



**An International Center for Soil Fertility and
Agricultural Development**

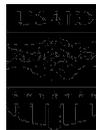
**Malawi: Agricultural Input Markets (AIMS)
Development Project**

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Capital City
Lilongwe 3
Malawi

**Semi-Annual Report
OCTOBER 1, 2002 TO MARCH 31, 2003**

**Implemented by
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TABLE OF ACRONYMS AND ABBREVIATIONS

ACB	Anti-Corruption Bureau or Agricultural Communications Branch
ADD	Agricultural Development Division
ADMARC	Agricultural Development and Marketing Corporation
ADP	Area Development Programme
AISAM	Agricultural Input Supply Association of Malawi
AIMs	Malawi: Agricultural Input Markets Development Project
ARET	Agricultural Research and Extension Trust
CIDA	Canadian International Development Agency
CNFA	Citizens' Network for Foreign Affairs
CPPs	Crop Protection Products
DFID	Department for International Development
EU	European Union
FEWS	Famine Early Warning System
FW	Farmers World
GIS	Geographical Information Systems
GOM	Government of Malawi
ICRAF	International Centre for Research in Agro-Forestry
ICRISAT	International Centre for Research in Semi-Arid Tropics
INDEFUND	Investment and Development Fund of Malawi
IFDC	International Center for Soil Fertility and Agricultural Development
KR II	Kennedy Round II
MASH	Malawi Association for Spices and Herbs
MASIP	Malawi Agricultural Sector Investment Process
MBS	Malawi Bureau of Standards
MCI	Ministry of Commerce and Industry
MIS	Market Information Systems
MOAI	Ministry of Agriculture and Irrigation
MRA	Malawi Revenue Authority
MSB	Malawi Savings Bank
NASFAM	National Association of Smallholder Farmers of Malawi
NASME	National Association for Small and Medium Enterprises
NGOs	Non-Governmental Organizations
NSO	National Statistical Office
OFDA	Office of US Foreign Disaster Assistance
OPV	Open Pollinated Varieties
PCB	Pesticides Control Board
POSAM	Pesticides Association of Malawi
SFFRFM	Smallholder Farmer Fertilizer Revolving Fund of Malawi
SP	Starter Pack
STC	Short Term Consultant
TIP	Targeted Input Program
USAID	United States Agency for International Development
WVI	World Vision International
ZIPA	Zipatso Association of Malawi

1.0 PROJECT DESCRIPTION

The IFDC is implementing a project titled, Malawi: Agricultural Input Markets Development Project (AIMs) which is funded by the United States Agency for International Development (USAID). The project is working to strengthen open and competitive markets and dealer networks as primary mechanisms to improve farmer access to appropriate technologies. It is directly enhancing enterprise development and improved policies and regulations. Both key to improving the efficiency in agri-input supply and facilitating smallholder access to appropriate production technologies. Through this working effort, the productivity and profitability of the agricultural system in Malawi will improve, thus improving household and national food security, reducing rural poverty, and increasing social stability.

1.1 Project Goal

Improve smallholder farmer access to improved quality seeds, fertilizer, and crop protection products through financially sustainable agri-input supply and marketing systems.

1.2 Project Objectives

The general *objective* of the project is, “to significantly increase the supply and use of improved quality seed, fertilizers and crop protection products (CPPs).”

The project set out to achieve the above goal and general objective by focusing on the following *specific objectives*:

- Improve the policy environment for input suppliers.
- Enhance entrepreneurship skills of agri-input dealers and develop a cadre of dealers who could become technology transfer agents.
- Facilitate improved access to finance by agri-input suppliers.
- Establish a market information system.
- Establish effective regulatory systems.
- Improve dealer and farmer knowledge of appropriate input practices.

The project was designed to focus on four core areas: Developing human capital and dealer networks, deepening of policy reforms and policy studies, establishment and implementation of regulatory systems, and the development of market information systems.

2. KEY CONTENTS

This document presents a report for the last half year (Semi-Annual) for the Malawi Agricultural Input Markets Development Project (AIMs) activities during the period October 2002 to March 2003, which addresses the outcomes identified in the “Work plan” submitted for the period of October 2002 to September 2003. It also presents the work plan (as submitted in October 2002) for the next six months from April to September 2003.

3.0 ADMINISTRATION AND MANAGEMENT

During the last six months, this project has made an aggressive effort to continue the development of a sound and well-functioning infrastructure, administration and management system. Monitoring, evaluation and performance measurement that allows for the efficient and effective attainment of the project goals and objectives has also been addressed in documentation and practice.

3.1 Infrastructure development: The following activities have taken place during the first half of year one:

- Blantyre office identified and established;
- Expanded office accommodation at the new offices, communications and logistics;
- Completed the hiring of core staff;
- Ensured that all staff understand the project and its objectives through regular management meetings;
- Implemented staff development training, and identified opportunities to take advantage of those opportunities to achieve the “benchmarks” set forth in this project.

3.2 Management: The following activities have been implemented:

- Finalized the first year work plan together with USAID and MOAI;
- Established contacts and reviewed project plans with relevant USAID partners and other donor programs, banks and other sources of support;
- Developed scopes of work and job descriptions for staff and consultants;
- Designed baselines and tracking systems for IR results and cost contributions;
- Established requirements for local, regional, and international STCs required to successfully complete work plan as submitted.
- Project Advisory Committee set up and active.

3.3 Monitoring and Performance Measurement: Under the overall direction of the Project Advisory Committee, the project team, in concert with USAID and the MOAI, established benchmarks and quantifiable targets to assess progress. The indicators established are:

- The number of agricultural inputs dealers;
- Composite cost of fertilizer;
- Composite cost of seed (maize);
- Fertilizer (nutrient) importation levels;
- Number of input dealers trained in improved inputs usage methodology;
- Distance to access inputs by farmers;
- Percentage of farmers using improved seeds, CPPs and fertilizer;
- Adoption of improved technology;
- Incomes of target farmers;
- Farm-gate costs of agricultural inputs;
- Impact of policy changes;
- Regulatory system impact on quality control of inputs;
- Quality of market information being made available to entrepreneurs.

4.0 CORE PROJECT COMPONENTS AND THEIR KEY ACTIVITIES HIGHLIGHTS

- More than 200 existing and potential inputs dealers were identified and trained
- About 400 sites across the country have been identified for inputs dealing
- A potential gap for fertilizer imports has been established and communicated to the Association and other stakeholders
- Radio programs to improve knowledge on fertilizers by traders, farmers and extension staff have been commenced
- A draft proposal to commercialize ADMARC has been submitted to GOM
- An Association on Agro-inputs dealership has been formed and registered
- The Association has been linked to three commercial banks in the country
- Business plans have been produced and submitted to the commercial banks for possible loans
- A Seed Act and Crop Protection Act have been collected from MOAI for review
- A workshop on policy issues and studies was conducted with MASIP

4.1 Human Capital Building and Dealer Development

This key component aims at building local capacity to improve the availability and expand the number of agri-input dealers within Malawi with the desired outcome of higher farm gate production, while more efficiently utilizing technologically based agricultural inputs. Important activities of this component are:

- Direct technical assistance to entrepreneurs in business planning and management, marketing and safety (developing the skills needed for dealers in rural areas to meet the needs of their customers);
- Fostering the development of a network of dealers and improve their advisory skills;
- Demonstrations of appropriate technologies through cost-sharing with private sector and MOAI extension service;
- Publication of technical brochures/bulletins on proper use of practices and nutrient contents of different fertilizers;
- Increasing dealers understanding of banking procedures, documentation and record keeping needed in order to conduct business profitably;
- Upgrade technical knowledge and skills of dealers, entrepreneurs, farmers, policy makers and organizations through workshops and study tours (nationally, regionally and internationally);
- Improve dealer access to credit from financial institutions.

4.2 Deepening of Policy Reforms and Policy Studies

This project component will assist the GOM in its ongoing effort to create an environment that is conducive to private sector investment in agri-input supply and marketing. Key areas on policy reforms and studies include:

- Identifying and providing analysis of specific policy issues (e.g., Targeted Input Program, ADMARC & SFFRFM);

- Providing recommendations for policy reform;
- Appraising and recommending appropriate modifications to donor funded programs to render such programs compatible with a market economy.

4.3 Strengthening Regulatory Systems

On this component, the project will assist the GOM in strengthening the regulatory frameworks for seeds, fertilizer and CPPs, and their implementation. The key activities included in this component are:

- A thorough assessment of the present legal environment (existence and appropriateness of laws and regulations), the inspection and analytical capacity and the administration and enforcement capacity;
- The identification of the necessary requirements for strengthening the regulatory system.

4.4 Market Information Systems

The system provides timely and accurate information in order to achieve market transparency and efficient, competitive functioning of markets as a necessary prerequisite for assessing the impact of policy reforms, and enabling the private sector entrepreneurs, commercial banks, GOM officials, and concerned donors to make timely appraisal of market conditions (i.e., supply, demand, and prices) for agri-inputs.

Key areas include:

- Identification of a network of affiliates for data collection.
- Development of an information system available to the identified target audience.
- Gathering (Collecting and collating) data in selected markets throughout the country.
- Analysis and dissemination through mass media (newsletter, radio, bulletins etc) and an electronically retrievable system (website) for use by the GOM, donors, clients and the public at large.

The AIMs project is strengthening open and competitive markets and dealer networks. These markets and networks are improving farmer access to appropriate technologies. The project is directly enhancing enterprise development and an improved policy and regulatory setting, both key to improving the efficiency in agri-input supply and facilitating smallholder access to appropriate production technologies. This activity is contributing to achieving the USAID Mission SO 6, *“To achieve sustainable increases in rural incomes”* and will directly address achievement of the intermediate result (IR) 6.1, *“sustainable increases in agricultural productivity”* by promoting the expansion of a private sector led economy and the growth of successful small and medium enterprises.

The project activities are also contributing to USAID Mission’s goals as outlined in the Strategic Plan, namely *critical private markets expanded and strengthened; more rapid agricultural development and food security expanded and made more equitable; and access to economic opportunity for the rural and urban poor expanded and made more equitable.*

5. ACTIVITIES OF AIMS PROJECT IMPLEMENTED FOR THE PAST HALF YEAR (OCTOBER 2002-MARCH 2003)

Table 1. Activities implemented during October 2002 to March 2003

YEAR ONE WORK PLAN OBJECTIVES	ACTIVITIES IN SUPPORT OF OBJECTIVES AND ACHIEVEMENTS – FIRST HALF YEAR
I. Human Capacity Building and Dealer (Network) Development	
<i>Establish dealer training needs</i>	<ul style="list-style-type: none"> • A nationwide training needs assessment has been completed • Established potential and actual fertilizer and seed demands
<i>Identify a cadre of new potential dealers</i>	<ul style="list-style-type: none"> • More than 200 new active members identified and assisted through training • More input dealers in groups or associations identified • 400 potential sites for inputs dealers established
<i>Establish / Develop Dealer Association and provide support</i>	<ul style="list-style-type: none"> • A national input dealers association has been formed and registered with the Government of Malawi • Association initial fund and checking account in place • Legal documents produced and sent to government for approval • Executive Director has been hired • Guided and contributed to AISAM's meeting • Established dealership network map • Linked inputs dealers and associations with inputs suppliers • Reviewed a report on Rapid Appraisal of Land Characteristics of Major Crops of Malawi in Relation to Fertilizer Requirements
<i>Enhance technical knowledge and business skills of dealers</i>	<ul style="list-style-type: none"> • Assisted association members in the development of business plan • Continuous liaison with stakeholders on business development and status of input supplies available in Malawi • 8 Training courses of potential and existing inputs dealers conducted in collaboration with MASIP, NASME, POSAM, Farmers World and NASFAM • Identified training facilities for use by the AIMS Project • Completed 12 training modules for agro-dealers • Over 250 existing and potential dealers trained • Attended a workshop as a launch pad for African Centre for Fertilizer Development • Organized and conducted a tour to Albania for dealers and other stakeholders • Evaluated training programs on plant nutrients, fertilizers and their marketing/distribution as well as Association Building Workshop • Provided advanced CPP and fertilizer product training as sponsored by NASFAM and POSAM and facilitated by AIMS Project staff

<i>Enhance knowledge of Dealers about credit sourcing and business development</i>	<ul style="list-style-type: none"> • Contacts/Linkages with every commercial bank, lending institution and microfinance institution established in Malawi • Explored support from all major donors to assist agro-input dealers to finance importation of input supplies
	<ul style="list-style-type: none"> • Developed a major proposal (and four minor proposals) and business plans for the importation of fertilizers with the Association and submitted same for funding to finance institutions
II. Policy Reforms and Policy Studies	
<i>Develop policy reform advocacy instrument</i>	<ul style="list-style-type: none"> • A review and summary of the existing policies has been completed. • Existing policies that constrain the inputs system identified and being addressed. • A draft voucher system for “give away inputs” has been completed and being reviewed. • Facilitated a GoM Policy workshop • Completed an update of an assessment report and action plan • Gathered information on other (Non-government) donor supported inputs programs • Position paper on Policy: Status of Activities has been developed • Privatization and Commercialization of ADMARC and SFFRFM meetings have been held with the Ministry of Agriculture. Position papers are being drafted on the issue • Advisory paper on the fertilizer buffer stocks has been submitted to HQ for review • Gathered, analyzed and published information on seed status and implications for policy • Attended the Nacala Corridor Investors Conference • Engagement of STC/Expert on regulatory framework – arrival in June 2003 • Discussed policy issues with ICRAF policy analyst in Zambia • Completed analysis of economic indicators data for use in evaluation of the project
III. Strengthening Regulatory Systems	
<i>Regulations</i>	<ul style="list-style-type: none"> • Held meetings with MOAI on development of Seed Regulations and operationalisation of Regulations.

	<ul style="list-style-type: none"> • Discussed the development of the Crop Protection Regulatory Framework • Collected the existing Policies, Acts and Regulations and sent to HQ for scrutiny by STC on regulations due to come in June/July • Capacity of Malawi Bureau of Standards and its constraints established • Capacity of MoAI on seeds and CPP inspectors established • Assessed needs for PCB staff and stakeholders
III. Market Information Systems	
<i>MIS established</i>	<ul style="list-style-type: none"> • Data collection strategy and methodology developed • First issue of the newsletter has been produced and circulated • Newsletter has been designed to contain MIS data and other information. • Conducted a needs analysis with stakeholders regarding the development of the MIS • Produced three radio programs on fertilizer guide and recommendations • Collected and published information on fertilizers, seeds and crop protection products and training activities in the press and in reports • Data base establishment based upon needs analysis outcome • Produced a documentary video program on the AIMs Project launch • Assessed and verified crop damage by floods in Salima and crop situation in Ntchisi, distributed information to input dealers and selected NGO's • Assessed inputs situation in Lilongwe, Salima, Kasungu, Mchinji and Ntchisi, distributed information to input dealers and selected NGO's. • Produced a position paper on contribution of local, hybrid and improved OPV maize varieties, distributed information to input dealers and selected NGO's • Provided MIS Internet Searches regarding inputs for input dealers and selected NGO's • Collected information on establishment of M & E system • Acquired maps (GIS) from Land Resources Department for mapping input dealers for development into a comprehensive input supply accessibility identification system

6. PROJECT PERFORMANCE AND RESULTS

6.1 Project Monitoring and Performance Measurement

Under the overall direction of the Project Advisory Committee, the project team, in concert with USAID and the MOAI, established benchmarks and quantifiable targets to

assess progress of the project throughout implementation phase. The project results (previously identified under Section 3) are measured quantitatively and in some cases qualitatively to most accurately reflect project progress towards our objectives.

All training programs are evaluated using a participant evaluation form. Results are tabulated and reviewed. Data on input prices and quantities are collected weekly and/or bi weekly, depending upon the season. Input dealers numbers are constantly being updated and recorded. Other pertinent data are collected and tabulated by project staff on a weekly basis.

This project has operated for a period of six months effectively and there has been significant progress to date achieving the project performance indicators. However, caution must be exercised in interpreting these indicators due to the short period the project has been operational. They should serve as nominal indicators showing trends and guiding formative adjustments to better achieve the objectives of this project.

