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MANGO VALUE CHAIN INTERVENTIONS IN GHANA, SENEGAL AND BURKINA FASO

MISSION REPORT 8

January 18 - March 11, 2016

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WEST AFRICA TRADE AND INVESTMENT HUB

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ACRONYMS

AFD	Agence Française De Développement
APROMAB	Associations Professionnels des Producteurs des Mangues (Burkina Faso)
ASEPEX	Agence Sénégalaise de Promotion des Exportations
CIR	Cadre Intégré renforcé
CDI	Cote d'Ivoire
COLEACP	Europe-Arica-Caribbean-Pacific Liaison Commette
DAMFA	Dangme West Association of Mango Farms (Ghana)
DPV	Département de Protection des Végétaux
ECOWAS	Economic Community of West African States
FAF	Financial Access Facilitators
GIZ	Deutsche Gesellschaft für International Zusammenarbeit
GVCC	Global Value Chain Coordinator
Ha	Hectare
HACCP	Hazard Analysis and Critical Control Point
IPM	Integrated Pest Management
LOC	Letter of Collaboration
M&E	Monitoring and evaluation
MENA	Middle East and North Africa
MOU	Memorandum of understanding
MT	Metric Tons
MVCA	Mango Value Chain Advisor
MCVS	Mango Value Chain Specialist
MVCS-G	Mango Value Chain Specialist - Ghana
MVCS-B	Mango Value Chain Specialist - Burkina Faso
MVCWG	Mango Value Chain Working Group
PETRAMAB	Professionnelles de transformation des mangues (Burkina Faso)
PIC	Presidential Investment Council
RCI	Republic of Cote d'Ivoire
SDP	Strategic Development Plan
SNV	SNV Netherlands Development Organization
STTA	Short-term technical assistance
SVCDA	Senior Value Chain Development Adviser
TOR	Terms of reference
Trade Hub	West Africa Trade and Investment Hub
UEMOA	Union Economique et Monétaire Ouest Africaine
VC	Value Chain
YKMFC	YiloKrobo Mango Farmers' Cooperative (Ghana)

EXECUTIVE SUMMARY

This report is based on the findings of a mission to Ghana, Senegal, Burkina Faso, and Cote d'Ivoire from January 18 to March 11, 2016 for the West Africa Trade and Investment Hub (Trade Hub). This Mission Report focuses on the findings from Ghana, Senegal and Burkina Faso (see *Mission Report 7 for findings and recommendations for Cote d'Ivoire*). The mission, carried out by the Mango Value Chain Advisor (MVCA), assessed the progress of the mango value chain interventions planned for 2016 and identified new opportunities to continue Trade Hub interventions in Ghana, Senegal and Burkina Faso. The mission worked with the Mango Value Chain Specialists (MVCSs) in each country and the Global Value Chain Coordinator (GVCC) based in Senegal. The mission met with stakeholders working with Trade Hub, including USAID trade and investment and private sector development units in Senegal and Ghana.

Throughout West Africa, mango producing countries are expanding into the processing industry and regional trade, in addition to exports and local trade of fresh fruits. Trade Hub interventions in Ghana, Senegal and Burkina Faso have focused on training in best agriculture practices of farm management, including fruit fly and other phytosanitary controls, in response to mango value chain players' demands. Requests are expanding to include support for long-term sustainable approaches to mango value chain development, such as access to established international standards and certifications, markets, finance, infrastructure facilities and association strengthening..

Ghana. Trade Hub interventions in the mango value chain started in 2015 mainly focused on promoting quality production for trade through training of farmers in agriculture best practices in mango farming. In 2016, interventions expanded to supporting associations and producers to access international standards for export production and building their capacity to meet demand, while continuing with farmer trainings in the zones that did not benefit from initial support under the 2015 program.

