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REPORT ON AGRO DEALER MAPPING IN KILOMBERO, MVOMERO, KONGWA AND KITETO DISTRICTS OF TANZANIA

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DISCLAIMER

The author's views expressed in this report do not necessarily reflect the views of the United States Agency for International Development or the United States Government.

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LIST OF ACRONYMS

AFAP	African Family Action Plan
AGRA	Alliance for a Green revolution in Africa
ASDP	Agricultural Sector Development Plan
ASA	Agricultural Seed Agency
CNFA	Citizens Network for Foreign Affairs
DAP	Di ammonium Phosphate
FtF	Feed the Future
GIS	Geographic information system
IFDC	International Fertilizer Development Center
ISFM	Integrated Soil Fertility Management
MAFC	Ministry of Agriculture, Food Security and Cooperatives
MRP	Minjingu Rock Phosphate
NAFAKA	Meaning 'cereals' in Kiswahili
SEEDCO	Seed Co. Tanzania Limited
SFSA	Support for Food Security Activities
TANSEED	Tanzania Seed Co. Limited
TPRI	Tropical Pest and Research Institute
TFA	Tanganyika Farmers' Association
TFC	Tanzania Fertilizer Company Limited

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I. INTRODUCTION

While the agricultural sector in Tanzania is expanding, more than 40% of the population lives in areas where erratic rainfall causes recurring food shortages. The Tanzania Staples Value Chain (NAFAKA) project aims to improve food security and reduce poverty and hunger in the country through a growth and poverty reduction strategy. NAFAKA is helping to increase the competitiveness of smallholder-based value chains in rice and maize. This will increase food availability, access, and consumption and ameliorate food insecurity and malnutrition in rural areas. The five-year project (2011-2015) is implemented by ACDI/VOCA and its Support for Food Security Activities (SFSA) team (including IFDC) and funded by the U.S. Agency for International Development (USAID) under the Feed the Future (FTF) initiative. FTF seeks to harmonize regional hunger- and poverty-fighting efforts in countries with chronic food insecurity and insufficient production of staple crops. NAFAKA is one of a number of value chain development projects under USAID/Tanzania's FTF program.

IFDC is working with agro-input suppliers and producers to improve the availability of quality agro-inputs and to demonstrate their proper use at the farm level. Other IFDC activities include: strengthening the supply of maize and rice seed; promoting technologies to increase crop yields and nutritional value; conducting training of trainer programs on Integrated Soil Fertility Management (ISFM); and introducing and expanding market information systems to increase transparency in agro-input and crop marketing.

The interventions focus on the geographic region of the Southern Agricultural Growth Corridor, primarily Kilombero and Mvomero districts in Morogoro, Kiteto district in Manyara Region, and Kongwa district in Dodoma and Zanzibar.

The USAID NAFAKA project will build on previous work on agro dealer development financed by AGRA (the Alliance for a Green Revolution in Africa) and the World Bank/Ministry of Agriculture Food Security and Cooperatives (MAFC) and implemented by CNFA.

On May 23rd 2012, NAFAKA organized a half day meeting with key players in the agricultural input supply chain to discuss ways to improve the distribution network. The theme of the meeting was: Alignment and Coordination: Developing the Agricultural Input Distribution Network. Representatives from USAID, MAFC, AGRA, AFAP, agricultural input supply companies and non-profits (both local and international) attended the meeting. The discussions centered on how to strengthen agro dealer/agro input retailers to more effectively reach smallholder farmers and increasing their access to inputs. Presentations covered on completed and ongoing projects and those at the design stage; discussions focused on the gaps and the different strategies to address these gaps.

The discussions showed clearly that the “*last mile distribution network*” is still absent in most districts; a large number of the agro dealers are still based in rural towns. The majority deal with subsidy voucher and input distribution and are not doing market development to increase their customer base nor establish permanent all year round shops. Participants at the meeting agreed that there is a need to invest in the establishment of the *last mile distribution network* for agricultural inputs.

The following is a summary of key interventions that will be incorporated into ongoing projects and those at the design stage:

- a) *Development of consignment agro dealers nearer to villages* – Suppliers will create strategic, innovative relationships with medium sized agro dealers in the villages. These relationships will provide a clear system of tracking product from factory to farm thereby discouraging counterfeiting and improving the quality of inputs sold to the farmer. They will also increase interactions between suppliers and retailers creating a feedback system on client requirements. All this will lead to accreditation of businesses. Insurance of consignments was seen as a way of improving credit access by agro dealers and farmers.
- b) *Development of village based agricultural advisors and agro dealers* – The aim is to stimulate demand for agricultural inputs by establishing demonstration plots showing good agronomic practices and use of inputs (seed, fertilizer and agrochemicals) to increase productivity. The relationships here should be commercially sustainable. VBAs cannot be developed as a standalone activity but must be linked to existing agro dealers in order to complete the flow of product.
- c) *Capacity building and accreditation of agro dealers on product knowledge and handling* – by working closely with input supply companies and the agro dealers themselves to determine what additional skills they would need to enable them to increase their rural presence. The aim is to create a strong agro dealer network, with agro dealers working collectively to reach farmers through their associations.
- d) *Innovative financing/trade credit mechanisms* - backward and forward flow of money.
- e) *Increase demand for inputs through intensified demonstration plot establishment* in collaboration with supply companies, agro dealers, village-based advisors and Government extension personnel.
- f) *Opportunity investment fund* to cater for emerging innovations.

This study is a key outcome of this meeting.

2. STUDY OBJECTIVES

The purpose of the study/mapping exercise was to provide guidance to the project team and partners on:

- a) Who the agro dealers are and where they are;
- b) Where they source their products; and
- c) Which products they are currently dealing with.

This would help make informed decisions on interventions for NAFKA's agricultural input component.

2.1 SCOPE OF THE STUDY

The mapping exercise was limited to four districts participating in the USAID NAFKA project: Kilombero, Mvomero (rice growing areas) and Kiteto and Kongwa (maize areas). Apart from mapping, additional data was collected that ranged from general information about the agro

dealers, sources of inputs and agricultural information, nature of their business and advisory/extension work that allowed profiling of the agro dealers.

Kongwa is one of the five districts of the Dodoma Region of Tanzania. It is bordered to the north by the Manyara Region, to the east by the Morogoro Region, to the south by Mpwapwa District and to the west by Dodoma Rural District. This area has unimodal rainfall of 500 to 700 mm. The area has dark-brown and dark-reddish loamy sands. The major crops are maize, sorghum, groundnuts, grapes, sunflower, cassava, and simsim.

Kiteto is one of the five districts of the Manyara Region. It is bordered to the north by the Simanjiro District, to the east by the Tanga Region and to the south and west by the Dodoma Region. Maize is the primary crop in all the villages surveyed though the percentage of households that cultivate maize varies substantially between villages. Sunflowers are the most cultivated crop after maize followed by peas, green vegetables, groundnuts, beans, and cassava. Livestock keeping is also a key economic activity in Kiteto District.

Mvomero is one of the six districts of the Morogoro Region. The economy of Mvomero, like most Morogoro districts, depends mainly on crop production, mainly cassava, rice, maize, and bananas. The altitude is between 380 meters and 1520 meters above sea level, providing a suitable climate for tropical and subtropical crops. The district receives a bimodal type of rainfall with peaks in April and December for long and short rains respectively; and is relatively dry from May to October. Average rainfall is 1200 mm per year, with variations from 800 mm to 2000 mm.

Kilombero is one of the six districts of the Morogoro Region. The district is situated in a vast floodplain, between the Kilombero River in the south-east and the Udzungwa mountains in the north-west. The area is predominantly rural with the semi-urban district headquarters Ifakara as the major settlement. The majority of villagers are subsistence farmers of maize and rice. In the north-west of the district, Illovo Sugar Company's sugar-cane plantations occupy most of the low-lying area. Annual rainfall is 1200 to 1400 mm (seldom below 1100 mm); rising to 1600 mm in the highlands is 1600 mm. Four seasons can be distinguished: hot wet season from December to March, cool wet season from April to June, cool dry season from July to August, and hot dry season from September to November.

3. STUDY METHODOLOGY

All active agro dealers (those operating year-round) in the NAFKA project area were visited. The study occurred at a good time as it enabled the study team to map only all-season agro-input shops and retailers. The study took 10 days, 26 July to 4 August 2012, with a team of four. The questionnaire had both structured and unstructured questions that allowed the enumerators to discuss with the agro input retailers. Secondary data were accessed from government reports and reports of other projects.

4. AN OVERVIEW OF DODOMA, MOROGORO AND MANYARA REGIONS

There are 476 agro dealers in Dodoma, Morogoro and Manyara regions, according to the 2011 reports of the AGRA funded agro dealer development project and the World Bank/MAFC funded training project implemented by CNFA.

Region	Total agro dealers
Dodoma	117
Morogoro	271
Manyara	88

Table 1: Agro dealers trained under the AGRA funded project in the three target regions

4.1 ACCESS TO AGRICULTURAL INPUTS

Between 2002/3 and 2007/8, the proportion of crop farming households using improved seeds increased from 18% to 24%. The proportion using chemical fertilizers increased from 12% to 13% (Data from ASDP M&E Report 2007/8).

