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TANZANIA AGRICULTURE PRODUCTIVITY PROGRAM (TAPP) QUARTERLY REPORT # 4



JULY- SEPTEMBER 2010

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EXECUTIVE SUMMARY

This is the fourth quarterly report (July - September 2010) for the Tanzania Agriculture Productivity Program (TAPP), funded by USAID/Tanzania under Task Order EDH-I-07-05-00007-00 with Fintrac Inc.

Year-to-date achievements:

- USAID-TAPP is providing agricultural training and technical assistance to increase the food security of 5,475 rural families in 136 producer groups in eight regions.
- 499 training events were held for 14,680 people. Topics included production, postharvest management, farm chemical safety, marketing, business management and health and nutrition.
- One technology fund and 11 partner fund awards are being implemented, bringing committed USAID-TAPP investment to \$1,785,112.
- Seventy-five demonstration plots were established, showcasing technologies such as drip irrigation, raised beds, mulching, live barriers, water harvesting and composting. USAID-TAPP is targeting schools for demonstration sites to teach farm business skills to youths, which is having a measurable impact. (See success story in Annex III).
- 6,360 people have been trained in HIV/AIDS prevention. Train the trainer sessions were emphasized to ensure sustainability and improve local capacity in HIV/AIDS prevention education.
- Co-investment from program partners and clients in technologies, inputs, labor and other production and operating costs has reached \$129,108.
- 1,256 hectares are now under improved technologies including drip irrigation, raised beds, crop rotation, live barriers, and fertigation.
- USAID-TAPP helped develop the national horticulture strategy, which will guide Tanzania's horticulture policy for the next 10 years.
- An IEE and PERSUAP were completed to help minimize the risks of using pesticide products and ensure proper environmental mitigation measures are in place.
- Eight technical and information bulletins have been produced along with 17 growing guides targeted towards small farmers. (See example in Annex IV).
- A revolving credit facility has been established to provide access to credit to TAHA members for inputs. Two loans have already been disbursed. (See Financial Crisis Initiative report).
- TAHA's advocacy efforts resulted in withdrawal of an 18 percent tax on agricultural exports.
- Through the USAID Financial Crisis Initiative funds, TAHA Fresh Handling, Ltd. is in the process of making 30-day revolving credit available to the client shippers. This provides needed working capital to help the companies stabilize now that the worst of the crisis is over.

Fourth quarter achievements include:

- USAID-TAPP, in conjunction with TAHA, participated in the Farmers Day (NaneNane) Agricultural Show in Morogoro and Arusha, which had interactive technology displays to stimulate interest in agriculture and technological innovation and to train farmers on production, postharvest, irrigation, water collection and other low-cost technologies.
- USAID-TAPP assisted in the transformation of a collapsed flower farm into a vegetable production unit in coordination with new partner Arusha Blooms, Ltd.
- Establishment of a new grading and sorting facility in Arusha and a solar drier generated about 200 new jobs for women in Muheza.
- USAID-TAPP established an area office in Morogoro that will be used to host training events and workshops for local farmers.

1. INTRODUCTION

1.1 PROJECT DESCRIPTION

The Tanzania Agriculture Productivity Program (TAPP) is a 5-year initiative supported by the American people through the United States Agency for International Development (USAID). The program aims to increase smallholder farmer incomes through enhanced productivity and improved domestic and export marketing of agricultural products.

1.2 GOALS AND OBJECTIVES

The overarching goal of USAID-TAPP is to achieve food security by boosting agricultural productivity for food consumption and income generation. The program will benefit 25,000 rural families by effectively transferring technology and business skills to farmers, attaining sustainable increases in rural incomes, and enhancing institutional capacity in the public and private sectors. Efforts to address the impact of HIV/AIDS on rural communities will be a part of all activities and there will be a strong emphasis on encouraging women and youth groups to become aware of the potential of horticulture as a business. Agroforestry initiatives are included in the project and good agricultural practices (GAPs) will guide all cropping programs to protect and enhance the environment.

1.3 COMMUNICATIONS, REPORTING AND INFORMATION

USAID-TAPP has appointed an experienced communications manager who is based at program headquarters in Arusha. Beyond managing USAID-TAPP's communication requirements, the communications manager will also help TAHA report activities and accomplishments more effectively through quarterly magazines and monthly bulletins. The communications manager is also working with the Agriculture Publications division of the Ministry of Agriculture, Fisheries and Cooperatives to determine how the program can help the ministry disseminate information to farmers. The ministry has produced a number of useful publications but they have had limited distribution. A review of the publications available but out of print may help prioritize production of further information by both the ministry and USAID-TAPP.

In the fourth quarter, three monthly reports were completed and distributed; nine were completed in 2010. Three quarterly reports were completed and submitted to USAID this year.

The initial phase to establish a market information system for produce prices in 13 national and regional centers has started. It will give farmers access to market prices via cell phone text messages. The geographic spread of the market information gathering includes all regions of Tanzania plus Mombasa and Nairobi in Kenya. This joint project with USAID-SHIFT will be embedded at TAHA to create sustainability and to improve services for TAHA's smallholder members.

We are also exploring a Web-based information system to provide farmers with real-time agronomic and market information. A company that is set up to provide such services has been linked to the USAID Farmer-to-Farmer program, which has experience with a market information system for grains and cereals. Stakeholders including input suppliers such as agrochemical companies, fertilizer suppliers and irrigation equipment providers will be convened with farmers and resellers to determine

the commercial potential for the system that would also be embedded in TAHA as both a member service and income generating activity.

TAHA's Web site has been reactivated and USAID-TAPP continues to provide support to improve the content and style of the site.

Four success stories highlighting program impact on smallholder farmers, women and youth have been posted on the USAID-TAPP Web site.

USAID-TAPP has produced eight technical and informational bulletins as well as 17 growing guides in 2010. Two technical bulletins, one on the nutritional benefits of *Moringa oleifera* (known as Mlonge in Swahili) and the other on the benefits of passion fruit pruning, have been prepared and distributed (Swahili and English) by USAID-TAPP. A technical brief on improved sweet potato varieties developed at HORTI-Tengeru was written and distributed (English and Swahili) to smallholder farmers. The benefits of Vermiculture (production of liquid manure through the use of earthworms in a composting system) has been explained in a technical leaflet (Swahili only) and distributed to USAID-TAPP client farmers.

A nursery manual showing a number of important nursery technologies was prepared by USAID-TAPP and distributed to farmers at the NaneNane Agricultural Show and at Farmer Field Days (Swahili only). Two Market information Bulletins on Avocados and Mangos have been prepared and disseminated (English only). A publicity bulletin advocating the benefits of growing avocados for Africado, Ltd. (see Section 2.2) was prepared and distributed in Northern Tanzania (Swahili only). Seventeen growing guides were prepared for various crops and are currently being edited and translated into Swahili for farmer distribution.

