



USAID
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QUARTERLY REPORT 06 – July-September 2007

ETHIOPIA AGRIBUSINESS AND TRADE EXPANSION PROGRAM

“Increasing Rural Incomes and Employment”



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USAID Agribusiness and Trade Expansion Program

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1.0 Executive Summary

This is the sixth quarterly report for the Ethiopia Agribusiness and Trade Expansion Program (the project) covering the period July 1, 2007 to September 30, 2007. The project works with public and private sector partners throughout Ethiopia to improve agricultural sales and competitiveness. Areas of emphasis include improving agronomic practices, introducing value-added and productivity-enhancing technologies, promoting investments, establishing grades and standards, improving air freight capacity and other infrastructure upgrades, and creating linkages with buyers in East African, Middle Eastern, European, Japanese and US markets.

Assistance this period focused on preparing producers and exporters for the approaching harvest and export seasons. Major achievements this quarter include:

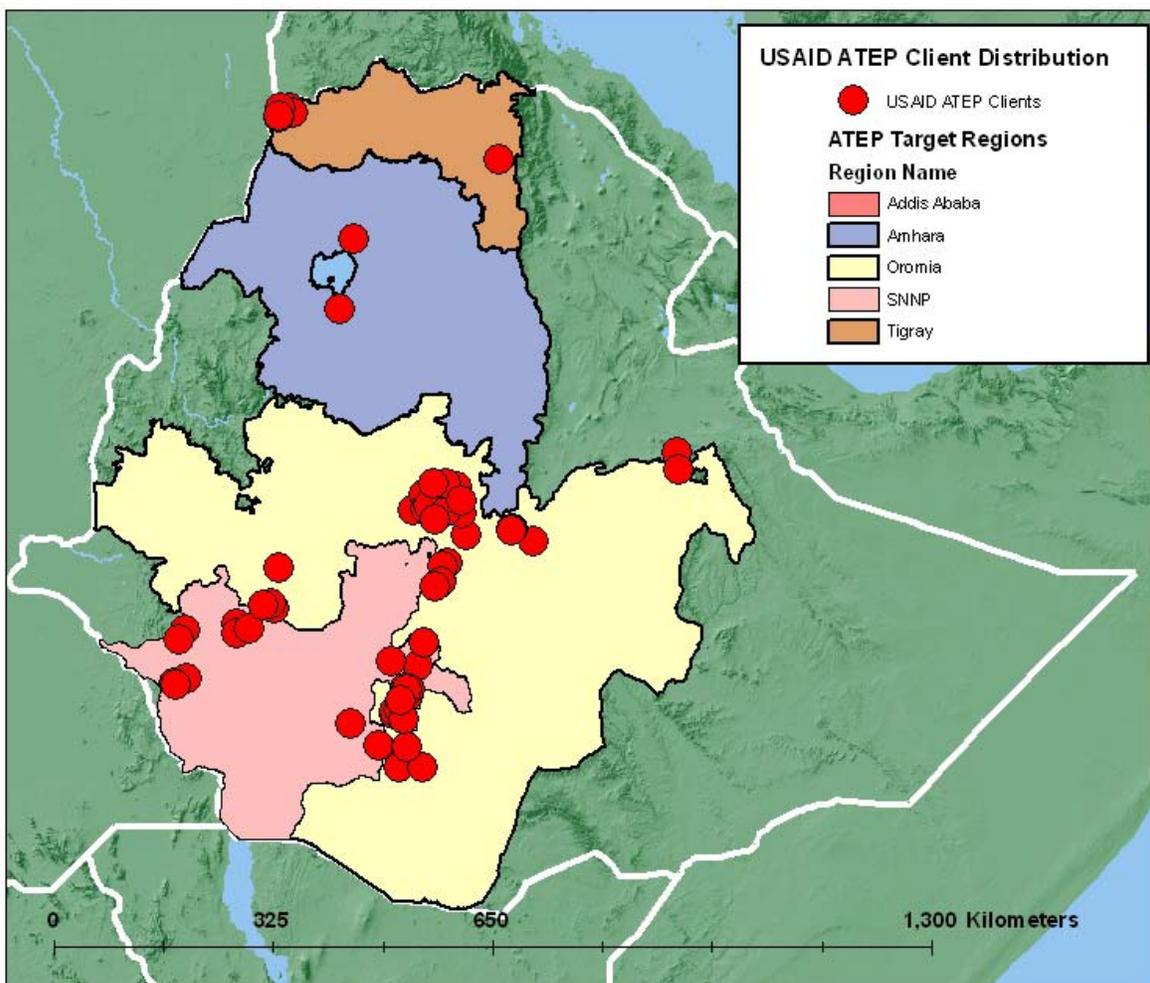
- **\$3.6 million in client and partner investments leveraged** to date in improved agricultural production and processing technologies (production systems, processing equipment, infrastructure, etc.). This represents four times the amount of Technology & Partner Fund dollars which USAID has invested.
- **Over 14,000 coffee farmers, processors, collectors, suppliers and extension agents were trained** in harvest and postharvest practices. The core focus of this Millennium Training Coffee Campaign was picking cherries at proper ripeness, and use of clean packing and storage materials, which should translate into increased volumes, quality, and sales this November harvest season. It was the first event of its kind in the country, and the first time many participating small farmers had ever received training.
- **Establishment of a propagation and distribution program for White Haricot seed** was achieved through an agreement with the Melkasa Research Center and Catholic Relief Services. Currently, farmers do not have access to quality seed for preferred bean varieties and are doing their own multiplication, leading to low quality and poor yields. This program has the potential to benefit 15,000 – 20,000 farmers by generating 2,000 MTs of certified quality seed, significantly increasing yields and sales.
- **US market sales for TAYTU leather apparel and accessories** were achieved at a New York City-based trade show. This high-end Ethiopian brand is the result of twelve companies (which employ hundreds, and source raw material from thousands) combining resources to better meet export market demand.
- **Two inward missions for Dutch produce buyers** were implemented, with orders secured for herbs, peas, beans and chillies; and two new products were trialed for introduction in the new export season (raspberries and high-altitude field flowers).
- **Ethiopian specialty coffee was promoted** at a Japanese trade fair; and 32 Ethiopian coffee cuppers were trained by international cupping experts in anticipation of the launch of the Q Program here (which means that exporters, for the first time, will be able to certify qualified coffees as “specialty” using the leading international certification).

Project expenditures are on target. To date, \$5,106,050, or 51 percent of the project budget has been expended. The updated PMP is attached as an annex to this report. This document and all other project publications are available to USAID through the password-protected ATEP intranet site: www.fintrac.com/ethiopia.