Source: ASDP M&E Report 2007/8

Region	Improved Seed		Insecticide/Fungicide		Chemical Fertilizer	
	2002/3	2007/8	2002/3	2007/8	2002/3	2007/8
Dodoma	11	22	3	2.4	1	0.4
Morogoro	15	16	8	9.7	7	13
Manyara	13	27	6	7.5	1	1.3

Table 2: Proportion of smallholder farm households using improved technologies

4.2 AVAILABILITY AND USE OF IMPROVED SEED

Availability of seeds from the private sector increased from 8,748.25 tons in 2005/6 to 14,536.42 tons in 2009/10. In the same period, availability of seeds from the public sector decreased from 1,728.92 tons to 1,608.37 tons. Overall, seed availability increased by 66%, with a significant increase in use of improved seed.

Source: Ministry of Agriculture, Food Security and Cooperatives 2010

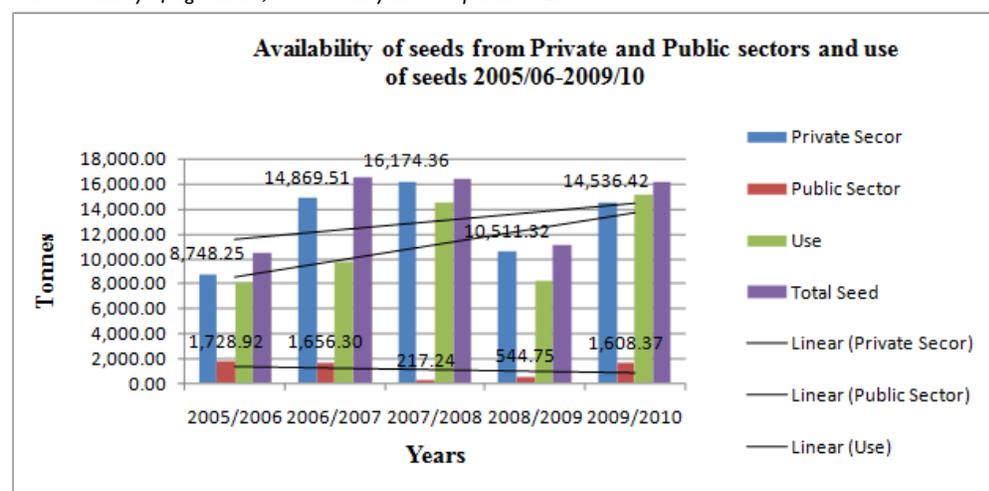


Figure 1: Availability and use of improved seeds, 2005/6 to 2009/10 planting seasons

4.3 AVAILABILITY AND USE OF CHEMICAL FERTILIZER

The availability of fertilizer has increased substantially. The number of fertilizer companies has increased from three in 2005/6 to seven in 2011/12. Fertilizer usage has increased from 49% use of available fertilizer in 2005/6 to 78% in 2009/10.

Source: Ministry of Agriculture, Food Security and Cooperatives 2010

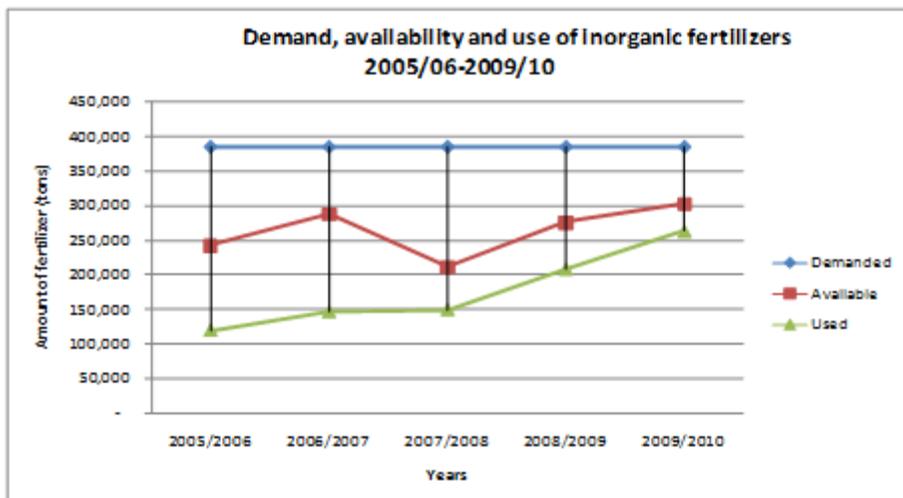


Figure 2: Demand, availability and use of inorganic fertilizers, 2005/6 – 2009/10 planting seasons

4.4 CROP PRODUCTION

Production of maize has been fluctuating from year to depending on rainfall. Other factors have also affected production, such as the ban on maize exports issued in 2008. The highest production was recorded in 2007/8 with 5,438,776 tons (agriculture sample census). Production was 4,733,073 tons in 2009/10, 13% below peak levels.

Source: Ministry of Agriculture, Food Security and Cooperatives 2010

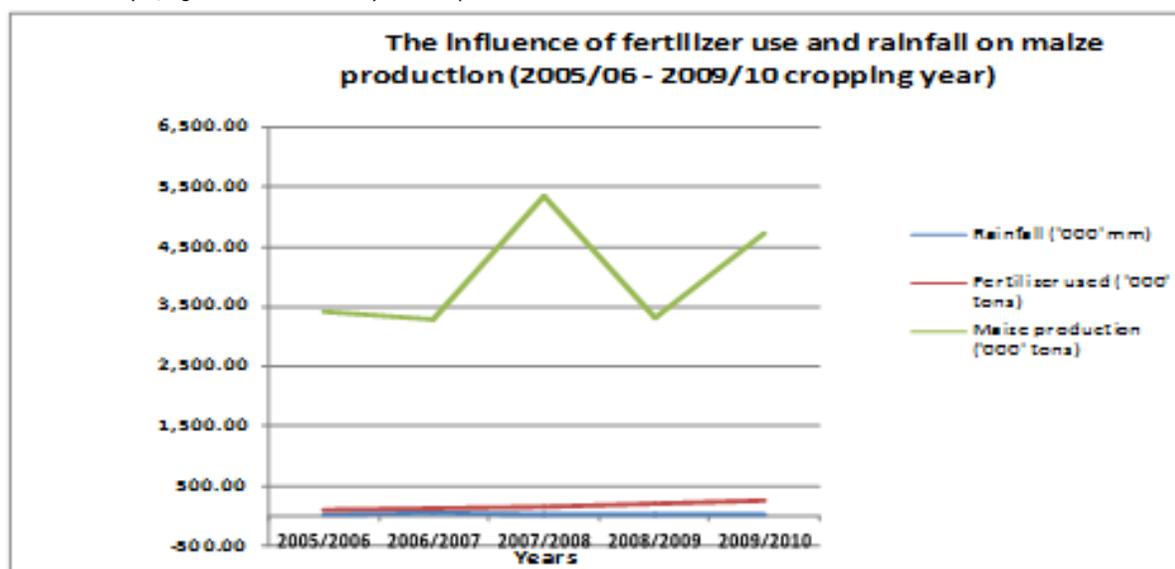


Figure 3: Influence of fertilizer use and rainfall on maize production, 2005/6 to 2009/10 seasons

Source: Ministry of Agriculture, Food Security and Cooperatives 2010

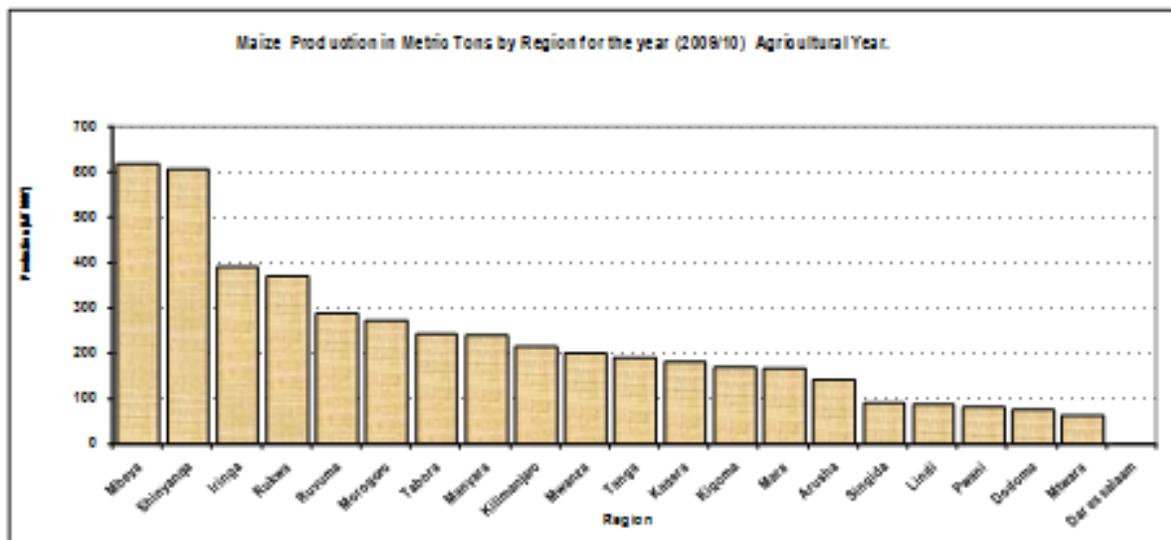


Figure 4: Maize production in metric tons, cropping year 2009/10

Paddy production remained more or less the same from 2005/6 to 2008/9, but almost doubled from 1,334,800 tons in 2008/9 to 2,650,115 tons in 2009/10. Figure 5 suggests that the voucher-based input subsidy program has been successful in increasing input use and hence increasing production against the backdrop of constant rainfall.