2. PRODUCTIVITY

Field personnel carried out 819 technical assistance visits to meet with clients in 2010–413 in the fourth quarter alone. Details on each technical assistance visit including client contact information, observations, and recommendations are compiled in CIRIS, Fintrac’s M&E system. Visit www.fintrac.com/tapp/ to access CIRIS.

2.1 REGIONAL ACTIVITIES

USAID-TAPP’s staff is now above the initial projected level. But because of the opportunities presented in a number of areas where markets for smallholder produce are not being fully exploited, the program has decided to add personnel. Adding personnel in northern Tanzania (Babati/Mbulu area), Kilimanjaro region and Morogoro could have significant impact and USAID-TAPP is seeking applications to fill these regional positions.

2.1.1 Northern Tanzania

A significant new development in the Arusha area has been the assistance provided to Arusha Blooms by USAID-TAPP through a partner fund to convert a collapsed flower farm into a vegetable production unit. Direct USAID-TAPP financing and collaboration with the Tanzania Investment Bank helped Arusha Blooms start exporting French Beans. Four tons have been dispatched since the first pick and plans are underway for significant increases in production and crop diversification. Smallholders will be incorporated into the effort and the Arusha Blooms will provide land to grow on the company’s property as well as drip irrigation for 40 growers to grow French Beans for export. Expected production in the first growing season is 70 tons of French Beans and 20 tons of edible podded peas. The project is expecting 275 tons of fresh produce to be packed and exported directly from Kilimanjaro International Airport in the 2011/2012 growing season.

USAID-TAPP is also helping Kenya-based Homegrown (K), Ltd. establish a presence in Tanzania to grade produce before it is shipped to Kenya. This will create more than 100 jobs for women in the Arusha area. An Arusha Blooms collection and grading hub in the Kilimanjaro area has also been proposed for new product lines of hand-shelled garden peas. This will increase opportunities for growers, particularly smallholders, who have trouble meeting quality standards for edible podded peas such as mange tout and sugar snaps. Homegrown has agreed to consider involvement in a packhouse in northern Tanzania. Stakeholders are set to meet in November with Homegrown’s operations manager in Tanzania to discuss the prospects of establishing such a facility.

Smallholder farmers involved with USAID-TAPP partner Floresta—61 percent of whom are women—have started production of edible podded peas for another partner, HomeVeg Tanzania, Ltd. HomeVeg now has 200 growers associated with Floresta and the program is actively assisting the firm seek new markets for vegetables in Europe and South Africa. Under the partner fund award with HomeVeg, USAID-TAPP is supporting the construction of a large coolstore that will considerably improve the quality of exported produce and open up new market opportunities. HomeVeg management is also being sponsored by USAID-TAPP to visit the Netherlands to explore export opportunities to markets in Western Europe.

2.1.2 Lushoto/Tanga

USAID-TAPP partner Golden Food Products established a new market for organic citrus peels to export to Austria. The initial order was for 5 tons of orange peels and 5 tons of lemon peels, which represents 1,200 tons of oranges and 1,000 tons of lemons. This is a significant market development for the Muheza area of the Tanga region where smallholder orange producers are facing grave marketing difficulties. Golden Food were experiencing great difficulty drying the peels but USAID-TAPP helped them establish a solar drier at their Muheza factory, which added jobs for 40 women to peel and dry the fruit. The annual market in 2011 for the organic peels is predicted to top 30 tons, which will provide seasonal employment for 80 to 100 women and income annual of about \$29,000 to farmers supplying Golden Food with the oranges and lemons.

The planned “Centre of Excellence” at the Agriculture Resource Centre in Lushoto demonstrates that good agricultural practices and improved technologies are penetrating according to plan. A greenhouse is already established at the site with a water catchment system for irrigation. A nursery will further demonstrate new methods with in seedling production of vegetables and trees for commercial agroforestry. The greenhouse and nursery will be managed by a local women’s group. Another women’s group will be involved with the management of two low-cost greenhouses on the site. Plans are under way to develop the knowledge center at the site where farmers can access data on crop management. The District Agriculture and Livestock Development Officer (DALDO) has been approached to determine if USAID-TAPP should establish a satellite office at the Resource Centre.

Farmers in the Malindi area associated with the Usambara Lische Trust and a group of farmers who have formed the Muamko Kumekucha SACCO have asked for assistance to renovate irrigation furrows. In response, USAID-TAPP’s Lushoto field manager has asked the DALDO to allocate government funding to assist the farmers. The DALDO has agreed to consider a joint project to rehabilitate the furrows and a survey is underway to determine costs.

Business skills trainings for farmers are being carried out in the Lushoto area by the University of Dar es Salaam Business Incubator Trust. 117 farmers are being trained in the period under review and 876 farmers will be trained throughout the year.

The horticulture project at Shukalai School is an outstanding success and several children have started production at their family farms to sell produce to pay for education. In recognition of their efforts, USAID-TAPP facilitated a trip to Morogoro so the students could see the advanced technologies on display at the NaneNane Agricultural Show in August. The model developed at the school will be discussed with the new 4H program coordinator to determine if a pilot project could be scaled up to a Regional Junior Farmer Field School program.

2.1.3 Morogoro

USAID-TAPP established an area office at the NaneNane grounds in Morogoro to host training events and workshops for local farmers. The program plans to convert the land in the vicinity of the office into a peri-urban positive kitchen garden for demonstrations. Additional land will be rented at the NaneNane grounds to establish a passionfruit production trial and a demonstration plot for an improved variety of sweet potatoes.

Prompted by USAID-TAPP, the Tanzanian Investment Bank (TIB) has agreed to consider loan financing to rehabilitate the UUNAT fruit juice plant in Morogoro, which is currently under

management restructuring. USAID-TAPP is prepared to provide technical assistance to TIB and to facilitate market linkages to growers, should the restructuring exercise be successful.

Agrobase, Ltd., a new vegetable grower near Morogoro, is installing drip irrigation on 16 hectares of land to supply the high-end Dar es Salaam market. Five hectares of drip irrigation is installed and USAID-TAPP consultant Sandi Roberts provided agronomic and postharvest advice together with market linkages to southern African buyers. A partnership program with Agrobase is being drafted and the firm is attending capacity building and export awareness training courses conducted by TANTRADE.

USAID-TAPP supported the analysis of subterranean water availability in Gairo, an important sweet potato growing area. New, suitable varieties of sweet potatoes are being bulked up to supply farmers in the district to increase production and evaluate the potential for export by seafreight.