2.0 Introduction

The Agribusiness and Trade Expansion Program (“the project”) is a three-year initiative of the United States Agency for International Development (USAID) that is improving the productivity and sales of thousands of Ethiopian farmers, processors, traders and exporters. These clients produce and export a wide range of products, including horticulture, coffee, oilseeds, pulses, and hides, skins and leather goods.

ATEP technicians transfer technologies, train local trainers, and providing direct technical assistance to producers, traders, processors, and exporters, including over 66,000 smallholders. In the eighteen months since project inception, export quality from participating coffee, sesame, and hides producers has increased; model packhouses, collection centers, and cupping labs have been built; export programs for new fresh produce items have been established; and buyers from around the world are sourcing Ethiopia’s agricultural exports. In addition, the project addresses cross-cutting issues in policy, organizational development, BDS/partner alliances, gender mainstreaming, environmental management, and HIV/Malaria. Its geographic coverage includes Tigray, Amhara, Oromia, and the SNNPR.



3.0 Progress to Date

This section provides a summary of activities carried out in each sector, pegged to the performance monitoring plan (PMP) approved by USAID and the Project Steering Committee (Annex I).

3.1 Section 1: Startup, Communications, and Reporting

Three Monthly Bulletins were completed and distributed to USAID, Steering Committee members, and counterparts. The Performance Monitoring Plan was updated as of September 30th 2007. Financial reports on monthly expenditures against the obligated budget were submitted with each monthly invoice. These reports along with the updated inventory list, approved Partner and Technology Fund agreements and expenditures, and Level of Effort reports are all available at the project's intranet site: www.fintrac.com/ethiopia

3.2 Section 2: Monitoring & Evaluation Activities

The project team continued to input information into the project's Client and Impact Results Information System (CIRIS), including technical assistance and training activities, and client sales and investments achieved to date. CIRIS reports can also be downloaded at the project's Intranet site: www.fintrac.com/ethiopia

3.3 Section 3: Marketing and Investment Activities

Clients are provided with market information, trade mission support, and assistance in preparing business plans and loan applications with the three private banks participating in the USAID Development Credit Authority (DCA) loan guarantee program in Ethiopia.

Market Information

The fourth group of Quarterly Market Bulletins for each of the four targeted sectors were completed. These bulletins are developed in cooperation with the four main counterpart associations for each targeted sector: The Ethiopian Horticulture Producers and Exporters Association (EHPEA), Ethiopian Coffee Exporters Association (ECEA), Ethiopian Leather Industry Association (ELIA), and the Ethiopian Pulses, Oilseeds & Spices Processors Exporters Association (EPOSPEA).

Business Planning & Loan Applications

To date, the project has helped current and prospective clients develop a total of 43 business plans including feasibility studies for production and value-added processing activities.

After the Millennium celebrations in September, the project presented an overview of investment opportunities in our sectors to the large diaspora community that had returned to Addis Ababa.

Trade Missions and Special Events

In August, the project co-financed the participation of ECEA at the Specialty Coffee Association of Japan (SCAJ) trade fair to promote the wide range of specialty coffees available from Ethiopia. In September, the TAYTU delegation of leather product and accessories manufacturers attended "the Train" tradeshow in New York City, showcasing the group's

summer 2008 collection.

Inward buyer missions included a Hungarian importer of leather gloves and two Dutch fresh produce importers.

3.4 Section 4: High-Value & Added Value Horticultural Program

The project continued its intensive training and technical assistance activities with lead clients and beneficiaries in support of vegetable and floriculture exports, and local market supply of vegetable crops to fresh and processing buyers.

Clients

To date, 22 lead clients including producers, farmer groups, exporters, etc. and 397 beneficiary farmers (working directly with lead clients) are receiving ongoing technical assistance and training from the program's field technicians. Export crops include Bobby beans, snow peas, sugar snap peas, baby corn, chillies and courgettes, as well as smallholder flowers. New crops added to the program include raspberries and table grapes. Major crops produced for the domestic market include tomatoes, potatoes, onions, chillies and cabbage.

Technical Assistance

The project has carried out 812 technical assistance visits to horticulture client farms to date that have focused on land preparation, mulching, seedling production, drip irrigation, pest and disease control including IPM, use of hybrid seeds, and other agronomic areas for crops under production, as well as postharvest handling and analysis of production costs and margins. Technical assistance provided this quarter is supporting the next planting of crops in late September / October (once rains desist and remaining drip systems can be installed) that will be geared for export to Europe during the main importing season commencing in December.

Training

Field days continued for farmers with training in improved production, postharvest handling and GAP protocols. A total of 84 on-farm production training events covering horticulture crops have been carried out to date for 720 participants. Trainings this period included land preparation, seedling production, specialized crop practices (such as trellising of tomatoes) and GAP areas such as BRC protocol requirements. Two new demonstration farms have been established with trials for new varieties of local vegetables, including onions and hot peppers, at Kibbutz Ethiopia and Omega Farm, for a new market linkages with local food distributors. Counterpart EHPEA is also progressing with training on the National Code of Practice for floriculture, which includes IPM recommendations for which the project has already provided training and is coordinating further efforts.

A total of 429 farmers have also been trained in safe use of chemicals to date. Twenty-eight producers have also received advanced GLOBALGAP training and five clients (5) have achieved certification to date.

Marketing

The project hosted two inward buyer visits from the Hage and Greenery companies of the Netherlands. Two new export market crops have been identified for trials: raspberries at

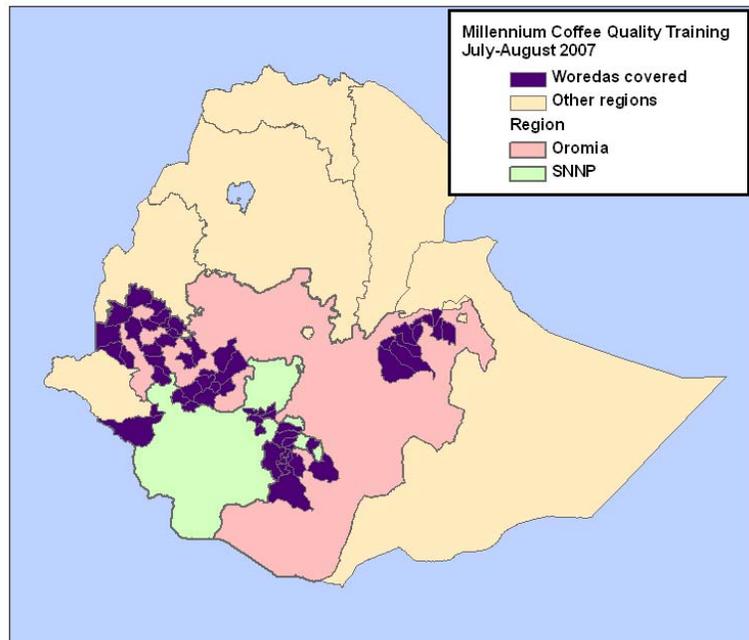
Florensis Organic, and high altitude field flowers (gentiana) at Marginpar. Other demonstration sites for export crops are being set up at Siet Agro, Chancho and Tabor Farms. Client crop programs being organized for the upcoming export season (December to April) include:

- Fresh herbs for the EU market;
- Snow peas (mangetout) and sugar snaps for the EU and Middle East markets;
- Fine beans for the UK and Bobby beans for Holland;
- Strawberries, capsicums and specialty tomatoes for the Middle East markets;

A smallholder marketing program is also under development to capitalize on opportunities for local market crops in Harge, Eastern zone, as well as low-value export crops by road and rail to Djibouti from this area. This is following an analysis in July conducted by project agronomists of opportunities for supplying buyers in Djibouti with fresh produce. A similar analysis of a smallholder program for the supply of a regional tomato processor is also being evaluated.

3.5 Section 5: Coffee Program

Coffee activities this quarter focused on preparing clients for the upcoming coffee harvest in November. This included a major industry-wide training program for farmers called the Millennium Coffee Training Campaign (see below). In August, the Coffee Industry Forum held its 6th meeting that included representatives from the private and public sector, as well as donors, with an agenda that covered efforts to enhance competitiveness and target areas for further development of the sector following the Millennium campaign. The project intends to continue use of Forum participation to expand training and maximize resources in the sector.



Clients

The project works with 22 lead coffee partners, comprised mostly of millers/exporters, and 16,037 beneficiary farmers. Twenty-seven training demonstration sites have been established in the western and southern producing areas for training of local farmers at field days and events such as the Millennium Campaign. The project has also leveraged \$597,203 of new client and counterpart investments in the coffee industry, consisting of mills, processing equipment, drying tables, etc.

Technical Assistance and Training

The majority of technical assistance for coffee farmers is provided through group trainings at

cooperative farms and coffee mills. To date, a total of 174 technical assistance visits were made to lead client farms.

Trainings this quarter centered around the **Millennium Coffee Training Campaign**. A total of 131 training events were carried out for 14,795 farmer beneficiaries as well as Ministry of Agriculture field technicians in anticipation of the next coffee harvest, to begin in November 2007. Training emphasis was on harvesting and postharvest practices at the farm level (picking cherries at proper ripeness, use of clean packing and storage materials, etc.). This was the first activity of its kind in Ethiopia, and the first time many farmers had received such training.

Cupping Activities

In September, international coffee experts Christina Garces and Kelly Peltier provided training for 12 “Star Cuppers” at ECEA’s coffee lab. The next part of this training will consist of exams in November 2007, when the first group of Star Cuppers will graduate to Q-Grader status. This will enable exporters to grade specialty and differentiated coffees against an internationally-recognized standard, and pave the way for high quality coffees to receive a premium in the international market.

The consultants also trained 19 cuppers at the five mini cupping labs based in the field and made recommendations for the lab facilities in anticipation of the approaching coffee harvest.

Certification

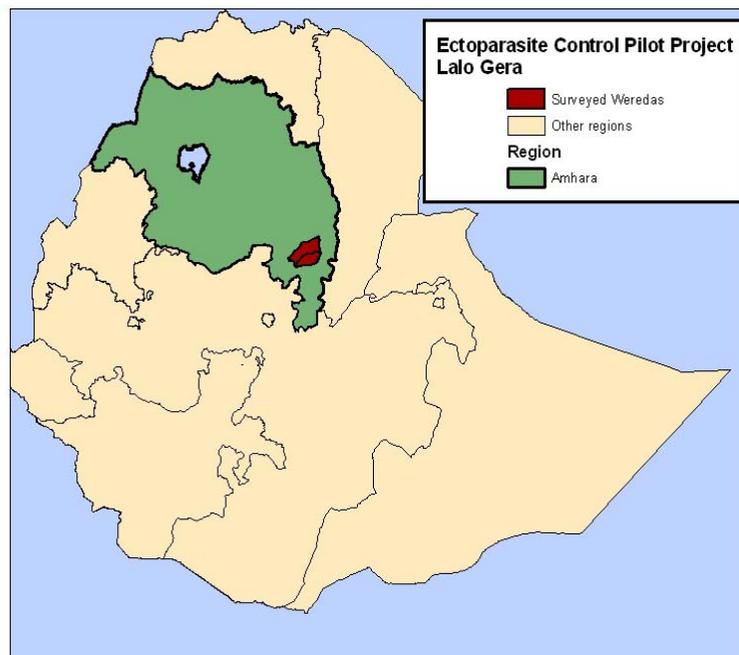
Rainforest Alliance certification of coffee farms continues, with over 8,000 hectares certified to date and plans in the works for certification of an additional 4,000 hectares in the next quarter.

3.6 Section 6. Hides, Skins & Leather Program

Clients in the HSL sector include all members of the value chain: farmers, abattoirs, tanners, traders and finished product manufacturers. The project continues its field-based training of rural livestock technicians in order to improve the quality of skins supplied to the industry, adding value to farmer sales in the process. The project is also working with abattoirs, tanners and traders in improving the quality and sales of HSL products on an industry level.

Clients

As of the end of this quarter, 50 lead clients/partners had received technical assistance and training representing thousands of beneficiary farmers. Collectively, partners and clients have made



investments totaling \$701,433 in the sector, including new and upgraded production and processing facilities.

Technical Assistance and Training

The project's training of Woreda-level technicians in ectoparasite control and improved skinning/flaying techniques is enabling rural producers improve the quality of their hides and skins, leading to reduced product rejection rates at tanneries and increased volumes sold. To date, the project has held 26 trainings for 303 technicians in the area of ectoparasite control, and 32 trainings for 527 slaughterhouse staff, and 563 collectors and traders in skinning/flaying and post-slaughter care. From the Lalogera project, after two rounds of ectoparasite treatments the quality of skins has improved dramatically (75 percent) as reported last quarter. Plans are underway for next two rounds of the ectoparasite control campaign in Lalogera, Amhara Regional State.