Senegal. Trade Hub interventions have helped establish producers' geo-referencing systems and international certifications, promote best farm management practices, local value addition (mango pulp and dried mangoes production), local and regional trade and global exports, and packing and collecting facilities.

Burkina Faso. Trade Hub interventions in 2016 continue to support training activities related to best agriculture practices by farmers, and training of harvesters. In addition, the Trade Hub will to help farmers and processors access international certifications including HACCP, provide grants to establish a collecting/bulking and packaging center to help a mango drying enterprise use modern drying units, and developing the capacity of associations.

I. INTRODUCTION

I.1. BACKGROUND

USAID/West Africa's Mission-wide goal is the West African-led advancement of social and economic well-being, as supported by several development objectives, including "broad-based economic growth and resilience advanced through West African partners." The West Africa Trade and Investment Hub will contribute to this development objective by achieving two critical intermediate results:

- I. Improving the capacity of West Africa's farmers and firms in targeted regional and global value chains.
- II. Improving the business enabling environment by addressing transport constraints and trade barriers affecting the efficiency of the region's corridors and borders.

Trade Hub works through regional private sector associations and regional governmental entities to help channel all partners' efforts in a way that will address critical constraints to trade competitiveness, capture opportunities to expand trade, demonstrate West Africa's productive potential to investors, and facilitate greater investment in the region. Its results will include both an increase in 1) regional trade in key agricultural commodities, a critical feed the Future (FTF) indicator, and in 2) value-added global exports, a targeted indicator for the Africa Competitiveness and Trade Expansion (ACTE) Initiative, which ultimately aims to increase Africa's share of world trade.

The project builds the capacity of several key groups of African partners from regional private sector associations and alliances. Stakeholders include the Economic Community of West African States (ECOWAS), the Economic and Monetary Union of West Africa (UEMOA); and global development alliances with private sector companies. As Trade Hub works with associations and regional alliances, it will help them serve as leaders in promoting reforms, attracting buyers and investors, and adopting improved practices. Eventually, Trade Hub's partners are expected to act independently and take on even greater leadership roles.

Trade Hub comprises several components. These include:

- Regional staple foods development (livestock and grains)
- Global value chain development (targeted agro-processing and manufactured consumer goods, such as mangoes, cashews, and apparel)
- Finance and investment
- Transport and the trade enabling environment
- Capacity building
- Communications

I.1. ASSIGNMENT CONTEXT AND STRUCTURE

The purpose of the present assignment was to assess the current status and advise the implementation of planned interventions to support the mango value chain this season in Ghana, Senegal and Burkina Faso, while identifying opportunities for future interventions. This assignment was carried out in parallel to another mission to identify opportunities for Trade Hub interventions to promote the mango and cashew value chains in RCI (see *Mission Report 7*).

Since 2015, Trade Hub's interventions in Ghana, Burkina Faso and Senegal have focused on increasing production of quality mangoes for global, regional and local trade as fresh and processed products. In line with this objective, Dr. Patrick Nugawela, MVCA, visited Ghana, Senegal, and Burkina Faso between January 18 and March 11, 2016. The MVCA held initial discussions in Accra with MVCSs from all three countries, the GVCA and Senior VC Development Advisor (SVCDA) from January 19-26, 2016, as well

as other stakeholders in Ghana. The MVCA then visited Senegal (January 30-February 8), Burkina Faso (February 25-March 2), and Ghana (March 3-9) for final briefing and finalizing the mission reports.

In each country, the MVCA was accompanied by the MVCS based in Senegal¹, Ghana² and Burkina Faso³; the GVCA joined the mission in Senegal. The mission reviewed each country's work plans and met with:

- **Ghana:** Mango farmers associations in the Somanya region, packhouse management, service providers, the USAID Regional Office of Trade and Investment, and a USAID Economic Growth Officer.
- **Senegal:** Agro Fruits processor, exporters and producers (Hortica, Laure agro and CADA), the organic producers' association in Niayes, traders (Senfresh, Wayamba Distribution), service providers (Enablis), financial advisors working with the Trade Hub), the Department of Horticulture at the Ministry of Industry, and USAID's Private Sector Development Office.
- **Burkina Faso:** Association leaders including APPROMA-B and PETRAMAB, enterprises (DAFANI, Gibana, Sanlee Sechage), service providers, technical assistance programs (SNV), and training consultants.