2.1.4 Coast

A sophisticated greenhouse, facilitated by USAID-TAPP and funded by the National Bank of Commerce was handed over to the Upendo Women's Group at Mlandizi in August. The program is using this as a demonstration farm for technology transfer and will provide further assistance to the group to connect the unit to treated water from the Municipal Council, which will enable it to sell the green peppers from the greenhouse to high-end markets in Dar es Salaam. USAID-TAPP has linked the group to a firm supplying fruit and vegetables to hotels, which has already resulted in sales.

Considerable emphasis has been placed by USAID-TAPP on the development of the mango industry and the program has agreed with the mango growers association (AMAGRO) on a format for a scientific conference (scientist-to-scientist), workshop (scientist-to-grower) and also to contributing to a mango festival so AMAGRO members can interact with the public to promote the industry. This is a joint venture with the Tanzania Competitive Cluster Program (TCCP). The official hosts for these functions are AMAGRO and TAHA. The events will be held in Dar es Salaam in mid-December and will involve regional and international speakers. TCCP is funding a mango value chain analysis, the finds of which will be discussed at the conference.

Mango processing firm NatureRipe has been regularly visited to determine how its business model could be augmented with a partner fund award. USAID-TAPP is cooperating with other international agencies to help the firm and is also looking at the question of freight prospects for fresh fruit. As part of the development of the fresh fruit export side of the business, the program has been in contact with a research scientist from Florida who is working on low pressure freight of mangos that will control fruit flies. The scientist will visit the firm in December 2010 as part of his involvement with the mango industry conference.

2.1.5 The Isles of Zanzibar

USAID-TAPP established market linkages between the Gando Farmers Association on Pemba Island and our partner Golden Food. The association is in the final stages of obtaining organic certification of more than 400 farmers and USAID-TAPP plans to obtain seeds and planting materials for the farmers to enable them to supply organic spices to the drying and exporting center of GFP in Muheza. Crops of interest include turmeric, cardamom, black and white pepper, ginger, cloves and cinnamon. Market linkages to Earthoil Plantations in Kenya have also been established to determine whether

organic essential oils from lemon grass, cinnamon and cloves would be of interest to the firm and farmers have been offered technical assistance to produce the crops related products.

USAID-TAPP met with Saleh Mbarouk Amour of the Ministry of Agriculture, Livestock and Environment on Pemba to discuss the program. He has assured cooperation from the ministry. A demonstration plot for a number of new crops and technologies will be established with the ministry under the auspices of the coordinator of the Commission of Agriculture, Research and Extension, in a joint effort to demonstrate new crops for both food security and income generation. The program will sponsor field days to transfer the knowledge to farmers on the island.

USAID-TAPP partner Volunteer Services Overseas has provided business skills training to 145 farmers and, with program assistance, has established charcoal coolstores at strategic points on Unguja Island to improve postharvest management of vegetables for tourism markets. A small marketing hub has been established in Stonetown for the group and USAID-TAPP has purchased equipment and trained staff in marketing techniques. As a result of this assistance, the farmers are selling all the vegetables they can produce. USAID-TAPP international consultant Sandi Roberts visited the hub and offered postharvest and coolstore management advice to the group. Trials to prevent postharvest losses in transport from the Isles of Zanzibar are at an advanced stage of planning and the involvement of all stakeholders including ministry officials is being sought to ensure maximum impact. The trials will concentrate initially on those fruits most vulnerable to logistical damage and will include land transport systems and inter-island ferry transport between Unguja and Pemba Islands.

A food nutritionist engaged under the partner fund award with Real IPM, Ltd. (PF#10) has undertaken a study of nutritional intake and other domestic indicators to help start a program concerning household assistance for vulnerable families that set to start in FY 2011.

2.2 CROPS

Several new crops are being considered for USAID-TAPP clients. As a result of discussions with buyers in southern Africa and European exporters, several new vegetables have been identified with strong market potential. The program intends to start trials with these as soon as plants or seeds can be imported. These include:

- Tender stem broccoli
- Hand-shelled garden peas
- Herbs, including Italian Parsley, Coriander, Wild Rocket, Rucolla, Sweet Basil, Rosemary and pea shoots
- Asparagus
- High care products including Petit Pois, Broad Beans, Edamame Beans, Broad Beans and mixed packs

New fruit crops required by established markets include the following:

- Blueberries
- Gooseberries

Several enquiries for ginger and ginger-based products have been received for conventional crops and organically certified produce. USAID-TAPP is coordinating with the Tanzanian Organic Agriculture

Movement, Golden Food and other interested parties in mainland Tanzania and the Isles of Zanzibar to develop the necessary production bases for the crops.

Macadamia nuts continue to interest many growers and the program is in discussions with a commercial nursery in northern Tanzania to produce sufficient seedlings to form the basis of a commercial industry.

There have been a number of enquiries for avocados and the firm Africado in Kilimanjaro area has been assisted to form a substantial outgrower scheme for grafted avocados for the export market. Africado recently indicated that because of USAID-TAPP support, they are looking to expand the outgrower scheme to 100 hectares. USAID-TAPP continues to offer support to reach this goal.

A shortage of grafted passion fruit is limiting production expansion and the program is now helping a nursery in northern Tanzania scale up its productive capacity to meet demand. Several trial plantations in northern Tanzania, Tanga and Morogoro will start as soon as planting material becomes available.

2.3 TECHNOLOGIES

The Farmers Day (NaneNane) Agricultural Show was held this quarter and was a good opportunity for USAID-TAPP to showcase new technology. These shows occur in three locations each year in August. USAID-TAPP, in conjunction with TAHA, participated in the NaneNane exhibitions in Morogoro and Arusha and developed an interactive display of technologies. Compost, vermiculture, sack gardens, seedling production, drip irrigation, raised beds, live barriers, manure and fertilizer trials and high quality seeds were all incorporated into the displays. Farmers who visited the USAID-TAPP display were taken on a programmed “tour” to show techniques in seedling production, composting, raised beds, incorporating manures, transplanting techniques, water conservation and plant protection. The technology that most impressed farmers was the use of a rizotron, which consists of a clear plate inserted in a pit in the vegetable bed so farmers can see the extent of the plant root system and observe the cone of wetting underneath the application point of a drip irrigation system. Displays and production demonstrations also covered passionfruit, bananas, citrus fruits, pawpaw and avocado, as well as agroforestry crops such as *Moringa oleifera*.

The success of a greenhouse built in the coast region has sparked interest and USAID-TAPP is following this up with other display units in Lushoto, Kilimanjaro and Arusha. Low-cost greenhouses will also be built in areas suitable for high-value crops such as sweet peppers and tomatoes, which would allow crops to be harvested in rainy seasons and take advantage of high prices.

Covered crop production of edible podded peas such as mange tout and sugar snaps is in great demand by exporters; USAID-TAPP has taken a cautious approach to this technology until profitability of these crops can be established after considering production costs. Trials are planned to establish economic in the forthcoming rainy season in Kilimanjaro and Arusha regions.