Supply Chain

A construction firm is presently finishing the thirty initial buildings of the HSL collection center network (27 were erected as of the end of September). The centers will recover hides and skins and create employment opportunities for up to 150 individuals, while the improved marketing network for HSL products is expected to benefit an estimated 30,000 households. The improvement in the quality of raw material destined for tanneries will also support the project's goal of fewer rejections and increased supplier revenues while also creating employment at the collection centers. It is anticipated that 186,000 skins will be marketed through the system, corresponding to around 10 percent of Ethiopia's skins produced in rural areas.

Export Market Development

In September, the project promoted the TAYTU "Made in Ethiopia" brand of leather apparel and accessories at "The Train" fashion show in New York City. This was the group's first attempt at sales and promotion in the US market, where its summer 2008 collection received initial orders worth \$20,000 from boutique owners throughout the country. The group received 150 different retail companies at its booth and also identified a US merchandising agent to help drive post-show orders. The project will support the group's attendance at one more tradeshow in October of this year in Paris, France.

The project also hosted an inward buying mission from representatives of a leather glove company from Hungary (Alpha Gloves), and arranged factory visits with potential suppliers.

3.7 Section 7: Oilseeds and Pulses Program

The oilseeds and pulses team is helping farmers improve yields and quality in order to qualify for higher grades and increase farm sales and employment.

Clients

The project is working with 24 lead clients engaged in oilseeds production, processing and marketing, including four large Farm Cooperative Unions (FCUs); a commercial farmers association; three investors; five smallholder farmers; and six exporters. These groups represent over 50,446 beneficiary client producers.

Technical Assistance and Training

This period saw 15 field-based trainings carried out for 816 beneficiary farmers in the areas of production, Integrated Pest Management (IPM), weed control, proper use of pesticides, quality standards and marketing of sesame in the Humera and Metema areas in northwest Ethiopia.

A major White Haricot seed propagation and distribution program was planned using the Technology Fund for farmers in Rift Valley, Eastern and Western Hararge Meetings in cooperation with Melkassa Research Center (MRC) and Catholic Relief Services (CRS). This program has the potential to benefit 15,000-20,000 farmers by generating 2,000 MTs of certified quality seed. Presently, farmers do not have access to quality seed for the preferred bean varieties such as White Haricot and are doing their own multiplication, leading to low quality and poor yields.

Work also continues with Hararge farmers in the Eastern corridor in the development of a business model with Farm Cooperative Unions (FCUs) that will result in improved production planning, inputs distribution, yields and sales with farmers throughout the region engaged in White Haricot bean production.

Processing

Following its successful loan application last quarter, processing client Prosper International has ordered the delivery of its new hulling plant for sesame seed. The equipment is en route to Ethiopia and is expected to be operational in the first quarter of 2008. The plant will clean an estimated 3,000 MTs of sesame purchased from farmers during its first year of operation, increasing to 7,000 MTs by year five. Profits from the cleaning and hulling operations will enable the group to enter more value-added activities such as tahini production over the next five years, further increasing the purchase of sesame from farmers and increasing value-added exports.

Warehouse Receipts

The project's Warehouse Receipts Specialist arranged a study tour to Kenya and South Africa from in July for MoARD and other Government officials. This tour was held to observe from the experienced institutions ways of establishing, implementing, and checking, systems of grades and standards for agricultural products. Such systems, once implemented, will help boost Ethiopia's grains and pulses commodities exports.

3.8 Section 8: Policy Intervention Activities

The project continues to identify and develop strategies to address critical policy constraints in the targeted sectors through technical advocacy, and by using a cluster approach to increase Ethiopia's agribusiness competitiveness.

Airfreight Logistics

The project organized a second visit to Nairobi airport and surrounding production areas in August for senior government officials. A pre-feasibility study for the expansion of cold storage and handling operations at Bole Airport is planned for early 2008.

HSL Cluster Activities

The project conducted the 4th leather industry competitiveness Cluster Working Group (CWG II) in July. The cluster consists of prominent business and government leaders involved in the HSL sector. A total of ten “action initiatives” are being acted on as part of the industry cluster business plan, which are expected to increase export volumes, quality and sales. One of these initiatives, the marketing of TAYTU “Made in Ethiopia” products was the main focus this period and is described in Section 3.6 above.

3.9 Section 9: Other Cross Cutting Activities

Cross-cutting activities include Technology and Partners Fund awards, gender mainstreaming, environmental activities, and HIV/Malaria.

Technology and Partners Funds

The project continues to identify and fund activities that support project objectives through the Technology and Partners Funds grant awards. To date, the project has budgeted a combined \$863,044 in these cost-sharing grants, leveraging partner commitments (including commercial loans obtained) of \$3,439,627, or \$3.98 for each dollar invested.

In terms of actual expenditures to date, the project has expended \$579,993 in partner and technology funds, leveraging client investments of \$1,147,796 (which represents \$1.98 for each USAID dollar invested).

Table 1: Technology Fund Awards through September 30, 2007

Award	Budgeted	Expended	Balance
01 Ectoparasite control materials and training	\$67,057.85	\$65,203.25	\$1,854.60
02 Coffee eco-pulping equipment	\$12,500.00	\$12,500.00	\$0.00
03 Cupping equipment for five regional coffee labs	\$21,230.00	\$21,201.75	\$28.25
04 Planting material for mangetout, sugar snap and chilli export trials	\$6,384.00	\$6,384.00	\$0.00
05 Modern drip irrigation systems installation and training	\$108,580.00	\$107,611.52	\$968.48
06 Improved coffee sun-drying beds	\$13,846.00	\$8,177.37	\$5,668.63
07 Planting material for fine bean and peas export trials	\$10,700.00	\$6,634.85	\$4,065.15
08 Modern drip irrigation pumping equipment	\$3,290.00	\$0.00	\$3,290.00
09 Eco-friendly coffee sun-drying beds	\$6,255.17	\$6,144.14	\$111.03
10 Materials for construction of crocodile ponds	\$18,264.37	\$18,039.69	\$224.68
11 Organic certification for coffee cooperatives	\$10,696.11	\$10,696.11	\$0.00
12 Upgrading hides and skins capacity of Legedadi Abattoir	\$14,857.15	\$7,274.68	\$7,582.47
13 Hides and skins collection and storage centers for Wondi Skins	\$17,143.00	\$8,500.21	\$8,642.79
14 Training for sesame producers in Amhara and Tigray	\$8,040.00	\$6,179.42	\$1,860.58
15 Planting materials for summer flower export trials	\$5,100.00	\$3,840.49	\$1,259.51
16 Modern irrigation systems for summer flower export trials	\$11,920.00	\$11,920.00	\$0.00
17 Coffee eco-pulping equipment for Limu Kossa	\$13,000.00	\$13,000.00	\$0.00

