaper publications, was improved during the quarter with the aim of securing important information and materials for project showcasing and reference purposes. The idea of developing shots of the overview of ATP activities in collaboration with Africable, a regional TV network, was put on hold because of high cost. ATP will likely make use of a regional TV coverage, if at all, only on a selective basis, for example, in high-level advocacy events.

As documentation practices, PowerPoint presentations made at important workshops, seminars etc were also duly secured and stored for reference purposes. Similarly, most project activities which were covered by radio and TV stations were documented on electronic storage devices such as CDs and DVDs Newspaper clippings on media reports on the project were also documented. (Clippings enclosed).

Communications on project activities and successes also increased during the last quarter. Two press releases as well as two success stories (in USAID format) on key project activities and impact, were produced. There were 16 newspaper articles/reports, across the region, on project activities in this quarter compared to 10 in the previous.

7.5 REGIONAL MEDIA COVERAGE

The project enjoyed extensive regional media coverage which presented the project in a good light to stakeholders and the general public. During the quarter, project activities covered more countries, creating more knowledge and visibility for the project. In addition to the media contacts made in the previous quarter, new ones were established in Niger and the old ones strengthened.

The project's relationship with Africable, a regional TV network was also improved to allow the project to communicate its activities more effectively across the region. The collaborative relationship with ATM FM in Abidjan, Côte d'Ivoire as well as L'Evenement in Niamey, Niger increased the project's regional presence. These collaborations are meant to improve project communications efforts in those countries,

Currently, the project has been introduced, and its activities also well communicated in Burkina Faso, Côte d'Ivoire, Ghana, and Niger. Efforts are being directed at extending the knowledge and visibility of the project to other countries including Benin, Mali and Togo. Efforts are also being made to introduce and communicate ATP and its activities in bilateral countries in the region. Other regional media outlets are also being sought to have wider regional media coverage of project activities.

7.6 ATP WEBSITE

ATP's website was delayed by design and Internet connectivity issues. Though this is yet to be accomplished, on the basis of ATP's systematic briefings to the media, various independent websites featured ATP's major activities undertaken during this quarter in Mali, Burkina Faso, Niger, Cote d'Ivoire, and Ghana (see samples in text box below). Discussions are on-going with some partners and stakeholders to allow ATP to use their websites as platforms to support ATP communications activities, pending the set-up of a project website by the end of the fiscal year.

Independent websites Provide Ample Coverage to ATP's Activities In the Region

ORO/AOC PIVA, Niger

« Atelier Régional d'Évaluation Interne de l'ORO/AOC : Le Project ATP Renforce les Capacités d'ORO/AOC »

Le Republican Niger, 24 avril 2009

http://www.republicain-niger.com/index.asp?affiche=News_Display.asp&articleid=5316

GAPTO PIVA, Ghana

"Agricultural producers, traders build capacity... At USAID-sponsored PIVA Workshop in Kumasi"

The Ghanaian Chronicle, Science/Nature, Th. 14 May 2009

<http://www.modernghana.com/news/216477/1/agricultural-producers-traders-build-capacity-at-u.html>

Maize Regional Advocacy Workshop

« Commerce Régional du Mais : Les Professionnels Céréaliers d'Afrique de l'Ouest Pour la Levée des Contraintes »

Sidwaya, Burkina Faso, 6 juin 2009

http://www.sidwaya.bf/sidwaya_08-06-09/eco-dev_2.htm

Promotion of Burkina's Livestock and Onion Exports to Cote d'Ivoire

« Filière bétail : Le projet Atp /Usaid s`engage en faveur des acteurs nationaux »

Le Nouveau Réveil, Cote d'Ivoire, 9 juin, 2009 :

<http://news.abidjan.net/h/330286.html>, <http://fr.allafrica.com/stories/200905110255.html>

Training on Trainers on Cattle Fattening, Mali (prepared in June)

"Filière bétail-viande: A l'Ecole de l'Embouche Bovine"

L'Essor, Mali, 2009.7.16 :

http://www.essor.gov.ml/sem/cgi-bin/view_article.pl?id=22841

Warehouse Receipt Program Workshop

"USAID initiates grain warehouse receipt system in Ghana... Holds action planning programme for 40 stakeholders"

Ghanaian Chronicle, Ghana, 22 June 2009

<http://www.modernghana.com/news/223376/1/usaid-initiates-grain-warehouse-receipt-system-in-.html>

During the quarter under review, the project benefited from Short Term Technical Assistance (STTA) from Laura Dillon, Communications Manager of Abt Associates Inc. The STTA mission built upon the project communications strategy, defining in a consistent and integrated manner the key audiences, core messages, and strategy communications channels and tools that will support the program objective and also communicate project progress to key stakeholders and partners. She

also held short training sessions with the technical teams in both Accra and Ouagadougou to facilitate their support in project communications activities. The STTA resulted in a comprehensive communications strategy to enable project communications efforts to be more focus-driven and outcome-oriented. Key outcomes of the project communications strategy include the development of at least two success stories per quarter (text box below), quarterly publication of a project

newsletter (which will be launched next quarter), and the provision of weekly highlights on project activities and outcomes, also to begin next quarter.

Press Release

USAID Helps Ghana's Agricultural Producers and Traders Improve Efficiency

Accra, Ghana – The Agribusiness and Trade Promotion (ATP) project, funded by the United States Agency for International Development (USAID), is holding a three-day workshop at the Sport Hotel in Kumasi, May 12-14, to evaluate the Ghana Agricultural Producers and Traders Organization's (GAPTO) capacity for effective management and to increase its efficiency.

The Partner Institutional Viability Assessment (PIVA) workshop, which will bring together more than 30 agricultural producers and traders in the maize, onion and livestock value chains, will review all aspects of GAPTO's institutional capacity and operations. PIVA – a method used to evaluate partner institutions receiving USAID assistance – analyzes internal performance levels of a partner organization and identifies areas that need improvement to ensure USAID's selected partners are efficient enough to support ATP's overall objectives.

The PIVA exercise will use 59 criteria to determine the organization's capacity, which will be presented, discussed, and scored by GAPTO members themselves. "The PIVA results will help us to develop strategies to strengthen the organization's efficiency, which is essential to increasing trade in the region," said Dr. Ismael Ouedraogo, ATP's Chief of Party.