3. MARKET AND TRADE DEVELOPMENT

Recent events in Mang'ola and Babati/Mbulu districts of northern Tanzania where the Government of Tanzania prohibited Kenyan traders from buying directly from farmers highlighted the need for strategic marketing of onions in the region. USAID-TAPP has held discussions with local leaders and farmers to support marketing efforts and is exploring, with the participation CNFA and other implementing partners, interventions to provide market hubs and storage/grading facilities. The GoT Warehouse Licensing Board has been approached to establish the storage and grading facility at Mang'ola, where a USAID-TAPP agronomist will be stationed to coordinate activities in the sector.

Low prices forced many tomato growers in the Kilimanjaro region to abandon attempts to sell their produce. USAID-TAPP intervened to link the growers to a tomato processor Darsh Industries and the farmers were able to sell almost 90 tons on short notice. Farmer leaders were taken to the processing factory to meet with management and observe production as initial training in quality standards. A more formal arrangement will be established in the future. This will replace Chinese tomato paste currently used by Darsh Industries and will result in sales of more than 600 tons of local produce in the next growing season.

New market opportunities for produce exports to southern Africa have been identified. The South African company, Fresh-to-Go, has indicated a willingness to buy more than 30 product lines including berries, organic produce and high-care (ready-to-eat) vegetables. This represents a significant breakthrough for Tanzanian growers as it will introduce several new crops to the range of products that can be grown for export and many of the crops could be grown in areas that have traditionally not exported fruit or vegetables. Several exporters have been linked to the new market and the first export of fresh produce is expected to be sent to South Africa on Oct. 10, 2010.

Opportunities are also being explored for a potential market for citrus oils from Tanzania. USAID-TAPP management has initiated discussions with R C Treatt PLC which has a subsidiary in the United States, Treatts USA, Ltd. The company is a significant force in the industry and has expressed interest in orange oil and lime oil. These developments are timely given that a European company is conducting a feasibility study into a large orange and lime plantation near Muheza in Tanga region. The two parties have been introduced, as the by-product of citrus oil from the juicing plant will make the financing of the plantation much more attractive to investors considering the proposal.

As mentioned in Section 2 of this report, considerable progress has been made in involving Homegrown Kenya more directly in the Tanzanian horticulture industry. New crop lines are to be grown in the Kilimanjaro region and there is considerable interest in the potential supply of edible podded peas grown under cover during the rainy season in the Arusha area. Discussions are on-going with the management of Arusha Blooms to establish both a low-care (pre-pack) and a high-care (ready to eat) packing facility at their grading hall that could supply both European and southern African markets. This would allow Homegrown to export directly from Tanzania. With this in mind, the company established Homegrown Tanzania, Ltd.

USAID-TAPP is helping Indu Farm, Ltd., a Kenyan-based company specializing in exporting vegetables to European and the UK, establish a production base in the Kilimanjaro region. The firm has extensive experience with seafreight of edible podded peas and is interested in exploring opportunities in Tanzania. USAID-TAPP will involve Indu Farm in trial demonstrations of edible podded peas under cover at both Arusha Blooms and with smallholders in the Kilimanjaro region.

4. OTHER CROSS-CUTTING THEMES

4.1 HIV/AIDS

In the fourth quarter, 4,401 people (1,846 men, 2,555 women) were trained in HIV/AIDS prevention through USAID-TAPP supported peer education and HIV/AIDS groups. Of those trained 2,799 were youths (1,588 men, 1,211 women). Through the use of train the trainer methodologies, USAID-TAPP's HIV/AIDS impact and outreach extended beyond members of producer groups and into the community as a whole during this quarter.

Agricultural training has been given to five groups of people living with HIV/AIDS to assist them in establishing kitchen and backyard gardens. Crops with high caloric content, proven immunological supportive properties and which require little labor were targeted to improve the health of those living with HIV/AIDS.

USAID-TAPP is collaborating with Huruma Aids Concern and Care (HACOCA) in Morogoro to support more than 320 Orphans and Vulnerable Children (OVCs) in Mvomero District. USAID-TAPP will work with HACOCA to provide training and technical assistance in the establishment of small gardens for the production of nutritionally beneficial crops and income generation.

Through a partner fund award with AIDS Business Coalition Tanzania (ABCT), USAID-TAPP will assist in the implementation of HIV/AIDS workplace policies and programs that will directly affect more than 3,000 employees on commercial farms.

4.2 GENDER ISSUES AND YOUTH

USAID-TAPP continues to place great emphasis on the role that women can play in the development of the rural sector in Tanzania. This reflects the program's focus on incorporating women in program assistance – nearly 50 percent of USAID-TAPP producer organization clients are women. Certain interventions such as the establishment of VICOBA's outlined in Section 6 of this report specifically target women's groups, which will further increase the participation of women in the program. To ensure a deliberate and systematic approach that truly integrates gender themes into all program interventions, USAID-TAPP has developed a Gender Mainstreaming (GMS) Policy, after an intensive assessment in rural areas of Tanzania, with program field staff and client farmers. The assessment found that strides are already being made by the program, such as the representation of women in management positions within program staff. More than 50 percent of the field managers are women, thus serving as role models for women beneficiary farmers. The GMS policy also established guidelines for intervention in areas for improvement.

USAID-TAPP is fully committed to developing the entrepreneurial and social skills of Tanzanian youth. A partner fund award has been signed with the Asian Vegetable Research and Development Centre (AVRDC) to develop the business and agronomic skills of 800 youth through technical assistance and training in the production of vegetable seeds for sale to other groups.

To date, 25 percent of members in program-supported producer organizations are considered youth.

4.3 NUTRITION AND HEALTH

As stated in earlier reports, the program has placed considerable emphasis on the role that nutrition can play in developing Tanzania. Both food security and nutritional security are considered of extreme importance and the program has a policy to distribute information regarding the nutritional benefits of the crops being promoted by the field agronomists of USAID-TAPP.

A partner fund award has been signed with the Kenya based organization Real IPM, Ltd. to develop 10 Positive Kitchen Gardens in northern Kenya to train staff of participating institutions and other interested parties in the development of crop production calendars and introduce novel crops that will boost immune systems and contribute to improved nutrition. A food nutritionist will train participants in harvest, postharvest management and utilization of the crops grown in each institution. A food nutritional consultant to the program has completed a study on Pemba, Unguja and Tumbatu Islands that will lead to implementation of training with the ZAPHA+ (Zanzibar Association of People living with HIV/AIDS) organization.