Source: Ministry of Agriculture, Food Security and Cooperatives 2010

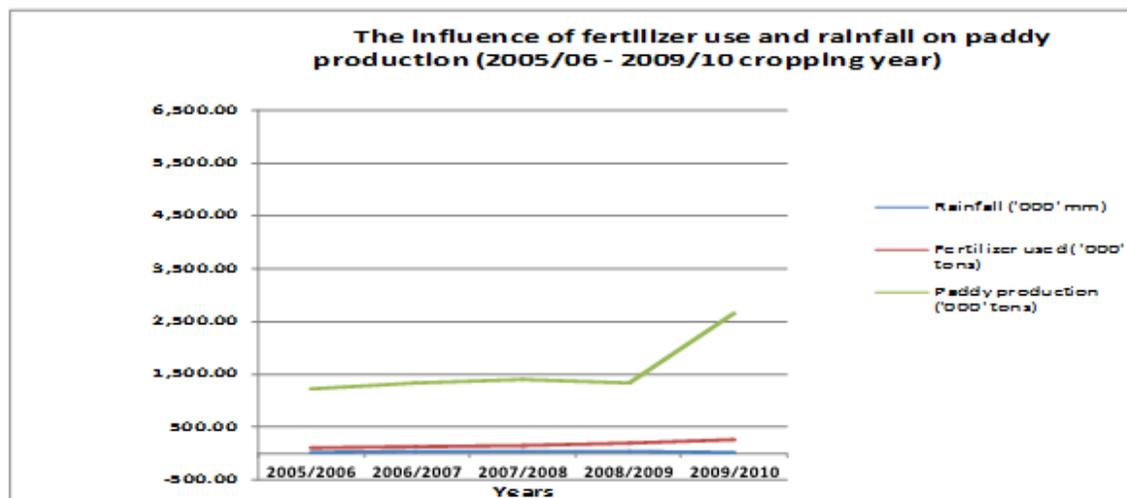


Figure 5: Influence of fertilizer use and rainfall on paddy production, 2005/6 – 2009/10 cropping seasons

Source: Ministry of Agriculture, Food Security and Cooperatives 2010

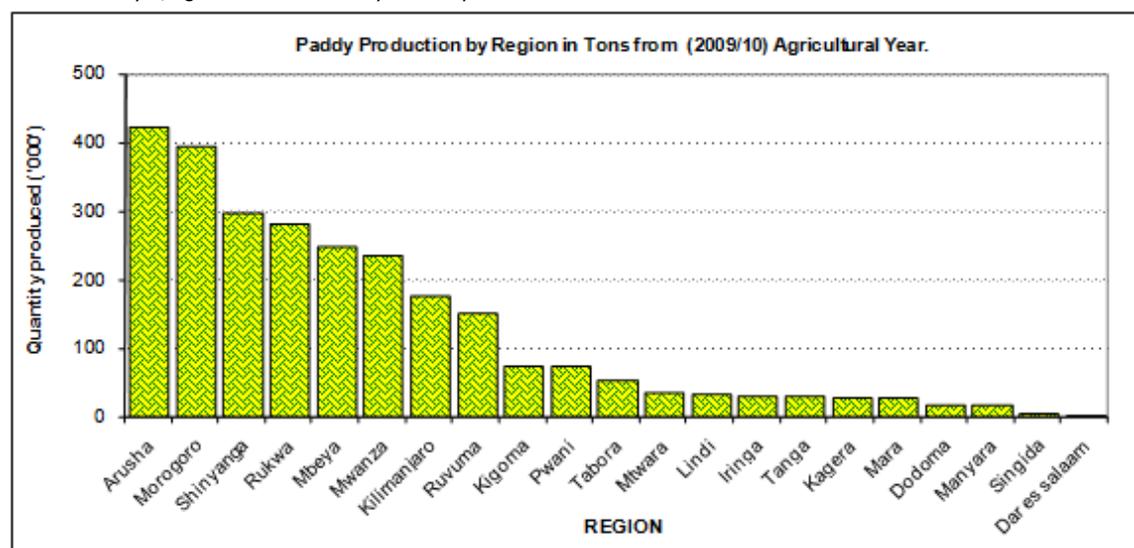


Figure 6: Paddy production by region in metric tons, 2009/10 cropping season

5. FINDINGS

5.1 NUMBER OF RESPONDENTS

A total of 75 agro dealers were interviewed and mapped. Details are shown in Appendix I. The highest number of agro dealers was in Kilombero District which had a total of 49 permanent (year-round) agro dealers, 11 shops in Mvomero in the rice irrigation area, 8 in Kongwa and 6 in Kiteto. Based on information from the district officials a large number of agro dealers in Mvomero, Kongwa and Kiteto only do business during the main season and participate in the government subsidy program.

District	Number of agro dealers interviewed	Of those interviewed how many have branches/more than one shop?
Kilombero	49	5
Mvomero	11	1
Kongwa	8	1
Kiteto	6	1
Total	74	8

Table 3: Number of agro dealers interviewed during the study

Based on the data collected in Kongwa and Kiteto, the majority of farmers, do not use improved seed or fertilizer but instead till and plant on a large area using the broadcasting method. The enumerators found a number of shops closed and it was confirmed by the district officials that those shops that were closed mainly dealt in subsidy voucher based sales.

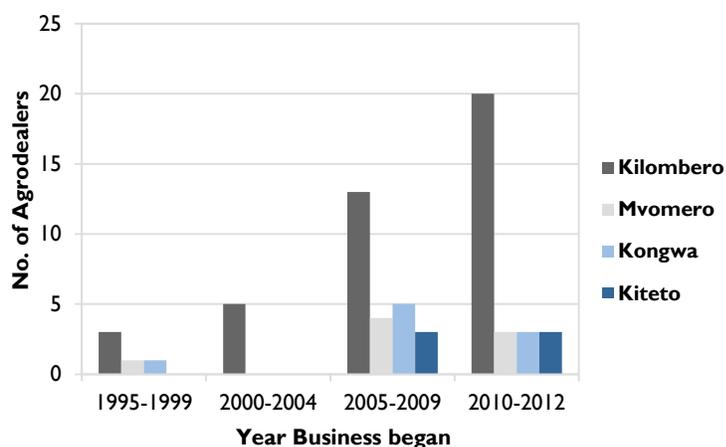
6. NATURE AND CHARACTERISTICS OF AGRO DEALERS

Agro dealer Profile

6.1 LICENSING AND LONGEVITY OF BUSINESS

From the study findings, the majority of shops had a business license as the only legal documentation. All shops visited sold agro-chemicals but only about 30% had attended the mandatory training at the Tropical Pest and Research Institute (TPRI) that allows one to apply for a license to trade in chemicals. Smaller agro dealers in small rural towns far from the main urban center tended not to have any documentation for their businesses and were not inclined to undergo agro-chemical training.

LONGEVITY OF RESPONDENTS' BUSINESSES PER DISTRICT



In Kiteto District, the oldest shop was started in 2007 while 50% of the shops started in 2011 and 2012. In Kilombero the oldest shops were started in 1998. Kilombero has the highest number of new shops: ten shops were started in 2011 and 2012. This shows that growing demand for inputs is creating business opportunities for new entrants. In Kiteto and Kongwa there were only three new shops and these were based in the main town.

Figure 7: Longevity of respondents' businesses per district

6.2 GENDER OF RESPONDENTS



Figure 8: Gender of agro dealers disaggregated by district

28% of agro dealers interviewed were women. In Mvomero district, no female agro dealer was interviewed while in Kongwa and Kiteto the majority were men. It was only in Kilombero that women accounted for a large proportion of those interviewed.