6.2 Specific Project Monitoring and Performance to Date

The following table shows the progress from July 2002 to March 2003 on some of the above for which data is available:

Table 2. Project Indicators of Progress from July 2002 to March 2003

Indicator	Subclass	Unit	PERIOD		Remarks
			Baseline 2002 (July)	March 2003	
Independent Dealers		Number	33	226	A seven fold increase in the number, more are expected.
Fertilizer Prices (Nominal)	CAN 27%N	\$/50 kg bag	14.20	13.0	8.45 % decrease
		MK/ 50 Kg bag	1,155	1,170	1.28 % increase
	Urea 46%N	\$/50 kg bag	15.6	14.9	4.48 % decrease
		MK/ 50 Kg bag	1,268	1,340	5.37 % increase
	NPK 23:21:0+4s	\$/50 kg bag	17.7	16.8	5.08 % decrease
	MK/ 50 Kg bag	1,445	1,510	4.30 % increase	
Fertilizer Prices (Weighted mean)	Main types only	\$/ 50 Kg bag	15.90	14.92*	6.16 % decrease
		MK/ 50 Kg bag	1,296.38	1,342.95	3.46 % increase
Seed Prices (Nominal)	Seed : Hybrid	\$/10 kg bag	9.81	11.11	11.7 % increase
		“	5.52	6.67	17.24 % increase
	OPV	MK/ 10 Kg bag	800	1000	20 % increase
		“	450	600	25 % increase
Seed Prices (Weighted mean)	Hybrid & OPV	\$/10 kg bag	8.14	9.15	11.0 % increase
		MK/ 10 Kg bag	663.5	860	22.8 % increase
Distance to input markets		Kilometers	>50	<=50	
Input Use	Fertilizers	Tons	174,957	201,799	15.0% increase

	Seeds ♦ Improved OPV ♦ Hybrid	Tons	4,498 6,978	5,463 10,165	The figures are based on 20kg/hectare for the available hecterage as provided by FEWSNET for 2001/02 and for 2002/03 cropping seasons.
MIS	Beneficiaries	Number	0	25	Fertilizer status Reports given to major input dealers including MOAI, FAO, CNFA and USAID.
Policy Studies/Reports completed		Number	0	6	Reports and papers for background information available and studies are upcoming.
Quality Control (Decrease in sale of out dated pesticides)		Percent	0	Exact figures not known, but information coming in for the current year	To be completed once figures are in

* Weighted Mean Price calculated based on January quantities and prices.

Note: Prices in dollars are lower in March 03 than in July 02 primarily due to the devaluation of 18.5 % for the Malawi Kwacha during this time frame.

7.0 SUMMARY DESCRIPTION OF SELECTED IMPACTS/ACHIEVEMENTS TO DATE

Some of the selected impact areas according to “core” components are given below:

7.1 CAPACITY BUILDING AND AGRO-DEALER NETWORK DEVELOPMENT

During the time of the assessment in year 2000, the number of agro dealers operating in the country was 33. This number includes all the players in the areas which the project is focusing on. The actual representation of this figure can be found in Annex 1. Details of the number of outlets can also be found in the same Annex.

When the project was finally implemented in July 2002, the number of agro dealers had risen to 38. However, it is believed that this number has now increased significantly. The number of trained potential and existing agro dealers as of 21st March 2003 was 211 (see Annex 2 for details).

To date eight training programs (Annex 3) have been conducted and seven have concentrated on safety, product knowledge, logistics analysis and marketing and distribution of inputs. One was on association development and leadership. The training programs have been responsive to the varied requirements of the participants following a training needs analysis that was carried out between the months of November and December 2002. No training has been conducted for the public sector per se though some representatives from the government parastatals have been involved in some of the trainings conducted.

One international study tour has been conducted for the representatives of the agri-input sector as well as one representative from the financial institutions. The same is yet to be done for the policy makers in government as the project is mandated to also build the capacity of MOAI.

7.1.1 Dealership network

Currently there are about 400 potential sites for the establishment of new privately owned, commercial agricultural inputs, retail outlets. This number was derived at by identifying underutilized parastatal locations and population centers without an outlet in existence, or in regular operation. ADMARC, a parastatal body dealing in inputs is operating a total of 385 centers (Table 3). A total of 197 centers have been identified operating below capacity and are being recommended for closure but the issue is still not resolved. Private entrepreneurs are eagerly awaiting closure on this issue.

Table 3: Number of ADMARC centers in all the three regions of Malawi

Region	Total centers	Earmarked for closure	Earmarked for retention
Northern Malawi	85	49	36
Central Malawi	159	72	87
Southern Malawi	141	76	65
Totals	385	197	188

7.1.2 Efforts made in dealer / financial institutions linkages

The history of associations in Malawi dates back to 1946 when the first Cooperative Ordinance Act was passed. This was aimed at incorporating Africans into a cash economy by boosting production and export of cash crops. Cooperative societies were mainly in agricultural production, processing, and marketing as well as merchandise units to provide farm inputs. The movements had a modicum of success such, that at independence, 181 cooperatives were registered, 132 of them were active with 48,000 membership.

With their simple democratic structure and easy application in both rural and urban sector, cooperatives/associations fit well as a development strategy for poverty reduction for the Malawi government and have also acted as economic development partners. Unfortunately, the momentum for progress has not been spared by the shocks of structural adjustment program and political reforms. As a result, the cooperatives especially in the agricultural sector have had mediocre performance and some have even failed completely e.g., Lime Makers Association, Poultry Association, Malawi Association of Spices and Herbs (MASH), Bee Keepers Association, Zipatso Association of Malawi (ZIPA) and the Herbalist Association of Malawi.

The following attributes contributed to the failure:

- Poor initiation which lacked the sense of ownership.
- Lack of managerial skills.
- Lack of financial prudence.
- Political interference
- Limited capacity building before donors pull out.

- Lack of financial sustainability.

At the time this project started, associations existed in the agricultural sector as well as other sectors as alluded to earlier, but none was in place in the area of agricultural input marketing. This has now been formulated and is undergoing the various stages of making its position known to the general public. Having identified the Associations lack of knowledge on procedures and what it takes to import fertilizer, the project sought the assistance of an International Procurement Specialist from IFDC/Albania, Teodor Gadeshi who is successfully carrying out the assignment in collaboration with project staff. Notable activities so far include consultations with both development and commercial banks, clearing and forwarding companies, road transport operators, railway company, insurance companies, seed companies, private fertilizer companies and individual input dealers within the association. The purpose of the consultations was to establish the benchmark on capacity of existing structures for importation. Two scenarios have been developed which details the cost implication for inputs brought through either Nacala or Beira ports in Mozambique. The scenarios form the basis for informed decisions by the importers and the information has been made available to the Association members, MoAI and other professionals involved in fertilizer importation. The project is assisting the association in these initial stages before it becomes self supporting. Smaller groupings have also been formed at regional level the most notable one being the Southern Region Agro Dealers Association.

In terms of linking the association to the financial institutions, this is an ongoing process in view of the adverse success stories among lending institutions with individual dealers and /or associations in Malawi. On the other hand, financial institutions are characterized by high interest rates (41% base rate) due to unfavorable macro economic environment and high collateral requirements which are not affordable by most locally initiated associations. Most financial institutions prefer high profits on non agricultural sector lending and investment particularly in risk free, lower cost management and high yielding treasury bills and government bonds.

Financial institutions are very hesitant to provide lending to agricultural businesses. The high default rate of small holder farmers is often brought to the forefront to explain the lending reticence. No distinction is made between small businessmen operating in the agricultural sector and production oriented small holder farmers when it comes to lending. Purchased agricultural goods have not been used as collateral for loans by the major lenders in Malawi to date. The land tenure system, an unstable currency, a traditional high default rate for agricultural production loans and a lack of traditional collateral all contribute to severely constrain access to funding for the entrepreneur engaged in agricultural trading.

7.1.3 Activities to date

- A Business Development Specialist has been hired to link financial institutions to the dealers and assist in preparation of Business Plans.
- A counterpart account for the Association has been opened with Commercial Bank of Malawi (soon to be called Stanbic) whose deposits are primarily from membership fees.
- A business concept for agro dealers has been developed which details criteria for participation, mode of participation and the logistics of operation.
- Business proposals for Association inputs importation financing has been presented to the following banks:

- i. Loita Investment Bank
- ii. Indefund limited.
- iii. Malawi Savings Bank.

Meanwhile official communication is awaited from the banks. However, one of the banks has indicated that they could provide between MK 15 million – MK 20 million (i.e. US\$ 163,000 – US\$ 217,000)..

7.1.4 Dealership in fertilizers and seed

The current status indicates that 85% of all fertilizers are imported by the Private sector while 15% are imported by the Parastatal bodies (Figure 1). The 2002/03 fertilizer imports, Parastatal bodies imported about 29,000 mt (ADMARC imported 4,231mt while 24,774 mt was imported by SFFRFM) with the rest of about 171,000 mt imported by the private sector.

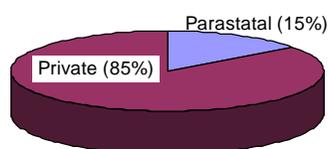


Figure 1: Fertilizer market share for parastatal and private for 2002/03 season

The Private sector has a number of business constraints some of which include:

- High interest rates (43-48%)
- Inadequate access to credit
- Inadequate logistical support
- Scarcity of foreign exchange
- Donor agri-input give away programs.

All the seed in Malawi is handled by the private sector. In 2002, about 10,000 mt seed for maize was stocked and distributed while up to March 2003, more than 15,000 mt seed maize was stocked and distributed..

7.1.5 Market information on Fertilizers and Fertilizer Prices

One of the objectives of the project is to make fertilizers more accessible to dealers and farmers at lower prices. A sample of markets was made in March 2003 to determine price consistency within the same geographical market for their fertilizer and seed inputs. Table 4 shows a variance of almost 30% in some cases.

Table 4: Fertilizer prices for the month of March 2003 for three dealers in Lilongwe

Type	SFFRFM prices		*Norsk Hydro		Rab Processors	
	Wholesale	Retail	Wholesale	Retail	Wholesale	Retail
NPK 23:21:0+4S	1535	1535	1928	2033	1575	1650
Urea	1365	1365	1647	1747	1400	1450
CAN	1290	1290	1575	1680	1250	1350
NPK 21:16:0+3S					1480	1520
NPK 20:11:0+4S			1919	2034		
Sulphate of Ammonia	1150	1150				
D/Compound (8:18:15+0.1B)	1570	1570	1920	2025	1550	1600
Super D (10:24:20+6S+0.15B)			2158	2263	1950	
Source of fertilizer	Ex-S/Africa (Sasol)		Ex-France & RSA		Ex- RSA & A. Gulf	

* Indicative prices for Norsk Hydro.

7.2 POLICY REFORMS AND POLICY STUDIES

The objective of Deepening of Policy Reforms and Policy Studies is to enhance a competitive market environment that is conducive to private – sector led development in agri –input and output marketing. The specific policy areas to be addressed are:

- Parastatal commercialization and/or privatization (i.e. ADMARC and SFFRFM).
- Formulation of a policy on fertilizer buffer stocks
- Review and submit a plan for the marketizing of government/donor commodity aid programs.

The following subsections summarize the activities of the project, impacts and achievements on Policy Reforms and Policy studies. Annex 4 provides a draft position paper on policy reforms.

7.2.1 Commercialization/Privatization and Marketization

The main function under this core component is to ensure a continuation of the commercialization and privatization of parastatal organizations such as ADMARC and SFFRFM. The purpose of this activity is to assist the Government of Malawi (GOM) in its ongoing effort to create an environment that is conducive to private sector investment in agri-input supply and marketing.

During the time of the assessment (2000), ADMARC and SFFRFM accounted for 33% of sales of fertilizer and their activities were said to be hindering the development of the private sector due to the continued support by government through subventions. Annex 5a and 5b show the market share for the two parastatals over the last 12 years. The trend in the share of the fertilizer market since liberalization shows that the private sector is participating more than the parastatal organization as shown in Fig. 2 below.

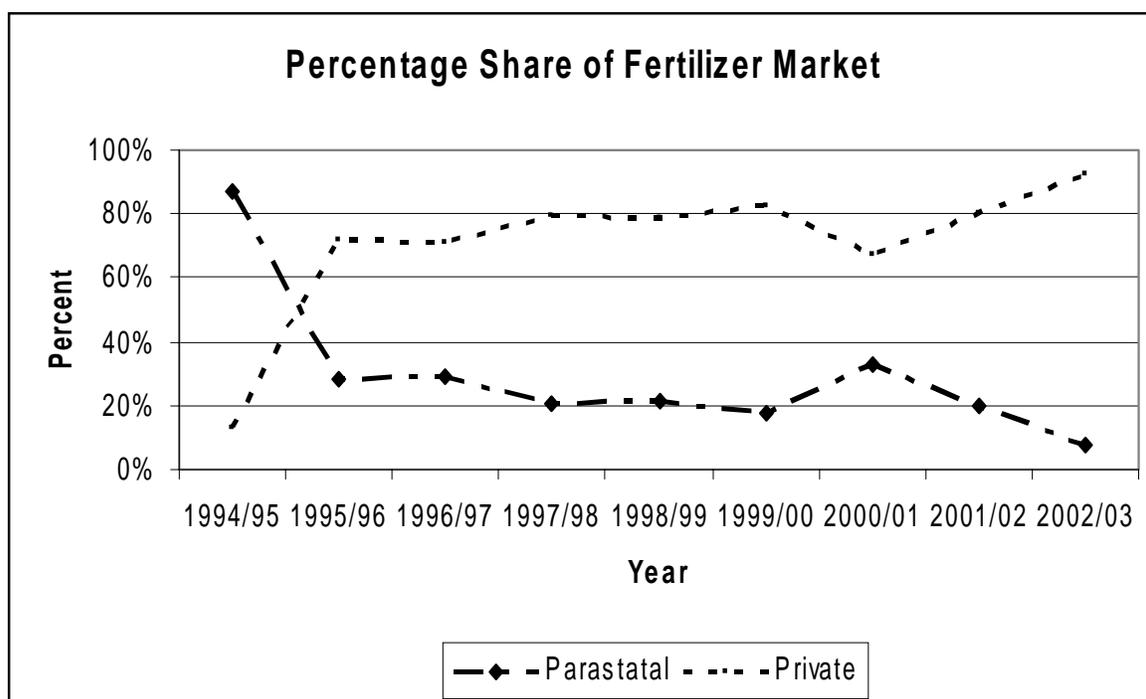


Figure 2: Showing the percentage share of the Fertilizer Market between Private and Parastatals since liberalization

At the time this project began, neither institution was receiving subvention from the government and the two parastatals accounted for about 8% of the fertilizer sales. The two institutions are now said to be operating within their own resources but this statement is still questionable since neither organization will disclose the amount of subventions they previously received from government, nor if there are plans to receive any in the future.

Both organizations operate with the “investment free” infrastructure that was funded by the government and other donor agencies. ADMARC has started letting out some of its warehouses to the private sector such as to Transglobe Produce at their Chilambula Depot. In terms of imports Table 6 shows how imports of fertilizer compare between the private and public sector.

Table 5: Distribution of the Fertilizer Imports in Metric Tons

	91/92	92/93	93/94	94/95	95/96	96/97	97/98	98/99	99/00	00/01	01/02	02/03
ADMARC						24,000	12,772	33,365	40,000		4,318	2,545
SFFRFM	95,000	118,400	90,700	4,942	52,500	42,000	20,000		24,350			17,651
Pvt. Sector	4,000	7,000	34,000	49,000	65,200	81,185	87,964	104,132	115,220	87,530	174,957	174,099
Total sales	99,000	125,400	124,700	53,942	117,700	147,185	120,736	137,497	179,570	87,530	179,275	194,295
% Parastatal	96	94	73	9	45	45	27	24	36	0	2	10
% Private	4	6	27	91	55	55	73	76	64	100	98	90

Source: ADMARC/ SFFRFM

Additional effort will be given in this area to ensure a complete commercialization or privatization of these firms. The Planning Department in MOAI which was mandated to conduct a survey in this area has not yet done so. This project will follow up this issue within the next six months. Meetings are already underway where this important topic is being discussed.

7.2.2 Assessment of some donor funded programs

The activities on some of the donor funded programs involved in distribution of agricultural inputs were assessed and evaluated. TIP which existed at the time of the assessment continues to exist and even after the implementation of the project. The program has grown in the numbers that it targets as well as the volume. Year 2001/2002 having been a disaster year in terms of food production (due partially to drought and exacerbated by poor government planning), it has seen an influx of donor and NGO initiatives trying to avert a starvation situation. Some have been involved in the distribution of actual food while others have been involved in the distribution of agricultural inputs. APIP has also continued to exist though its operations have been scaled down significantly from around 300,000 beneficiaries three seasons ago to only 40,000 beneficiaries last season (Dimitri Gianakkis, Farmers World).

Apart from the government and donor programs, several NGOs have participated in the distribution of inputs. Unfortunately, the targeting for most of these programs has been similar in that in some areas, they ended up double, triple or quadruple (Cyril Ferrand, FAO, March 2003) targeting some beneficiaries while completely missing others. This data underscores the need for donor assistance distribution methodology reform.

7.2.3 NGO CASE STUDIES

World Vision International (WVI) is one of the NGOs that benefited from various donors financing such as USAID (under the OFDA), CIDA and other agencies. WVI operates in 28 geographical areas across the country which they call Area Development Programs (ADPs). In these programs, they have a number of activities which they perform apart from the direct donor programs.