The MVCA briefed USAID in Senegal on February 4 and in Ghana on March 3. *Please find a list of people and institutions contacted during this mission in Annex A and the program in Annex B.*

1.2. KEY OBSERVATIONS OF THE MISSION

1.2.1. GENERAL OBSERVATIONS

Historically, countries throughout West Africa, including Senegal, Mali, and Cote d'Ivoire, tended to produce quality fresh mangoes for export directly to global markets (mainly Europe). Burkina Faso gradually expanded local value addition through processing (mango drying and pulp production), and Ghana focused on high value-added mango products (fresh cuts, mango-based snacks and fruit drinks).

Today, each country is investing in local value addition through drying, mango pulp production, and processing of juice and other high-value mango products. For example, Senegal is also venturing in to mango pulp and juice production and several exporters are interested in mango drying. Ghana is expanding its existing processing capacities. RCI is making investments in large-scale processing industries.

Based on requests from mango traders and associations, the Trade Hub initially focused training in best agriculture practices, fruit fly and other phytosanitary controls to improve quality and reduce post-harvest losses. Increasingly, value chain players also request assistance to gain new international certifications (Rainforest Alliance, Global G.A.P., HACCP), build or improve infrastructure (bulking houses, cold storage facilities) access new markets and finance, and develop the capacity of associations.

Key players in the mango value chains in these countries also seek assistance for more long-term sustainable approaches for mango value chain development. These include:

- exporter-producer linkages and out-grower supplier systems
- collecting and cold storage facilities
- trained, organized harvesters/groups
- production and harvesting patterns
- organic production

¹ MVCS Senegal - Mamodu Dabo (STTA)

² MVCS Ghana – Pamela Okyere (LTTA)

³ MVCS Burkina Faso – Jean Bosco Dibouloni (STTA)

- Methods to reduce post-harvest losses
- enhanced local and regional markets for fresh fruits
- development of new, demanded varieties (in Senegal and Ghana in particular)
- expansion of local value addition
- regional mango production and marketing clusters (in Burkina Faso, Mali and RCI).

1.2.2. OBSERVATIONS BY COUNTRY

1.2.2.1. Ghana

Lead processors of high value-added products, including HPW, Bomarts Farms and Blue Skies, are increasing investments and looking for new markets, including the U.S. However, obstacles remain, including lack of available fresh mangoes for processing during a longer period of the year, and limited volumes from processing companies.

Fresh mango production zones are expanding to the Brong Ahafo, Volta and Eastern regions, in addition to the existing supply zone in the Somanya region. Interestingly, even in limited quantities, Ghana is the only country in the region now exporting tender green mangoes to the EU (mainly to the UK) for the pickles industry. These mangoes are local varieties not generally exported to fresh mango markets.

1.2.2.2. Burkina Faso

Mango drying continue to expand for export to the EU and South Africa and spur investments in processing.

Demand for technical assistance is increasing for new certifications, training on harvesting techniques, infrastructure development (packhouses and collecting/bulking centers), and training on international standards of organic production. Multiple development partners are interested in developing a mango cluster in the Bobo Dioulasso region.

1.2.2.3. Senegal

New high value-added processing ventures are emerging in mango pulp production, and several exporters have expressed interest in mango drying. Producers were interested in developing organic production, grafted plant nurseries, and new mango varieties.

The Niayes region continues to remain the prime area for mango trade. The regions of Sine-Saloum and Casamance offer large production potential yet have not been oriented toward trade.