Table 1: Technology Fund Awards through September 30, 2007

Award	Budgeted	Expended	Balance
18 Oilseeds processing with Prosper International	\$50,000.00	\$50,000.00	\$0.00
19 Haricot seed propagation with Melkassa Research Station	\$15,414.58	\$0.00	\$15,414.58
20 Sun-drying coffee beds	\$13,379.69	\$4,682.62	\$8,697.07
21 Upgrading hides and skins at Suluta Abattoirs	\$16,125.00	\$0.00	\$16,125.00
Total	\$443,782.92	\$367,990.10	\$75,792.82

Table 2: Partner Fund Awards through September 30, 2007

Award	Budgeted	Expended	Balance
01 Inward and outward trade missions	\$58,950.00	\$15,566.78	\$43,383.22
(a) Coffee: Roundtable 2006	\$8,500.00	\$9,523.26	
(b) Horticulture: Buyer mission expenses	\$130.00	\$1,212.56	
(c) All: CCA meetings and presentation	\$3,360.00	\$0.00	
(d) HSL: Pan African Leather Industry Tradefair	\$25,000.00	\$0.00	
(e) Coffee: Roundtable 2007-08	\$9,000.00	\$0.00	
(f) All: TBD	\$12,960.00	\$0.00	
02 HSL collection centers with ELIA	\$38,220.00	\$18,934.79	\$19,285.21
03 HSL radio campaign for proper harvesting and handling	\$8,691.00	\$8,634.73	\$56.27
04 CQI Coffee Corps activities	\$62,812.00	\$51,489.23	\$11,322.77
05 Q-Grading program with CQI/ECEA	\$82,000.00	\$19,722.51	\$62,277.49
06 EAFCA trade show expenses	\$13,162.00	\$11,886.16	\$1,275.84
07 Hortiflora trade show expenditures	\$34,500.00	\$32,403.47	\$2,096.53
08 Coffee sector trade missions with ECEA	\$45,282.00	\$25,248.86	\$20,033.14
09 Capacity building for TAYTU	\$40,644.00	\$12,428.20	\$28,215.80
10 Coffee training in 81 woredas	\$35,000.00	\$15,688.74	\$19,311.26
Total	\$419,261.00	\$212,003.47	\$207,257.53

HIV/Malaria

Agreements have been made with Pathfinder and PSI to assist with HIV and malaria awareness programs at the same time project technicians are conducting farmer trainings on agronomy and harvesting. These activities are expected to start in late 2007 and early 2008.

3.10 Section 10: Global Results Targets

National export sales for the four targeted agricultural sectors for 2006 and 2007 to date showed an overall increase in value of \$254,940,000 over 2005 figures.

Client and counterpart investments to date have reached \$3,615,232. These have consisted of on-farm investments in infrastructure and technologies (drip irrigation systems, planting materials, packhouses, tractors, IPM materials, etc.) as well as improvements and upgrades to processing facilities such as abattoirs, oilseed plants, coffee mills, etc.

4.0 Planned Activities for Next Reporting Period

Horticulture

- Development of export programs with UK and Dutch produce companies for European import season commencing December 2007.
- Continue other vegetable export trials with lead clients;
- Develop eastern corridor initiative with smallholders for Djibouti
- Follow up with processing companies, including tomato and juice processing companies and evaluation of smallholder contracting programs with these groups.
- Scale up fruit development work on fruit crops including strawberries, table grapes and passionfruit.

Coffee

- Carrying out further training on cupping and export quality certification for “Star Cuppers” and regional cupping lab staff;
- Continue training lead clients on improved harvest and postharvest techniques as the harvesting season gets underway in November 2007;
- Completion of coffee harvest and auction/sales for previous 2006-07 season;
- Work with lead client millers on improved processing practices.
- Plan next coffee training campaign following success of MCTC through our Coffee Forum.

HSL

- Continue with training program for veterinarians (ekek control) and skinner/flayers (reducing damage);
- Continue with Lalogera eradication campaign in close co-operation with Pittards, which has committed financial support for this initiative.
- Commission and official launch of hides/skins collection centers;
- Plan Fifth competitiveness cluster meeting for January 2008.
- Follow up on TAYTU sales enquiries from New York and Paris tradeshows.

Oilseeds/Pulses

- Continue to identify lead clients in Tigray for oilseeds and Rift Valley area for pulses production;
- Conduct IPM trainings and find suitable storage for insect control in NW Tigray;
- Assist pulses and sesame processors with business planning and financing for new equipment;
- Promote warehouse receipts program, submit grades and standards for targeted oilseeds/pulses to MoARD for adoption;
- Provide specialized assistance during the forthcoming sesame harvest in November to avoid post harvest losses in Humera.

Trade and Investment

- Continue business planning with current and prospective clients;
- Work with private companies in targeted sectors to access financing;
- Complete quarterly marketing bulletins for four associations.

USAID-ATEP - Workplan & Performance Monitoring Plan for 3-Year Base Period (version 13, sixth quarterly report 9/30/07)