Under the OFDA program, WVI received \$ 1.2 million to assist in the Malawi Emergency Seeds and Soil Fertility Program. The project started in September 2002 and was implemented in the districts of Mwanza, Chikwawa, Thyolo, Nsanje and Mulanje all in the Southern region. In these areas, the organization still had its ongoing area development programs whose financing comes from other sources. For the emergency program, they distributed the following inputs:

OPV maize seed	4Kgs/pack/household
Cow Peas	5Kgs “
Cassava cuttings	1 bundle of 50 x 1 m long cuttings per household
Sweet potato vines	1 heap of 50 x 1 m long vines per household
Pigeon Peas	2Kgs/pack/household
Fish beans	200g/pack/household
Vulgar beans	1 Kg/pack/household

No fertilizer was distributed under the OFDA funding because they were told to encourage the use of compost manure. The beneficiaries under this program were 69, 000 households.

To avoid double targeting of beneficiaries in this program, each NGO was allocated specific districts through the NGO consortium. However, the NGOs who had financing from other agencies other than USAID (OFDA Program) were also present in the districts which had already been targeted doing almost similar programs. A case in point is Mulanje district where OXFAM was also targeting the same beneficiaries that had been identified by WVI. However, the situation was avoided when WVI and OXFAM agreed to concentrate on different villages within the district. But double targeting with TIP beneficiaries could not be avoided in almost all the districts.

WVI also benefited from the Canadian International Development Agency (CIDA) for the Inputs and Irrigation Program. This activity was concentrated in the central region in the districts of Dowa, Kasungu and Mchinji. The program was set up for purposes of seed multiplication and the beneficiaries were given: Irish potato, Maize seed, assorted vegetables, Cassava cuttings and fertilizer.

The funding for the program was \$325,000. It targeted 822 beneficiaries and these received in total the following inputs:

Irish potatoes and Sweet potato	45.8 mt
Cassava cuttings	134 mt
Vegetable Seed	10.4 Kg
Fertilizer	25 mt

The organization uses two approaches to acquire its inputs. The first approach is where they use centralized procurement. This is where each ADP indicates quantity by type of their requirements

in terms of agricultural inputs. These are then consolidated to come up with the total requirements for their programs. Three quotations are sought from the various input suppliers in the country and then they settle on one who offers them the best rate.

The second approach is where for one reason or another, the ADPs fail to submit their requirements on time since most of them are located in the most remote areas. When this happens, the ADPs are given the mandate to source the inputs on their own. In this particular case, there is a chance that local dealers (small in operation) could be involved though rarely. The main suppliers for most of the WVI activities have been Norsk Hydro under the CIDA program, Rab Processors, ICRISAT and some of their own seed multiplication programs provided the seed.

For most of the WVI programs, beneficiaries are asked to pay back an equivalent of 25% of what they received so that other people could also benefit from the program. This was however with the exception of the OFDA program where inputs were distributed free. For the last cropping season, 2002/2003, WVI has distributed a total of the following inputs:

Maize Seeds	400 Mt +
Groundnuts	300 Mt +
Fertilizer	100 Mt +
Pigeon Peas	7 Mt
Cow Peas	40 Mt

The above inputs were obtained from the major agricultural input suppliers or from their own programs as already indicated.

The other donor program that came of interest is the Fertilizer for Work program. The project started in May 2001 and was designed by Mr. Stephen Carr, a retired World Bank agricultural specialist. The program got funding from USAID to the tune of \$744,900 and was implemented by the Evangelical Baptist Church of Malawi in Machinga and Balaka districts. It originally targeted 20,000 beneficiaries directly and 100,000 indirectly.

Initially the program was to be completed in one year but was extended to two years. Additional funding was obtained from a British NGO, Tearfund, which allowed for an additional 8,000 direct beneficiaries during 2002. The program was implemented based on the past experience of the NGO on a "food for work". The program provided a high yielding package of hybrid maize seed and urea fertilizer in exchange for work on community rehabilitation projects. The project proposed to build 250 kms of road, broken into 40 sub projects so that the participants worked on stretches of road within walking distance of their villages. At the time the program was being proposed, in the two districts, many communities suffered from precarious road access, with some of the communities only being accessible by foot and bicycle paths.

Targeted beneficiaries included female headed households and families with landholding insufficient in relation to the number of family members. The program also included aged and infirm beneficiaries who did not participate in the road construction and rehabilitation activities. Field committees in each village selected the non-participant beneficiaries. However, the program is largely self targeting with individuals volunteering to participate. The poorer sections of the community tend to be willing to do this work for inputs.

Each village was expected to come up with 100 people to work on the roads. If all 100 people that committed to work, did their share, then the village received 10% additional seed and

fertilizer. This was to be given to people within the village who were not able to work on the roads due to age or infirmity.

Participants are given a voucher redeemable with 10 Kg of hybrid maize seed and a 50 Kg bag of Urea sufficient to plant half a hectare in compensation for their work on the program. Based on the value of the input package at retail level, the value of the voucher is approximately MK 1,950. Participants work for approximately one month- usually half a day for two months sometimes 1/3 of a day for three months depending on the community consensus decision on how to arrange the work. Vouchers are issued once the road work has been completed and suppliers to the program were identified through a tender process and the following won the tender:

Pannar Seed	Hybrid maize Seed in 10 Kg packs
Agora	Fertilizer – Urea or CAN in 50 Kg bags

The results showed that maize yields had increased. They targeted that the yields would increase by 50% but instead it increased by 200%. Local unfertilized maize had a yield of 530 kg/ha while the fertilized hybrid gave a yield of 1,600 kg/ha.

During the first year, 12,784 participant beneficiaries and 816 non – participant beneficiaries received input vouchers and the road rehabilitation reached the 170 Kms target. During the second year, 100 kms of road was built/rehabilitated through the efforts of 7,466 participant beneficiaries and 534 non-participant beneficiaries.

- Conclusions drawn from the program were that it provides a model for resolving Malawi's chronic and recurrent food security crises. Farm families have to increase yields by using a package composed of improved seed and fertilizer. Farmers understand the value of this package through extension efforts but have been unable to purchase these inputs in recent years. The model can work nationwide to meet chronic maize deficits for poor families willing to participate in the program.

The program used a voucher scheme and the designer of the program was very supportive of it to be used in the TIP program. However he was not supportive of the idea that the people should pay back in kind since they would still need food at a later stage. Therefore, he still considers that the best approach is to let the communities decide the program and then get paid through inputs.

In a recent visit by a British VIP, during interviews, it was established that for every person that was asked how they viewed the inputs for work program, they preferred getting inputs to cash because cash was hard to keep. At the same time, they said the program improves access by their communities to the commercial trading network and to the social and development services which have been denied to them by non-existent or impassable roads. The program therefore further contributes to increasing family incomes and hence food security.

Looking at the two programs, it can be seen how important inputs are to the farming families in Malawi. Therefore, if these donor, NGO and government programs could be marketized, it could help in the development of the input supply system. Several donors have already shown interest in supporting the Fertilizer for Work program (to this NGO) and would like to extend it to several other districts. This could provide an opportunity to the agri-input dealers, especially if they made themselves available in the communities which these programs are being implemented. It could save the program implementers from logistical arrangements in ensuring that the inputs are made available to the beneficiaries when needed. Beneficiaries would present their vouchers to the dealers who would be operating in their area after prior arrangements had been made.

7.2.4 Fertilizer Buffer Stocks

To date there has been no major indication as to whether the government will reintroduce the fertilizer buffer stocks concept to cushion against any unforeseeable fertilizer shortages in the country. Some quarters within the Ministry, and other stakeholders, are advocating this be addressed. A study is planned within the next six months, to ensure an informed decision will be made before a program of this nature can be implemented.

7.2.5 The MASIP Policy Workshop

The Malawi Agriculture Sector Investment Process (MASIP) with assistance from the AIMS project organized a workshop to address their current and future role in the agricultural sector. The objective of the workshop was to present, modify and/or verify the MASIP Vision, Mission, Strategy and Implementation document to agriculture stakeholders and give them an opportunity for input. The framework for addressing major policy issues that relate to the Ministry of Agriculture was specifically discussed.

The summary report of the workshop is presented in Annex 6. The workshop was attended by members of the IFDC/AIMs project to provide direction on policy issues and further linkages with stakeholders. An IFDC/AIMs Project staff member facilitated the workshop.

7.3 STRENGTHENING REGULATORY SYSTEMS

This project will assist the GOM in strengthening the regulatory framework for seeds, fertilizer and CPPs and the implementation of a related enforcement system.

Several extensive meetings have been conducted with MOAI on development of Seed Regulations and operationalisation of these regulations. Copies of the Acts and Regulations on Crop protection have been collected. These are available for inspection at the office of IFDC. The training needs of the regulatory institutions have been produced and the capacity of both the Malawi Bureau of Standards (MBS) and MOAI on seeds and CPPs has been established. In order to fully review and analyze these Acts, Standards and Regulations, an expert has been commissioned for an STC. He is due to arrive in June, 2003.

The regulatory system needs to be market oriented in order to increase the integrity and vibrance in the input markets. A legal framework needs to be put in place which protects all parties from abuses and/or exploitation. The fundamental concept under the regulatory system is “truth in labeling.” However, the number of inspectors who are supposed to enforce this in both the Ministry of Agriculture and Irrigation (MOAI) and Malawi Bureau of Standards (MBS) is very low.

MOAI has only 14 seed inspectors allocated for the entire country of Malawi. There are only three Seed Laboratories (Bvumbwe, Lunyangwa and Chitedze). The Pesticides Board, which also operates within the MOAI, has 10 inspectors for Malawi. As a result the Ministry has to also rely on the services of the MBS especially with regards to pesticide residue analysis.

The capacity of MBS is also entirely inadequate. In total, they have 22 inspectors. Of these, five are inspectors who also have administrative duties. One is based in Lilongwe and one in Mzuzu. The rest are based at their headquarters in Blantyre. For one to become an inspector under the MBS Act, they need to be appointed by the Minister of Commerce and Industry or the Director General of the Bureau. A cumbersome bureaucracy.

The activities of MBS are concentrated within Malawi but sometimes go beyond the border. Their mandate comes from what is stipulated in the MBS Act. They also go by standards which are made mandatory by the Ministry of Commerce and Industry (MCI). The bureau has technical committees which determine the national standards. Once standards are established, they are voluntary until they are declared mandatory by the Minister of Commerce and Industry.

The bureau has identified the following constraints:

- Human Resources
- Equipment – especially Laboratory
- Office Equipment
- Transportation
- Raw materials – especially chemicals and reagents.
- Reference materials and Reference standards. These would help the bureau to effectively analyze the results.

Apart from the above, the bureau is also financially constrained. Being a government parastatal, they are supposed to get government subvention of about 14% of their total operation requirements. However, this has not been the case over the past few years where their subvention has fallen under 10% of their total requirements. For instance last year they received MK 5 Million Kwacha (current exchange rates are about mwk 92:1usd) from the government to last the year. This has necessitated the Bureau to begin charging for its services to remain fiscally solvent.

The MBS works in collaboration with the MOAI, MCI, Ministry of Environmental Affairs, Ministry of Tourism, Ministry of Labor and Vocational Training, the Local Authority, and MRA, but there has not been a strong collaboration with inspectors in other Ministries.” The activities of the bureau are demand driven especially where the setting of standards is concerned. As for inspections, the bureau comes up with their own program in isolation of the other ministries. In terms of standards for agricultural inputs, the only ones developed are for fertilizer. There are no Malawian standards for Pesticides.

From the above information it can be seen that there is a tremendous need for additional effort in the area of regulatory systems. Meanwhile, in order to improve the outlook of the regulatory system in the input sector, the project has collected all relevant information as well as the acts which govern the fertilizer, seeds and crop protection products (CPPs) and their regulations. These have been shipped for early analysis to the Regulatory Expert Consultant, who is due to visit the country in June and July, 2003.

7.4 MARKET INFORMATION SYSTEM

The system will provide timely and accurate information in order to achieve market transparency and efficient functioning of open and demand driven input markets. This is a necessary prerequisite for assessing the impact of policy reforms, and enabling the private sector entrepreneurs, commercial banks, GOM officials, and donors to make timely appraisal of market conditions (i.e., supply, demand, and prices) for agri-inputs.

During the last six months, employee capacity has been put in place. There is a staff member who has made significant contributions to the component. A paper/template on information systems has been developed. A data collection methodology has been set up after a needs analysis and subsequent extensive discussions with interested stakeholders. To complement these efforts, a newsletter, three radio programmes and video programmes have been produced and aired on public media on fertilizers, seeds and CPPs regarding requirements or needs, prices, imports, constraints, utilization and trends, only to list a few activities. Internet searches on MIS have been conducted and assistance has been provided to Association members as well as interested stakeholders.

As part of developing market information systems, the data on fertilizers, seeds and crop protection products were collected, analyzed and published. This was part of the establishment of the market information systems. The following major components illustrate the achievements made to date.

7.4.1 Fertilizer Imports

Total NPK Nutrients were derived from fertilizer imports. A comparative analysis for two major crops; maize and tobacco was made. The results show a close relationship between nutrient imports and crop yields for the eleven year data (Table 6).

Table 6. Maize and Tobacco yields in relation to NPK imports for the past 11 years

Item	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002
Nutrient Imports (mt)	53747	60768	34053	48017	57142	24675	47418	47795	51769	44797	46937
Maize yield (kg/ha)	1307	3050	1369	1829	2450	1801	2180	2699	2575	1967	1761
Tobacco yield (kg/ha)	507	602	492	486	874	844	825	726	831	723	733

The fertilizer imports that were principally meant for tobacco and maize were isolated and NPK nutrients were derived and compared to their yields for a period of eleven years. This also showed a very strong relationship (Figure 3a & 3b). These relationships are a good indicator that fertilizer imports have an important impact on crop yields. This also means that fertilizer use is increased when fertilizer availability is increased as a result of increased importation.

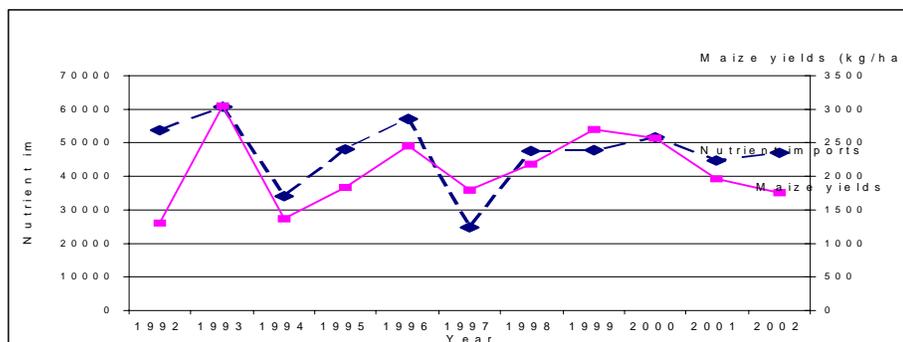


Fig. 3a: A relationship between hybrid maize yields trend with nutrient imports for the past 11 years.

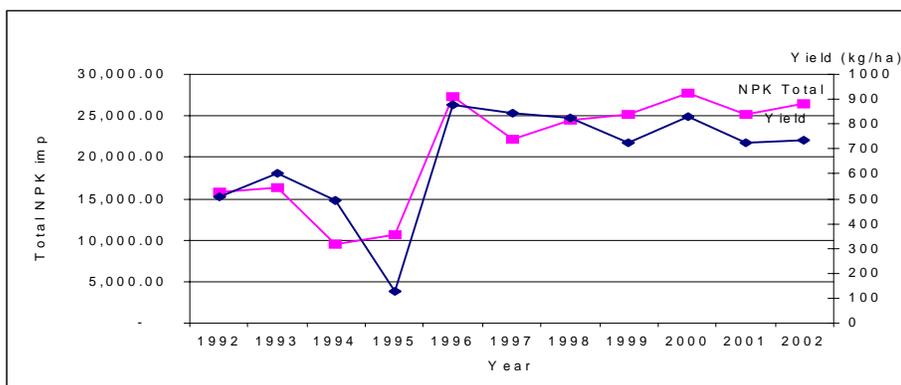


Fig. 3b: Relationship of Tobacco yields and Nutrient imports trends for the past 11 years

7.4.2 A comparison of fertilizer imports and estimated requirements

Data on crop land currently being cultivated for major crops that require fertilizers were compared to the importation level of fertilizers. The results show that imports are far below the current potential requirement. The imports are only 25% of the estimated requirement (Table 7 and Annex 7). The graphical presentation (Figure 4) shows that most fertilizers arrived between December 2002 and January 2003 when planting actually started in October 2002 for some parts of the country and November to December 2002 for the rest. This resulted in scarcity of fertilizers during the time of need and most likely this reduced fertilizer use and promoted late application of basal fertilizers.

Table 7: Fertilizer use and potential requirements based on 2002 final crop estimates data for major crops in Malawi

CROP	Hectarage	Fertilizer potential use (mt)	Amount of fertilizer used (mt)	% of potential
MAIZE	1,488,449	520,957	147,698	28
RICE*	56,029	6,684	5,323	80
TOBACCO	122,033	105,000	12,109	11
PAPRIKA	21,405	11,773	2,124	18
I. POTATOES*	25,789	2,579	2,559	99
SUGARCANE	15,000	10,500	1,488	14
COTTON	46,773	9,355	0	0
Total	1,775,478	666,848	171,301	25

Source: FEWS, MoA&I, IFDC, NSO

* Need for a sample survey to verify fertilizer use.