6.3 AGE GROUP OF AGRO DEALERS

AGE-BAND OF RESPONDENTS

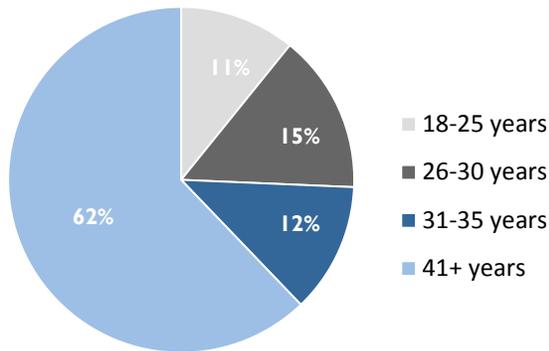


Figure 9: Age-band of respondents

100% of agro dealers mapped in Morogoro were male while in Kilombero 35% of those mapped were female. Female respondents were 25% (2) in Kongwa and 17% (1) in Kiteto. The majority of the agro dealers (62%) were 35 years and older, 12% were in the 30 - 35 age group and 35% were 30 years and below.

6.4 EDUCATION OF RESPONDENTS

EDUCATION LEVEL OF AGRO DEALERS IN KONGWA, KITETO, KILOMBERO AND MVOMERO

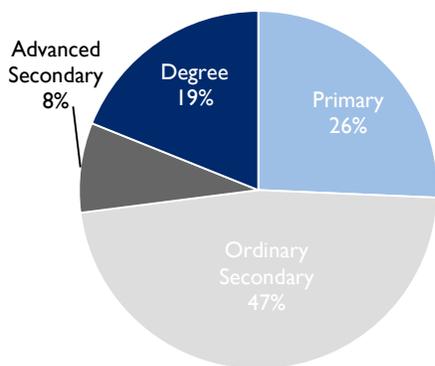


Figure 10: Education level of agro dealers in Kongwa, Kiteto, Kilombero and Mvomero

50% of the agro dealers interviewed have secondary education, either A-Level or O-Level meaning that majority know how to, read and write.

6.5 BUSINESS PROFILE – GIS MAPS

i. Business location and concentration of agro-input shops



Figure 12: GIS map of agro dealers in Kilombero district



Figure 11: GIS map of agro dealers in Mvomero district



Figure 14: GIS map of Agro dealers in Kongwa district

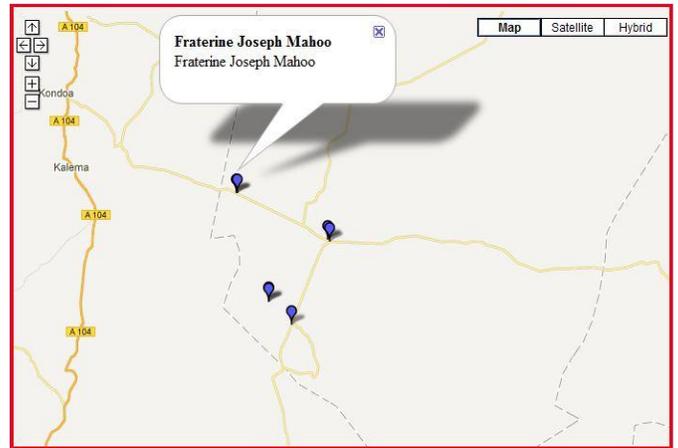


Figure 13: GIS map of agro dealers in Kiteto district

ii. Type of agro dealer

TYPE OF AGRO DEALERS

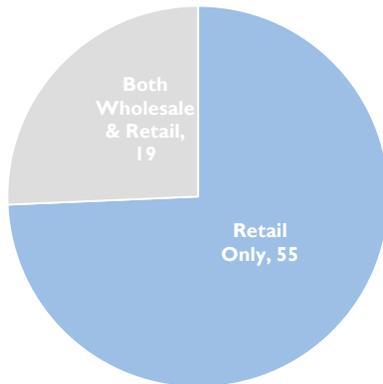


Figure 15: Type of agro dealers

26% (19) of the agro dealers interviewed were both wholesale and retail dealers selling to other smaller agro dealers. The remaining 74% (55) were predominately retailers. Agro dealers with branches were both wholesalers and retailers. The same number and percentage also sourced for inputs directly from the companies or travelled to Dar es Salaam to purchase inputs. From the information collected the same percentage of agro dealers were aware of counterfeit products and cited that as a reason for direct purchase from trusted suppliers or directly from the source.

AGRODEALERS WITH SHOP BRANCHES

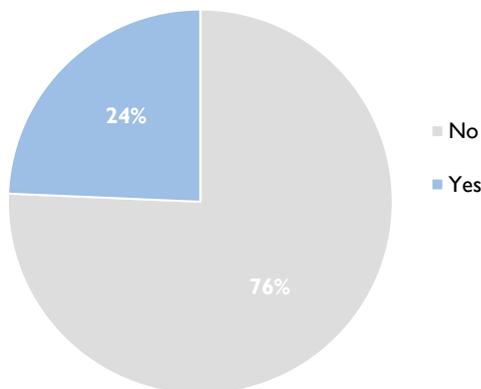


Figure 16: Agro dealers with branches

Of those interviewed, 24% had more than one shop in other villages further inland. These are agro dealers who would likely make good consignment agro dealers who can be promoted by input supply companies as agents.

iii. Employees

50% of the respondents (74) employed one staff at the shop. For agro dealers who had shop branches, each branch had one employee who was not a family member or spouse. This suggests that input retailing is profitable enough to enable the owner to make a profit and pay employees. 24% of agro dealers had shop branches.

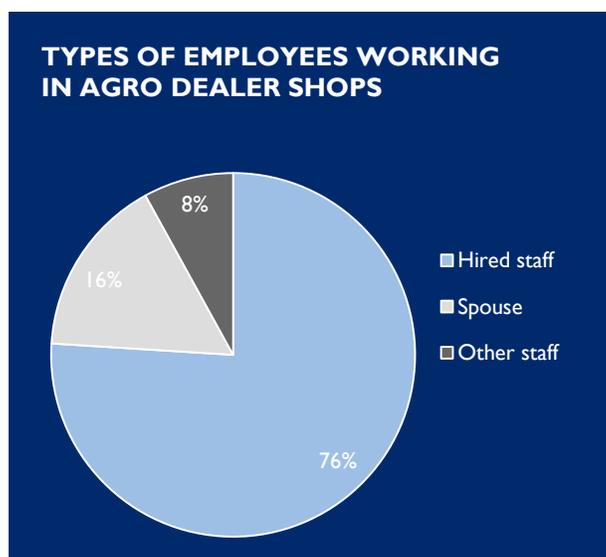


Figure 17: Types of employees working in agro dealer shops

6.6 FERTILIZER: SOURCING, TYPE OF FERTILIZERS SOLD AND BRAND PER DISTRICT

i. Fertilizer sourcing

66% of agro dealers interviewed sourced fertilizer from other agro dealers. Of the agro dealers interviewed 42 (56%) had stores of approximately 100 tons of fertilizer in 50 kg bags. This suggests that the cost of fertilizer in rural areas is high due to: a) buying from another agro dealer vs. an agent who adds his mark-up; and b) high transportation costs incurred by the rural agro dealer which are then passed on to the farmer. This means that an agro dealer cannot estimate demand nor be able to offer after sales service and follow-up to the farmer as the amount of fertilizer they sell depends on how much working capital they have at the time and the price they are able to buy at. In order to save on transport costs, the majority have their shops in towns or along the road, as seen from the GIS maps.

ii. Types of fertilizers sold

The main types of fertilizers sold during the main seasons were DAP (sales were limited by the high prices), Urea, NPK and CAN which mainly was sold during the short rains or off season. NPK was very common, probably because it is generally cheaper than Urea or DAP. But given the predominance of Chapameli (specialized cereal NPK), it was clear that farmers are rational thinkers and will purchase fertilizer not just because it is cheap but also based on the results seen through participation in demonstrations. This was confirmed in discussions with agro dealers who said that many farmers had been convinced to use this product because it was promoted during demonstrations.

			Capacity of store				Total	
			<1 tone	1 – 99	100 – 999	1000+		
District	Kilombero	Count	4	16	6	2	28	
		% of Total	9.5%	38.1%	14.3%	4.8%	66.7%	
	Mvomero	Count	0	2	2	0	4	
		% of Total	0.0%	4.8%	4.8%	0.0%	9.5%	
	Kongwa	Count	0	5	1	0	6	
		% of Total	0.0%	11.9%	2.4%	0.0%	14.3%	
	Kiteto	Count	0	2	2	0	4	
		% of Total	0.0%	4.8%	4.8%	0.0%	9.5%	
	Total		Count	4	25	11	2	42
			% of Total	9.5%	59.5%	26.2%	4.8%	100.0%

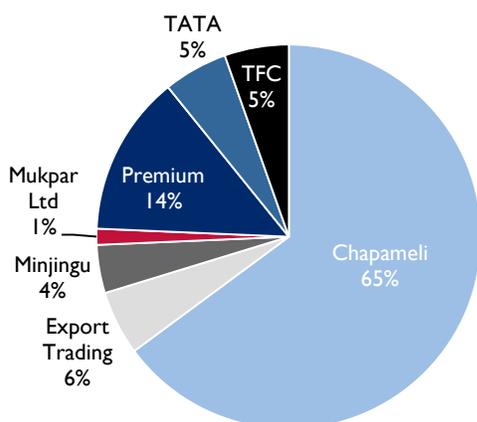
Table 4: Storage capacity (tons) of agro dealers interviewed

iii. Re-packaging of fertilizers

Discussions during the survey revealed that during the off season when most farmers grow vegetables, they would have preferred smaller packaging of fertilizer. Those who suggested this also said that input supply companies should consider smaller packages. Many farmers reportedly demanded that retailers open the 50 kg sack and sell small quantities even during the main season. They suggested 5 kg, 10 kg and 20 kg bags especially for Urea. They felt that given the high prices, smaller packages would increase sales and promote fertilizer use even on small areas cultivated.

iv. Market Share for Fertilizer Suppliers in the four districts

FERTILIZER COMPANIES' MARKET SHARE IN KONGWA, KITETO, KILOMBERO AND MVOMERO



The list of importers whose fertilizer was sold in the four districts can be found in Figure 18. The predominant fertilizer in Kilombero and Mvomero was Chapameli (Yara) and Premium Fertilizer.