4.4 ENVIRONMENT

The USAID-TAPP PERSUAP, prepared by Dr. Richard Pluke and consultant W. Mushobozi of Tanzania has been submitted to program partners for review and also has been presented to program agronomists as part of the process of assimilating it into their work programs. The document will undergo its review process for a month before being formally submitted to USAID for final approval. As it stands 142 insecticides, 127 fungicides, 76 herbicides, 6 rodenticides and 14 biorational pesticides have been included in the list of recommended pesticides for use on field crops. Extensive information is given on Integrated Pest Management and on ways of ensuring pesticide safety for human and environmental health.

As mentioned in Section 2.3, considerable emphasis has been placed on conserving water through drip irrigation to ensure efficient use of this important resource. Seventy-five demonstration plots have been established to display the benefits of drip irrigation to participating farmers. Through USAID-TAPP interventions, many farmers have been exposed to the use of Kickstart treadle pumps to minimize the use of furrow irrigation and more than 30 Kickstart pumps have been purchased for use in demonstration plots with farmer groups.

The program has been approached by many farmer groups for help to buy trees for environmental protection planting. The farmers have been asked to prepare concept notes, with the help of program staff, in order to focus their attention on the business aspects of nursery management and operations. Then the program will be able to more effectively help the groups establish nurseries for-profit and allow them to conduct their own environmental rehabilitation projects and contribute to the finances of the group selling trees to the surrounding communities.

Water collection programs are planned for schools and other institutions where the program is working and these will also be incorporated into the positive kitchen garden developments mentioned in Section 4.3.

5. PARTNERSHIPS AND CAPACITY BUILDING

5.1 TAHA

USAID-TAPP's Program Director continues to meet regularly with the TAHA Board and Executive Director to discuss program priorities. A monthly meeting is also held between senior management of USAID-TAPP and the Secretariat staff of TAHA to ensure that the junior members of the TAHA staff are fully advised on the program's activities and to obtain feedback from TAHA on progress towards objectives in their strategic plan. The USAID-TAPP Financial Consultant employed to oversee the capacity building of the farms affected by the world financial crisis has been particularly active in assisting develop the capacity of the junior staff of the Association. Fintrac's Nairobi-based Africa/Asia Regional Director Dr. Stephen New also participated in discussions with TAHA board members throughout the quarter.

The Association has yet to develop the capability to produce a regular flow of information to its members and the appointment of the USAID-TAPP Communications Officer will materially assist that to happen. Several meetings have been held with the TAHA Marketing and Information Officer to facilitate the production of a regular newsletter and the program will ensure that a mechanism is put in place in the FY 2011 Partner Fund Award with TAHA to enable that to happen. Local market information and export data is not readily available in Tanzania and USAID-TAPP believes that this should be a core function for TAHA as it is essential for encouraging investment in the industry. The activities outlined in Section 1.3 of this report regarding mobile phone based market information is the initial step in providing the local data and visiting staff from Fintrac Home Office assisted the capacity building of TAHA in respect to the provision of export data by training the Market and Information Officer in market analysis.

The suggestion put forward to TAHA by USAID-TAPP regarding the possibility of obtaining offices owned and managed by TAHA for their own use and for rental to associated programs and projects such as USAID-TAPP and HODECT was put to TAHA and enthusiastically endorsed. A concept note has been received from the TAHA Executive Director and will be discussed with the full Board in the near future.

5.2 TAHA FRESH HANDLING, LTD.

The past 15 months have been difficult for those involved in production and export of fresh produce from Tanzania due to the dramatic fall in market prices and demand resulting from the global financial crisis. The negative effects of this crisis continue to be felt by TAHA Fresh shipping customers with several exporting companies closing and shipment volumes reduced to levels which negated the viability of charter operations out of Kilimanjaro International Airport (JRO).

However, 2010 was the company's first solo financial year, with only core administrative costs being funded by USAID-TAPP and TAHA Fresh responsible for meeting most of its own variable costs. The results form an actual "learning curve" throughout the year with a poor first and second quarter with high net losses and from then breaking even and showing positive results.

USAID-TAPP supported TAHA Fresh through a Partner Fund award, enabling the company to purchase its own truck and trailer which should further reduce the costs for the Tanzania exporters.

Through the USAID Financial Crisis Initiative funds, TAHA Fresh is in the process of making available 30 day revolving credit to the client shippers. This provides needed working capital to allow the companies to try and stabilize now that the worst of the crisis is over.

5.3 TANZANIA COMPETITIVE CLUSTER PROGRAM (TCCP)

The management of USAID-TAPP continues to meet regularly with the implementation staff of the TCCP program and have initiated several joint ventures with that program. An important joint venture is planned with TCCP to promote the mango industry which will take place in December 2010. TCCP are also providing supplementary support to a number of USAID-TAPP partners including TAHA, Golden Foods and HomeVeg.

5.4 AFRICAN ENTERPRISE CHALLENGE FUND (AECF)

The Program Director met with the Director and staff of the AECF in Nairobi to discuss the possibility of Tanzanian companies having greater access to the Fund. The discussions were fruitful and when the AECF is rolled out into Tanzania in late 2010 USAID-TAPP will be deeply involved with the Funds activities.

5.5 AFRICAN DEVELOPMENT FOUNDATION (ADF)

Many of the companies that have approached the program for assistance have also previously received or have applied for assistance from the ADF and to ensure that the USAID-TAPP program was complementary to and not repeating other assistance the Program Director has met several times with the William Mwasawe, Managing Director of ADF to discuss joint interventions.

5.6 TANZANIA INVESTMENT BANK (TIB)

The Program Director has met several times with TIB and the program has a close working relationship with the Bank. Two client flower farms of TIB in northern Tanzania that were in serious financial difficulties have been materially assisted by USAID-TAPP and are now stabilized and moving towards sustainability and profitability. Several discussions have been held with TIB on the future of the fruit processing company UUNAT and the program and the Bank are collaborating to determine the whether the industry can be revitalized.

6. PLANNED ACTIVITIES

Following the success of the Upendo Women's Group greenhouse cropping program, several new initiatives are under way to demonstrate greenhouse technologies with both sophisticated units and those made with local materials. A technician with many years of international experience will visit Tanzania in November and December 2010 to train USAID-TAPP staff in building and managing low-cost greenhouses.

Trials are planned to determine the costs and benefits of covered production of edible podded peas for export. Several exporters from Kenya have expressed interest in obtaining peas grown this way and USAID-TAPP is to provide trial tunnels in several parts of the Kilimanjaro region to determine their benefits for growers.

In light of the success of linking grower groups to tomato processor Darsh Industries, which was covered in Section 3, the program plans to meet with the company to establish contract arrangements between growers and the company for future production. Growers need to plan their production better and Darsh Industries needs to provide more infrastructural support, transport solutions, and better prices. These factors will form the basis of upcoming discussions among those involved.