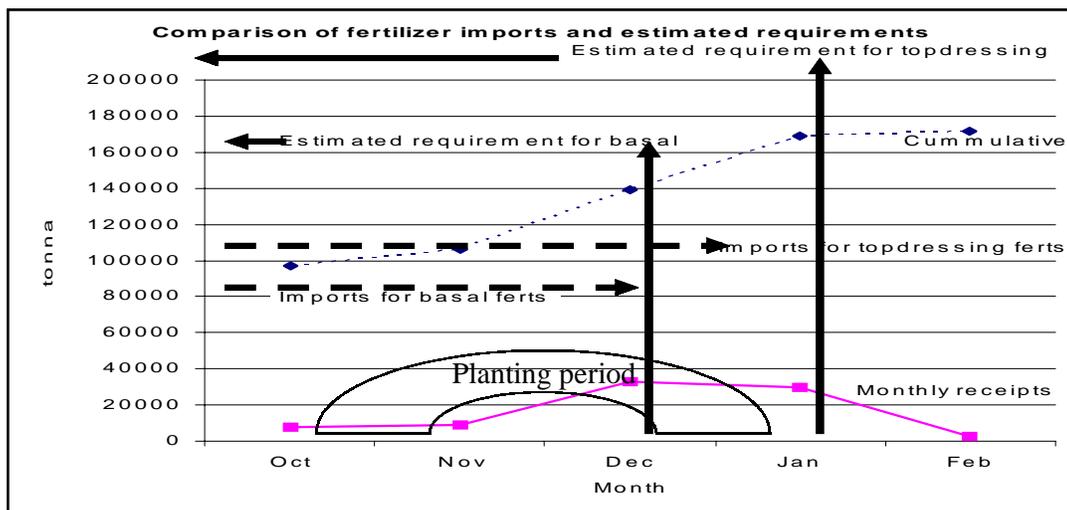


Figure 4. Comparison of fertilizer imports and estimated requirements

7.4.3 Winter crop production

Using MOAI data collected for 2002, there is an apparent great potential to develop an additional inputs marketing strategy for private suppliers for winter production of maize (Table 8).

Table 8. Estimated inputs for three major crops for winter production

	Maize	Rice	I. Potatoes	Total	Period required
Winter ha	84,000	1,375	6,500	91,875	
Winter fert (mt)	29,300	130	650	30,080	March-August
Winter seed (mt)	2,100	87			March-August

Source: FEWS, MOAI

Desirable maize seed varieties will have short maturity requirements and tolerance to low moisture conditions. Hybrids such as MH18, PAN 6193, SC403, SC407, SC515, and OPVs such as Sundwe, Chitibu, Matindiri, ZM 421 and ZM521. Selection has followed a criteria of low days to maturity and tolerance to Grey Leaf spot, Maize Streak Virus and Leaf Blight.

7.4.4 Contribution of maize types to total hectareage and total production

The 2002 crop estimates data for maize types indicate that hybrid maize had 25% of total area put to maize while local OPV types contributed 59% with the rest of 16% left to improved OPVs (Table 9). The contribution of hybrids to total maize production was 43% compared to only 38% for local OPV which occupied an overwhelming 59% land put to all maize. Improved OPV contributed only 19% from the 16% land contribution (Figure 5a and 5b). The trends of yields for hybrid maize types have continuously been highest among the three maize types for the past nine years (Figure 6). This reflects the strong impact hybrids have on production.

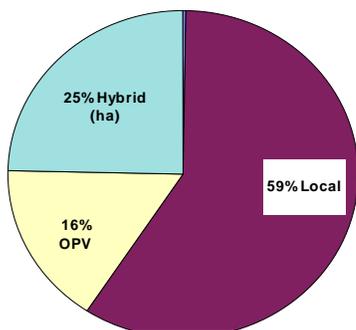


Figure 5a: Proportion of hectareage for local, hybrid and open pollinated varieties

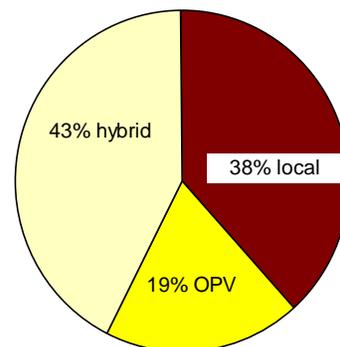


Figure 5b: Proportion of production for local, hybrid and OPV maize types in 2002

Table 9: The contribution of maize types to total hectareage and total production for 2002

Maize Type	% Hectarage	% Production
Hybrid	25	43
Local	59	38
Improved OPV	16	19

Source: MoAI, FEWS 2002

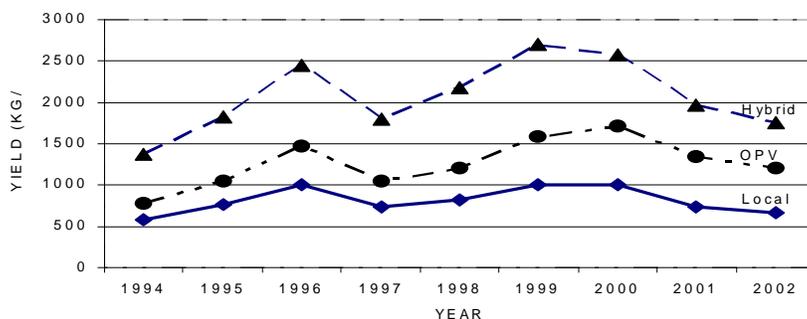


Figure 6: Trends of yields for maize types for the past nine years

In the drought year of 1992, the 83% ha put to OPV maize only contributed 56% to total maize production while hybrids had a 16% share of ha and contributed 43% to total yield. In another drought year of 2002, the 59% of land put to OPV's only contributed 38% to the total maize production while the 25% of hybrid planted area contributed 43% of the maize grain yield. Improved OPV's took a 16% share of ha, yet only contributed 19% to total maize production. Therefore, to improve maize production per hectare in order to free up some land to allow for more cash crops, high yielding varieties plus the use of fertilizer are being highly promoted by this project through our training programs, weekly radio program, weekly newspaper slots and distribution of our monthly newsletter.

7.4.5 Information Dissemination

a) Radio Programs

As one way of fostering information dissemination, IFDC-AIMs started technology promotional programs on the local radio through Zokomera Alimi (Farmers' Requests) program. The program is aired on MBC Radio One from 10:00 hrs to 10:30 hrs every Saturday in two vernacular languages of Chichewa and Tumbuka.

b) Newsletter

An IFDC-AIMs newsletter has been designed (Annex 10) to carry information on various matters and issues that are important to input dealers and policy makers)

c) Newspaper articles

An article about IFDC-AIMs Project was submitted to The Nation newspaper for publishing. In addition, we have been requested, and will comply, to submitting a weekly "Tips for Agriculture" column. This will further the message of adoption of improved methodology by farmers, through short... to the point messages in a "reader friendly format".

8. PLAN FOR THE NEXT HALF YEAR BY ACTIVITY (April – September 2003)

Table 10: Activities planned for April to September 2003

ACTIVITY	FUTURE PLAN
Dealer Development; Association Development; Association Support	<ul style="list-style-type: none"> • Proceeding with importation of 40,000mt of fertilizers
	<ul style="list-style-type: none"> • Consultant from Albania will be arriving on 15th March 2003 to assist with procurement and logistics
	<ul style="list-style-type: none"> • Recruitment of a Procurement Specialist to assist in the procurement of the 40,000 mt is beginning.
	<ul style="list-style-type: none"> • Negotiations with Commercial Banks for possible loans
	<ul style="list-style-type: none"> • Organize more meetings with agro-input dealers in collaboration with other interested stakeholders
	<ul style="list-style-type: none"> • Assist Dealer Associations in establishing export markets for certain commercial tree seeds
	<ul style="list-style-type: none"> • Conduct capacity building workshop or training for staff and stakeholders of Pesticides Control Board (PCB)
	<ul style="list-style-type: none"> • Advise on extension messages for fertilizers application and requirements for cassava growing
	<ul style="list-style-type: none"> • Establish a list of Dealers for each site identified so far.
	<ul style="list-style-type: none"> • Finalize import finance availability from micro-finance institutions for financing fertilizer importations
	<ul style="list-style-type: none"> • Elaborate credit structures, regulations and ways to access credit
Training needs assessment	<ul style="list-style-type: none"> • Encourage dealers to establish demonstration plots and provide extension advice
	<ul style="list-style-type: none"> • Continuation of collaboration with interested stakeholders • Assess needs of the new as well as existing dealers
Demographic data collection	<ul style="list-style-type: none"> • To establish the presence of inputs dealers in the potential sites • Establish a list of dealers for each site identified so far
	<ul style="list-style-type: none"> • Updating of the GIS maps
Market Information System	<ul style="list-style-type: none"> • Collection of MIS data as well as M & E Data
	<ul style="list-style-type: none"> • Dissemination of MIS information via radio, electronically and newspaper.
	<ul style="list-style-type: none"> • Assist MOAI to draw its MIS to accommodate inputs
	<ul style="list-style-type: none"> • Continue setting up a structured MIS with affiliates
	<ul style="list-style-type: none"> • Conduct radio programmes on AIMs activities to farmers and dealers
Training Courses	<ul style="list-style-type: none"> • Additional training to potential and existing dealers.
	<ul style="list-style-type: none"> • Assist in international training course from HQ.
	<ul style="list-style-type: none"> • Produce more training materials on fertilizers in Malawi and rates for recommended crops
	<ul style="list-style-type: none"> • Conduct training on input markets
	<ul style="list-style-type: none"> • Conduct training on record keeping methods by dealers
	<ul style="list-style-type: none"> • Coordinate training initiatives of other government bodies and NGOs.
	<ul style="list-style-type: none"> • Conduct training on NPK fertilizer production
	<ul style="list-style-type: none"> • Conduct training on import procedures
	<ul style="list-style-type: none"> • Conduct training on safe use of pesticides
Study tours; Conferences	<ul style="list-style-type: none"> • Study tour to Kenya.
	<ul style="list-style-type: none"> • Prepare and implement more international and regional tours
Business Development	<ul style="list-style-type: none"> • Assisting Association in business plan development.
	<ul style="list-style-type: none"> • Assist association with business management.
	<ul style="list-style-type: none"> • Linking association to credit institutions and support organizations.
	<ul style="list-style-type: none"> • Hold discussion with finance institutions on AISAM's collateral issue to support their business plans
	<ul style="list-style-type: none"> • Follow up with EU, Norwegian Embassy and other support organizations on assistance for input dealer development
	<ul style="list-style-type: none"> • Provide financial counseling and tax advisory services to dealer clients
	<ul style="list-style-type: none"> • Monitor existing loan repayments to financial institutions

Policy & Regulations	<ul style="list-style-type: none"> • A regulatory expert has been identified and scheduled to arrive in June/July 2003.
	<ul style="list-style-type: none"> • The voucher system draft proposal will be presented to DFID in the coming weeks for a pilot project.
	<ul style="list-style-type: none"> • Finalize preparations for the STC or Expert regulatory framework and the framework itself
	<ul style="list-style-type: none"> • Establish a policy directory together with the MOAI
	<ul style="list-style-type: none"> • Gather more existing policies, Acts and regulations on fertilizers, seeds and CPPs
	<ul style="list-style-type: none"> • Promote use of quality seeds
	<ul style="list-style-type: none"> • Assist in development of Plant Breeders Rights Act, Plant Variety Act and Technician training
	<ul style="list-style-type: none"> • Conduct training of pesticide trainers to be used as resource persons in future trainings
Regional Offices	<ul style="list-style-type: none"> • To deploy staff to Blantyre.
	<ul style="list-style-type: none"> • To finalize Mzuzu office in the North and deploy staff

9. OTHER COMPONENTS

9.1 Cooperation/Linkages (Complementary Project Activities)

One of the objectives of the project is to build linkages between suppliers of credit, agri-input entrepreneurs, and policy makers, but also with other stakeholders interested in input markets in the country, including associations. Through information sharing, more linkages are being developed with international input manufacturers and traders.

So far, the project has created linkages and areas of collaboration with the following institutions:

- a) Sasakawa Global 2000 (SG2000): Conduct of technology transfer and strengthening capacity of the MOAI for integrated agricultural input benefits.
- b) Community Services: Training of input dealers.
- c) MOAI: Input dealer development, mapping of distribution of dealers, capacity strengthening and training as well as policy reforms.
- d) Financial Institutions: Financing AISAM and other input dealers.
- e) NASME, NASFAM and POSAM: Assisting with training of dealers and other extension messages on technologies.
- f) ICRAF: Dealer development and policy formulation
- g) EU and Norwegian Embassy: Assisting with development of agro-input dealers to finance imports of inputs.
- h) Food and Agriculture Organization of the United Nations: submit monthly reports which contribute to the agricultural sector coordination efforts. Collaborate on data collection.

10. ANNEXES

Annex 1. NUMBER OF AGRO DEALERS

Number of Dealers at the time of Assessment	Number
Fertilizer	
Total large Importers	5
Total small direct importers	7
Total other dealers (agents)	13
Seed	
Total large Importers & producer	2
Total small direct importers	3
CPP	
Total large Importers & producer	8
Total small direct importers	2
	40
TOTAL NUMBER OF AGRO-DEALERS*	33

LARGE DIRECT IMPORTERS

SUPPLIERS NAME	ADDRESS	No of Outlets	Area of Operations
Norsk Hydro (PVT) Malawi Limited	Hq, Kanengo, Box 31301, Lilongwe 3 Tel: 01710181/099	6	North, Centre & South
Farmers World Limited	HQ, Kanengo, Box 1327, Lilongwe Tel: 01710941/518	53	Centre & North
Agora Limited	Box 51142 Lilimbe Tel: 01641642	20	South
ADMARC	Hq, Limbe, 5052, Tel 01640044	About 1000	All Districts
SFFRFM	Hq, Blantyre, Box 2505, Tel: 01624466		

* total number less than 40 because some of the dealers also appear in other categories

Annex 1. (Continued)
SMALL DIRECT IMPORTERS

SUPPLIERS NAME	ADDRESS	No of Outlets	Area of Operations
STC Group Input Division	HQ, Lilongwe, Box 30843 Tel: 08835382	3	Centre & North
Produce Mart International	P.O. Box 31067, Lilongwe 3	4	Centre
Farm Chemicals Limited	Box 51465, Limbe		South
Rab Processors	Hq, Limbe, Box 5338, Tel: 01645200		
TransGlobe	Hq, Limbe, Box 5035, Tel: 01643967		
Agricultural Trading Compnay (ATC)	Hq, Kanengo, Box 40038,	4	North, Centre & South
International Multifoods Corporation	Hq, Kanengo, Box 30961	3	North, Centre

OTHER FERTILIZER DEALERS (Agents)

Agri Tech Marketing Limited	Box 30728, Chichiri Blantyre 3		South
Atlantis Marketing	Box 652 Lilongwe		Centre
LittleWays Limited	Box 1703 Lilongwe		Centre
Hardware & General Dealers	Box 248 Blantyre		North, Centre & S
Kamwayi Enterprise	P/B 177 Kasungu		Centre
J & K Farmers Investment	Box 503 Kasungu		Centre
Farmwise	Box 40453 Kanengo Lilongwe 4		
Lisaka Investments	Box 31273 Lilongwe 3		Centre
Mwasacho Traders	Box 40644 Kanengo, Lilongwe		Centre & North

PRODUCERS AND IMPORTERS OF SEEDS

National Seed (Malawi) Limited	Hq, Kanengo, Box 30144 Lilongwe 3		
Pannar Seed (Malawi) Limited	Hq, Blantyre, Box 353		
ARET			
Great Lakes Cotton Co.	Box 11 Blantyre		

Annex 1 (Continued)
IMPORTERS AND DEALERS IN CROP PROTECTION PRODUCTS

Chemicals and Marketing	Box 1230 Blantyre Tel:01670600		Importer
Rhone Poulenc	P.O Box 30606, Lilongwe 3		Importer
Farmers Organizations	Box 1916 Blantyre		Importer
Norsk Hydro (PVT) Malawi Limited	Box 30301 Lilongwe 3		Importer
Farmers Cooperative	Box Bvumbwe		Importer
Agricultural Trading Company	Box 40038 Lilongwe 4		Importer
Agri-Hort	Box 1787 Limbe		Dealer
ADMARC	Box 5052 Limbe		Importer
National Seed	Box 30144 Lilongwe 3		Importer
Farm Chemicals Limited	Box 51465 Limbe		importer

OTHER LISTED INPUT DEALERS

Swank Haulage	Box 489 Mzuzu		
Lufina	Box		
Msiyamo Whole & Farmers Investment	Box 255 kasungu		

Number of Dealers at the time of project implementation	Number
Fertilizer	
Total large Importers	7
Total small direct importers	5
Total other dealers (agents)	8
Seed	
Total large Importers & producer	3
Total small direct importers	2
Total other small dealers (agents)	7
CPP	
Total large Importers & producer	9
Total small direct importers	2
	43
TOTAL NUMBER OF AGRO-DEALERS[∞]	38

[∞] total number less than 43 because some of the dealers also appear in other categories.