Figure 18: Fertilizer companies' market share in Kongwa, Kiteto, Kilombero and Mvomero

6.7 SEED: TYPE, BRAND AND SOURCING BY AGRODEALERS

In the rice growing districts of Mvomero and Kilombero, rice seed was sourced from Agricultural Seed Agency (ASA) and Tanzania Seed Co. Limited (TANSEED). Off season,

farmers purchased maize seed. The predominant brands of maize seed were Seed Co. Tanzania Limited (SEEDCO) and Kibo Seed Co. Limited. Kibo Seed was the only company to conduct training for agro dealers on seed handling, planting and product knowledge that allowed the agro dealer to better service the customer.

Brands of seed sold	Type of seed
<i>Agro-seed technologies</i>	
ASA	Rice and Maize Seed
E.A. Seed,	Vegetable Seed
TANSEED	Rice and Maize
Fica seed	Maize
ZOSEM (QDS)	Maize
Kibo Seed Co Ltd	Maize
SEEDCO	Maize
Meru Agro tours	Maize
Krishna Seed	Maize
Pannar Seed	Maize

Table 5: Type and brands of seeds sold in the target NAFKA areas

In all districts all agro dealers interviewed sold seed of one type or the other. Rice seed in Kilombero was sold by only 29 (39.2%) agro dealers while sunflower seed was only sold by 3 agro dealers. In Mvomero, only three agro dealers of those interviewed sold rice seed. It can be inferred that majority of the rice farmers do not purchase seed but use farm saved seed.

COMMON TYPES OF SEEDS SOLD BY AGRO DEALERS

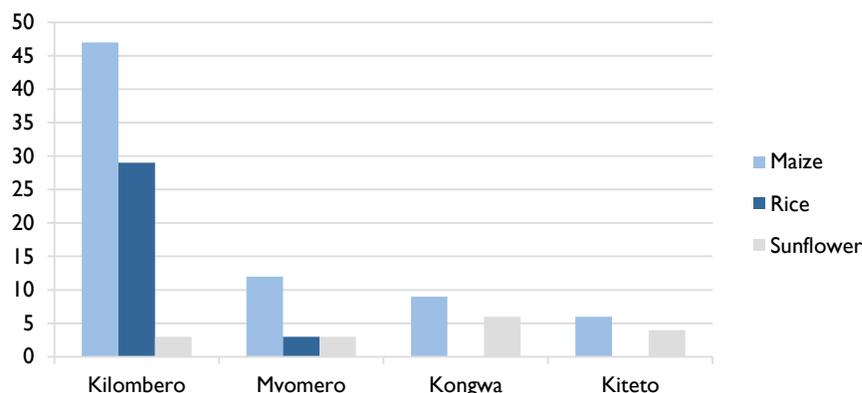


Figure 19: Common types of seeds sold by agro dealers

i. Seed Sourcing by agro dealers

About half of the agro dealers selling seed purchased directly from the companies (56.7%) while the others purchased seed from other agro dealers and from other sources. Those who purchased seed from other sources came to Kariakoo and bought seed from the big dealers.

SOURCES OF SEED BY RESPONDENT AGRO DEALERS

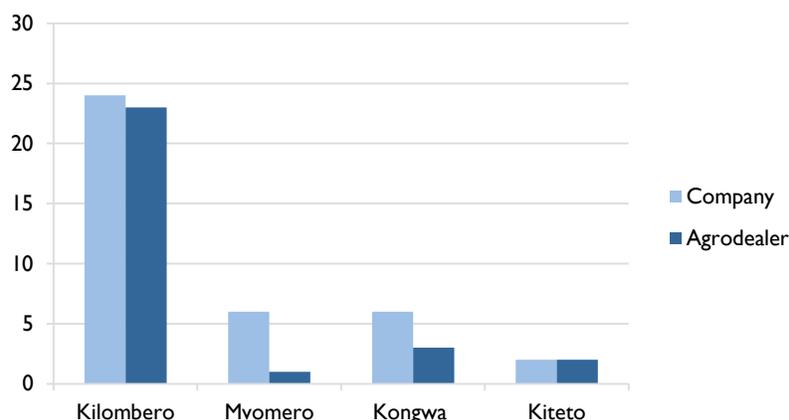


Figure 20: Sources of seed by respondent agro dealers

6.8 AGROCHEMICALS: TYPE AND BRAND PER DISTRICT

All agro dealers interviewed in the rice growing areas sold agrochemicals and it can be assumed that these are fast moving goods. For example, the majority of agro dealers sold not less than 200 cartons (each carton contains 12 one liter bottles) of herbicide from many different companies but predominantly from Twiga Chemicals and Balton.

Annex II provides a list of major agrochemicals sold by agro dealers in the four districts of Kongwa, Kiteto, Kilombero and Mvomero.

6.9 PAYMENT INSTRUMENTS AND WORKING CAPITAL (ACCESS TO LOANS/TRADE CREDIT, AVERAGE WORKING CAPITAL)

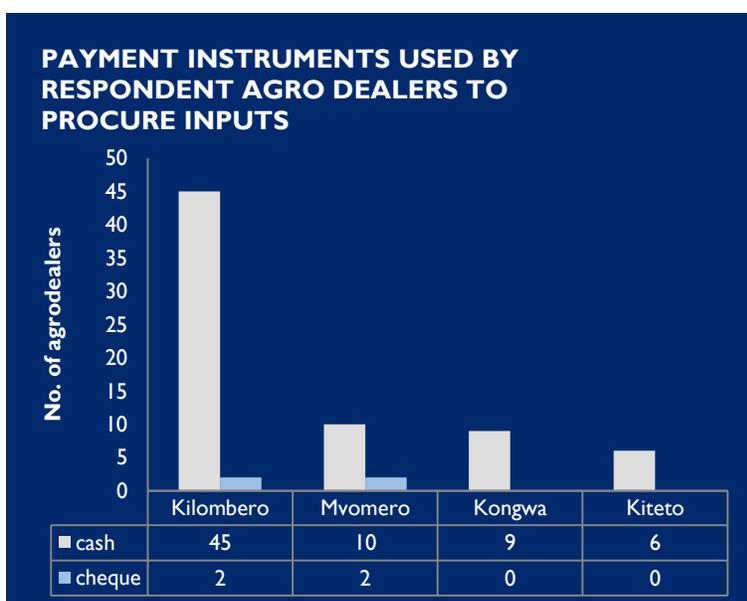


Figure 21: Payment instruments used by respondent agro dealers to procure inputs

All agro dealers interviewed paid mainly in cash. Only four had ever made payments by cheque. Those who made cheque payments said that it was mainly with the agrochemical companies where they wrote postdated cheques. The majority of agro dealers interviewed said that if it was possible to get credit, they would maybe sell more but because their clients had limited cash in hand, their sales were limited to the amount of goods available in stock.

6.10 TRADE CREDIT

76% of agro dealers interviewed had never received trade credit. Credit was mainly given by agrochemical companies. 12% of the dealers said they had received a credit line from one of the following input supply companies and large wholesales/ agents: Tanganyika Farmers' Association (TFA), Tanzania Fertilizer Company Limited (TFC), Suba Agro Trading & Engineering Co. Ltd, YARA/ Chapameli (through their agent Ngaula), E.A. Seeds, Bajuta International Tanzania Limited, Kibo Seed Co. Limited, Twiga Co. and Tanzania Seed Company (TANSEED).

SOURCE OF TRADE CREDIT FOR AGRO DEALERS IN THE LAST TWO SEASONS

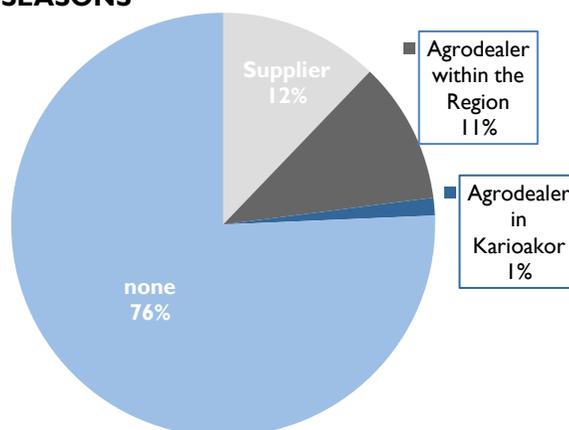


Figure 22: Source of trade credit for agro dealers in the last two seasons

6.11 BANK LOANS

Only 36% of agro dealers interviewed had ever accessed loans from the bank to purchase inputs. It was mainly from NMB Bank during the time of the AGRA funded project on agro dealer development where they accessed an overdraft facility.