Act- ivity #	Activity	2006			2007												2008				2009	Deliverable/Result	Verification of Milestone Achievements	Numerical Target Status		Summary Schedule Status				Comments		
		Q2	Q3	Q4	J	F	M	A	M	J	J	A	S	O	N	D	Q1	Q2	Q3	Q4	Q1			Achieved to Date	Balance Remaining	DONE	Ahead	On	Behind			
3.6	Support high-potential producers and/or processors participating in international trade shows and fairs			6				2		2					2		4		2		20	producers/processors participate in international trade shows and fairs	regular project reporting	25	(5)	X					Lyon 4, Cairo 5, EAFA 8, Hortiflora 2, SCAA Long Beach 2, SCAJ Japan 2, The Train Fashion Show New York 2	
3.7	Support inward buyer/ investor missions across sectors		1	2				2									2		1		10	buyers provided support for inward buying and investment missions	regular project reporting	29	(19)		X				Various buying missions and conferences	
3.8	Strategy and action plan for sustained access of market information developed			1																	1	action plan and strategy developed	Copy of plan	1	-	X						
3.9	Develop partnerships with local BDS partner(s) to provide market information services (at least one for each sector)			1				1									1				4	BDS partnerships developed/Partner fund agreements operationalized	CIRIS, Copy of agreements	1	3				X		EHPEA	
3.10	MOARD, four main trade associations and other organizations' staff trained in agribusiness market information systems and export analyses		2	2	2												2				12	workshops	CIRIS	13	(1)		X					
			20	20	20													20				120	people trained in market analyses	CIRIS	176	(56)		X				
3.11	Training support to domestic market price reporting systems MOARD		1	1					1											1	6	domestic market price reporting systems training	regular project reporting	2	4				X			Central Statistics Authority (CSA) has a system to monitor prices (for the calculation of inflation).
4	High-Value and Added-Value Horticulture Program																															
4.1	Initial selection of Lead Partners (exporters, farmer groups, processors, individual farmers) & development of partner-specific activity workplans		10	15				10									5				75	lead partners identified and partner-specific activity workplans developed	CIRIS (lead partner data & workplans)	22	53				X			22 partners with agreements signed
4.2	Beneficiaries of lead partners identified and representative M&E data collected		0	70	25			25									50				355	beneficiary farmers supported directly through lead partners	CIRIS	397	(42)		X					Eteco: 30, Zi-Andeta:300, Ethioflora: 67
4.3	Product-specific and technology-specific technical manuals, bulletins and other technical materials produced and disseminated (production, postharvest, processing)	2	7	9	4			4									4	4	4	4	50	technical manuals, bulletins and other technical materials produced and disseminated	copies of materials	22	28				X			These in draft form, not yet finalized
4.4	On-Farm Extension Program		100	270	50	50	50	50	75	75	90	90	90	90	90	270	270	270	270	270	2610	On-farm extension visits made by program agronomists	CIRIS extension logs	812	1,798				X			
4.5	On-Farm Group Training Events		10	27	5	5	5	6	6	8	9	9	9	9	9	27	27	27	27	27	261	training events	CIRIS training logs	84	177				X			
			50	135	25	25	25	30	30	40	45	45	45	45	45	135	135	135	135	135	1305	participants at training events	CIRIS training logs	720	585				X			
4.6	Training in postharvest handling			50																	500	participants in postharvest training events	CIRIS training logs	149	351				X			Training in postharvest management and food safety
4.7	Technical assistance to packhouses and micro- to large-scale horticultural processors (layout and design, equipment recommendations & sourcing, new technology demos, etc.)			5				2													40	packhouses and processors assisted	TA logs (CIRIS)	6	34				X			Trainings and technical assistance provided by Jonathan Parkin and Benjamin Mwangangi to Tabor Herbs, Jordan Herbs, Prins Vegetables, Upper Awash, Ethiovegfru and Ilan Tot

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Act- ivity #	Activity	2006			2007												2008				2009	Deliverable/Result	Verification of Milestone Achievements	Numerical Target Status		Summary Schedule Status				Comments																						
		Q2	Q3	Q4	J	F	M	A	M	J	J	A	S	O	N	D	Q1	Q2	Q3	Q4	Q1			Achieved to Date	Balance Remaining	DONE	Ahead	On	Behind																							
4.8	New processed products for local and export market developed				1				1	1	1	1	1	1				3			10	new products developed	regular project reporting	-	10			X																								
4.9	Packhouse and processing training program (in-plant & workshops & seminars)				15	15	20				15	15	20	15	15	20		50	50		250	participants in processing training events	CIRIS training logs	-	250			X																								
4.10	Food Safety Systems & HACCP Program			2					2									4			12	food processing firms implement food safety systems (e.g. HACCP or other)	client certification records; other project reporting	-	12			X		Training in BRC and HACCP provided to 55 trainees by Jonathan Parkin and Benjamin Mwangangi																						
4.11	Establishment of demonstration sites at regional educational institutions (farm & microprocessing)								2												2	demonstration farms established with educational partners	Alliance agreement; regular alliance reporting; CIRIS	-	2			X																								
4.13 Local Market Vegetable Program																																																				
4.13.1	Demonstration farms established with Farmer Groups			15											3	3	4	3	3	4		55	demonstration farms established in key production regions		13	42				X																						
4.13.2	PF# TBD: Improved Seed and Production Technologies - Demonstration Plots (TBD)			1	1																3	Partner Alliance established with input suppliers	Alliance agreement; regular alliance reporting; CIRIS		3			X			Program under development																					
4.14 Export Market Development Program (EUREPGAP, SPS Compliance, Food Safety & Product Traceability)																																																				
4.14.1	Work with major exporters to identify target groups for GlobalGAP certification																						Target groups identified	Regular project reporting					X			Target lead farmers identified.																				
4.14.2	Provide technical assistance and training to support quality/safety protocol compliance and/or certification of exporters and smallholders (such as GlobalGAP, MPS, EHPEA Code of Conduct, etc)				50																300	Growers assisted on quality/safety protocol certification	CIRIS reports	22	278				X																							
4.14.3	Support development and implementation of EHPEA Code of Practice and provide technical assistance and promotional support on international accreditation to counterparts				2				1												7	Support activities with counterpart organizations completed	Press articles; speaker lists, event report	2	5			X			Participation in the official launch of the Floriculture Industry Code of Conduct, KENYAGAP launch																					
4.14.4	Support development of local certification capability - ("train the trainers" program; direct support to private certification companies)			10																	50	individuals receive advanced training in EUREPGAP protocol and certification requirements	CIRIS training logs; partner training logs	28	22		X			Training of 28 managers. Total people trained in EUREPGAP: 140																						
4.14.5	Development of local certification capability - ("train the trainers" program; direct support to private certification)																				1	regional firm provide new or improved certification services	Certification received from EUREPGAP	-	1			X																								
4.14.6	Support implementation of safe use of chemicals, and identify more farmers for safe use training, and provide training directly and through farmers			300	100	100	100	100	100	100	100	100	100	100	100	100	500	500	500	500		3500	farmers trained in safe use of farm chemicals	CIRIS training logs; partner training logs	429	3,071				X	Production systems 273, Use of chemicals 16, EUREPGAP 140 (total 23 events). Training Strategy designed.																					
4.15 Export Market Development Program (New Product Development)																																																				
4.15.1	Determine target products through production, market, and competitive analysis		3	1																		8	target crops identified over life of program based on current and changing market conditions	market surveys, competitiveness assessments, production analyses	11	(3)	X				Mangetout, sugar snap peas, snow peas, baby corn, chillies, okra, baby courgettes, french beans, summer flowers, raspberries, organic peas, gentiana																					
4.15.2	Detail program activities and interventions for target crops (most likely are listed below)																												X																							