Annex 1 (Continued)
LARGE DIRECT IMPORTERS

SUPPLIERS NAME	ADDRESS	No of Outlets	Area of Operations
Norsk Hydro (PVT) Malawi Limited	Hq, Kanengo, Box 31301, Lilongwe 3 Tel: 01710181/099	3	North, Centre & South
Farmers World Limited	HQ, Kanengo, Box 1327, Lilongwe Tel: 01710941/518	65	Centre & North
Agora Limited	Box 51142 Lilimbe Tel: 01641642	30	South
ADMARC	Hq, Limbe, 5052, Tel 01640044	about1000	All Districts
Rab Processors	Hq, Limbe, Box 5338, Tel: 01645200	12	North, Centre & South
SFFRFM	Hq, Blantyre, Box 2505, Tel: 01624466	27	North, Centre & South
TransGlobe	Hq, Limbe, Box 5035, Tel: 01643967	5	North, Centre

SMALL DIRECT IMPORTERS

SUPPLIERS NAME	ADDRESS	No of Outlets	Area of Operations
STC Group Input Division	HQ, Lilongwe, Box 30843 Tel: 08835382	3	Centre & North
Northern Corridor General Traders	Hq, Mzuzu, Box 657 Tel: 01331549	2	North
Farm Chemicals Limited	Box 51465, Limbe		South
Agricultural Trading Compnay (ATC)	Hq, Kanengo, Box 40038,	4	North, Centre & South
International Multifoods Corporation	Hq, Kanengo, Box 30961	3	North, Centre

OTHER FERTILIZER DEALERS

Agri Tech Marketing Limited National Smallholder Farmers Ass. Of Malawi, (NASFAM) Atlantis Marketing LittleWays Limited Hardware & General Dealers	Box 30728, Chichiri Blantyre 3 Box 30716 Lilongwe 3 Box 652 Lilongwe Box 1703 Lilongwe Box 248 Blantyre	38	South North, Centre & South Centre Centre North, Centre & South Centre Centre Centre & North
J & K Farmers Investment Lisaka Investments Mwasacho Traders	Box 503 Kasungu Box 31273 Lilongwe 3 Box 40644 Kanengo, Lilongwe		Centre Centre Centre & North

Annex 1 (Continued)

PRODUCERS AND IMPORTERS OF SEEDS

Monsanto (Malawi) Limited Pannar Seed (Malawi) Limited SeedCo (Malawi) Limited Great Lakes Cotton Co. Pioneer Seed	Hq, Kanengo, Box 30144 Lilongwe 3 Hq, blantyre, box 353 Hq, Kanengo, Bag 421 Lilongwe 4 Box 11 Blantyre Box 1230 Blantyre		
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IMPORTERS & DEALERS IN CPP

Chemicals and Marketing CropServe (Malawi) Limited Farmers Organizations Norsk Hydro (PVT) Malawi Limited Farmers Cooperative Agricultural Trading Company Agri-Hort Akonda Trading ADMARC Monsanto Farm Chemicals Limited	Box 1230 Blantyre Tel:01670600 Box Lilongwe 3 Tel:01750473 Box 1916 Blantyre Box 30301 Lilongwe 3 Box Bvumbwe Box 40038 Lilongwe 4 Box 1787 Limbe Box 203941 Mzuzu Box 5052 Limbe Box 30144 Lilongwe 3 Box 51465 Limbe		Importer Importer Importer Importer Importer Importer Dealer Dealer Importer Importer importer
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OTHER LISTED INPUT DEALERS

Kebs Trading Swank Haulage Agri Marketing Services WAK Enterprise Kamwayi Pvt Enterprise Kings of God Company Msiyamo Whole & Farmers Investment	Box 20218 Luwinga Mzuzu Box 489 Mzuzu Box 40472 Lilongwe 4 Box 22 Balaka P/B 177, Kasungu Box 260 Kasungu Box 255 kasungu		
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Annex 2. Training Schedules

A LIST OF TRAINED AGRO-DEALERS AND THEIR LOCATIONS IN MALAWI AS OF 21ST MARCH 2003

PARTICIPANTS TO THE DOMESTIC ASSESSMENT OF INPUT SITUATION IN MALAWI 19TH SEPTEMBER 2002

AGRO-DEALER NAME	ADDRESS	Name of person	REGION
1 Nosrk Hydro Malawi	Box 31301 Lilongwe 3	A. Shemu	Centre
2 Farmers World Limited	Box 1327 Lilongwe	J. Straton	Centre
3 Monsanto Malawi Limited	Box 30344 Lilongwe 3	S. Phiri	Centre
4 Chemicals & Marketing	Box 1230 Blantyre	P. Khembo	South
5 CropServe Malawi Limited	Box 30375 Lilongwe 3	J. Silungwe	Centre
6 Northern Corridor General dealers	Box 657 Mzuzu	D. M. Harawa	North
7 STC Group	Box 30843 Lilongwe 3	P.C.C Chirwa	Centre
8 Little Ways Limited	Box 1746 Lilongwe	L. Loga	Centre
9 ADMARC	Box 5052 Limbe	J. Gausi	South
10 Yazenga Properties	B0x 40671 Kanengo	C.Y. Mkandawire	Centre

PARTICIPANTS OF DECEMBER 12 2002 TRAINING ON FERTILIZER INFORMATION SOURCES

No	Title	Second Name	First Name	Designation	Company Name	Box No	District	
1	Mr.	Kamwangala	Fredrick F	Director	Atlantis Marketing International	P.O Box 652	Lilongwe	Cell:09826683 Ei:Kamwangalaf@yahoo.com
2	Mr.	Gwirani	Andrew	Director	Gatoma Investments	P.O Box 187	Balaka	08891800
3	Mr.	Kaluwa	Manuel	Director	Munthu Trading & Grading Comp	P.O Box 2260	Lilongwe	09201315
4	Mr.	Munthali	Brown	Director	Kebs Trading	P.O Box 20218 Luwinga	Mzuzu	09919441/866372
5	Mr.	Kachipanda	Howard	G .Manager	Agri-Marketing Services	P.O Box 884	Lilongwe	Tel:08897453/9207402 Ei :hwardka 2002@yahoo.ac.uk
6	Mr.	Kawalewale	Fredrick J.	O/ Director	Bengo General Agency	P.O Box 1269	Lilongwe	Tel:09942459 Em: abengo @malawi. Net
7	Mr.	Nkosi	Alexius D.	G/Manager	Farm Chemicals Ltd	P.O Box 51465 Limbe	Blantyre	644293/645831
8	Mr.	Chauluka	Ndione	Director	Agri-Tech Marketing Ltd	P.O Box 30728 Limbe	Blantyre	Tel: 01645252 Em: chauluka@sdpn.org.mw
9	Mr.	Mkandawire	Collings	C.EO	Yazenga Properties	P.O Box 40671 Kanengo	Lilongwe	Tel: 01794092 Fax: 07794094 Ei: Yazenga@Malawi .Net
10	Mr.	Chinguwo	Biziwick	O/ Manager	SFFRM	P.O Box 2505	Blantyre	624466/621920

Annex 2. Training Schedules (Continued)

PARTICIPANTS OF DECEMBER 13 2002 TRAINING ON ASSOCIATION BUILDING

1	Mr.	Kaluwa	Manuel	Director	Munthu Trad/&Grading Com	P.O Box 2260	Lilongwe	09200315
2	Mr.	Kamwangala	Fredrick	Director	Atlantis Marketing International	P.O Box 652	Lilongwe	
3	Mr.	Kawalewale	Fredrick	O/ Director	Bengo General Agency	P.O Box 1269	Lilongwe	
4	Mr.	Kachipanda	Howard	G .Manager	Agri-Marketing Services	P.O Box 884	Lilongwe	
5	Mr.	Phiri	Frazer C	K/way G/Mechandise	Operations Director	P.O Box 31067	Lilongwe	830002
6	Mr.	Harawa	Daniel	Managing Partners	Northern Corridor Gen I & E W/sale	P.O Box 657	Mzuzu	Tel 01331549 Fax 01331574 Ei: dnharawa@malawi.net
7	Mr.	Chirwa	Patrick	Group M/Director	STC Group	P.O Box 30843	Lilongwe	Tel:08835382 Fax:01772426 stc-group@hotmail.com
8	Mr.	Kachere	Mike C	Director	Carnac International	P.O Box 40401	Lilongwe	08835571 Ei: mckachere@yahoo.com

PARTICIPANTS OF PLANT NUTRIENTS, FERTILIZERS AND THEIR MARKETING AND DISTRIBUTION 29-30/02/03 KARONGA

NO	TITLE	FIRST NAME	SIR/NAME	DESIGNATION	COMPANY NAME	BOX NUMBER	DISTRICT	TEL: NO
1	Mrs.	Mercy	Mwanja	Manager	Nkamanga Yasi	P.O. Box 1	Chitipa	01382256
2	Mr.	Alfred S.	Sanyika M	Manager	Sayikamo Millers	P.O. Box 219	Karonga	
3	Mr.	Maxwell	H .Kayira			PA/ Wenya	Chitipa	01382602
4.	Mr.	Oliver	Mwenifumbo	Managing Director	Safari Construction	P.O. Box 340	Karonga	01362340
5	Mr.	Chizamsoka	O. Mulwafu		Chiza Investments	P.O Box 11 Misuku	Chitipa	01382721
6	Mr.	Andrew	Masebo		Magalasi Malyasi	Chitipa/PO	Chitipa	
7	Mr.	Amosi	M Kanjeri	Chairperson		P.O Box 12	Chitipa	
8	Mr.	Brighton	Z . J Nyondo	Manager	Shekinus Shop	P/A/Kameme	Chitipa	
9	Mr.	Matias	Mzimbi			P/A Chisenga	Chitipa	01382817
10.	Mr.	Thomas	Ferefete Sikwese	Manager		Chisangu School.P/A Tondola		
11	Mr.	Young Man	Buka Mhango	Marketing Officer		Karonga ADD P/Bag 4	Karonga	01362251
12	Mr.	Phillip	Kayange	Director	Pattermer Shopping Centre	Misuku T/Centre	Chitipa	01382702
13	Mrs.	Lusekero	Kanyika			P.O Box 11 Misuku	Chitipa	
14	Mr.	Riford	Mayingiso K.			P. O Box 76		01382870
15	Mrs.	Ireen	Mwaiseni		Kuswigha Transport	P.O. Box 26	Chitipa	01382404
16	Mr.	Henry	Chikuweza	Director	Chaza Estate	P.O Box 8 Nthalire	Chitipa	
17.	Mr.	Alimbula	L Msongole		Bwira Investment	P.O Box 19	Chitipa	01382346

Annex 2. Training Schedules (Continued)
IFDC-AIMs –CNFA TRAINING CAPITAL CITY MOTEL December, 2002

<u>No</u>	<u>TITLE</u>	<u>S/ NAME</u>	<u>F/NAME</u>	<u>Designation</u>	<u>COMPANY NAME</u>	<u>BOX No.</u>	<u>DISTRICT</u>	<u>Tel No</u>	<u>Fax No</u>
1	Mrs.	Kaluwa	Rose C.	M/Director	Tiwonge Investments	P.O. Box 342	Mzuzu	09957403	332789
2	Mr.	Nyasulu	Elwin		Hangalawe G/ Traders	P.O. Box 222	Rumphi		
3	Mr.	Nyasulu .M	Keepson.		Uzumara T/ Centre	P.O Box 23	Rumphi		
4	Mr.	Msiska Mlekeni	Masowa		Wuli T/Company	P.O Box 188,	Karonga	08897900	
5	Mr.	Kathewera	Mabooza.	M/Director	Gaj Akonda Trading	P.O Box 20394	Mzuzu	01331376	01331376
6	Mr.	Vilimunthunzi	Francis Vilimunthuzi.		Vilimunthuzi Store	P.O Box 21			
7	Mrs.	Kazombo	Mary	M/Director	Bulinde mphawi Invest	P.O Box 166	Kasungu	09209702	
8	Mr.	Harawa .M	Daniel.	Managing	Northern C/ W/sale	P.O. Box 657	Mzuzu	01331549	01331574
9	Mr.	Chirambo .L	Mac Dennis	Manager	Northern/C Wholesale	P.O. Box 111	Rumphi		
10	Mr.	Sitemkamu	Samson		Ulimi Nchuma Store	P/A Bembeke	Dedza	01223619	
11	Mr.	Kanyinji	Kanyinji.		Kanyinji Enterprise	P.O. Box 26 Mkanda	Mchinji		
12	Mr.	Chikatentha	Chimwemwe	M/Director	Active A/dealer Shop	P.O. Box 2170	Blantyre	01684848 09932150	
13	Mr.	Mgawadere M	Bentry.	M/Director	Boyd Business Center	P.O. Box 156	Mzimba		
14	Mr.	Manda	Harry	M/Director	Manda Grocery	P.O. Box 2 Kafukule	Mzimba	0133903	
15	Mr.	Makowa	Aubrey		Tim Enterprises	P.O. Box 969	Blantyre	09915218	01621651
16	Mrs.	Gwaza	Grace		Jogejeri G/ Enterprise	P.O. Box 802	Zomba	01515251	

17	Mr.	Yonah	Davison		Chumasakaikirana WholeSale	P.O. Box 1298	Chikwawa	01420290	
18	Mr.	Nkosi	Farn		FVN Investment	P.O. Box 50 Santhe	Kasungu		
19	Mr.	Mhango	Chiziwa.		Menyatwako Grocery				
20	Mr.	Kathewera	Hilda		Akonda Trading	P.O. Box 142 Chitala	Salima		
21	Mr.	Kambani	Hannock			P.O. Box 53 Champhira	Mzimba		
22	Mr.	Mataya	.Richard		Chiku General Supplies	Box 31612	Blantyre	08844066	01643628
23	Mr.	Nyirenda	Towera.	C/ Controller	Tayambeko store	P.O. Box 489	Mzuzu	01332417	332417
24	Mr.	Chipeta	Stayteen.		Yazgaso Store	P.O. Box 4 Champhira	Mzimba		
25	Mr.	Nyondo	Happy	Supervisor	Mwasacho Traders	P.O Box 20200	Mzuzu	01750086 835383	
26	Mr.	Mbingwa	Mbingwa.			P.O. Box 32 Nsalu	Lilongwe		
27	Mr.	Longwe	Maxon	Supervisor	Elite Hardware & stationary	Box 167 Mzimba	Mzimba	342395	342395
28	Mr.	Sakala	Paulosi .M		Mpositoli Grocery	P O Box 38 Mbwengu	Rumphi		
29	Mr.	Mankhukwa	Harry		Makhukwa Tea Room	P.O Box 127	Ntchisi	02285212	
30	Mr.	Gonthi	Dennis.		Phatidzi Holdings	P.O. Box 113 Notches	Ntchisi	01285326	
31	Mr.	Subili	Ernest Adon		Kumanda Com/ Agency	P.O. Box 1351	Ntchisi		
32	Mr.	Mlima	Gilbert Ruston	Director	Ndaula Com Agency	P.O .Box 7 Mawelo	Lilongwe	01710262	
33	Mr.	Mphoka	Lewis		Ambewe Shop	P.O Box 48 Mawelo	Lilongwe		
34	Mr.	Nkhoma	Nephtal		Mdodoma Enterprise	P.O. Box 172		01242205	01212381
35	Mr.	Kambani	Hannock		Kambani General Dealers	P.O Box 53 Champhira	Mzimba		
36	Mrs.	Kabera		Director	Msiyamo Farmers	P.O. Box 255	Kasungu	09209702	