The Thai mango variety being grown in Senegal has high demand for export.



Thai mango variety grown by Hortica Co. at Rufisque near Dakar

2. PLANNED INTERVENTIONS AND OPPORTUNITIES BY COUNTRY

1.3. GHANA

Trade Hub interventions in the mango value chain commenced in Ghana in 2015, mainly focused on promoting quality production for trade through training of farmers in agriculture best practices in mango farming. Trade Hub interventions in FY2016 include training for partner associations and enterprises to achieve international standards for exports, while expanding farmer trainings to other regions. Specifically:

- In collaboration with Bomarts and HPW enterprises, trained 500 farmers in 12 districts on agricultural best practices to increase high-quality mango production during the minor season from the end of 2015 through early 2016.
- Training 124 producers with YKMFA and DAMFA mango farmers' associations and the Akorley packhouse in standards and certifications, including Global G.A.P. Option 2.
- Proposed grant for Akorley packhouse to establish laboratory facilities for testing quality of mangoes bound for export.
- Collaborate with value chain stakeholders and other technical partners to organize a workshop to discuss the feasibility of a regional mango alliance (to take place in Senegal June 2016).

All Trade Hub support for the mango value chain is based on the following strategic considerations to have sustainable impact:

Improving high-quality mango production.

- Trainings and monitoring of farmers on best farming practices to increase fresh mango exports from the Brong Ahafo, Volta and Eastern regions.
- Global G.A.P. certification option I certification of farmer groups for mango associations in the Brong-Ahafo and Volta regions and Greater Accra.
- Training of internal auditors for Global G.A.P. and HACCP certifications to promote Training packhouse workers at Ohumpong Farms and Kobiman Farms in the Brong-Ahafo region.

Accessing new markets.

- Promotion of regional mango trade through import/export of fresh mangoes.
- Promote access to US, EU and regional markets for Blue Skies, HPW, Bomarts Farms and HPW.
- Support exporters' participation in regional and international trade fairs, including Fruit Logistica and Bio Fach with FAGE (February 2017), Dubai Logistica (October, 2016-17), and Sweet & Snacks Fair (May 2017).

Developing national and regional mango sector platforms.

- Organizing national buyer-seller meetings and Mango Days.
- Support to the National Mango Roundtable in collaboration with GiZ and FAGE.

Developing new business models, including:

- Collecting centers.
- Producer-exporter out-grower systems.
- Exports of local green mango varieties.
- Plant nurseries that would include new varieties.

I.4. SENEGAL

Trade Hub interventions in this country help entrepreneurs establish international certifications, facilitate supplier contacts for mango pulp and dried mango production, promote local, regional and export trade, and bolster packing and collection facilities.

Main interventions for 2016, which are underway or awaiting approvals, include support for:

1. A geo-referencing system to help exporters (Bio Niayes Organizations, COOPEC Sud, etc.) and associations (CADA Sarl, Hortica Sénégal) better manage and connect with producers.
2. Certification of small producers in the Niayes region through business linkages with Hortica Sénégal and CADA Sarl.
3. Continued training on best agriculture practices in the Niayes region, including fruit fly control.
4. Promotion of best practices in packaging through training in collaboration with CADA Sarl, Hortica Sénégal, and Laure Agro enterprises.
5. AGROFRUITS' mango pulp production unit, including helping establish commercial relationships with mango suppliers in Senegal and in the region.
6. Organization of sector events, including Mango Day in Senegal with CIR and ASEPEX

The USAID Private Sector Development Office in Dakar expressed interest in supporting interventions to support the mango value chain. Recent communications with USAID/Senegal and the Government of Senegal's Ministry of Trade have focused on the organization of a regional mango week in Dakar in June 2016. This will include a working group meeting to discuss creating a regional mango alliance.