The ATP project conducted PIVA workshops in late 2008 for two of its partners - la Confédération des Fédérations Nationales de la Filière Bétail/Viande des Pays membres de l'UEMOA (COFENABVI), and l'Observatoire Régional de la filière Oignon en Afrique de l'Ouest et du Centre (ORO/AOC) - in Abidjan (Cote d'Ivoire) and Niamey (Niger) respectively, bringing together over hundred participants in the livestock and onion value chains.

USAID's ATP project works to increase the value and volume of intra-regional agricultural trade in West Africa through support to key agricultural stakeholders in the livestock, maize and onion value chains. The project works in collaboration with regional partners and organizations, including ECOWAS and UEMOA, and covers six countries including Ghana, Burkina Faso, Mali, Niger, Cote d'Ivoire, and Benin.

Press Release

USAID Helps Agricultural Stakeholders Plan for Warehouse Receipts Pilot Programme

Accra, Ghana – The Agribusiness and Trade Promotion (ATP) project, funded by the United States Agency for International Development (USAID), is holding a two-day workshop at the Noda Hotel in Kumasi, June 16-17, to develop a sustainable warehouse receipts programme in Ghana.

The warehouse receipts pilot programme workshop will bring together approximately 40 stakeholders from the agriculture sector to address major post-harvest problems facing Ghanaian farmers, including a lack of adequate storage facilities and an inability to access financing for investment capital. The warehouse receipts programme - a critical factor in expanding and attracting credit to the agricultural sector, raising farmer incomes, and increasing investment in production and storage infrastructure – will facilitate post-harvest trade and allow for the development of a functioning commodity exchange.

A warehouse receipts system allows producers, traders and exporters to store their crops in approved warehouses that are secure and meet proper conditions. The farmers receive a receipt for their deposited goods which can be used at a bank to secure a loan worth a percentage of its value. When the goods are sold, the loan and interest are first paid off along with any management fees from the warehouse with the remaining profits then going to the borrower. Storing the goods also allows the seller to time the market to ensure the highest price for the goods. A quality storage system enables sellers to spread out their financial gain over a longer time span as well as ensure more value for their products as they are kept dry and clean.

“The workshop will allow for the buy-in of key stakeholders, including bankers, warehouse owners and managers, insurance representatives, certification authorities, and farmer groups, to develop a sustainable action plan to help increase the efficiency and value of agricultural commodities in Ghana and the West African region,” said Dr. Ismael Ouedraogo, ATP’s Chief of Party.

The ATP project is linking hundreds of stakeholders through workshops with regional organizations, such as ECOWAS and UEMOA and local ones such as the Ghana Agricultural Producers and Traders Organization (GAPTO), to increase the value and volume of intra-regional agricultural trade in livestock, maize and onion/shallot value chains in seven countries in West Africa including Ghana, Benin, Burkina Faso, Cote d’Ivoire, Mali, Niger, and Togo.

8. PERFORMANCE INDICATOR REPORTING

8.1 INTRODUCTION

During the period under review, ATP completed the network of trade organizations/partners through which ATP collects trade data. In the maize value chain, the associations identified include (i) Techiman and Ejura Maize Traders Association in Ghana, (ii) CIC-B in Burkina Faso, and (iii) the *Association des Vendeurs des Produits Locaux de Sikasso*, Mali (APLS), which produces and exports maize and maize products to Côte d'Ivoire. For the ruminant livestock value chain, the associations include (i) the Ashaiman and Kumasi Livestock Traders and Breeders Associations, which records imports of cattle into Ghana, and (ii) COFENABVI, our regional partner, which records imports of livestock into Côte d'Ivoire and Benin and exports from Mali, Burkina Faso and Niger. In the onion value chain, ATP works with (i) onion traders associations under GAPTO, which coordinates data on onion imports into Ghana, and (ii) ORO/AOC, our regional partner to record imports of onion into Côte d'Ivoire, Togo and Benin and exports from Burkina Faso and Niger.

The M&E Specialist visited partners in Burkina Faso and Niger and trained all the enumerators collecting trade data from selected border markets. Data collection started soon after the training. COFENABVI identified six markets, three in Burkina Faso and three in Niger, for the export data collection, and posted two enumerators in each market for a total of twelve. CIC-B identified twenty markets along the Mali, Côte d'Ivoire, Ghana, Togo and Benin border to track import and export of maize to and from Burkina Faso. In all, forty enumerators are involved in the data collection. ORO/AOC also identified eight markets, four in Burkina Faso and four in Niger involving sixteen enumerators, and they will be tracking onion exports to the coastal countries. In all 68 enumerators have been engaged to collect trade data in Niger and Burkina Faso. Also, all the partners have been tasked to help estimate the baseline data (October 2007-September 2008) and to reconstruct the data from October 2008 to the time of the training. Once this is done the project will have the missing data that is needed to compute the change in value and volume for the end of FY09.

ATP does not view the organizations/associations that it is working with as mere data collectors, but rather as partners with which the project works to strengthen their capacities, provide market information services, and market facilitation to act on bids and offers, in order to deliver better services to their members and contribute to increase the volume and value of their trade. ATP asks its partners (who are well known in market places) to collect information on all trades at key market places, and not just trade conducted by members of the trade associations. That is, ATP collects trade data through market channels, rather than just trader associations. ATP initiated operations in April/May, but is making efforts to collect baseline data (October 2007-September 2008) on value and volume of the selected value chains to evaluate the performance of the project by the end of the first year of implementation.

8.2 ONION VALUE CHAIN

ATP is now covering the onion trade corridors (related to Niger's onion and Burkina's onion imports into Ghana), which go through the onion marketing channels operating under GAPTO in Ghana. Trade data are collected at Accra, Kumasi and Techiman (Table 1). GAPTO has worked hard to estimate the baseline data from October 2007-September 2008 and also obtained data from Kumasi and Techiman markets to add to Accra market data. ORO/AOC has started data collection from the various markets in Burkina Faso and Niger. In Burkina Faso, ORO/AOC is very new and

they are now putting structures in place to operate as a proper association. In Niger ORO/AOC has no database on onion exports. They rely on customs and the Department of Vegetables of the Ministry of Agriculture to provide them with unreliable data on exports. To get more reliable information on exports it is proposed that import data from Côte d'Ivoire, Togo and Benin will also be collected to enable us compare both imports and exports.