37	Mr.	Kabera	Sebastino	Director	Msiyamo Farmers	P O Box 255	Kasungu	09209702	
38	Hon.	Kanjira	Weston		WAK Enterprise	P.O. Box 22	Balaka		
39	Mr.	Kasitu	Amidu		Tithandizane Store	P.O. Box 4 Mailana	Dedza	01223241	
40	Mr.	Chigwedera	Evance	Director	AKH Associates	P.O Box 205 Mponela	Dowa	01286222	
41	Mrs.	Malimba	Rosena			P.O. Box 23 Timbre	Mchinji		
42	Mr.	Mataya	H.P		Carnac International	P.O Box 269	Rumphi		
43	Mr.	Nkhunga	Timothy H.		A.K.H Associates	P.O Box 205	Lilongwe		
44	Mr.	Malama	Ephraim D	Director	Malama Investments	P.O Box 51 Kasiya	Lilongwe		
45	Mr.	Dzuwa	Helix	Director	Mentol General Suppliers	P.O. Box 58	Ntcheu	01232298 08855242	
46	Mr.	Chipandula	Nemon Msiska	Director	Liskaska Investment	P.O. Box 31273	Lilongwe 3	01724396 09204663	
47	Mr.	Zuze	Lisiton		Mwalinyu Grocery	P.O Box 143	Ntcheu		
48	Mr.	Subili	Adon	Director	Kumanda Com/ Agency	P O Box 1351	Lilongwe	01274305	
49	Mr.	Chitete	Herny		HKCB Investments	P.O Box 167Lumbadzi	Lilongwe	01700797	0170151
50	Mrs.	Chitete	Joice	Director	HKCB Investments	Private Bag 3 Mponela	Dowa	01700797 08895150	
51	Mr.	Kapudzula	George			P.O Box 38 Nambuma	Lilongwe		
52	Mr.	Mkwinda K.	Tendayi	Agro Business	Kalumba Agro Inputs	C/o Box 809	Mzuzu	09947192	
53	Mr.	Mwafulirwa	Ndawona D	Director	Nyasa Farmers Input	C/o Box 890	Mzuzu	09947192	
54	Mr.	Munthali	Rashid		Chimenya Enterprise	P.O Box 14	Mzuzu	339231	
55	Mr.	Mkoola			Mapeto Coml Agency	P.O Box 1519 Nsundwe	Lilongwe		

56	Mr.	Chitsanzo	B Sikelo		Chitsanzo Agro Shop	Private Bag 12 Namitete	Lilongwe		
57	Mr.	Fwataki	Henry. T	Director	Limani Investment	Private Bag 46	Lilongwe	09942452	
58	Mrs.	Phiri	Ester Cecilia	Director	Takula Enterprise	Private Bag 12 Namitete	Lilongwe		
59	Mr.	Paliyani	Joseph		Jays Investments	Private Bag 3 Namitete	Lilongwe		
60	Mr.	Manyozo	Alfred		Namitete Commercial,	P.O Box 24 Namitete	Lilongwe	01792434	
61	Mrs.	Kumwenda	Patricia	Managing Director	Nyachibankhuni Investments	P. O Box 647	Lilongwe	09201156	
62	Mr.	Kambalame	David.			P. O Box 121 Nathenje	Lilongwe	08864413	
63	Mr.	Mbowe	Peter Frazer	Managing Director	Self Help Agri Dev Agencies	P.O Box 40437	Lilongwe	01716032	
64	Mr.	Matekenya	Charles		IWO Investments	Private Bag 12 Namitete	Lilongwe	01274392	
65	Mr.	Sikero	Bryson C.		Chitsanzo Ago Shop	Private Bag 12 Namitete	Lilongwe	01274403	
66	Mr.	Kamphinda	Frazer Lezard.	Regional Coordinator	Carnac International	P.O. Box 40401	Lilongwe	08301915	
67	Mrs.	Chikafa	Lincy.		Regional Coordinator	P.O. Box 290			
68	Mr.	Banda	Moses.		Msiyamo Farmers Investment	P O Box 255	Kasungu		
69	Mr.	Mgwawadera	Chiwezi.	Manager	Boyd Business Centre	P.O. Box 30723	Lilongwe	01759840	01759840
70	Mrs.	Kapiza	Dinnah Rissie		Tisaiwale Variety Shop	P.O. Box 85 Mponela08859867	Dowa		
71	Mr.	Phiri	Kondwani		Konshams Investment	P.O. Box 132			
72	Mr.	Kumakanda	Borax	Director	Kutchena Agri Marketing	P.O. Box 1603	Lilongwe	01775554	01775554
73	Mr.	Harawa	Chitsanzo Charles	Director	International Group Associates	P.O Box 40437	Lilongwe 4	01716032	
74	Mrs.	Phiri S	Bertha		Dzukani Alimi Enterprise	P.O Box 32	Mchinji		
75	Mrs.	Harawa	Prisca	Director	C&P Corporate	P.O Box 40437	Lilongwe	01716032 08893321	

76	Mrs.	Chaphweteka	Jane	Director	Dr Farmer Investment	P.O Box 31290	Lilongwe	08844238	
77	Mr.	Jeremiah	Mike S	Director	Farmers Pride G/Supplies	P.O. Box 182	Ntcheu	08863132	
78	Mrs.	Matemba	Janet	Director	Sakata Trading	Private Bag 4 Lumbadzi	Lilongwe	01700720	
79	Dr	Kafumbula	Marieta		Kulimbanazo Grocery	P.O Box 24 Mponela	Lilongwe	08892	
80	Mr.	Manowa	Aubrey		Tim Enterprises	P.O Box 969	Blantyre		
81	Mr.	Kamelamizu	Denis G	Director	Phatidzi Holdings & General Dealers	P.O Box 133	Ntchisi		
82	Mr.	Hara	Maurice	Director	J.H.D Magness and General Supplies	P.O Box 130 Madisi	Dowa		
83	Mr.	Mbingwa	Kondwani	Director	Kondwani Creations	P.O Box 32 Nsalu	Lilongwe		
84	Mr.	Kamanga	Elias	Director	Globe Business Investments	Private Bag B 331	Lilongwe	09916772	
85	Mrs.	Mwale	Florida		Konflo's Agro dealer Enterprise	Box 154	Mchinji	09930595	
86	Mrs.	Phiri	Ester C	Director	Takula Investment	Private Bag 1 Namitete	Lilongwe		
87	Mrs.	Malindi	Ferlistas		Mphando Grocery	P.O Box 122 Liwonde	Machinga	01542350	
88	Mr.	Chambakata	George		Liskaska Investment	P.O Box 31273	Lilongwe 3	01724396	
89	Mr.	Kazgakawo		Manager	Kabiliti General Supplies	Private Bag 164	Kasungu	01253633	
90	Mr.	Mwale	Phonex F		Chinsinsi Cha Mulungu	P O Box 286	Kasungu	09917579	
91	Mr.	Banda T	Moses	Facilitator	Msiyamo Farmers Investment	P.O Box 255	Kasungu	09209702	
92	Mrs.	Ngalande	Clementina		Chibophi Trading	P.O Box 597	Kasungu	09203793	
93	Mr.	Kambalame	David. P		Kondwani Farmers Agency	P O Box 121 Nathenje	Lilongwe		
94	Mr.	Munthali	Rashid		Chimenya Enterprise	P.O Box 14	Mzuzu		
95	Major	Makanani	George		Akonda Trading	P.O Box 142	Salima		

96	Mr.	Sakala	Paulosi	Director	Mpositoli Grocery	P O Box 38 Mbwengu	Rumphi		
97	Mr.	Zgambo	Mike Wills	Director	Namitete Commercial Agency	P.O Box 24 Namitete	Lilongwe	01274340	
98	Mr.	NKhunga	P Ephraim`		King Joshua Investment	Private Bag 1 Kanengo	Lilongwe	01286490	01286490
99	Mr.	Chizirwa	Mhango		Yaulungu Village	P/A Mhunju	Rumphi		
100	Mr.	Yamikani	Noah	Clerk	Limani Investment	P/Bag 46	Mchinji	09942452	
101	Mr.	Kachere	Bosco	Manager	Kachere Agriculture Trading	P.O Box 40632 Kanengo	Lilongwe 3	09929062 756862	
102	Mr.	Theu	Owen		Pick & Pay	P.O Box 191	Kasungu		
103	Mr.	Nkhoma L	Hubert		Msinkho Investment	P.O Box 132 Magawa	Mchinji		
104	Mr.	Chalira	Luhana		NASME	P/A Bembeke	Dedza	223039	
105	Mr.	Phiri	Francisco		CNFA	P.O Box 21 Champhira	Mzimba		
106	Mr.	Sikero	Andrew K		Zonse ndi Moyo Shop	P.O Box 253	Dedza	223028	
105	Mr.	Juvensio	Sifiliano		Madalitso Grocery	P.O Box 95	Mchinji		
106	Mr.	Chimpango	Lyson Basket		Limani Investment	Private Bag 46	Lilongwe	09945452	
107	Mr.	Majunchwa	Elwin		Hangalawe General Traders	P.O Box 222	Rumphi		

Annex 2. Training Schedules (Continued)

PLANT NUTRIENTS, FERTILIZERS AND THEIR MARKETING AND DISTRIBUTION 6/7 March, 2003

NO	TITLE	FIRST NAME	SIR/NAME	DESIGNATION	COMPANY NAME	BOX NUMBER	DISTRICT	TEL: NO
1.		Sebastian	H Mndelemani	Committee Member(NASME	Kabiza Farm	P.O. Box 22	Nkhotakota	
2.	Miss	Bernadetta	Kubwala	Consultants	NASME	P.O. Box 312	Mangochi	01593056
3.	Mr.	Gasiyano S	Chitatanga		NASME	P.O. Box 154	Mchinji	
4.		Dalitso	Sinumbe		NASME	P.O. Box 88	Kasungu	
5.	Mr.	Patrick	S. Ross	Chairman	NASME	P.O. Box 131	Zomba	01524358
6.	Mr.	Helix D.	Dzuwa	Consultant	NASME	P.O. Box 58	Ntcheu	08855245
7.	Mr.	Charles	Kachiwanda	Director	Kasungu Farmers Ass	P.O. Box 69	Kasungu	01253770
8.	Mrs.	J.	Seya		NASME	P.O. Box 47	Ntchisi	01285260
9.	Mr.	Kennedy	P. N. Jingini		NASME	P.O. Box 454	Zomba	01524358
10.		Agness	Nkhonjera		NASME	P.O. Box 241	Mzimba	01342369
11.	Mr.	Layson	V. Magwaya			Private Bag 5014	Limbe	09948401
12.	Miss.	Lucy	Chiwaula			P.O. Box 312	Mangochi	08305989
13.	Miss.	Lydia	K. Nkhonjera	Director	Ulanga General Dealers	P.O. Box 371	Mzuzu	08874817
14.	Mr.	Sylvester	J. Zimpita			P.O. Box 144	Nkhotakota	01292200
15.	Mr.	George M.	Kampango	Facilitator	NASME	Private Bag 403	Lilongwe 4	01775839
16.	Miss	Nancy	C. Ngwira			P.O. Box 24	Rumphi	
17.	Mrs.	Rose	G. Nkhonjera			P.O. Box 165	Mzuzu	01330132
18.	Mr.	Frank	S. Makass			Private Bag 3	Mwanza	01471333
19.	Ms	Dawn	Miriam Phiri		NASME	P.O. Box 27	Kasungu	08891297
20.	Mr.	William	P. Mwale		NASME	P.O. Box 154,	Mchinji	01930595
21.	Ms	Atupele	Maya Matola		NASME	P.O. Box 217	Salima	01262393
22.	Mr.	Willex	Mbangala Phiri			P.O. Box 454	Zomba	01524089

23.	Mr.	Darlington	K. Harawa			P.A Tondola	Chitipa	01382289
24.	Mr.	Richard	K. Munthali		NASME	P.O. Box 219	Rumphi	01372342
25.	Mr.	Michael	M. Mzandu		NASME	P.O. Box 71	Ntchisi	
26.	Mr.	Wisdom	Nchawaka Jere			P.O Box 93	Chitipa	
27.	Mr.	Annie	Mkandawire		NASME	Private Bag 29	Mzimba	01342423

Annex 2. Training Schedules (Continued)

IFDC-AIMs NASFAM/POSAM TRAINING NATURAL RESOURCES COLLEGE 18/19 MARCH 2003

PLANT NUTRIENTS, CROP PROTECTION PRODUCTS AND FERTILIZERS-THEIR USE, SAFE HANDLING AND MARKETING TRAINING

NO	TITLE	FIRST NAME	SIR/NAME	DESIGNATION	COMPANY NAME	BOX NUMBER	DISTRICT	TEL: NO
1		Kondwani	Nkhoma			P.O Box 49 Nsalu	Lilongwe	
2		Alice Goodson	Mathewe		NASFAM	P.O Box 410	Mulanje	01466389+Fax
3		Justice Jonathan	Lisiya	Depot Supervisor	ATC	P.O. BOX 40038	Lilongwe 4	01710155./724742
4		Mabvuto Fitta	Chipeta	Sales Clerk				
5		Rabecca Mwatida	Ngalande	Shop Clerk	NASFAM	P/Bag 75	Kasungu	01253294/01253294 +Fax
6		Geroge Hetherwick	Munthali	Sales Representative	NASFAM	P/Bag 27	Rumphi	01372320
7.		John Benson	Mandala	Shop clerk	NASFAM	P.O. Box 1219	Zomba	01535307
8.		Lameck Samson	Somanje		NASFAM	P.O. Box 1219	Zomba	01535307
9		Abel Bedian	Chavula	Shop Clerk	NASFAM	P.O. Box 43	Rumphi	01372320
10		Abishai Winston	Mphande	Area Manager	Farmers World Ltd	P.O. Box 40294 Kanengo	Lilongwe	01710518/01710070
11		Lonely Grolify	Nyirenda	Shop Clerk	NASFAM	Private Bag 8 Embangweni	Mzimba	
12		Rhodes	Mandaliza	Shop Clerk	NASFAM	P.O. Box 311	Ntcheu	01235310/235310

13		Winfrey	Simmingss Lungu	Area Manager	Farmers World	P.O. Box 40294 Kanengo	Lilongwe	01710518/01710070/08 863025
14		Kondwani	Nkhoma	Shop Clerk		P.O Box 49 Nsaru	Lilongwe	
15		Hassan William	Jalles	Book-Keeper	NASFAM	Private Bag 49	Balaka	01545238/01542238
16		Luis Antonia	Correia	Area Manager		P.O Box 40294 Kanengo	Lilongwe	08864762/017100070
17		Susan L.C	Kacheche	Shop Clerk	NASFAM	P.O. Box 9 Katumbi	Rumphi	
18		Peterson Hatwibu	Batxon	Shop Clerk	NASFAM	P.O. Box 410	Mulanje	01480048
19		Catherine	Mmenyanga	Shop Clerk	NASFAM	P.O Box 1219	Zomba	01535307/535307
20		Treza M.	Chireni	Sales Clerk	NASFAM	Magawa 26	Mchinji	
21		Dyna Marthar	Kachiwanda	Shop Clerk	NASFAM	P.O. Box 130	Lilongwe	01759067
22		Chimwemwe F.	Kumitengo	Shop Clerk	NASFAM	P.O Box 130	Lilongwe	01759067
23		Violet Patrence	Banda	Shop Clerk	NASFAM	P/Bag 1	Namwera	01586115
24		Magret	Mponda	Shop Clerk	Nyambi Association	P.O. Box 286 Nselema	Machinga	
25		Joice	MacJessie	Shopkeeper	NASFAM	Private Bag 1 Namwera	Mangochi	01586115
26		Jonathan	Mumba	Sales Clerk	NASFAM	P.O. Box 35 Embangweni	Mzuzu	
27		Una	Chirambo	Shopkeeper	NASFAM	P/Bag 75	Kasungu	01253294
28		Sylvester Happy	Chimombo	Shopkeeper		Private Bag 75	Kasungu	01253294
29		Ida	Mughogho	Shop Clerk	Lisasadzi Association	P/Bag 75	Kasungu	01253294
30		Jonas Jonasi	Thawani	Shop Clerk	NASFAM	P.O. Box 1912	Zomba	01535307
31		Silver Smart	Mapunda	Shop Clerk	NASFAM	Private Bag 27	Rumphi	01372320
32		Grace Muyipa	Kasiya	Shopkeeper	NASFAM	Private Bag 34	Balaka	01545238
33		Amos Peaceman	Mphande	Shop Clerk	NASFAM	Private Bag 27	Rumphi	01372320
34		Mussa Harris	Idrissa	Shop Clerk	NASFAM	Private Bag 1	Namwera	01586115
35		Sydney Giriford	Lihoma	Shop Clerk	NASFAM	P.O. Box 410	Mulanje	01466389

36		Gift Salatiel	Huwa	Cashier	Malawi Flowers Ltd	Private Bag 3 Malilana	Dedza	01223087/306
37		Oscar	Malinga	Seed Controller	Malawi Flowers Ltd	P/Bag 3 Thete	Dedza	01223306
38		Nellie	Muthotho	Shopkeeper		P.O. Box 20 Kandeu	Ntcheu	01235310
39		Moir Atomex	Nyirenda	Area Manager	Farmers world Ltd	P.O Box 40294	Lilongwe 4	01710618/710070
40		Daniel Potipher	Kalikokha	Shop Clerk	NASFAM	P.O. Box 160 Lumbazdi	Lilongwe	01700807

**SOUTHERN REGION AGRO-DEALERS ASSOCIATION OF MALAWI - IFDC –SORAAM TRAINING ON PLANT NUTRIENT FERTILIZERS THEIR USE HANDLING AND DISTRIBUTION.
26TH AND 27TH MARCH**