I.5. BURKINA FASO

As in Senegal and Ghana, Trade Hub interventions in Burkina Faso in 2016 will include continuing training activities related to best agriculture practices including phytosanitary and other fruit fly controls, and training of harvesters. In addition, Trade Hub is introducing training support to help farmers and processors access international certifications including Global G.A.P. and HACCP. In 2016, Trade Hub grants will help establish a collecting/bulking and packaging center, promote a model demonstrative mango-drying enterprise to introduce a new tunnel dryer, and strengthen associations.

Mango value chain activities in Burkina Faso are carried out by the MVCS on an STTA contract. Since February 22, 2016, he has worked from a small office in the SNV program office in Bobo Dioulasso, which enables meetings value chain partners and better organization of project records and information.

Activities currently underway in 2015 include:

1. Seven training sessions on fruit fly controls and best agricultural practices for 140 farmer leaders who are members of APROMAB.
2. Eight training sessions on fruit fly controls and best agricultural practices for 40 farmer leaders who sell exclusively to DAFANI.
3. Global G.A.P. training for 100 producers linked to key exporters.

4. Grant to Rose d'Eclart processing enterprise for installation of an improved tunnel dryer.

Longer-term, potential Trade Hub activities in Burkina Faso could include:

1. Support a geo-reference system to help Sanlee Séchage/Ranche de Koba and DAFANI exporters and processors better connect with more than 1,000 mango producers in the region.
2. Support training of 30 technical personnel operating mango drying units that supply dried mangos to Gebana enterprise and other exporters in the region.
3. Continue training farmer trainers in collaboration with APROMA B on best farm management practices. These trainers will then train producers.
4. Support mango processors and exporters of dried mangoes in the region to improve the mango storage system, the quality of mangoes, and to reduce losses. Trade Hub should also link Burkina Faso producers and suppliers with other producers and suppliers in Mali, Senegal, and RCI with the same product.
5. Link producers and processors to a cold storage system planned in the Bobo Dioulasso region.
6. Work with other donor projects on development of a mango cluster in the region and investigate the possibility of extending/linking activities in Burkina Faso to activities in Mali's Sikasso region and RCI's Korhogo region.

The mission met with the Permanent Secretary of the Presidential Investment Council (PIC) who expressed the government's interest to support initiatives in the mango sector in Burkina Faso's Hauts-Bassin region, where Trade Hub is already working.

3. RECOMMENDED NEXT STEPS

Activities planned and underway during the 2016 season in all three countries require follow-up from each country's MVCS and coordination from the MVCS in Accra, including biweekly updates and finalizing budget details with partners for planned trainings. Additional activities should include:

Follow up on consultations with regional mango value chain stakeholders on formation of the proposed regional mango alliance. Priority should be given to organizing the alliance's first workshop before the end of this season, preferably in a French-speaking country, led by the SVCDA and GVCC.

Prepare a concept paper on the development of a mango cluster in the Bobo Dioulasso region. To be done by J.E. Austin Associates and the MVCA.

Promote and expand high-impact, innovative pilot business models, including:

- Supplier–processor linkage of Agro fruits
- Exporter–producer geo-reference system through CADA enterprise in Senegal
- Processor–harvester linkage through DAFANI enterprise
- Collecting and packing center linkages with producers through Sanlee Séchage
- Mango drying cluster linked with Gebana for export in Burkina Faso
- Processor–producer linking supply system through BOMARTS and HPW
- Packhouse exporter linking through Akorley in Ghana