**TABLE I MONTHLY ONION IMPORTS INTO GHANA AT ACCRA MARKET
IN SECOND AND THIRD QUARTERS OF FY09**

Quarter 2 (FY09)	Volume (tons)	Value (US\$)
January	2,728	1,205,361
February	1,339	263,290
March	4,228	902,756
Total	8,295	2,371,407
Quarter 3(FY09)	Volume (tons)	Value (US\$)
April	3,798	867,813
May	4,233	1,696,409
June	3,200	1,381,716
Total	11,231	3,945,937
% Change (Qrt3/Qrt2)	35.39	66.40

Source: GAPTO

Onion trade in Ghana at Accra-Agbobloshie terminal market during the third quarter of FY09 recorded about 35% increase in volume and about 66% in value over the second quarter imports (table I). The increase in volume took place in spite of the limitation imposed by the implementation of the axle load limit by Niger. The measure has been adopted by all ECOWAS countries years ago, but Niger was first to start implementing it in March 2009. To comply with the measure, onion truck load was reduced from 350-450 bags to 200 bags of 120 kg. To compensate for the reduced truckloads, traders increased the number of rotations, as a truckload of 200 bags now takes far less time to dispose of than a truckload of 350-450 bags. The number of trucks/trailers that conveyed onions to Accra markets has increased from 322 in the second quarter to 369 in the third quarter, giving an increase of 15% over the previous quarter.

Data now available for the other key terminal markets in Ghana (Kumasi and Techiman) since March 2009² show 5,760 metric tons of onion imports valued at US\$2,010,252 for the quarter. Data from these two markets will be added to that from Agbobloshie to estimate the baseline for onion imports into Ghana.

A comparison of onion import into Accra by origin in the third quarter over the second quarter indicates (Table 2) about 63% increase in onion imports from Niger and about 74% decrease from Burkina Faso. Burkina Faso remains a small player in the onion trade into Ghana and saw its market share decline from 20% (on a total volume of 1,672 tons) in the second quarter to 4% in the third quarter (on a total volume of 438 tons), with Niger taking the lion's share (on total volumes of 6,624 tons and 10,793 tons, respectively). ATP will investigate factors behind these changes in market shares.

² Data from other markets (imports into Cote d'Ivoire and exports from Niger) are being estimated to establish the baseline.

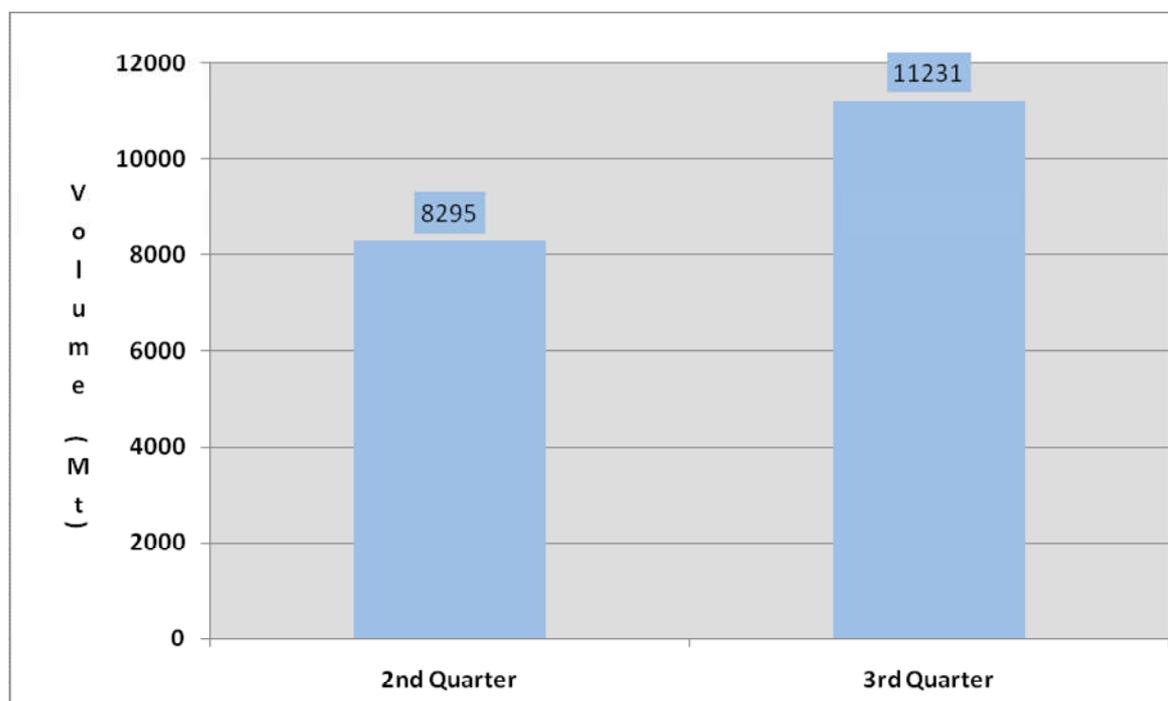
TABLE 2: COMPARISON OF ONION IMPORTS FROM NIGER AND BURKINA INTO ACCRA DURING THE SECOND AND THIRD QUARTER OF FY09

Month	Niger	Burkina Faso
January	1,651	1,077
February	1,172	167
March	3,801	428
Total	6,624	1,672
April	3,584	215
May	4,009	223
June	3,200	
Total	10,793	438
Percent Change (Qrt 2/Qrt 3)	63%	(74%)

Source: GAPTO

Figure 2 shows the increase in onion import into Accra market from the second to the third quarter. The second quarter imports of 8,295 tons were valued at about US\$2.37 million, and the third quarter imports of 11,231 were valued at about US\$3.95 million. The transport charge per bag of 120 kg from Galmi in Niger to Accra also increased from an average of FCFA 5,667 (US\$12) in the second quarter to an average of FCFA 7,000 (US\$15) in the third quarter. This reflects the fact that traders continue to pay the same price to hire a full truck that now carries fewer bags because of the implementation of the axle load limit. The insurance of 1.05% of total value of shipment remains the same, however. Within the third quarter, the reported FOB price per 120 kg bag of onion increased from an average of FCFA 6,000 (US\$13) in April to FCFA 20,000 (US\$43) in June as a result of high demand of onions and low supplies in exporting countries.