NO	TITLE	FIRST NAME	SIR/NAME	DESIGNATION	COMPANY NAME	BOX NUMBER	DISTRICT	TEL: NO
1		Tendai Kamoza	Mkwinda	M/Director	Kalumba Agro-Inputs and General Traders	P.O. Box 890	Mzuzu	09947192
2		Ferlista	Malindi			P.O. Box 122	Machinga	01542350
3		Bryson Chitsanzo	Khan	Manager	Chitsanzo Investment	P/Bag 12 Namitete	Lilongwe	01274403
		Enock	Chakwiya	Director		Box 16	Thondwe	01795534
5		Samson S	Chinyamula	Mwati waMwati	Ulimi Nchuma Store	P/A Bembeke	Dedza	01253328
6		Davie Chanza	Kausiwa	Managing Director	Mentol Workshop	Box 58Ntcheu	Ntcheu	
7		Adamson	Banda Kapalamula	Managing Director	Mentol Workshop	P.O. Box 58	Ntcheu	
8		Phillip L.D	Yonah		Chumasakailkirana	P.O. Box 69	Chikwawa	01420290/309
9		Charles Kweza	Matekenya	Director	IWO Investment and General Dealers	P/Bag 12 Namitete	Lilongwe	01274403
10		Ezara	Kanyinji	Director	Kanyinji Enterprises	P.O. Box 26, Mkanda	Mchinji	

11		Brian	F. Fraser	Managing Director		P.O. Box 145	Ntcheu	099209497
12		Grace	Gwaza			P.O. Box 802	Zomba	08852866
13		Liston	Zuze	Managing Director		P.O. Box 143 Bilira	Ntcheu	
14		Mike J.	Sato	Manager		P.O. Box 182	Ntcheu	08863132
15		Maggie V	Chibowa	Manager		P.O. Box 136	Mangochi	01593307
16		Anne	kunje	Managing Director		P.O. Box 629	Mangochi	01593307
17		Helix K.	Dzuwa	Managing Director		P.O. Box 58	Ntcheu	01235298
18		Chimwemwe	Chikatentha	Managing Director		P.O. Box 2170	Blantyre	09927754
19		Ndaona	Mwafurirwa	Manager	Nyasa General Traders	P.O.Box 890	Mzuzu	09947192

Annex 3: Official agro Dealer list

AGRODEALER OFFICIAL LIST

District	AD No.	Name & Surname	Business Name	Address	Telephone
Balaka	19	Hon. Weston Kanjira Phiri	WAK Enterprises	Box 22, Balaka	01545 405
	76	Mrs. Ferlista Malindi	Mphando Grocery	Box 122, Liwonde	01 542 350
Blantyre	70	Mr. Blessings Mukhuwo	Wabwino Shop	P/Bag 25, Blantyre	09 207 630
	71	Mrs Chimwemwe Chikatentha	Mamshie Trading	Box 2170, Blantye	09 932 150
	72	Mr. Richard Mataya	Chiku General Suppliers	Box 31618, Blantye 3.	08 844 066
	78	Mr. Aubrey Makowa	Tim Enterprises	Box 1298, Blantyre	01 621 826
Chikwawa	69	Mr. Phillip LD Yonah	Chumasakayikirana W/Sale	Box 69, Chikwawa	01 420 290
Dedza	80	Mr. Japhet C Luhana	Luhana General Enterprises	P/A Bembeke	
	81	Mr. Sitemkam S Chinyamula	Ulimi Nchuma Store	P/A Bembeke	
	90	Mr. Amidu J Kasito	Tithandizane Store	Box 4, Malirana, Dedza	01 223 241
	102	Mr. Andrew Kadzemmawa	Zonse Ndi Moyo Shop	Box 253, Dedza	01 223 761
Dowa	1	Mrs. Marieta Kafumbula	Kulimbanazo	Box 244, Mponela	08 892 253
	11	Mrs. Dinnah Rissie Kapiza Mr. Timothy Henderson	Tisayiale	Box 85, Mponela	
	13	Nkhunga	AKH Associates	Box 205, Mponela	01 286 229
	14	Mrs. Janet Matemba	Sakata Trading	P/Bag 4 , Lumbadzi	01 700 720
	20	Mr. Henry K. Chitete Banda	HKCB Investment	Box 167, Lumbadzi	01 700 112
	23	Mr. Richard Chapata	International Group Associates	Box 40473, Lilongwe 4	08 870 348
	26	Mr. George Kapudzula	HKCB Investment	Box 38, Nambuma	
	40	Ms. Joice Chitete Banda	Chisomo Grocery	P/Bag 3, Mponela	
	68	Mr. Evans L Chigwedera	AKH Associates	Box 205, Mponela	01 286 229
	108	Mr. Maurice Hara	JHD Magness Suppliers	Box 130, Madisi	09 937 756
Karonga	120	Mr. Jamu Lagiyo Mr. Peter Frazer Angetile	Mwasacho Traders	Box 46, Lumbadzi	
	38	Mbowe	Self Help Investment	Box 46, Karonga	
Kasungu	3	Mrs. Kabela Phiri Mr. Dalitso Kumangwawo	Nsiyamo Farmers	Box 255, Kasungu	01 253 632
	5	Mbewe	Angoni Conner Shop	Box 1, Chilowamatambe	
	9	Mr. Phonex Fayisoni Mwale	Chisinsi Cha Mulungu	Box 286, Mtunthama	09 917 579
	10	Mrs. Clementina Ngalande	Chibophi Trading	Box 94, Kasungu	08 850 668

AGRODEALER OFFICIAL LIST

District	AD No.	Name & Surname	Business Name	Address	Telephone
		Kaomba			
	16	Mr. Moses Tasowana Banda	Nsiyamo Farmers	Box 255, Kasungu	01 253 632
	17	Mr. Farn Vincent Nkosi	FVN Investment	Box 50, Santhe	
	18	Mr. Fred Franco Chiwera	Kabiliti General Dealers	P/Bag 164, Kasungu	01 253 600
	22	Mr. Borax Chisambiro	Alekeni Anene Store	Box 457, Mtunthama	
	35	Mr. Foster Kazgakawo	Kabiliti General Dealers	P/Bag 164, Kasungu	01 253 600
	41	Mr. Sebastiano Kabera Phiri	Mchotsa Njala Farming	Box 255, Kasungu	01 253 632
	42	Mrs. Moriah Msiska	Chibophi Trading	Box 94, Kasungu	08 850 668
	46	Mr. Mozzyse Mhango	Isapajola Trading	P/Bag 28, Kasungu	09 928 988
	89	Mr. Langson S Nkhoma	Mwasacho Trading	Box 12, Chisemphere	
	100	Ms. Mary Agness Kazombo	Bulinde Umphawi Investment	Box 166, Kasungu	
	118	Mr. Owen TW Theu	Pick & Pay Wholesalers	Box 191, Mkhota, Kasungu	
	119	Mrs. Melina BP Chapemba	Melina Investment	Box 1, Mkhota, Kasungu	
Lilongwe	4	Mr. Kondwani Mbingwa	Kondwani Creations	Box 32, Nsalu	
	6	Mr. Sofasi Meke Msonthi	Chuma Ndi Moyo	Box 30, Mitundu	01 277 234
	7	Mr. Titus Malipa	Big Brains Wholesalers	Box 115, Nsalu	09 932 395
	8	Mr. Mike Wills Zgambo	Namitete Commercial	Box 24, Namitete	08 851 831
	12	Mr. Chizaso Charles Harawa	International Group Associates	Box 440437, Lilongwe 4	08 870 348
	15	Mr. Nemon Msiska	Liskaska Investment	Box 31273, Lilongwe 3	01 724 396
		Mr. Charo Brain Chiziweni			
	21	Mgawadere	Boyd Business Center	Box 30723, Lilongwe 3	01 715 001
	24	Mr. Henry Tumeyo Fwataki	Limani Investment	C/O P/Bag 46, Lilongwe	09 942 452
	25	Mr. Borax Kamakanda	Kutचना Agri-Marketing	Box 1603, Lilongwe	09 938 642
	28	Mr. Frazer Lezard Kamphinda	CARNAC International	Box 40401, Lilongwe 4	08 835 579
	32	Mr. Christopher Harawa	International Group Associates	Box 40473, Lilongwe 4	01 716 032
	44	Mrs. Prisca C Harawa	International Group Associates	Box 40437, Lilongwe 4	01 716 032
	47	Mr. Gibson Chambakata	Liskaska Investment	Box 31273, Lilongwe 3	01 724 396
	50	Mr. Petros Jomera Chipandula	Liskaska Investment	Box 31273, Lilongwe 3	01 724 396
	51	Mr. Charles Alfred Manyozo	Namitete Commercial	Box 24, Namitete	01 274 340
	52	Mr. Vincent Nyirongo	Namitete Commercial	Box 24, Namitete	01 274 340
	57	Mr. Humpreys Patrick Mataka	CARNAC International	Box 40401, Lilongwe 4	08 835 579
	66	Mr. Charles CBH Soole	Chris Frank International	Box 30589, Lilongwe 3	08 871 029

AGRODEALER OFFICIAL LIST

District	AD No.	Name & Surname	Business Name	Address	Telephone
	74	Mr. Bryson C Sikelo	Chitsanzo Shop	P/Bag 12 Namitete	01 274 403
District	AD No.	Name & Surname	Business Name	Address	Telephone
Lilongwe	82	Mr. Charles K Matekenya	IWO Investment	P/Bag 12 Namitete	01 274 208
	83	Mr. Joseph EY Paliyani	JAYS Investment	P/Bag 3 Namitete	01 274 392
	87	Mr. Noah P Yamikanai	Limani Investment	C/O P/Bag 46, Lilongwe	09 942 452
	88	Mr. Layson B Chimpango	Limani Investment	C/O P/Bag 46, Lilongwe	09 942 452
	91	Mr. Ernest Adon Subili	Kumanda Commercial Agency	Box 3151, Lilongwe	01 247 335
	92	Mr. Alfred S Mkoola	Msundwe Produce & Marketing	Box 1519, Lilongwe	01 247 334
	93	Mr. Ephraim Dongolosi Malama	Malama Investment	Box 51, Nsaru	
	94	Mr. Peterson E Nkhunga	King Joshua Investment	P/Bag 1, Lilongwe 4.	01 716 249
	95	Mr. Mussa Kondwani Salimu	Konshams Investment	Box 132, Namitete	08 892 046
	97	Mrs. Ester Cecilia K Phiri	Takula Enterprises	P/Bag 12 Namitete	01 274 392
	99	Mrs. Partiricia Lizzie Kumwenda	Nyachibankhuni Investment	Box 646, Lilongwe	09 201 157
	106	Mr. Lewis LJ Mphoka	Ambewe Shop	Box 48, Mawelo, Lilongwe	01 247 335
	107	Mr. Ruston Gilbert Mlima	Lucy Trading	Box 7, Mawelo, Lilongwe	
	113	Mr. Bosco Kachere	Kachere Agriculture Trading	Box 40632, Lilongwe 4	09 929 062
	114	Mrs. Jane Chapweteka		Box 31384, Lilongwe 3	08 844 238
	115	Mr. David Phillip Kambalame	Kondwani Farmers Agency	Box 121, Nathenje.	08 864 413
Mangochi	75	Ms. Anne Kunje	A & L Enterprises	Box 629, Mangochi	09 927 754
	85	Ms. Maggie Chibowa	Mayankho Enterprises	Box 136, Namiasi	
	62	Mr. Kennedy Wina Matupa	Mathero Investment	Box 20, Monkey Bay	09 928 509
Mchinji	77	Mr. Ezara Kanyinji	Ezara Kanyinji Enterprises	Box 26, Mkanda, Mchinji	
	96	Ms. Bertha Stanslus E Phiri	Overlands Grocery	Box 32, Ludzi, Mchinji	01 227 843
	98	Ms. Florida Mwale	KONFLO's Enterprises	Box 154, Mchinji	01 242 372
	104	Mr. Naphtal Patrick Mtema	Mdodoma Enterprises	Box 172, Mchinji	01 242 321
	109	Mr. Sifoliano J Banda	Madalitso Grocery	Box 95, Mchinji	
	110	Mr. Raseno Chunga	Sanje Sipindula Enterprises	Box 23, Tembwe, Mchinji	
	111	Mr. Hubert Luckson Nkhoma	Msinkho Investment	Box 132, Magawa, Mchinji	01 242 372
Mzimba	29	Mr. Bentry Moffat Mgawadere	Boyd Business Associates	Box 156, Mzimba	
	30	Mrs. Lincy Chikafa	Chidedza Enterprise	Box 290, Mzuzu	01 332 136
	31	Mr. Francisco Vilimunthazi Phiri	Vilimunthazi Store	Box 21, Champhira	

AGRODEALER OFFICIAL LIST

District	AD No.	Name & Surname	Business Name	Address	Telephone
Mzimba	33	Mrs Rose Kalua	Tiwonge Investment	Box 20133, Mzuzu	09 942 404
	34	Mr. Henry Manda	Manda Grocery	Box 2, Kafukule	
	36	Ms. Towera Nyirenda	Tayamba Investment	Box 489, Mzuzu	01 332 417
	37	Mr. Maxon Zebedia Longwe	Elite Hardware	Box 167, Mzimba	01 342 395
	39	Mr. Stayteen Kamoto Chipeta	Yazgaso Store	Box 4, Champhira	
	45	Mr. Hannock Kambani	Kambani General Suppliers	Box 53, Champhira	01 334 196
	48	Mr. Rashid Munthali	Chimenya Grocery	Box 14, Mzuzu	01 339 231
	54	Mr. Happy M Nyondo	Mwasacho Traders	Box 86, Ekwendeni	08 835 383
	55	Mr. Elwin Nyasulu	Hangalawe General Traders	Box 222, Phwezi	
	56	Mr. Paulosi M Sakala	Mpositoli Grocery	Box 38, Bwengu	
	58	Mr. Masowa Mlekeni Msiska	GAJ Akonda Trading	Box 20394, Mzuzu	08 897 900
Nkhotakota	59	Mr. George Mabooba	GAJ Akonda Trading	Box 20394, Mzuzu	09 950 632
	60	Mr. Daniel Mwarabo Harawa	Northren Corridor Wholesaklers	Box 657, Mzuzu	08 827 259
	64	Mr. Tendai K Mkwinda	Kalumba General Traders	Box 56, Mzuzu	09 947 192
	65	Mr. Ndawona D Mwafulirwa	Nyasa General Traders	P/Bag 94, Mzuzu	09 947 192
	2	Mr. Laster Edward Kasiyamaliro	Kankuyu Hardware	Box 31, Mwansambo	
Ntcheu	63	Mr. Mike Jeremiah Sato	Farmers Pride G/Suppliers	Box 182, Ntcheu	08 863 132
	73	Mr. Helix DK Dzuwa	Mentol General Suppliers	Box 58, Ntcheu	08 855 245
	79	Mr. Liston Zuze	Mwarinyu Grocery	Box 143, Bilira, Ntcheu	
Ntchisi	105	Mr. Harry Mankhukwa	Gwirigwi Trading	Box 127, Ntchisi	01 285 212
	116	Mr. Dennis K Gonhti	Kumbukani Shopping Center	Box 113, Ntchisi	01 285 326
Salima				Chipoka	
	101	Hilda Kathewera	Akonda Trading	Box 142, Chipoka	37
Rumphi	103	Major Stephen G Makanani	Tithandizane Grocery	Box 36, Chitala	
	49	Mr. Keepson Nyasulu	Hangalawe Shopping Center	Box 23, Mzokoto	
	53	Mr. Kenneth Chizirwa Mhango	Manyatwako Grocery	PA Mphwamphwa, Mhuju	
Zomba	117	Mr. McDennis Luca Chirambo	Northren Corridor Wholesaklers	Box 111, Rumphi	
	67	Mr. Chakwiya Mpaluko	Ankadziwa Ndani Grocery	Box 16, Thondwe Zomba	
	86	Mrs. Grace Gwaza	Jojejeri General Enterprises	Box 802, Zomba	01 515 251

Annex 4

Position Paper on the Deepening of Policy Reforms and Policy Studies

Introduction

The supply of agricultural inputs in Malawi has been undergoing a difficult transition from a government-dominated system during the years 1991 – 1995 when it accounted for an average market share of 97% (IFDC – Data) to a system led by the private sector. In the past, the government owned parastatals; Agricultural Development and Marketing Corporation (ADMARC) and the Smallholder Farmers Fertilizer Revolving Fund of Malawi (SFFRFM), imported, distributed and set the prices for most of the agricultural inputs. In order to improve this situation, a study was commissioned in the year 2000 to establish the constraints to the agricultural input supply systems in Malawi by the private sector. Therefore, this paper brings out issues which were identified during the study on the performance of past agricultural policies with regard to the agricultural input supply systems in Malawi. For this purpose, a background to the study is provided in the first section as well as the recommendations which resulted from this study. The second section discusses what was proposed should be done in the area of policy if the agricultural input markets were to develop. The paper further discusses what has been done so far in the third section and lastly, it presents the way forward.