The implementing agency Orgut-Sedit, which has been active in establishing VICOBA (Village Savings Banks) groups, is to be employed to establish 200 savings groups involving 6,000 farmers commencing October 2010. These savings groups, comprised mostly of women, are trained in financial numeracy and literacy together with social and political awareness skills and have become established financial models at the village level. USAID-TAPP currently works with many of these groups to provide agronomic and nutritional advice. Incorporating new groups in Morogoro, Manyara and Tanga regions is planned.

7. CHALLENGES AND CONSTRAINTS

The major challenges facing the program are those that have been experienced by growers and exporters for many years. In the areas of production and logistics, of concern are:

- Improving the investment environment within Tanzania by raising government awareness of the importance of the lost export opportunities within the horticultural industry.
- Creating awareness and cohesion within the farming industry regarding the benefits of cooperative marketing that will lead to improved profitability.
- Ensuring that farmers have quality inputs. This is particularly important in the area of fake inputs such as agrochemicals and seeds.
- Ensuring efficient use of scarce resources such as water, this requires the assistance of the government to reduce tariffs and duties on imported irrigation equipment.
- Improving the quality of government extension services and making knowledge available to farmers.
- Increasing the availability and affordability of finance for smallholders.
- Achieving critical mass of vegetable exports that will enable charter flight operations out of Kilimanjaro International Airport.

In regard to the program's HIV/AIDS, and Health/Nutrition components, the major challenges include:

- Overcoming the reluctance of communities to become closely involved with the income generating activities being promoted with groups affected by HIV/AIDS
- Making affordable technologies suitable for those with reduced energy levels, including, low cost greenhouses and drip irrigation.
- Training enough peer educators and maintaining the participation of those already trained.

ANNEX I: PERFORMANCE AGAINST PMP INDICATORS

Name of the Implementing Agency: <i>Fintrac Inc.</i>	Reporting Period: <i>Y1: October 2009 – September 2010</i>	
Local Address: USAID-TAPP c/o TAHA P.O. Box15035 House #49 Kanisa Road Arusha Tanzania	Home Office Address: <i>Fintrac, Inc.</i> 3077 Kronprindsens Gade 72 St Thomas, USVI 00802	
Project Title: <i>Tanzania Agriculture Productivity Program</i>	Target regions: <i>Arusha, Moshi/Hai, Lushoto, Morogoro, Coast and Zanzibar.</i>	
Cooperative Agreement/Contract #: <i>EDH-I-07-05-00007-00</i>	Sub-contract/sub-grantees: <i>Tanzania Horticultural Association (TAHA)</i> <i>TAHA Fresh Handling, Ltd. (TAHA Fresh)</i>	
Period of Project: (Start and End Dates) <i>October 19, 2009 – October 18, 2014</i>	Related Program Area and Elements of the Operational Plan: <i>1. Agricultural Sector Productivity</i> <i>2. Trade and Investment</i>	
Planned Life of the Project: <i>\$35,490,000</i>	Amount Obligated to Date: <i>\$3,129,985</i>	Pipeline: <i>\$0</i>
Principal Target Beneficiaries: <i>Tanzanian Smallholder Farmers</i>	Major Counterpart Organizations: <i>TAHA, Ministry of Agriculture</i>	

Indicators	FY 2010						Units
	Target	YTD	Q1	Q2	Q3	Q4	
Percent change in rural income of targeted population (reporting to begin in Q3)	10	122				122	Percent
Number of rural households benefiting directly from USG intervention	5,000	5,475		1,917	2,048	1,510	Rural Households
Percentage change in yield (reporting to begin in Q3)	10	127				127	Percent
Percentage change in cost of production per unit output (reporting to begin in Q3)	-5	-19				-19	Percent
Percentage change in volume of crops produced (reporting to begin in Q3)	10						Percent
Value of new client and counterpart investments	1.0 M	0.10			0.02	0.08	US\$ Million
Percentage change in volume/value of domestic, regional and extra-regional sales in targeted sectors (annual target)	15						Percent
Number of assisted program farmers implementing NRM & good agricultural practices (GAPs)	5,000	2,190		624	1,566		Program Farmers
Number of new technologies adopted	5	5		5			Technologies

Indicators	FY 2010						Units	
	Target	YTD	Q1	Q2	Q3	Q4		
Area under new technologies	2,500	1,256				1,256	Hectares	
Increased sales by processing clients (annual target)	10						Percent	
Number of organizations providing market analysis	3	3		2		1	Organizations	
Number of new products and/or markets identified	3	9		2	1	6	Products	
Number of new market linkages facilitated	200	39		7	2	30	Markets	
Number of farmer groups/producer organizations strengthened	200	216		67	69	80	Producer Organizations	
Number of PPPs and GDAs formed and implemented	25	13		1	6	6	PPPs/GDAs	
Number of policy reforms supported	1	1		1			Reforms	
Number of partner organizations providing improved policy analysis & advocacy services (reporting to begin in Q3)	1	2			2		Organizations	
Number of partner organizations providing improved extension services to smallholders	10	7			5	2	Organizations	
Number of demonstration farms supported	100	75		1	40	34	Demonstration Farms	
Number of individuals who have received USG supported short term agricultural sector productivity training	21,300	14,680		758	6,269	7,653	Training Participants	
Number of certified farmers (reporting to begin in Q3)	100	273				273	Farmers	
Average costs for certification (reporting to begin Year 2)							Percent	
Number of processors & packhouses implementing HACCP & other food safety standards (reporting to begin Year 2)							Processors	
Number of people with increased adaptive capacity to cope with impacts of climate variability and change as a result of USG assistance	4,000						People	
Percentage of women/youth participating in training events	40	54		52	55	55	Percent	
Percentage of women/youth membership in producer organizations	Women	10	50.3		54	47	49.8	Percent
	Youth	10	24.6				24.6	Percent
Percentage of households participating that are vulnerable	5	11		23	11		Percent	
Number of people trained in HIV/AIDS prevention	5,250	6,360			2,864	3,496	Training Participants	
Number of workplace programs implemented (reporting to begin in Q3)	8						Workplace Programs	

Indicators	FY 2010						Units
	Target	YTD	Q1	Q2	Q3	Q4	
Number of firms receiving capacity building assistance to export		7				7	Firms
Number of baseline or feasibility studies (FCI)		4				4	Studies
Number of institutions with improved Management Information Systems, as a result of USG assistance (FCI)		1				1	Institutions
Number of organizations undergoing capacity assessments as a results of USG assistance		3				3	Organizations
Number of new producer/traders organizations established							Producer Organizations
Percent change in value of exports to targeted agricultural commodities as a results of USG assistance							

ANNEX III: SUCCESS STORIES



TAPP | Tanzania Agriculture Productivity Program

MAPATO ZAIDI KUPITIA KILIMO BORA

SUCCESS STORY

Program helps Tanzanian students see a future in farming

LUSHOTO, Tanzania – USAID-TAPP is showing young people that agriculture can be a viable business. With help from the program, students at the Shukilai Primary School in the village of Magamba are growing peas and garlic on their school farm and are learning good agricultural practices like trellising, mulching and terracing.