FIGURE 2: VOLUME OF ONION IMPORTS INTO ACCRA IN THE SECOND AND THIRD QUARTERS OF FY09



Source: GAPTO

8.3 LIVESTOCK RUMINANT VALUE CHAIN

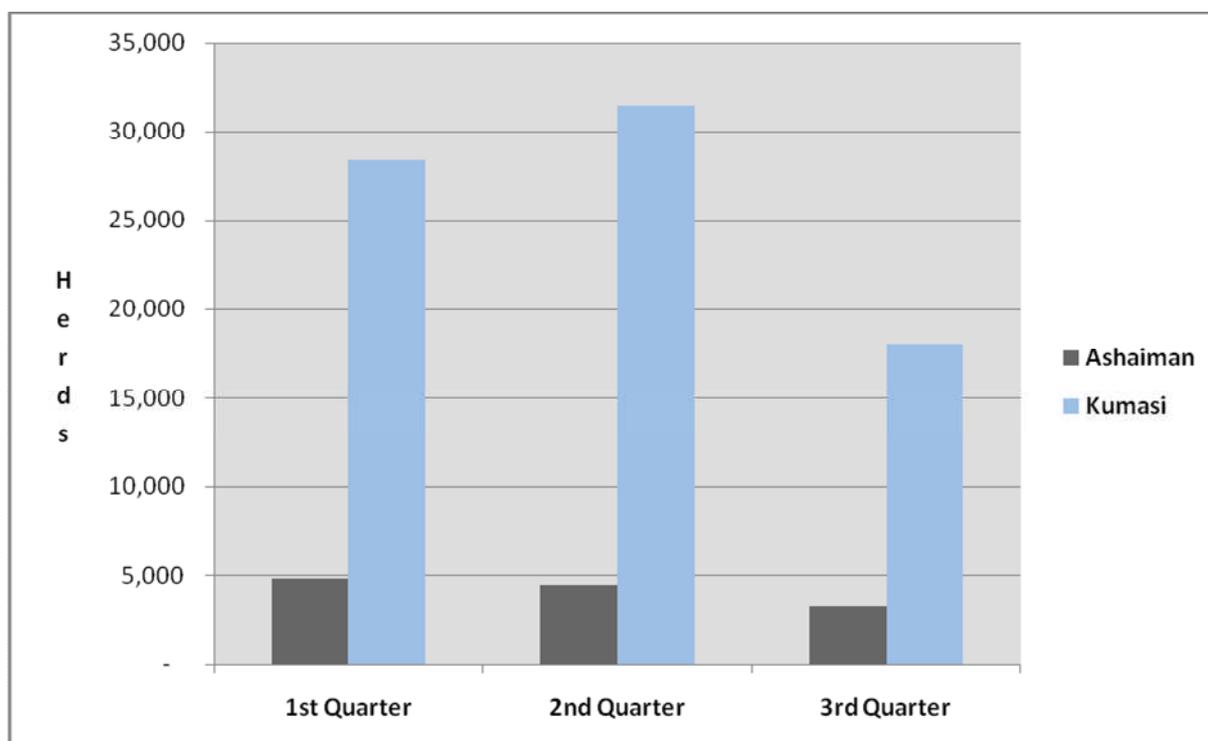
ATP collects data for livestock trade import into Ghana's main distribution channels through the Ashaiman Cattle Breeders and Traders Association operating in Tema near Accra, and the Kumasi Cattle Breeders and Traders Association operating in Kumasi. About 95% of livestock imported into Ghana go through these two market channels (Table 3 and Figure 3). The two associations have no record on sheep and goats imports into Ghana.

TABLE 3: CATTLE IMPORT INTO GHANA THROUGH THE KUMASI AND ACCRA DISTRIBUTION CHANNELS, OCTOBER 2008 – JUNE 2009

Month	Ashaiman		Kumasi	
	Heads of cattle	Value (US\$)	Heads of cattle	Value (US\$)
October	1,310	676,307	9,385	6,664,755
November	1,670	871,233	7,644	3,511,175
December	1,815	887,361	11,343	6,106,518
January	1,716	768,375	8,590	4,415,338
February	1,130	489,544	6,107	3,777,496
March	1,645	686,549	16,679	10,111,972
April	1,205	602,517	5,890	3,342,657
May	1,125	562,653	6,022	3,888,980
June	886	445,900	6,160	3,988,000
Totals	12,502	5,990,440	77,820	45,806,892

Source: Kumasi Livestock Traders and Breeders Association

FIGURE 3: CATTLE HEADS IMPORTED INTO GHANA THROUGH THE KUMASI AND ACCRA DISTRIBUTION CHANNELS, OCTOBER 2008 – JUNE 2009



COFENABVI's enumerators in Burkina Faso and Niger will be trained in July in data collection methodology using data collection tools designed by ATP in collaboration with COFENABVI. ATP will collect data on the volume and value of cattle, sheep and goats exported from Sahelian countries to the coastal countries. COFENABVI has a very good database of animal exports to Côte d'Ivoire and Benin from 2007 to present. However, they had not been collecting data on value and therefore the training focused on prices needed to compute the value of animal exports. Sheep and goats are exported to Côte d'Ivoire mostly by train, and cattle mainly by road. A lot of cattle are also exported to Nigeria via Benin. COFENABVI's database does not cover animal exports to Ghana because the organization is not yet present in this country.

Enumerators in Niger have also been trained to collect export data from three border markets. A large number of Niger's livestock export is to Nigerian markets, with only a few head of cattle ending up in Benin, Côte d'Ivoire and sometimes, reportedly, Senegal. COFENABVI-Niger has not established its own database on livestock exports. (Data available is at the Agriculture Minister's office but are difficult to access.) The training was to encourage them to establish their own database. COFENABVI-Niger was therefore not able to provide any data either on baseline or to reconstruct data from October 2008 to present. A similar exercise will be conducted in Mali, Côte d'Ivoire, and Benin to collect trade data in these countries.

ATP worked with COFENABVI-Burkina Faso to collect export trade data on cattle, sheep and goats to Benin and Côte d'Ivoire from 2007 to June 2009. Export data on cattle, sheep and goats to Benin is complete and up-to-date, but that on such exports to Côte d'Ivoire is not complete: data from January to June 2009 was not readily available even though the baseline estimates for the two countries were provided. Efforts are being made to get the balance of the data from COFENABVI headquarters in Abidjan.