AGRODEALERS WHO ACCESSED BANK LOANS

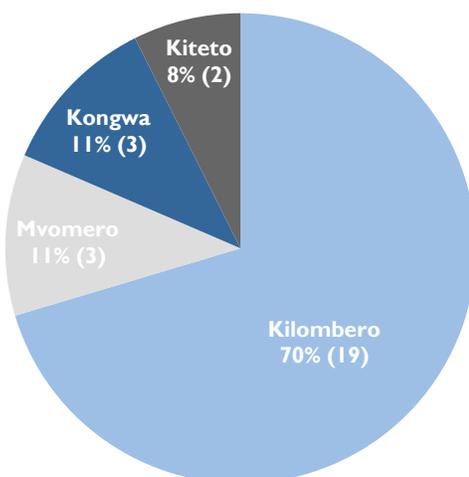


Figure 23: Agro dealers who accessed bank loans

6.12 WORKING CAPITAL

From the data collected, an agro dealer's average income in the project area is Tshs 20 million. Agro dealers estimated that the ideal amount of capital was Tshs. 30 – 35 million.

6.13 INVOLVEMENT IN TRANSFER OF KNOWLEDGE/TECHNOLOGY

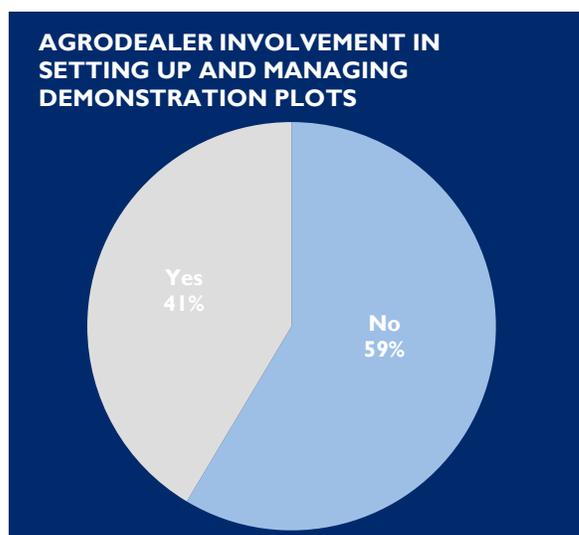


Figure 24: Agro dealers' involvement in setting up and managing demonstration plots

41% of the agro dealers interviewed had been involved in setting up and managing demonstration plots. It should be noted that this was under projects; very few had set up demonstrations on their own.

6.14 STORAGE FACILITIES

42 agro dealers (56.7% of respondents) had access to storage facilities. Of the total respondents 22 were found in Kilombero and had a storage capacity of over 1000 tons.

			Capacity of store				Total
			<1 tone	1 – 99	100 – 999	1000+	
District	Kilombero	Count	4	16	6	2	28
		% of Total	9.5%	38.1%	14.3%	4.8%	66.7%
	Mvomero	Count	0	2	2	0	4
		% of Total	0.0%	4.8%	4.8%	0.0%	9.5%
	Kongwa	Count	0	5	1	0	6
		% of Total	0.0%	11.9%	2.4%	0.0%	14.3%
	Kiteto	Count	0	2	2	0	4
		% of Total	0.0%	4.8%	4.8%	0.0%	9.5%
Total		Count	4	25	11	2	42
		% of Total	9.5%	59.5%	26.2%	4.8%	100.0%

Table 6: Storage capacity of agro dealers' stores

6.15 TRAINING

The majority of the agro dealers interviewed had been trained by the previous agro dealer development project (implemented by CNFA) in business management, integrated pest management and output marketing. The only company that had conducted agro dealer training in the last season was Kibo Seed Co. Limited.

Agro dealers felt they needed more training in record keeping, inventory management and product knowledge. They also felt that input supply companies should train them on their products to allow them to advise farmers. Respondents also felt that if they carried out farmer training through demonstration plots with input supply companies it would boost their business.

ANNEXES

ANNEX I: NAMES AND DETAILS OF AGRO DEALERS MAPPED

AGRO DEALERS IN KILOMBERO DISTRICT

No.	Shop Proprietor	M/F	Education Level	Name Of Shop	Date Shop Started	Box	Tel and Email	Village	Ward	GPS	
										Latitude	Longitude
1	Novatus Mwananengula	M	Ist degree	Nowkim Investment	Jul-10	288. Kidatu	0784 403779 novatusam@yahoo.com	Mkamba	Kidatu	07.67753S	036.97009E
2	Christopher Juma Kileo	M	Primary	New Mchombe Kileo Agrovet	Jun-98	1371, Ifakara	0784 327084	Mchombe	Mchombe	08.31641S	036.12356E
3	Wilson Mfungufu Mwamakubi	M	Primary	Gwijumilege Agrovet	Sep-08	365, Ifakara	0786 727006	Igima	Mbingu	08.20910S	036.22769E
4	Nuru Omar Kanyemka	M	Ist degree	Gairo Agrovet Shop	Apr-03	57. Mlimba	0787 425783 kanyemkanuru@yahoo.com	Mlimba	Mlimba	08.78385S	035.80538E
5	Haji Ali Kiding'a	M	Ordinary Secondary	Haji Agrovet	Feb-11	135. Mlimba		Mlimba	Mlimba	08.78143S	035.81106E
6	Mary Zacharia Mvunjapole	F	Primary	Henja Agrovet	Nov-11		0768 536740	Mlimba Town	Mlimba	08.78261S	035.81246E
7	Evelina William Shindika	F	Primary	Shindika Vet Centre	Feb-02			Mlimba B	Mlimba	08.78399S	035.80564E
8	Augustin Munisi	M	Ordinary Secondary	Mudio Shop	2009		0684 007299 ibramunisi@gmail.com	Mlimba	Mlimba	08.78605S	035.80506E
9	Miraji Hassan	M	Primary	Mgaya Agrovet	Apr-07			Chita	Mngeta	08.52256S	035.94324E
10	Jackline Peter Lema	F	Ordinary Secondary	Mangowi Agrovet	Jan-10	107. Morogoro	0784 520601	Mbingu	Igima	08.20930S	036.22807E
11	Petronilla Jonas Ngulikila	F	Ordinary Secondary	P. Agrovet	May-12		0786 613647	Ifakara	Ifakara	08.13125S	036.68465E
12	Tumaini Muhilu	F	Ordinary Secondary	Malungu Agrovet	Oct-05	454. Ifakara	0712 856231	Msfuni	Ifakara	08.13883S	036.67814E
13	Mary Kitua	F	Ordinary Secondary	Mary Kitua Agrovet Shop	Jan-11	411. Ifakara	0653 735846	Kibaoni	Kibaoni	08.09152S	036.68512E
14	Fatuma Awami Kondo	F	Primary	Rahim Agrovet Shop	Nov-11	5. Ifakara	0787 433933	Misufini	Ifakara	08.13957S	036.67798E
15	Vijana Mbasa	M	Ordinary Secondary	Vijana Mbasa	Nov-03	454. Ifakara	0789 127924	Mbasa	Kibaoni	08.10700S	036.68343E
16	Elizabeth Michael Bakari	F	Ordinary Secondary	Tayana Agrovet	Apr-06	36. Ifakara	0788 275123	Madukani	Ifakara	08.14071S	036.67737E
17	Ramadhani Kiumbile	M	Ordinary Secondary	Ramadhani Kiumbile				Ifakara	Ifakara	08.13849S	036.67987E
18	Hamisi Sudi	M	Ordinary Secondary	Shilingi Agrovet				Njage	Njage	08.25500S	036.17109E