The school will use the money from the farm for supplies for the children, and buyers have already placed orders for the first harvest.

Halima Ababukary, a program field manager, has been helping the students with the crops, and USAID-TAPP sponsored the children on a trip to the Nane Nane agriculture exhibition in Morogoro.

Some children are taking their learning beyond the classroom and starting their own farms at home, impressing both parents and teachers.

Headmaster Charles Kiangi says the training has changed students' attitudes toward agriculture, and he wants to expand the project.

"The students now see agriculture as a source of income," Kiangi said.

12 year olds Alex Richard and Rehema Kusaga are two students who are growing crops at home. They say they

"We support Rehema and we are here to help where we can, because it is good for all of us."

— Mrs. Kusaga, whose granddaughter Rehema learned to grow garlic and peas through a USAID-TAPP school initiative.

hope for a good harvest so they can buy books and save money for a secondary education.

Kusaga's grandmother is proud of her granddaughter, noting that she is now more involved in the family farm.

"We support Rehema and we are here to help where we can, because it is good for all of us," she said.

The school is now asking USAID-TAPP to provide production and business skills training for all young farmers. Accessing water is also a challenge for the students, who have to walk to a nearby river and carry water to the school. The program is looking at how it can collect rain water on the school's roof and plans to have a water collection and storage system in place before the next crop cycle.



Shukilai Primary School students in Magamba are learning new farming techniques through USAID-TAPP.

Photos by Fintrac Inc.



TAPP | Tanzania Agriculture Productivity Program

MAPATO ZAIDI KUPITIA KILIMO BORA

SUCCESS STORY

Agricultural training empowers women in Tanzania

The USAID Tanzania Agriculture Productivity Program (USAID-TAPP) started in October 2009, and already 52 percent of the program's beneficiary farmers are women. Women make up a majority of the agricultural workforce in Tanzania, so USAID-TAPP is targeting women in the community, working with women's groups and encouraging established groups to include more women members. The program provides gender-sensitive trainings to improve incomes, food security, living standards, quality of life and education for the whole family.

According to the U.S. State Department, "Economic output could be increased by 15-40 percent and under-nutrition reduced by 15 million children simply by providing women with assets equal to those of men." In Tanzania, USAID-TAPP has incorporated that message into all of its activities. The program emphasizes gender equality as a guiding principle and provides gender training to sensitize program staff, clients and partners. Key interventions include:

Trainings and Extension Services: USAID-TAPP addresses subjects that are relevant to women, such as land preparation and postharvest handling. Trainings take place at locations and times convenient for women.

Women Agronomists: 50 percent of USAID-TAPP field managers are women. They serve as leaders and role models to participating farmers.

"My work involves helping all family members, but I particularly enjoy seeing women become confident in their ability to contribute to their families' wellbeing," said Halima Abubakary, a USAID-TAPP field manager in Lushoto.

HIV/AIDS Services: Because women are more vulnerable to HIV/AIDS than men, the program has integrated awareness and prevention trainings into its activities.

Improving Access to Inputs: Only 5 percent of Tanzanian women currently participate in the formal banking sector, so USAID-TAPP is collaborating with Village Community Banks to help women access small loans and agricultural inputs.

Nutritional Services: The crops women grow directly contribute to the nutrition of their families. USAID-TAPP teaches women to cultivate "kitchen gardens," which help provide fruits and vegetables throughout the year to improve household nutrition.

USAID-TAPP sets, tracks and meets gender goals because we know that women are critical forces in Tanzania's agriculture sector, and because empowering them contributes to the food security of the nation as a whole.



Photo by Fintrac Inc.

USAID-TAPP Field Manager Halima Abubakary demonstrates how to install a drip irrigation system.

"My work involves helping all family members, but I particularly enjoy seeing women become confident in their ability to contribute to their families' wellbeing."

— Halima Abubakary, Field Manager, Lushoto Region

ANNEX IV: MARKET BRIEF



TAPP | Tanzania Agriculture Productivity Program

MAPATO ZAIDI KUPIITIA KILIMO BORA

Market Bulletin #02

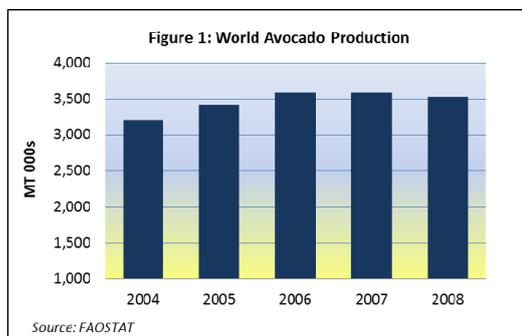
Avocados

INTRODUCTION

Avocado (*Persea americana*) is the fruit of a tree native to Latin American and the Caribbean. It is cultivated in many countries with tropical climates across Asia, Africa and Latin America, as well as some temperate ones such as the United States (California). The Hass variety is the dominant and most popular type grown in and exported to the United States, the world's primary market.

PRODUCTION

Between 2004 and 2007, world avocado production increased at an average rate of 4 percent per year, but dropped slightly in 2008 due to the world economic crisis and a weather-related drop in production in Chile.



Preliminary figures for 2009 and 2010 indicate that the industry has recovered and production is expected to continue increasing at rates comparable to pre-2008

Mexico is by far the world's leading avocado producer. In 2008, it accounted for more than one-third of global avocado output, nearly five times more than Chile, the world's second largest producer.

Other major producers include Indonesia, Dominican Republic, Colombia, Brazil, Peru, Spain and the United States.

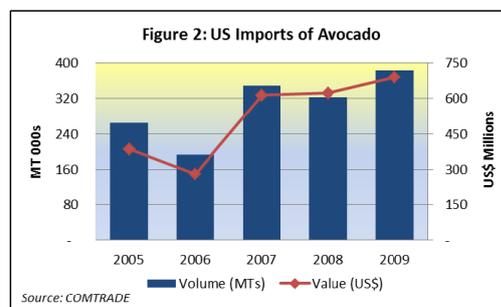
In **Africa**, Kenya, South Africa and Democratic Republic of Congo together accounted for 7 percent of world output in 2008.



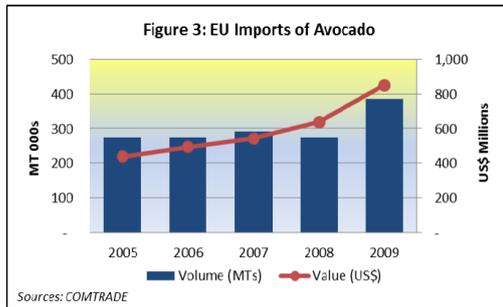
MARKETS

The United States is the world's largest import market for avocados. Although the US is also among the top 10 world avocado producers, imports by volume in 2009 – 383,437 MTs, valued at US\$689 million – were equivalent to 53% of global exports that year.