Table 4 shows volume of cattle exported from Burkina Faso to Benin from October 2008 to June 2009: about 106,040 heads of cattle valued at US\$47.84 million, and 31,647 of sheep and goats, valued at US\$1.96 million. Benin, however, mostly acts as a transit market for Burkina Faso's export to Nigeria. Animals are desembarqued in Benin to cross into Nigeria on foot. ATP will investigate the causes of the decrease in export volume over the October 2008 to June 2009.

TABLE 4: BURKINA FASO'S LIVESTOCK EXPORT TO BENIN, OCTOBER 2008 – JUNE 2009

Month	Cattle		Sheep/goats	
	Heads of cattle	Value (US\$)	Number	Value (US\$)
October	20,282	8,112,800	4,932	295,920
November	19,406	7,378,707	4,280	244,106
December	14,342	5,759,839	7,565	455,723
January	7,249	3,610,060	2,620	156,574
February	10,213	4,881,931	300	17,208
March	8,251	4,013,132	2,800	163,424
April	8,405	4,641,815	3,450	238,166
May	11,605	5,488,851	3,450	203,970
June	6,287	3,954,088	2,250	188,679
Totals	106,040	47,841,224	31,647	1,963,770

Source: COFENABVI-Burkina Faso

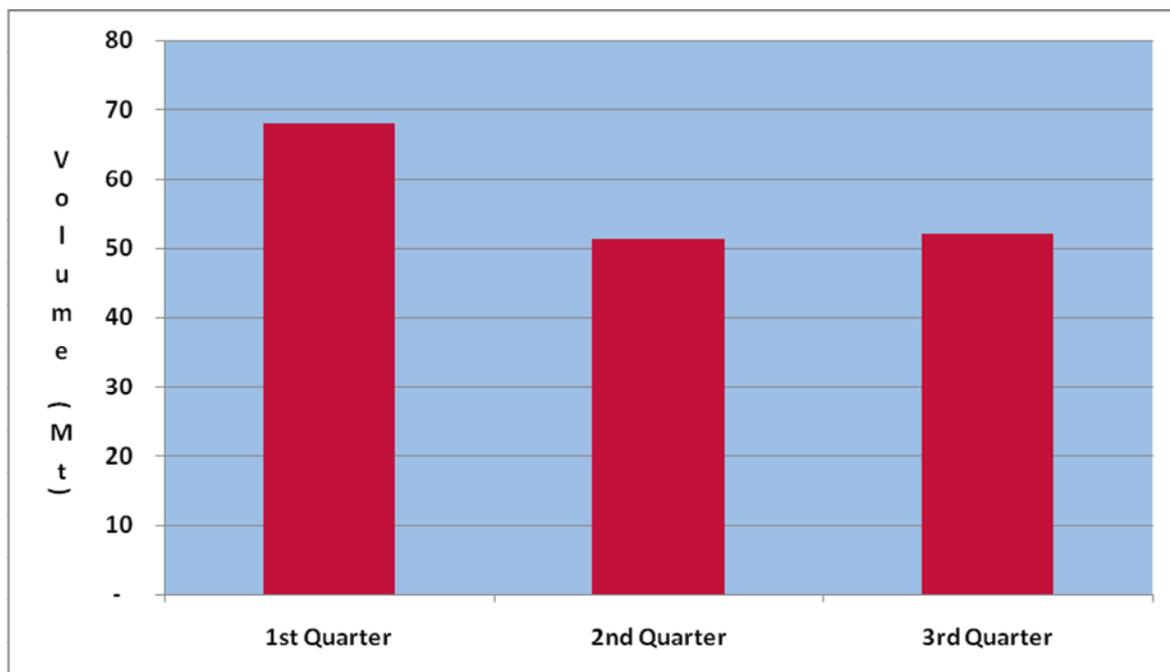
8.4 MAIZE VALUE CHAIN

ATP collects maize trade data through three main associations in the maize value chain: Techiman Maize Exporters Association and Ejura Maize Exporters Association, both based in Ghana; and CIC-B, a national association based in Burkina Faso. Techiman and Ejura markets export maize to Burkina Faso and Niger. CIC-B in Burkina Faso provides data on maize import into Burkina Faso and export to neighboring countries. From October 2008 to January 2009, Burkina imported 460 tons of maize valued at US\$563,997. Two Burkinabe businessmen reported 630 tons (valued at US\$280,853) of maize export to neighboring countries.

Ejura Maize Exporters Association reported export to Burkina Faso of 171 tons of maize valued at US\$78,353 from October 2008 to June 2009 (see figure 4). Exports from Ejura market decreased from 68 tons in the first quarter (October – December 2008) to 52 tons in the third quarter (April-June 2009), in line with lower maize availability during the lean season (March to June) that comes before the new crop harvest in July³. Maize export from Ghana resumes from August to December.