No.	Shop Proprietor	M/F	Education Level	Name Of Shop	Date Shop Started	Box	Tel and Email	Village	Ward	GPS	
										Latitude	Longitude
19	Ayubu Msigwa	M	Primary	Ayubu Msigwa				Mpanga	Mpanga	08.93015S	035.81755E
20	Tesha Heladius	M	University	Yesu Atosha Agrovat	Nov-06	123 Kidatu	788250636	Mkamba	Kidatu	07.67550S	036.97167E
21	Wahda Kiumbile Kisuli Ramadhani									07.80120S	036.89942E
22	Juma Rajabu Sanje	M	Primary		Feb-09	138 Mangula	787818999	Kisasawa	Mangula	07.89346S	036.87236E
23	Ngaula Mohamed Agrovat	M		Ngaula Mohamed						08.13455S	036.6842E
24	John Boscque Z. Mvunjapole	M	Primary	Mvunjapole Agriculture Input Supply	Mar-98		0784226208 0764077455 johnbosquezakaria@yahoo.com	Ifakara Mjini	Ifakara	08.13769S	036.67895E
	Branch 1							Mlimba-Viwanja Sitini		08.81082S	035.80334E
	Branch 2							Ikule		08.41386S	036.00989E
	Branch 3							Mpanga		08.93148S	035.81762E
	Branch 4							Mlimba-Matema		8.8395015S	035.76714E
	Branch 5							Mbingu		08.19058S	036.25708E
25	Dr. Anneth Kitambi	F	University	Divine Agrovert	2010	53 Ifakara	786309344	Ifakara Mjini	Ifakara	08.13814S	036.68008E
	Branch 1							Ifakara Mjini		08.14053S	036.67818E
26	Germanus Yustunian Msonti	M	Ordinary Secondary	Likunda Agro Supplier	Mar-05	126 Mahenge	784784486	Ifakara Mjini	Ifakara	08.14104S	036.67767E
27	Dotto Seleman Kishoto	F	Primary	Kishoto Agrovat	Oct-08	144 Ifakara	783081110	Ifakara Mjini	Ifakara	08.13972S	036.67877E
28	Hiyari Mwinyimvua	M	Ordinary Secondary	Mwinyimvua Agrovat	2008	394	788511649	Ifakara Mjini	Ifakara	08.14053S	036.67824E
29	Macy Minja M/S	F		Minja				Ifakara Mjini	Ifakara	08.13793S	036.67866E
30	Honest Philip Ngerangera	F	Primary	Ngera Agrovat	May-10	632 Ifakara	783607332	Mchombe	Mchombe	08.31657S	036.12313E
	Branch 1							Signal		08.02128S	036.83209E
31	Salum Hiyari Bohari	M	Ordinary Secondary	Bohari Agrovat		624 Ifakara	0786720470 0763715750	Ifakara Mjini	Ifakara	08.13844S	036.67992E
32	Simon Nungwana Nwaka	M	University	Bukumbi Agrovat	Apr-10	394 Ifakara	786624018 nuwakasimon@yahoo.com	Ifakara Mjini	Ifakara	08.14044S	036.67745E
	Branch 1							Mkanga-Wwalo		08.36033S	036.08859E

No.	Shop Proprietor	M/F	Education Level	Name Of Shop	Date Shop Started	Box	Tel and Email	Village	Ward	GPS	
										Latitude	Longitude
	Branch 2							Ikule		08.414285S	036.00897E
	Branch 3							Chisano		08.6792 S	035.86013E
33	Salehe Kigugu	M	Ordinary Secondary	Kigugu Agrovet	Jun-12		787376608	Igima	Mbingu	08.20934S	036.22701E
34	Robert Hongole	M	Certificate	Msolwa Agrovert	2007	74 Mangula	784968922	Msolwa	Sanje	07.73837S	036.92882E
	Branch 1							Mkula		07.80091S	036.92882E
35	Amri Chuma	M		Chuma Agrovet				Namawala		08.15382S	036.39623E
	Branch 1							Mofu		08.24619E	036.36162E
36	Cyprian Haule	M								07.85415S	036.89521E
37	Masela Ismael Kiwelu	M								07.85510S	036.89630E
38	Hassan A. Mwegole	M	Primary	Wakati Ni Mali Shop	Jul-05		784683991	Mbasa	Kibhoni	08.0915S	036.68512E
39	Sylvester M. Kasunga	M	Degree	Kasunga Agrodealer	Dec-08	669 Ifakara	0784587021 0766432173 sylvesterkasunga@yahoo.com			08.13844S	036.67826E
40	Mohammed.J. Mpangile	M	Secondary	Mpango Mpangile Agrovet	Jan-11	79 Ifakara	0786 377420	Ifakara	Ifakara	08.14058S	036.67807E
41	Rahm Mboya	M	Primary	Green Agrovet	Feb-12		0787 343209	Ifakara	Ifakara	08.14075S	036.67802E
42	Gregory K. Mutayoba	F	Secondary	Gregory Mutayoba Agrovet	1998	41 Ifakara	0784 456956			08.14162S	036.67716E
43	Abdulrahman N.Kapilima	M	Secondary	Tuyende Bambo Agrovet	2005	93 Ifakara	0782954562 0714470381			08.14575S	036.67788E
44	Erosvida Ndomba	F	Primary	Ndomba Agrovet Shop	2010	30 Mang'ula	0787438639 0714120494	Mang'ula B	Mang'ula B	07.84083S	036.89696E
45	Moses Mwaulambo	M	Primary	Mwaulambo Agrovet	2004	70 Mang'ula	0784 948410	Mwaya	Mang'ula	07.85501S	036.89608E
46	Mwanaidi Mfundo	F	Secondary	Mfundo Agrovet Idete	2010	454 Ifakara	684474251	Idete	Idete	08.09962S	036.50950E
47	Salma Suleiman	F	Primary	Sasesco Agrovet	2010		687393939	Signal	Kiberege	07.99191S	036.83518E
48	Shaban A. Salahange	M	Primary	Shasco Ltd	Aug-10	169 Ifakara	782803950	Kikwawila	Kibaoni	08.09173S	036.73275E
49	Semkuya H. Hassan	M	Secondary	Shambalai Agrovet	Jun-10	374 Chita	783296136	Chita	Chita	08.522785S	036.94319E
50	Hasara Elias	F	Primary	Hasara Elias	Apr-11		0686221645 0786318596	Mgeta	Mgeta	08.31717S	036.11785E

AGRO DEALERS IN MVOMERO DISTRICT

No	Shop Proprietor	M/F	Education Level	Name Of Shop	Date Shop Start	Box	Tel and Email	Village	Ward	GPS	
										Latitude	Longitude
1	Moses Tem	M	Degree	Nemo Agrovert	1998	40 Turian	718232378 temim29@yahoo.com	Mazizini	Mtibwa	06.14073S	037.63814E
2	Alex Soka	M	Degree	Soka Agrovet	2005		756363066	Mvomero	Mvomero	06.30352S	037.44455E
3	S. Mmanda	M	Ordinary Secondary	Kasese Agrovet			784424411	Madizini	Mtibwa	06.13968S	037.63413E
4	Mrinde Mngara	M	Ordinary Secondary	Dakawa Agro	2007	663 Morogoro	765288860/784674130	Wami Dakawa	Dakawa	06.43833S	037.53088E
5	Thomas.O.Mushi	M	Degree	Thom Agrovet	2005	62 Mtibwa	232605237 715396516/784396516 tomushi2003@yahoo.com	Madizini	Mtibwa	06.13867S	037.63239E
6	Pascal P.Kitende	M	Degree	Paluki Agrovet	2010	2260 Morogoro	654500047/754271147 paschakitende@yahoo.com	Dihombo	Hembeti	06.26607S	037.53465E
	Branch I							Hembeti	Hembeti	06.272855S	037.50302E
7	Christopher Beneth	M	Ordinary Secondary	Christopher Beneth Agrovet	2010	303 Morogoro	755899888 christopher2000@hotmail.com	Manyenga	Dihongoya	06.13565S	037.61926E
8	John Augustine	M	Degree	Jm Agorchemicals	2011		653649152/653837688	Wami Dakawa	Dakawa	06.43711S	037.53141E
9	Estomihi Makayaho	M	Ordinary Secondary	Igija Agrovet	1999		715418317	Madizini	Madizini	06.14031S	037.63781E
10	Rajabu Mwigwa	M	Advanced Secondary	Vumero Adult Farmers Group (MAFG)	2000		784765475	Mvomero	Mvomero	06.36642S	037.44486E
11	Pangarasi Thomas Fuko	M	Ordinary Secondary	Fuko Agrobusiness	2010		719535085			06.25286S	037.54688E
12	John Alex Jones	M	Ordinary Secondary	Yes Development Foundation Agrovert Group	2007	60 Turiani	718483415 joneslx92@gmail.com	Kichangani	Mhonda	06.14508S	037.59363E

AGRO DEALERS IN KONGWA DISTRICT

No	Shop Proprietor	M/F	Education Level	Name Of Shop	Date Shop Started	Box	Tel and Email	Village	Ward	GPS	
										Latitude	Longitude
1	Antony Mwisa	M	Ordinary Secondary	Kilimo Kwanza Agrovet	10.09.2011	125 kongwa	759661314	Mbande	Segeli	06.10420S	036.31815E
2	Andrea Chacha	M	Degree	Amc Afromedic Centre	19.05.1995	953 dodoma	769247200	Kibaigwa	Pandambili	06.08039S	036.64626E
3	Juma Masare	M	Ordinary Secondary	Chitego Agrovet	01.05.2012	125 Kongwa	786051831	Chitego	Chitego	05.61207S	036.37247E
4	Temu Msanjo	M	Primary	Agro Chemical	01.08.2009		756340436 785278788	Mlali	Mlali	06.29641S	036.75085E
5	Mariam Nusura Mbwambo	F	Ordinary Secondary	Jitegee Agrodealer	01.01.2011		717555760 757656866	Kibaigwa Market	Kibaigwa	06.07883S	036.64430E
6	Chepe Makaranga	M	diploma	K.U.Farming	01.01.2007		754601438	Kibaigwa Market	Kibaigwa	06.08114S	036.64660E
7	Amos Magesa Makaranga	M	Degree	Kongwa Farmer Care	01.01.2006	151 Kongwa	784753987	Kongwa	Kongwa	06.19685S	036.41327E
	Branch 1							Mkoka		05.81354S	036.43620E
8	Peter Maeda	M	Ordinary Secondary	Peter E. Maeda	26.08.2008	76 kongwa	784773039 maedaeland@gmail.com	Kongwa	Kongwa	06.19895S	036.41756E
9	Lyimu E.Mathias	M	Degree	Mlali Agrovet	18.04.2008	125 kongwa	685638713 ellymatias@yahoo.com	Mlali	Mlali	06.29630S	036.75040E