By 2009, US imports had increased over 200% by volume since 2004. Mexico supplied 65 percent by volume of import demand in 2009, while Chile accounted for 31 percent.



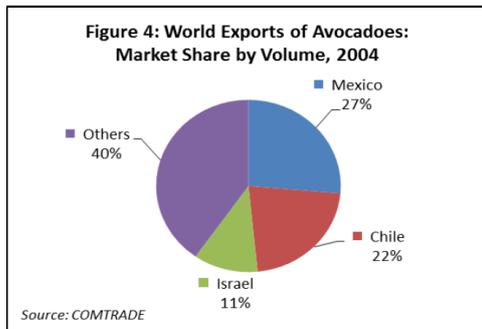
The **European Union (EU)** is the second largest import market for avocados, importing 316,969 MTs in 2009 valued at US\$688 million. Peru, South Africa and Chile are the top suppliers of avocados to the EU market, together providing 67 percent of its 2009 imports by volume.



SUPPLIERS

Mexico is the world's leading exporter of avocados. In 2009, Mexico exported over 337,977 MTs valued at US\$645 million, representing 47 percent of world avocado exports. Due to regulation changes in 2005 and 2007 that allowed Mexican avocados into all states in the US – previously only 31 states permitted Mexican avocado imports due to phytosanitary issues – Mexico's exports to the US, its primary export market, have increased by 150 percent.

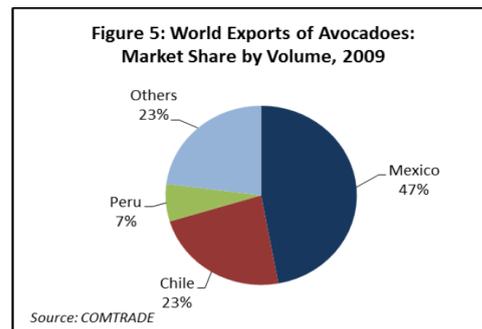
Chile is the second largest world supplier of avocados. It competes closely with **Spain**, and more recently, **Peru**. The latter's market share – although still under 10 percent of world export totals – has doubled since 2005. Chile was the primary supplier of avocados to the US prior to Mexico's market expansion in 2005, although its increased exports to Europe resulted in a net gain for Chile during that same period. In 2009, Chile exported 166,192 MTs of avocados valued at US\$284 million, accounting for 23 percent share of the world's avocado exports for that year, and maintaining its second place position worldwide.



Peru is expected to continue increasing its market share in Europe, as its own production continues to grow. Peruvian government sources estimate an export growth of 19 percent in 2010 (*Andina News Agency*). In addition, Peru has access to the US market beginning this year, as USDA announced its approval of

importation of Hass avocados from Peru into the US, effective February 2010.

Although relatively small in terms of global market share, **South Africa** and **Kenya** are the main African exporters of avocados, shipping 46,603 MTs and 15,037 MTs in 2009, respectively. Primary markets for these two countries are Europe and the Middle East. Exports from South Africa have doubled since 2004 (to nearly half of its production levels), while Kenya's have remained relatively unchanged, accounting for approximately 15 percent of avocados produced.



Tanzania also has climatic conditions that favor production of avocados. Production is mainly for the local market and very little volumes are currently exported to Europe, with 5.6 MTs shipped to the UK in 2009.

PRICES

US wholesale prices increased steadily from US\$26 per carton (25 lbs) to more than US\$42 between February 2007 and September 2008. In September 2008, prices began to decline due to a decrease in demand caused by the financial crisis, returning by April 2009 to previous 2007 levels, followed by a downward shift for the next four months. Prices increased to an average \$28 per carton (reaching as high as \$34) in the first half of 2010, signaling a rebounding US market.

In the **EU**, where avocados are marketed in 4-kg containers, wholesale prices in 2009 fluctuated from US\$1.93 to \$3.71 per kg. Avocado imports from Kenya and South Africa averaged \$2.83 and \$2.79 per kg, respectively, while those from Israel garnered an average of \$2.39 per kg. During the first half of 2010, average prices from all suppliers have ranged \$2.56 to \$2.61 per kg.

EU prices are slightly lower during the summer months when product is available from suppliers such as Peru, whose peak harvest season extends from May to September.

**TRENDS****Consumer demand increasing**

In recent years, consumption of avocados has increased steadily in the EU, while experiencing rapid growth in the US. Promotional campaigns in Europe from producing countries such as South Africa, Chile, Israel, and, most recently, Peru have resulted in increased demand, particularly in the UK.

Three EU countries act as hubs or redistribution centers for the avocado trade in Europe: the Netherlands, Spain and France, which is also the largest consumer in the EU. Growing demand by these countries has resulted in a 14 percent increase in imports by volume since 2005. Industry analyses indicate that further expansion in demand is likely as consumers become educated about the health benefits of avocados.

Tighter standards in some markets

Industry representatives have complained about the requirements some countries are imposing in terms of food safety and Good Agricultural Practices certifications. According to sources speaking to the *Fresh Produce Journal*, while meeting GlobalGAP certification is sufficient to export to most European countries, growers have to undergo additional audits if they supply different supermarket chains in the UK. These additional certifications and codes (for example, British Retail Consortium certification, Tesco Nature's Choice and Ethical Trading Audits) can add to the cost of doing business.

OUTLOOK

Industry sources expect demand for avocados in Europe and the US to continue its upward trend in the coming years. Much of the demand in Europe is driven by increased awareness of the fruit and its potential uses and benefits, while in the US the rapidly increasing Hispanic population plays a significant role.

Other expanding markets include countries in the Middle East, where avocado imports have increased by nearly 20 percent by volume since 2004, particularly United Arab Emirates, Saudi Arabia and Qatar.

Table 1: Avocado Imports by France, Netherlands and Spain

MT 000s					
Country	2005	2006	2007	2008	2009
PERU	14,405	24,149	29,447	44,142	40,838
CHILE	11,479	24,377	21,715	11,253	33,549
SOUTH AFRICA	32,492	23,731	25,722	37,315	28,990
KENYA	14,698	12,329	11,193	10,582	13,916
ISRAEL	41,130	29,824	47,618	24,967	10,431
MEXICO	15,062	13,511	10,612	10,841	9,677
BRAZIL	662	1,033	1,072	1,411	2,368
MOROCCO	-	-	378	1,771	2,039
ARGENTINA	1,037	1,388	1,536	739	1,805

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Productivity Program TAPP**
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