ANNEX A: PERSONS/INSTITUTIONS CONTACTED ON MISSION 8, JANUARY – MARCH 2016

Ghana			
1	IPM Consultant Fruit Flies Trainer	Victor Avah	Email : victoravah@yahoo.co.uk , Tel: 0244507530
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Burkina Faso			
No.	Institution	Person Contacted	Contact Details
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5	Ste Rose eclart	Antonio Toure	Antonio.toure@lapost.net
6	SN Ranch DU Koba	Bougoum Issaka	ranckoba@yahoo,fr, Tel. +226 76606270 /70102215
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8	Packing of mangoes Trainer	Sanou Arsene	Sarsene2016@gmail.com Tel, +226 70256212
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18	SOTRIA –Societe de Transformation Industrielle d’anacard Au Burkina Faso	Mme Minata Kone	Burkinacajou@gmail.com tel. +226 70232796
19	Gebana Enterprise	David Heubi	d.heubi@gebana.com Tel. +226 76617033
20	Importer of dried Mangoes UK	Ian Morris	ian@fullwellmill.co.uk

SENEGAL

1	USAID	John Gorlorwulu –Private enterprise Officer	jgorlorwulu@usaid.gov Tel. +221 777138520
2		Mustapha Ly -Investment , Policy and Trade Specialist –Economic Growth Office	mly@usaid.gov tel. +221 33879 4903
3		Seydou Kane, Agriculture Specialist, USAID Senegal	
4	Ministry of Agriculture and rural Equipment	Dr Macoumba Diouf –Director	Diouf,macoumba@gmail.com Tel.776394091/774508618
5		Momadou Kebe –Chef de division , Reglamentaions, et de la promotion des filières Horticoles	Makebel@yahoo.fr Tel.+221 5753893
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7		Ousman Ndoya Enterprise Développent Associates	Ousman.ndoye@enablis.org +221 708984636

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9	Mango sector consultant	Momodu Dabo Contacted on Phone	Email: dabokl@yahoo.ca
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12	WAYAMBI GIE Produits Locaux Sénégalaise	Mme Yama Ndiaye – Marketing officer	Yaboye2006@yahoo.fr +221773007866
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15		Mbaye Faye –Member	Tel.+221 775501744
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17	CADA	Bakhao Guisse Responsable Admin.	bakhaoguisse@yahoo.fr Tel. +221-776423520
16	Laure Agro –Exporter in Senegal and Cote D'Ivoire	Mme Hachem Yasmine Direct rice	Senegal.lauresarl@gmail.com tel.+221 774626210

ANNEX B: MISSION PROGRAM

Date		Institution/Meeting
Ghana		
18	Jan Sunday	Travel to Ghana
19 th	January. Monday	Arrival Accra –report to WATIH
20-26	Jan. Mon Tues. Wed	Meetings with Mango Specialists team and work plans review of Ghana ,Burkina and Senegal
		Preparations for RCI mission
		Visit Somanya –Meet Mango farmers Associations
		Review of work plans –Ghana and arrangements for RCI Mission
Senegal		
30	Jan. Sat	Travel to Senegal
31	Jan .Sun.	Senegal
1-2	February .Mon.Tues	Meetings –Trade Hub –Senegal, Agro fruits , Senfresh , Enablis
3	Feb . Wed	Travel to Niayes –Visit Hortica , Meet with Bio Mango Association
4-5 6-7	Feb Thu. Through . Sunday	Debriefing with USAID –Dakar, Meeting Financial Adviser , Agro fruits , Senfresh , Laure agro products .Wayam Bi GIE .Sene commerce (Gambia)
		Senegal report details work , meeting Sene fruits
Burkina Faso		
25	Thur	Departure to Bobo-Visit Bureau Trade Hub
26-Feb to 1st March	Fri.- to Monday	Travel to DAFANI Banfora –Oradara Sanlee Exports , ISRA – Bobo, Visit Gabena ,meetings with Associations –APROMA-B etc.
1st March	Tuesday	Travel to Ouagadougou –Work on the report
2 nd March	Wednesday	Travel to Accra –Work on the briefing Presentation
Ghana		
3rd March	Thursday	Visit Ghana HPW
4 th to 9 th March	Friday –to Wednesday	Discussions on Ghana Programmes ,. TOR of RCI consultant and work on the report
10- 11 March	Thursday	Work on the draft I final report and Travel to Sri Lanka