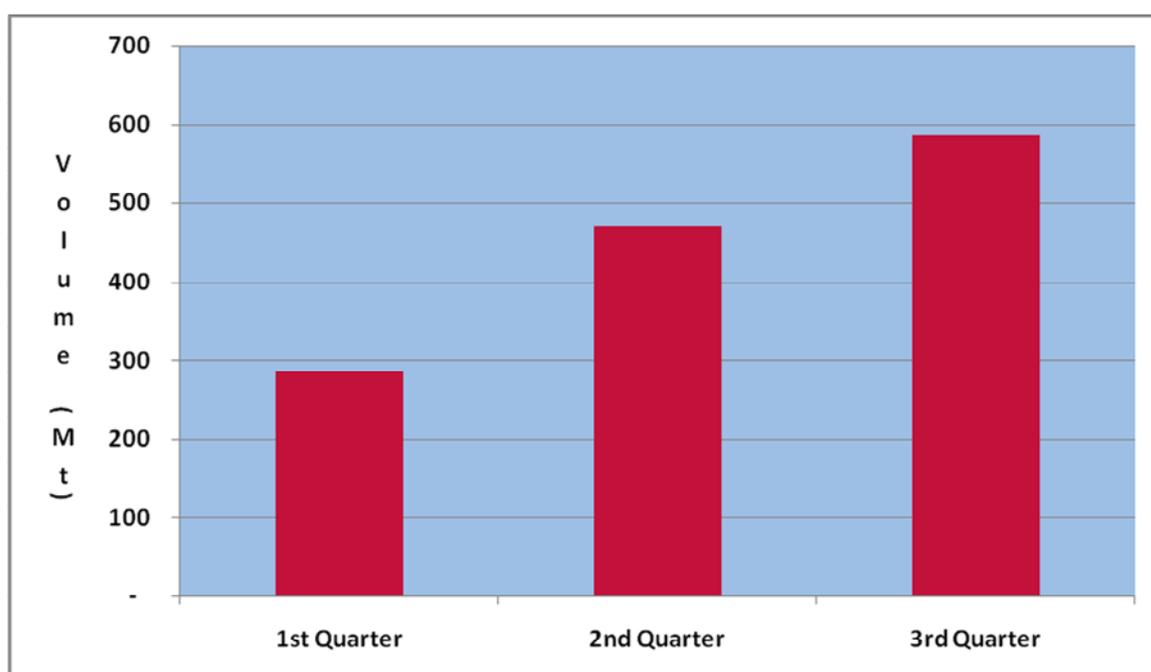
³There are two maize cropping seasons in the Ghana's maize belt (around Ejura and Techiman). Farmers plant the first crop in March-April for harvest in June/July, and plant the second crop in the second half of August for harvest in November-December. Producers are eager to sell the July harvest as soon as possible to raise cash for the second planting season, just around the corner, and traders are compelled to export maize as quickly for lack of adequate storage facilities to handle maize with high level of humidity.

FIGURE 4: VOLUME OF GHANA'S MAIZE EXPORT TO BURKINA FASO BY (EJURA MAIZE EXPORTERS ASSOCIATION)



There is a reverse flow of maize trade going from Burkina Faso into Ghana from January to June: Techiman reported some 1,343 metric tons of maize imported from Burkina Faso, valued at US\$472,340 (see figure 5). During this period, which falls on the first planting season, local supply of maize dries up and prices increase in Techiman market, attracting maize export from Burkina Faso. Maize is transported into Ghana by both Ghanaian and Burkinabe traders.

FIGURE 5: MAIZE IMPORT INTO TECHIMAN MARKET FROM BURKINA FASO, OCTOBER 2008 – JUNE 2009



8.5 ATP DELIVERABLES

TABLE 5. ATP DELIVERABLES

Outcome	Task	Deliverables	Achievement/Comments
Outcome 1: Significant reduction of the incidence of physical and policy-related barriers to moving agricultural and related commodities regionally in West Africa	Task A 3.1.1: Collect and disseminate information on transport barriers, in coordination with UEMOA	Semi annual reports on road harassment on at least one selected trunk route	Anticipated by end of next quarter (Q4).
	Task A 3.1.2: Support a communications campaign to discourage road harassment	Annual dissemination strategy for information on road harassment Implementation of dissemination campaign with partners	Strategy anticipated for end of Q4 of FY09.
	Task A 3.1.3: Identify key locations where investments in logistics infrastructure have the potential to greatly enhance intra-regional trade; facilitate private investment in these locations	Annual list of target investments in market logistics infrastructure with a 'mini-strategy' for facilitating public/private investment for each target investment One PPP in logistics infrastructure facilitated per full project year	Anticipated along an onion trade & transport corridor by end of Q4.
	Task A 3.1.4: Identify priority public investments to improve the efficiency of transport corridors critical to our value chains; support advocacy and provide know-how to our partners	Annual list of the highest priority road infrastructure investments needed by transport corridor tracking progress against previous list Dissemination and advocacy plan for promoting road infrastructure investments (Coordinated with Component 3)	Anticipated along an onion trade & transport corridor by end of Q4.
	Task B 3.1.1: Define Agricultural and Trade Policy Priorities for ATP	Analysis and vision statement for priority agricultural policy reform for each selected ATP value chain including updates of analyses done in preparation for ECOWAP with annual updates 7 training workshops on key agricultural and trade policy issues	Planning & preparation for a training workshop in Q4 of FY09
	Task B 3.1.2: Help ECOWAS Co-ordinate Implementation	Annual implementation plan for agricultural policy change with milestones Institutionalized process for gathering and incorporating industry feedback in policy change at ECOWAS	Anticipate by end of Q3. Significant work on this will be undertaken in Q4 with posting of Policy Advisor in Abuja
	Task B 3.1.3: Develop systems and capacity for Monitoring Policy Implementation	Status of implementation analysis for ECOWAS on key agric reforms as baseline for monitoring M&E process ECOWAS can use to monitor policy implementation with member countries and other institutions	Initiated with ompilation on CD/ROM of ECOWAS policy measures Planned for Q4 of FY09
Outcome 2: Enhanced linkages among agricultural producers and agro-input suppliers, agro-processors and	Task 3.2.1: Confirm Value Chain Selection with USAID and Partners	Presentation of proposed value chains and process for validation with partners	Completed

Outcome	Task	Deliverables	Achievement/Comments
distributors			
	Task 3.2.2: Assess Selected Value Chains with Regional Partners	Assessments of key constraints for three selected value chains with proposed interventions (coordinated with VCDPs below) Workshops to present and discuss assessments with regional member governments, ECOWAS and other partners	Assessed at validation workshops for the three value chains in Accra and Ouagadougou during Q1.
	Task 3.2.3: Select Regional Private Sector Association Partners	See task 3.2.4 below as deliverables apply to both 3.2.3 and 3.2.4	Selected COFENABVI, ORBV and ORO/AOC at the regional level, and CIC-B and GAPTO at the national level
	Task 3.2.4: Create a Value Chain development plan and build the capacity of regional associations	VCDP for each selected value chain updated yearly with monitoring of progress MOU and Capacity Building Plan for each selected private sector association partner aligned with the appropriate VCDP Initial PIVA assessments for each private sector association partner; with annual updates to identify progress against Capacity Building Plans Training of Trainer Manuals for association partners Models and user guides for contractual and payment arrangements to protect producers and long-distance traders	Initial VCDPs drafted in Q2 and completed in Q3. Completed for COFENABVI in Q3 after PIVA PIVA completed for COFENABVI in Q2.
	Task 3.2.5: Build linkages and support transactions through a network of Market Facilitators	Monthly market information reports and target deals for each target consumption market Periodic 'barriers to doing business' reports from buyers and distributors to feed into policy and advocacy efforts	Facilitators were hired and trained in Q2 and reporting began in Q3
Outcome 3: More effective advocacy by regional private sector and other non-governmental actors for regional and national policies in support of a conducive environment for increased regional agricultural trade	Task 3.3.1: Define regional advocacy plans by value chains	Annually updated VC Advocacy Plan as part of the VCDP including Top Advocacy priorities	ATP assisted partners to develop their own advocacy plans; advocacy plan for the maize VC is completed, and that for livestock and will be ready by September 2009.
	Task 3.3.2: Provide advocacy assistance and grants to apex and value chain organizations	MOU and Capacity Building Plan for Apex Associations ORO, COFENABVI, GAPTO, APLS and CIC-B updated and monitored annually	ATP assisted partners to develop their own capacity building plans through PIVAs, with assistance specified in MoUs (see 3.2.3/3.2.4)
	Task 3.3.3: Support Key Events to Highlight Priority	Two advocacy events per year in support of Value Chain Advocacy	One event covered in Dakar (FAO/CMAAOC workshop)