AGRO DEALERS IN KITETO DISTRICT

No	Shop Proprietor	M/F	Education Level	Name Of Shop	Date Shop Started	Box	Tel and Email	Village	Ward	GPS	
										Latitude	Longitude
1	Jonas Seuli	M	Advanced Secondary	Twins Agrovet	22.03.2012		786657131 / 782220279 jogosaga@gmail.com	Kibaya Kati	Kibaya	05.31045S	036.55966E
2	Hamis Mwande	M	Ordinary Secondary	Mwande Vet-Agro Shop	01.04.2011	200 Kondo	787242196	Olboloti	Olboloti	05.18130S	036.29680E
3	Augustino Papian John	M	Ordinary Secondary	Dubai Bazaar Shopping Centre	01.01.2007	78 Kibaya	754853414	Kibaya	Kibaya	06.31547S	36.56649E
	Branch 1							Ngusero		05.54373S	036.45617E
	Branch 2							Mtui		05.48095S	036.38866E
4	Anna N. Nsuri	F	Advanced Secondary	Living Agrovet Centre	01.01.2005	66 Kibaya	784930244 / 767930244 pnsuri2000@yahoo.com	Kibaya	Kibaya	05.31417S	036.56433E
5	Goodluck M. Mmari	M	Advanced Secondary	Matui Agrovet	01.01.2008	600 Kibaya	7867110559	Matui	Matui	05.47985S	036.38836E
6	Fraterine Joseph Mahoo	M	Ordinary Secondary	Fraterine Joseph Mahoo	15.07.2012	42 Kibaya-Kiteto		Olboloti	Olboloti	05.18211S	036.29793E

ANNEX II: LIST OF MAJOR AGROCHEMICALS SOLD BY AGRO DEALERS IN THE TARGET DISTRICTS

No.	Chemical	Type
1.	Darfarm	Insecticide
2.	Karate	Insecticide
3.	Paranex	Acaricide/Vet
4.	Round Up	Herbicide
5.	Palapaz	Herbicide
6.	24-D	Herbicide
7.	Duducype	Insecticide
8.	Linkonil	Fungicide
9.	Wipe Up	Herbicide
10.	Randopaz	Herbicide
11.	Booster	Foliar Fertilizer
12.	Amecron	Insecticide
13.	Celetron	Insecticide
14.	Atakan	Insecticide
15.	OTIL 3605L	Herbicide
16.	Glamaxon	Herbicide
17.	Kungfu	Insecticide
18.	Baphosate	Herbicide
19.	Banco 720	Fungicide
20.	Hamaxon	Herbicide
21.	Haison 800	Herbicide
22.	Actelic 50 Ec	Insecticide
23.	Gugusate	Herbicide
24.	Lambdascope	Insecticide
25.	Marshal 250EC	Insecticide
26.	Thionex	Insecticide
27.	Projectclon	Insecticide
28.	Shumba Powder	Insecticide
29.	Dume	Insecticide
30.	Malathion	Insecticide
31.	Megasate	Herbicide
32.	Servian	Herbicide
33.	Paraquat	Herbicide
34.	Duduba	Insecticide
35.	Amarat	Insecticide
36.	Boxyfan	Herbicide
37.	Carach 500SC	Fungicide
38.	Dimethoate	Insecticide
39.	Volar MC	Fungicide
40.	Proamine	Herbicide
41.	Duduthin	Insecticide
42.	Mo-Durs	Insecticide
43.	Profit	Insecticide
44.	Ninja	Insecticide
45.	Sumicom	Insecticide
46.	Insectido	Insecticide
47.	Duduall	Insecticide
48.	Mupalcron	Insecticide
49.	Glyphosate	Herbicide
50.	Mo-Karate	Insecticide

ANNEX III: ANALYSIS OF DATA

Age of Shop Proprietor					
		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	18-25	8	10.8	10.8	10.8
	26-30	11	14.9	14.9	25.7
	31-35	9	12.2	12.2	37.8
	35-40	10	13.5	13.5	51.4
	41+	36	48.6	48.6	100.0
	Total	74	100.0	100.0	

Education Level of Shop Proprietor					
		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Primary	19	25.7	25.7	25.7
	Ordinary Secondary	35	47.3	47.3	73.0
	Advanced Secondary	6	8.1	8.1	81.1
	Degree	14	18.9	18.9	100.0
	Total	74	100.0	100.0	

Staff hire					
		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	No	37	50.0	50.0	50.0
	Yes	37	50.0	50.0	100.0
	Total	74	100.0	100.0	

Do you supply to other agro dealers?					
		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	No	56	75.7	75.7	75.7
	Yes	18	24.3	24.3	100.0
	Total	74	100.0	100.0	

Do you sell rice seed* District Cross tabulation?									
Count		District							Total
		Kiteto	Kongwa	Mvomero	Kilombero	Kiteto	Kongwa	Mvomero	
Do you sell rice seed?	No	3	3	3	19	3	6	5	42
	Yes	0	0	0	29	0	0	3	32
Total		3	3	3	48	3	6	8	74

			Who did you access fertilizer from?			Total
			Company	Agro dealer	Company and agro dealer	
District	Kilombero	Count	19	17	11	47
		% of Total	25.7%	23.0%	14.9%	63.5%
	Mvomero	Count	7	5	0	12
		% of Total	9.5%	6.8%	0.0%	16.2%
	Kongwa	Count	4	5	0	9
		% of Total	5.4%	6.8%	0.0%	12.2%
	Kiteto	Count	2	4	0	6
		% of Total	2.7%	5.4%	0.0%	8.1%
Total		Count	32	31	11	74
		% of Total	43.2%	41.9%	14.9%	100.0%

			Agro dealers selling seeds		
			Maize	Rice	Sunflower
District	Kilombero	Count	47	29	3
		% of Total	63.5%	39.2%	4.1%
	Mvomero	Count	12	3	3
		% of Total	16.2%	4.1%	4.1%
	Kongwa	Count	9	0	6
		% of Total	12.2%	0.0%	8.1%
	Kiteto	Count	6	0	4
		% of Total	8.1%	0.0%	5.4%
Total		Count	74	32	16
		% of Total	100.0%	43.2%	21.6%

			Whom did you access seed from?			Total
			Company	Agro dealer	Company and agro dealer	
District	Kilombero	Count	24	13	10	47
		% of Total	35.8%	19.4%	14.9%	70.1%
	Mvomero	Count	6	0	1	7
		% of Total	9.0%	0.0%	1.5%	10.4%
	Kongwa	Count	6	1	2	9
		% of Total	9.0%	1.5%	3.0%	13.4%
	Kiteto	Count	2	1	1	4
		% of Total	3.0%	1.5%	1.5%	6.0%
Total		Count	38	15	14	67
		% of Total	56.7%	22.4%	20.9%	100.0%

			Are you involved in any other type of business apart from agro input?		Total
			No	Yes	
District	Kilombero	Count	20	27	47
		% of Total	27.0%	36.5%	63.5%
	Mvomero	Count	7	5	12
		% of Total	9.5%	6.8%	16.2%
	Kongwa	Count	4	5	9
		% of Total	5.4%	6.8%	12.2%
	Kiteto	Count	3	3	6
		% of Total	4.1%	4.1%	8.1%
Total		Count	34	40	74
		% of Total	45.9%	54.1%	100.0%

Sourcing of fertilizer – supplier					
	Frequency	Percent	Valid Percent	Cumulative Percent	
Valid		23	31.1	31.1	31.1
	Chapameli	25	33.8	33.8	64.9
	Export Trading	4	5.4	5.4	70.3
	Minjingu	3	4.1	4.1	74.3
	Mukpar Ltd	1	1.4	1.4	75.7
	Premium	10	13.5	13.5	89.2
	TATA	4	5.4	5.4	94.6
	TFC	4	5.4	5.4	100.0
	Total	74	100.0	100.0	

District * Sex of Shop Proprietor Cross tabulation?				
Count		Sex of shop proprietor		Total
		Female	Male	
District	Kilombero	18	29	47
	Mvomero	0	12	12
	Kongwa	2	7	9
	Kiteto	1	5	6
Total		21	53	74

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