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Activity #	Activity	2006			2007												2008				2009	Deliverable/Result	Verification of Milestone Achievements	Numerical Target Status		Summary Schedule Status				Comments									
		Q2	Q3	Q4	J	F	M	A	M	J	J	A	S	O	N	D	Q1	Q2	Q3	Q4	Q1			Achieved to Date	Balance Remaining	DONE	Ahead	On	Behind										
5 Coffee Program																																							
5.1	Initial selection of Lead Partners (processors, exporters, cooperatives, other farmer groups) & development of partner-specific activity workplans	2	9	9																								30	lead partners identified and partner-specific activity workplans developed	CIRIS (lead partner data & workplans)	22	8		X					
5.2	Beneficiaries of lead partners identified and representative M&E data collected	300	1350	1350																								4,500	beneficiary farmers supported directly through lead partners	CIRIS	16,037	(11,537)		X				Includes outgrowers, individual farmers and cooperative associations	
5.3	Technical manuals, bulletins and other technical materials produced and disseminated		2	1	1				1																			10	technical manuals, bulletins and other technical materials produced and disseminated	copies of materials	3	7				X		Processing and Harvesting, Agronomical practices, Mulching	
5.4	On-Farm Extension Program (improved production practices- pruning, weeding, composting, harvesting)		30	90	40	40	40	40	40	40	40	40	40	40	40	40	120	120	120	120	120							1,200	On-farm extension visits made by program agronomists	CIRIS extension logs	174	1,026				X			
5.5	On-Farm or Mill Group Training Events (improved management practices)		10	30	10	10	10	10	10	10	10	10	10	10	10	10	30	30	30	30	30							310	training events	CIRIS training logs	131	179				X			
			250	750	250	250	250	250	250	250	250	250	250	250	250	250	250	750	750	750	750	750							7,750	participants at training events	CIRIS training logs	14,795	(7,045)		X				Millennium Quality Coffee Training took place in July and August 2007
5.6	Demonstration sites established at cooperatives/private farms for improved production, pulping technology, washing, drying and grading of beans			3	2				2																			12	demonstration sites established	Technology Fund Investment reports; CIRIS	27	(15)		X				Max 3 per client	
5.7	Establishment of low-cost cupping labs				5																							5	low-cost cupping labs established	Technology Fund Investment reports; CIRIS	5	-	X					Teppi Coffee Farmers Union, Wotoma Bultuma Cooperative, Bench-Maji Coffee Forest Union, Gololcha Cooperative, Koga Cooperative/Yiracheffee	
5.8	Training to develop improved local skills in cupping to determine specialty grades, defects, etc.			5	3				3									3	3									23	trained in cupping techniques	CIRIS training logs	32	(9)	X					19 cuppers at low-cost cupping labs locations and 12 private cuppers trained in Q Grading in Addis Ababa	
5.9	National preselection and international cupping & promotional events supported, support inward buyer missions			1	1																							3	events supported	regular project reporting	4	(1)	X					Coffee Roundtable 2006, EAFCA 2006, SCAA Long Beach 2007, SCAJ Tokio 2007	
5.10	Training in Rainforest Alliance third party certification process				1																							2	trained in third party certification process, Wellega and Kafa	CIRIS training logs	1	1				X		Training local certifiers to ensure sustainability.	
5.11	Land area certified: Organic, RA, FairTrade, UtzKapeh																											Y1: 12,500 ha Y2: 22,500 ha Y3: 32,500 ha	Hectares certified starting from baseline of 1,831 ha in 2005	CIRIS	13,413				X		including Organic and Rainforest Alliance certifications, RA=8,207 ha, Organic= 5,206 ha, 4,000 additional hectares planned for		
5.12 Coffee Program-Specific Impact Targets																																							
5.12.1	Total value of overall coffee exports increases																											\$209,000,000	value of increase in annual coffee exports	Trade and industry statistics	\$93,328,000	\$115,672,000				X		Export data taken from MOTI. Cumulative increase in sales (Jan 06 to Sept 07) over 2005 baseline figure.	
5.12.2	Total value of specialty coffee exports increases																											\$57,000,000	value of increase in specialty coffee exports	Trade and industry statistics	\$44,919,802	\$12,080,198				X		Base year (2005/06): \$51,956,290.03 Year 1 (2006/07): \$71,221,076.06 Incremental sales for July-Sept 07: \$25,655,015.81	
5.12.3	New Client investment in new processing and cupping technology																											\$1,600,000	value of client and counterpart	CIRIS	\$597,203	\$1,002,797				X		Confirmed investment	
5.12.4	Average yield and/or sales increases by program-supported farmers																											Y1: 10%	average yield increase for assisted farmers	CIRIS	152%						X		Increase in sales of \$9,892,398 for the 22 program-supported farmers, from baseline \$6,509,632 to \$16,402,031
																	Y2: 20%																						
																Y3: 25%																							