Outcome	Task	Deliverables	Achievement/Comments
	Issues	Plans	in July 09
Outcome 4: Improved efficiency of trade transactions and regional market access, in particular through the improvement of regional market information system	Task 3.4.1: Building on existing systems for market information and move them closer to meeting the real needs of the users	Assessment, workshop and action plan for ATP support to public sector MIS Private sector MIS for selected commodities launched in one trade corridor with busylab	Collaboration initiated with CILSS with ATP's contribution to CILSS-sponsored workshops and MoU to be signed by September 2009. Partnership with esoko networks is operational in four countries,
	Task 3.4.2: Mobilize finance in the cereals value chain through warehouse receipts	DCA agreements in place with at least two regional banks to provide guarantees for at least \$10 million in lending	Access to Finance STTA carried out and Finance Specialist just recruited
	Task 3.4.3: Mobilize finance in the cereals value chain through warehouse receipts	Pilot warehouse receipts program implemented in one selected country	Action plan available

9. PROJECT MANAGEMENT

9.1 STAFFING

The ATP project faced performance issues with its Onion/Shallot VC Leader, Alseny Soumah, and had to terminate his employment contract effective June 30. Mr. Soumah was a great field implementer but lacked the regional coordination and reporting experience to carry out his duties to the level required.

Decision was made upon COTR's advice to pursue placement of an Agriculture VC Policy Advisor at ECOWAS in Abuja. Frank Ofei has accepted to take that position. USAID and ATP will seek ECOWAS Commissioner's approval of that placement and discuss modalities.

The ATP project is approaching full staffing with only two unfilled positions: Financial Services (Mobilization) Advisor and market facilitator in Cotonou and the replacement for the Onion/Shallot VC Leader. Three final candidates for these positions were identified, Daouda Sakho, Eric Newman, and Issa Djibrilla, and are negotiating their compensation package. After notice to current employers, these candidates should join the ATP team on/about September 1.

TABLE 6: STAFFING MATRIX

Position in Accra	Hire	Type	Start Date	Comments
COP	Ismael Ouedraogo	Intl.	5/5/08	
Finance & Admin.	Patrick Addai	LCN	6/5/08	
Policy Advisor	Frank Ofei	LCN	6/15/2008	Half time working from Ghana
Driver	Jeffrey Edue	LCN	6/23/08	
Operations Manager	Christel Tshikudi	Intl.	8/4/08	
Office Maintenance	Gabriel Dzikunu	LCN	9/15/08	
Communications Specialist	Felix Deyegbe	LCN	10/1/08	
IT Specialist	Nana Akwasi Boaitey	LCN	10/20/08	Replaced Francis Anim
M&E Specialist	Chris Amedo	LCN	11/5/08	
Office Assistant	Edith Mills-Tay	LCN	12/12/08	Replaced Philip Essuman
Transport Advisor	Kossi Dahoui	TCN	12/22/08	
MIS Specialist	Olivier Kabre	TCN	1/1/09	
Grants Manager	Bernardin Gatete	LCN	4/15/09	
Finance Mobilization Specialist	TBD	TBD		
Position in Ouagadougou	Hire	Type	Start Date	Comments
DCOP	Raphael Vogelsperger	Intl. (TCN)	5/22/08	
Maize VC Coordinator	Rose Lum Wanzie	TCN	6/9/08	
Onion VC Coordinator	TBD	TCN		Replacement for Alseny Soumah
Janitor/Office Assistant	Seyba Zeba	LCN	07/01/08	
Admin./Office Manager	Lucienne Bambara	LCN	07/07/08	
Boukari Nebie	Driver	LCN	08/21/08	
Livestock VC Coordinator	Seydou Sidibe	TCN	9/1/08	
Capacity Building Specialist	Jules Sombié	LCN	10/15/08	Replaced key personnel Prosper Bissi, who never

				took the job
Office Assistant	Souleymane Belem	LCN	2/16/09	Replaced a temporary hire
Market Facilitators	Hire	Type	Start Date	Comments
Accra	Haruna Agesheka	Consultant	5/1/09	Contracted through GAPTO
Abidjan	Daouda Diomande	Consultant	6/1/09	
Cotonou	TBD	LCN	TBD	

9.2 TRAVEL

Table 7 below lists travel made between April and June 2009 and their purpose.

	Date of Travel	Countries	Travelers	Purpose
1	13/4/09 - 9/5/09	Ghana, Burkina Faso, Niger, Mali	Daouda Sakho, Samuel Kouame	Develop a three-year plan for improving access of key regional value chain participants to finance for ATP.
2	19/4/09 - 25/4/09	Niger	Alseny Soumah, Jules Sombie, Felix Deyegbe	Conduct a Partner Institutional Viability Assessment (PIVA) on livestock/meat organizations of ORO.
3	19/4/09 - 25/4/09	Ghana, Burkina Faso	MariaClaudia DeValdenebro	Train ATP staff on report/document production and formatting.
4	25/4/09 - 16/5/09	Ivory Coast, Burkina Faso, Ghana	Seydou Sidibe, Nicholas Kulibaba	Discuss public private partnership (PPP) opportunities with commercial organizations in the livestock sector and to develop draft producer-buyer contracts and Memoranda of Understanding for those PPPs.
5	3/05/09 - 19/05/09	Ghana, Burkina Faso, Niger	Marelia Martinez, Kossi Dahoui	Work towards reducing the incidence of physical barriers to moving onion from Niger to Ghana.
6	2/05/09 - 17/05/09	Ghana, Burkina Faso, Niger, Bamako	Frank Ofei, Daniel Plunkett	Carry out a study on the ATP Value Chain Trade Barriers in the Bawku-Ouagadougou-Niamey-Bamako transport corridors.
7	12/05/09 - 22/05/09	Burkina Faso, Cote d'Ivoire, Niger	Olivier Kabre	Work on the categorization of the ATP Value Chain products to facilitate the linkage between the operators.
8	9/05/09 - 17/05/09	Ghana	Rose Wanzie, Jules Sombie, Nebie Boukari	Conduct a Partner Institutional Viability Assessment (PIVA) session for Ghana Agricultural Producers and Traders Organization (GAPTO) as well as carry out training on trade data collection and information needs assessments with maize organizations in Techiman, Ejura and Wenchi.
9	8/06/09/ - 12/06/09	Burkina Faso	Kossi Dahoui	Discuss strategies to analyze and publish the ATP onion, maize and cattle road harassment data.
10	12/06/09 - 21/06/09	Ghana	Rose Wanzie	Organize and participate in a roundtable stakeholders workshop on warehouse receipt.
11	11/06/09 - 21/06/09	Ghana	Sophie Walker	Conduct a stakeholder workshop in Kumasi on warehouse receipt systems, which will result in the launching of a pilot project for such a system in Ghana.
12	18/06/09 - 21/06/09	Ghana, Burkina Faso	Felix Deyegbe, Laura Dillon	Develop an effective communications strategy and provide communications training to the ATP project staff.

13	23/06/09 - 30/06/09	Burkina Faso	Olivier Kabre	Meet with the Value Chain Leaders to plan activities for the year 2009.
14	28/06/09 - 11/07/09	Burkina Faso, Niger	Christian Amedo, Bernardin Gatete	Establish baselines and conduct training for enumerators on trade collection procedures and provide orientation and training on trade data processing and transmission to grantees.

9.3 PROGRESS REPORT, AND OTHER CONTRACTUAL DOCUMENTS

ATP submitted its fourth quarter progress report at the end of April and was approved by COTR.

The project received the second task order modification that included clauses addressing:

1. environmental impacts and resulting environmental mitigation and monitoring actions for the ATP program activities;
2. revised schedules for progress reports, annual workplans and PMP, and period of performance; and
3. increased funding sub-obligation.

ATP also received a revised COTR designation letter with increased delegation of authority from RCO.

ATP received draft of the USAID WA Initial Environment Examination (IEE) for the agriculture portfolio. However, the team was confronted with challenges while attempting to understand the extent to which the project is affected by the regulations in that IEE. ATP sought approval to work with Abt Associates' Environment Expert, Carey Yeager, to put in place an environmental impact screening process and mitigation measures for its activities and grants. In addition, the project requested training by USAID WA Environment expert.

9.4 AGREEMENTS

ATP entered into agreements with the following organizations:

	Period of Performance	Organization	Amount	Purpose
1	1/05/09 – 31/3/10	GAPTO	GHC 42,840	Contract Haruna Agesheka as ATP Market Facilitator in Ghana
2	22/06/09 – 30/09/12	ORO/AOC	FCFA 59,810,000	Provide support for data collection on intra-regional onion/shallot trade flows
3	22/06/09 – 30/09/12	COFENABVI	FCFA 60,649,600	Provide support for data collection on intra-regional livestock and meat trade flows
5	22/06/09 – 30/09/12	CIC-B	FCFA 49,290,000	Provide support for data collection on intra-regional maize trade flows

9.5 OTHER ADMINISTRATIVE ISSUES

The ATP project benefits from VAT waiver in some countries because of the agreement between USAID and CILSS and the bilateral agreement with the Government of Ghana. However, it continuously encounters problems in non CILSS countries, e.g. Côte d'Ivoire and Benin. Challenges arose while negotiating a contract with a market facilitator in Côte d'Ivoire, as local laws mandate not only 7.5% honorarium withholding and payment but also 18% VAT payment for professional services. These taxes seem excessive for independent consultants working on a USAID project. The ATP project will work with ECOWAS and UEMOA to waive VAT liability of the project in ECOWAS countries.

Both offices in Accra and Ouagadougou terminated their office tenancy agreements at the end of June. The landlord in Ouagadougou was dissatisfied with the non-renewal notification and threatened to start proceedings against the project claiming that he made financial commitments to his bank (loan) in consideration of the project 4-year duration. However, the project abided by the terms of the lease agreement and notified him three months prior to the end of the annual lease.

10. PIPELINE ANALYSIS

CONTRACT BUDGET CATEGORY	BUDGET AMOUNT	ACCRUED EXPENDITURES TO 6/30/09	REMAINING BALANCE
DIRECT LABOR (including Fringe)	3,627,240	893,791	2,733,449
OTHER DIRECT COSTS	3,035,178	1,147,486	1,887,692
SUBCONTRACTS , CONSULTANTS, GOVERNMENT PROPERTY, GRANTS	7,509,641	1,284,291	6,225,350
INDIRECT COSTS	1,705,903	759,709	946,194
FIXED FEE	1,032,068	263,486	768,582
TOTAL	16,910,030	4,348,763	12,561,267
PIPELINE ANALYSIS			
FUNDED AMOUNT (OBLIGATION)			6,333,536
TOTAL BUDGET			16,910,030
LESS EXPENSES THROUGH 6/30/09 TO LAST QUARTER			4,348,763
OBLIGATION BALANCE ON 6/30/09			1,984,773
BUDGET BALANCE ON 6/30/09			12,561,267
MONTHLY AVERAGE BURN RATE			310,626
PIPELINE MONTH OBLIGATION AT CURRENT MONTHLY BURN RATE			6
PIPELINE MONTH BUDGET AT CURRENT MONTHLY BURN RATE			40
PROJECTED MONTHLY BURN RATE FOR NEXT QUARTER			325,000
PIPELINE MONTH OBLIGATION AT PROJECTED MONTHLY BURN RATE			6
PIPELINE MONTH BUDGET AT PROJECTED MONTHLY BURN RATE			39