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		Q2	Q3	Q4	J	F	M	A	M	J	J	A	S	O	N	D	Q1	Q2	Q3	Q4	Q1			Achieved to Date	Balance Remaining	DONE	Ahead	On	Behind									
6 Hides, Skins & Leather Program																																						
6.1	Initial selection of Lead Partners (producers, abattoirs, traders, tanners, manufacturers) & development of partner-specific activity workplans		15	15	5																							45	lead partners identified and partner-specific activity workplans developed	CIRIS (lead partner data & workplans)	50	(5)		X				50 partners in the HSL industry, including ELIA
6.2	Coordinate and collaborate with existing industry support programs (i.e. UNIDO) and relevant government offices.		15	2																								17	Ongoing collaborations to ensure synergy		19	(2)		X				
6.3	Training of trainers for existing ectoparasite programs; direct training where gaps exist	1	3	3	1				1																			11	Training Programs	CIRIS (lead partner data & workplans)	26	(15)	X					
		30	90	90	60				60																				450	Technicians trained		503	(53)	X				
6.4	Training activities in quality improvement in flaying and curing to abattoirs (training of trainers)	3	3	1				1																				8	Training Programs	CIRIS (lead partner data & workplans)	32	(24)	X					
		150	150	50				50																					400	Technicians trained	CIRIS (lead partner data & workplans)	1,090	(690)	X				
6.5	Training activities in standardization, coding, QC, to collectors and traders	1	3	1				1																				13	Training Programs	CIRIS (lead partner data & workplans)	32	(19)	X					Collectors and traders are trained together with technicians and abattoir employees
		15	45	15				15																					195	Technicians trained	CIRIS (lead partner data & workplans)	563	(368)	X				
6.6	Develop pilot traceability program to improve raw material supply to leather processors		1		1																							3	Pilot traceability programs established	CIRIS (lead partner data & workplans)	1	2			X			Lalagera ectoparasite control project ongoing, decrease in infection is more than 75%
6.7	Explore enhancing recovery of raw stock through improved marketing																											1	Collection Center System developed	CIRIS (lead partner data & workplans)	1	-			X			30 collection centres in Addis constructed and ready to start operations
6.8	Assist manufacturers in business and investment planning																											4	Manufacturers assisted	CIRIS		4			X			
6.9	Supporting inward missions				1																							5	Inward missions supported through cost share.		5	-		X			Includes outward missions. Lyon, Moscow, Brazilian and Hungarian missions. The Train Fashion Show New York	
6.10	Partner agreement with U of Northampton and LLPTI to improve lab, train technicians and standards training																											1	Needs Assessment and Financing strategies developed			1			X		Needs Assessment report completed	
6.11	Develop HSL competitiveness cluster		1																									1	Competitiveness cluster developed	CIRIS, industry sources	1	-	X					
6.12 HSL Program-Specific Impact Targets																																						
6.12.1	Reduction in number of skins affected by ectoparasites																											15%	reduction in skins affected	Industry surveys	0%	15%			X		Baseline taken at tannery level. Percentage of hides and skins defects Pre-mortem= 75%, Post-mortem= 12.53%	
6.12.2	Client and counterpart investments																											\$ 5,000,000	value of new client and counterpart investments	CIRIS	\$ 701,433	\$ 4,298,567			X		Confirmed investments	
6.12.3	Increased value of hide, skin and leather exports from Ethiopia																											\$ 48,000,000	value of increased exports	Trade and Industry Statistics	\$ 24,712,000	\$ 23,288,000			X		Export data taken from MOTI. Cumulative increase in sales (Jan 06 to Sept 07) over 2005 baseline figure.	

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		Q2	Q3	Q4	J	F	M	A	M	J	J	A	S	O	N	D	Q1	Q2	Q3	Q4	Q1			Achieved to Date	Balance Remaining	DONE	Ahead	On	Behind								
7 Oilseeds and Pulses Program																																					
7.1	Initial selection of Lead Partners (processors, exporters, cooperatives, other farmer groups) & development of partner-specific activity workplans			3				2	2	2						3	3	4								19	lead partners identified and partner-specific activity workplans developed	CIRIS (lead partner data & workplans)	24	(5)		X					
7.2	Beneficiaries of lead partners identified and representative M&E data collected			300				200	200	200						300	300	400								1,900	beneficiary farmers supported directly through lead partners	CIRIS	50,446	(48,546)		X				Beneficiaries of lead clients (cooperative members, association members, etc.)	
7.3	Technical manuals, market information bulletins and other technical materials produced and disseminated			2	1			1								1										11	technical manuals, bulletins and other technical materials produced and disseminated	copies of materials	4	7		X				Sesame seed bug, Sesame production, Warehouse receipts, Bruchid control	
7.4	On-Farm Extension Program (improved production practices)							10	10	10	40	40	40													270	On-farm extension visits made by program agronomist	CIRIS extension logs	26	244			X				
7.5	On-Farm Group Training Events (improved production practices)							10	10	10	10	10	10													90	training events	CIRIS training logs	15	75			X				
7.6	Support Organic Certification of Farms through Partnership Alliances			1	1			2			2					2										10	Farmer groups certified					X					
7.7	Introduction of new processing technologies -- design, business plans,			3	2			2			2					2	2	2	2	2						21	projects supported	CIRIS; other project reporting	10	11			X				
7.8	Inbound investment missions supported			1				1																		3	mission supported	project reporting	-	3				X			
7.9	International market linkages developed			1	1			1			1					1	1	1	1	1						10	deals made for international sales	CIRIS	-	10				X			
7.10 Warehouse Receipts																																					
7.10.1	Coordinate warehouse receipts activities with EGTE, MOARD, CBE other donors and projects																										Comprehensive national program using 8 EGTE warehouses	CIRIS training logs	coordination meetings held				X			Discussion and meetings are going on	
7.10.2	Develop technical bulletins and other training materials on general program and disseminate to cooperative partners, private traders and exporters, trainings conducted			2	1	1		1								1										7	Workshops	CIRIS	4	3			X			Four trainings held on WHRS and manuals disseminated to the participants	
7.10.3	Develop materials and training package on simplified grades/standards for oilseeds/pulses, conduct workshops and distribute via cooperatives, traders and exporters			1	3	1	1	1																		7	Workshops, need approval from MOARD taskforce	CIRIS	1	6			X		Workshop took place in Nairobi and South Africa. Grade/standard manuals in draft form for maize, wheat, telf, haricot beans, coffee and sesame.		
7.10.4	Develop materials and initiate activities in support of a commodity exchange																										Work at PIU with other donors and MOARD	CIRIS					X		Office established at ECEX		
7.11 Oilseed Program-Specific Impact Targets																																					
7.11.1	Increased value of oilseed exports																										\$ 71,000,000	value of increased exports	Trade statistics	\$80,767,000	(\$9,767,000)			X			Export data taken from MOTI. Cumulative increase in sales (Jan 06 to Sept 07) over 2005 baseline figure.
7.11.2	Client and counterpart investments in new value-added processing																										\$ 1,000,000	value of new investment	CIRIS	\$1,396,598	(\$396,598)			X			Investment in cleaning and hulling machines, training
8 Policy Intervention Activities (Cross Cutting)																																					
8.1	Identification of policy constraints through investment and competitiveness activities			2	2			2								2											12	Issues identified and prioritized	regular project reporting	7	5			X			Airport coldstorage, Central Bank, Coffee Law, WR Tax, Pesticide Approval, Import Taxes, hybrid seeds for commercial production
8.2	AGOA and other trade protocol training conducted	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	27	AGOA and other trade protocol training events held	CIRIS	2	25			X		AGOA and WTO training for ministry personnel, participation in Diaspora Investment Conference	
8.3	Address constraints where policy interventions are needed/assist with issues paper development			1	1			1								1											6	Issue papers developed, presented at Ministerial level	CIRIS	1	5			X		Airport cold storage official visit to Kenya	
8.4	Support to national-level conferences and consultative groups supported to address policy constraints			1	1											1											6	project support to national-level conferences and consultative groups	CIRIS	11	(5)		X			Coffee Stakeholder meetings 4, HSL Cluster meetings 5, EHPEA Strategy meetings	