Background

Malawi implemented major reforms in the input sector beginning early 1990's. The most significant of the policy changes included reducing direct government interventions, eliminating monopoly privileges of parastatals, eliminating subsidies on inputs, liberalizing input prices, and relaxing controls on private firms' market entry and operations. The policy changes were aimed at facilitating a transition to a sustainable private sector input supply system that would efficiently meet the needs of the farming community. After more than a decade, the supply system for agricultural inputs continues to go through a difficult transition; these markets are not operating as efficiently as expected when policy reforms were introduced. As a result, input prices and availability have been issues of concern, particularly for smallholder agriculture.

Given the importance of modern inputs for food security and protecting the natural resource base, the Ministry of Agriculture and Irrigation (MoAI) commissioned an IFDC – led assessment of the seed, fertilizer and crop protection products supply systems and the development of a companion Action Plan for strengthening private sector input marketing in the year 2000. This move was also meant to allow the public sector and donors to effectively play their critical roles as facilitator and adjudicator. In developing the Action Plan, the team (which comprised of policy economists, marketing specialists, credit specialist, inputs and production economists, a seed specialist and an inputs trader from the private sector) assessed various options available for supplying agricultural inputs and concluded that the free market system should be used because of its efficiency and sustainability. However, it was also recognized that to develop sustainable supply systems, the liberalized markets need to be strengthened by undertaking activities in the areas of policy reforms, human capital formation, and improved financial services.

The Action Plan then led to a proposal by MoAI to develop the Input and Output Markets. Eleven (11) issues were identified in the proposal which needed immediate attention if these markets were to develop. One of the issues identified was the Deepening of Policy Reforms and Policy Studies with specific regards to input markets.

What was proposed for the Deepening of Policy Reforms and Policy Studies?

The objective of Deepening of Policy Reforms and Policy Studies was to continue to create a competitive market environment that is conducive to private – sector led development in agri –input and output marketing. The specific policy areas to be addressed were:

- Continuation of parastatal commercialization and/or privatization particularly for ADMARC and SFFRFM.
- Formulation of a policy on fertilizer buffer stocks – whether to be removed completely or reduced in size and if the latter, determining its level of operational structure and guidelines.
- Reviewing and marketizing government/donor commodity aid programs.

Prior to the time of the assessment between 1996 and 1997, ADMARC was not directly involved in fertilizer importation but rather distributed SFFRFM fertilizer imports. During its first year of operation as a fertilizer importer (using offshore and in-country financing), ADMARC accounted for only 13% of the total market in terms of metric tons of products (**Update to the Action Plan 2002**). By 2000-01 when the assessment was conducted ADMARC fertilizer import share had decreased substantially and has continued to decrease since then. However, ADMARC has continued to operate in Malawi as a parastatal but on commercial basis. But, compared to other input distributors, ADMARC enjoys the advantage of its important distribution network supported by storage facilities throughout the country and a relatively impressive transportation fleet. Because of this infrastructure, ADMARC remains the only input marketing organization in Malawi capable of reaching many of the remote rural areas of the country, thereby offering access to input and output marketing opportunities to farmers who would otherwise be excluded from the markets. ADMARC no longer receives direct government subsidy.

On the other hand, SFFRFM was designed to keep fertilizer buffer stocks so that the country was not deprived of inputs at critical times. When the civil war in Mozambique prevented the use of the Nacala and Beira ports, such a buffer stock was a necessity. SFFRFM had the monopoly for importing fertilizer for smallholder farmers in Malawi up to 1993 – 1994(import share for 1991/92 was 96%). After liberalization in 1994 – 1995, SFFRFM has continued to import fertilizer but its import share has decreased substantially from 29% in 1996/97 to around 14% in 1999/2000 (IFDC - Data). Prior to year 2000, SFFRFM was only operating from its major depots in Blantyre, Lilongwe and Mzuzu and was mainly involved in government programs. However, the organization has now started opening satellite depots in rural areas as a result of competitive pressure and in an effort to capture part of the Malawi Rural finance Corporation (MRFC) clientele.

On the donor/government programs, a number of them have been carried out since 1998 the most notable ones being the Starter Pack (SP) and the Targeted Inputs Program (TIP) which were primarily meant to improve household food security in rural areas by providing them at no cost, maize hybrid seed, fertilizer and legume seed. In addition to this, there has been the Kennedy Round II (KR II) input supplies which came in as a grant from the Japan. These programs (SP/TIP) though well intentioned thus create policy uncertainty and discourage investment in inputs markets since the inputs are delivered direct to the farmer by the government. Similarly, the KR II supplies were being sold by the State Owned Enterprises (SOEs) at a cost of two-thirds of the free on board (fob) price in the country of origin thereby introducing an implicit subsidy of 30% - 40% with which the private sector could not compete (**Action Plan 2000**).

It was thus recommended in the proposal that the overall co-ordination of the policy reforms component was to be done by the Planning division of MoAI and that the commercialization and privatization of the SOEs would be an ongoing process. To ensure a smooth process, it was proposed that the activities under this would include commissioning of studies (where necessary), consultations with key stakeholders in the agricultural sector and feeding the information collected to the appropriate government decision making machinery.

Ultimately, IFDC received a grant from United States Agency for International Development (USAID) to implement the Agricultural Input Markets Development Project (AIMs) to specifically address four of the eleven issues identified, one of them being the point under discussion.

The AIMs project would assist the Government of Malawi (GOM) in its ongoing effort to create an environment that is conducive to private sector investment in agri-input supply and marketing. To be able to do this, two key activities were planned:

- Commercialization of input distribution activities of both ADMARC and SFFRFM.
- Marketization of government/donor commodity programs.

It was also proposed that workshops will be conducted to discuss in an open forum which would involve the GOM, donors, private sector and the banking community the policy issues relative to agri-input market development in Malawi.

What has been done so far?

Efforts in the area of commercialization/privatization of ADMARC are under way by a task force which is being coordinated through the Ministry of Finance. Markets have been classified into social and commercial markets. Decisions are yet to be made on the future of the parastatal. It has been a hot issue with most people preferring to maintain ADMARC in its present state. An article in the Nation newspaper of 3rd April 2003 indicates that the issue of privatizing ADMARC has created a lot of controversy in Parliament and outside with critics arguing that the matter should be approached with caution to avoid jeopardizing the corporations social roles to the nation. However, a task force was formulated which is being coordinated within the Ministry of Finance. A report on its findings has yet to be released.

SFFRFM is already operating as a commercial entity and interim results show that it has started making profits. However, there are indications that some progress on the commercialization of the parastatal may have been stalled by the Anti Corruption Bureau (ACB) investigations on the allegations that were made by some quarters that the valuation of Fertilizer Buffer Stocks which were later sold to various organizations was not done in good faith.

On government and donor programs, there has not been any KR-II fertilizer or pesticide supplied to Malawi after the 1999-2000 cropping season. It is still not clear whether this discontinuation is permanent or temporary. There are two explanations floating around in the country related to the justification of the termination of KR-II imports to Malawi. One explanation holds that the KR-II programme in Malawi was discontinued by the Japanese themselves as continent-wide response to criticisms about its depressive effect on private sector development. The other explanation is that the programme was discontinued by the Japanese because the GOM had not paid its bill, which it has

since done. Whatever the truth may be, the fact is that the government has continued to request KR-II inputs. Efforts are also being made to marketize the SP/TIP program through a proposed voucher program. A proposed voucher scheme has been drawn up which will soon be put forward for discussion with various interested parties.

Way Forward

Meeting has been arranged with the Head of the Planning Division in MoAI. It is expected that from this meeting a number of issues will be clarified regarding the status of the two big parastatals. It is also hoped that it is from the results of this meeting that the project might see which direction to take on the issue.

As regards the Marketization of donor programs, it is hoped that once the idea of introducing a voucher scheme for the SP/TIP has been floated around and gets the required approval, the project will implement it on a pilot basis.

Annex 5a: Fertilizer Imports and sales by Parastatals and Private companies

FERTILIZER IMPORTS 2002/03 CROPPING SEASON

PUBLIC AND PRIVATE COMPANIES

Organization	Quantity MT	% of Total
Parastatal A	3,965.00	2.0%
Parastatal S	17,651.00	9.1%
Private N	69,963.82	36.0%
Private F	64,053.22	33.0%
Private Z	800.00	0.4%
Private R	28,191.00	14.5%
Private T	2,588.80	1.3%
Private X	1,862.00	1.0%
Private LL	5,220.00	2.7%
Total	194,294.84	100%

As at 19th March 2003

FERTILIZER SALES 2002/03

PUBLIC AND PRIVATE COMPANIES

Organization	Quantity MT	% of Total
Parastatal A	3,405.00	2.0%
Parastatal S	9,619.00	5.6%
Private N	63,073.82	37.0%
Private F	56,570.49	33.2%
Private Z	800.00	0.5%
Private R	27,170.00	16.0%
Private T	2,588.80	1.5%
Private X	1,862.00	1.1%
Private LL	5,220.00	2.7%
Total	170,309.11	100%

As at 19th March 2003

Annex 5b: Share of the Fertilizer Market in Sales

	91/92	92/93	93/94	94/95	95/96	96/97	97/98	98/99	99/00	00/01	01/02	02/03
ADMARC	130,274	142,258	82,808	121,887	43,042	29,414	13,962	12,571	19,794	37,104	3,260	3,405
SFFRFM	-	-	-	-	12,554	15,100	25,000	26,160	13,640	18,340	31,560	9,619
Pvt. Sector	1,298	347	264	18,753	140,437	106,960	147,964	144,045	158,218	111,534	140,137	157,285
Total sales	131,572	142,605	83,072	140,640	196,033	151,474	186,926	182,776	191,652	166,978	174,957	170,309
% Parastatal	99	100	100	87	28	29	21	21	17	33	20	8
% Private	1	0	0	13	72	71	79	79	83	67	80	92

Note: The private sector is an oligopoly of three companies. NH, FW-AGORA, RAB

Source: ADMARC/ SFFRFM

ANNEX 6

MALAWI AGRICULTURE SECTOR INVESTMENT PROCESS WORKSHOP REPORT

1.0. INTRODUCTION

The Malawi Agriculture Sector Investment Process (MASIP) with assistance from the International Soil Fertility and Fertilizer Development Centre (IFDC) organized a workshop at Capital City Motel. The objective of the workshop was to present The MASIP Vision, Mission, Strategy and Implementation Framework document to agriculture stakeholders and give them an opportunity to comment.

Due to limited resources only stakeholders in Lilongwe were invited. The stakeholders that were invited were the representatives of farmers, produce buyers, input dealers, financial institutions, Non-government Organizations, farmers associations, development partners, line ministries. Annex 1 outlines the list of participants. Mr. Ludwig Shatz of IFDC facilitated the workshop.

2.0. STRUCTURE OF WORKSHOP

The workshop was opened by the Secretary for Agriculture and Irrigation Mrs. A Mchiela. In her opening remarks she requested all the stakeholders present to continue working together to develop agriculture. She observed that numerous challenges faced in the agriculture sector cannot be addressed by individual institution by requires a concerted effort by all. The PS also stated that all stakeholders should own MASIP and this was why the Ministry was bringing the document to the stakeholders so that they critically look at it and come up with a document that is accepted by all.

Mr. P Khembo of Chemicals and Marketing made a speech that dwelt much on the importance of taking MASIP serious so that it does not face the same fate as other past initiatives like “Vision 2020” and “Heath for all by the Year 2000” which he said have had no impact. He applauded the idea of Multisectoral approach being advocated in MASIP because it reflects the challenges faced in the agriculture sector. Mr. Khembo also stated that the success of the program will largely depend on the efficiency in the production processes of farmers through cutting down of unit cost of production. He however said that this could only be possible if the cost of financing is brought down by reducing the interest rates. This could be achieved through the commitment of all stakeholders especially the government.

The MASIP Secretariat briefly presented the Vision, Mission, Strategy and Implementation Framework document. The emphasis was on the Vision, Mission and Implementation Framework.

The Principal Secretary for the Ministry of Finance commented on the document and observed that there is a need to widely consult with his ministry as well as the department of Economic Planning and Development. The PS said that the MASIP document should be developed in the contest of PRSP and PSIP. He said there are other areas like agro processing which the document indicates that there are few

donors yet the treasury has money from other donors like ADB earmarked for agro processing and these funds have been idle for almost 6 years.

The FAO representative also observed that the “guiding principles” for MASIP need to be recast because they look more less like strategies than guiding principles.

3.0. GROUP DISCUSSIONS

Participants were divided into three groups and all the groups discussed the following issues and questions

- Confirm (amend) the Vision, Mission, objectives and guiding principles of MASIP
- What are you or your organization doing in the ten priority areas and what are the levels of effort
- What are the gaps and overlaps? What should be done to fill the gaps
- How can we bring together other key players that form part of the rural economy such as roads, transport, security and others?
- How do we identify projects and programs to fit into the sector needs
- What does the private sector need from the government and what does the government need from the private sector.

4.0. GROUP PRESENTATIONS, DISCUSSIONS AND COMMENTS

The groups presented the results of their findings as follows

GROUP 1

The group made the following observations

That MASIP should be considered as a process and the heading of the paper should indicate as such

VISION –the group adopted the vision as presented

MISSION – The group suggested that the Mission be changed to read “Developing a sustainable agriculture through effective commercialization of the agriculture sector”

GOAL – Suggested that the goal should be “Make Malawi food and nutritional secure as well as achieving improved income.

OBJECTIVES

The following objectives were suggested to be included in the document

- Promoting irrigation development (to replace the one that say “developing micro and small scale irrigation schemes”
- Development of an efficient and effective information system

GUIDING PRINCIPLES

The group suggested that the guiding principles should be recast

OTHER ACTIVITIES BY DEVELOPMENT PARTNERS

The following activities were suggested to be included on the table that depicts the activities of development partners

- UNICEF** –Is undertaking activities in food security and Nutrition particularly for children
- IFAD** - Undertaking activities in irrigation, institutional capacity, agriculture financing
- USAID** – Is also working in the area of institutional linkages and coordination
- UNDP** – Should be featured in the matrix for sustainable livelihoods programme

GAPS & OVERLAPS

The group identified the following gaps and overlaps in the document

- Matrix on Page 26 should be exhaustive, MASIP Secretariat to ensure that all issues are reflected in the Matrix
- Include a section on the operationalization of the activities (Implementation arrangements need to be well articulated)
- Define the place/of the process in the MTEF and PSIP, PRSP
- Need to identify a process of defining projects/ programmes under MASIP
- Marry priority areas from PRSP and MASIP process
- The document should clarify the role of civil society and other players in the MASIP.
- Need to identify our problems and formulate projects based on the consultation rather than working on problems identified from somewhere.
- The document should provide guidelines on projects
- Need to strengthen the projects unit in the Ministry of Agriculture and Irrigation

B. GROUP 2

Group 2 presented their report as follows

Vision:

The group noted that the vision statement is okay **but** said the there is a need to clearly define the meaning of "Agricultural Sector" as a footnote.

Mission

Should cover all sectors in agriculture not just smallholder e.g "Developing a sustainable agriculture sector through commercialization"

Guiding Principles

All the principles adopted except point 4 (rephrased) 4 & 5 combined.
 "The sector will advocate local and community empowerment in line with government decentralisation policy"

Goal - Objectives: Split as 2 objectives

Objective 1: " Ensuring national and household food security and nutritional status".

Objective 2: "Increase employment and incomes in rural areas.

The group then recommended that the existing objectives be reviewed accordingly and ensure that they are clearly prioritised and sequenced (Action Plan: By who, By when)

The group suggested that the MASIP Secretariat should circulate table 2 to Donors, NGOs and the private sector for their review and comments

OTHER ACTIVITIES BY DEVELOPMENT PARTNERS

The following was additional information on what development partners are doing in the sector

European Union – Is supporting Land Resource Management Programs

The group also suggested that issues of aquaculture and HIV/AIDS and gender should be included in the document

GAPS & OVERLAPS

The following were identified as gaps in the document

- A thorough identification of stakeholders in the sector should be undertaken
- The document should clearly define Roles of stakeholders
- The strategies should be prioritized and sequenced

The group also recommended the following

- That table 2 should be circulated to the Private Sector and NGOs.
- That MASIP should contact NAG through Dr Z. Chalira of EP&D to get more information to beef up the document
- MASIP should undertake rigorous public awareness campaign
- The Terms of Reference for NASCC should be reviewed
- MASIP process should facilitate needs identification of farmers by category - small, medium, large scale
- Local institutions should be involved in project identification such as DA, VDC

Lastly the group identified the following as the expectations of the private sector from the government

Enabling environment conducive to investment including

- Stable macroeconomic conditions
- Interest rates, currency
- Infrastructure
- Electricity
- Political stability and
- Freedom from interference

On the other hand the government expects the private sector to honor their obligation like paying of taxes

GROUP C

The group observed that Micro-finance for productivity of small scale farmers are limited due to few or no financiers for small-scale processors/industries and the risks attached to agricultural activities. The other problem identified by the group was that of low investment in human capital.

Vision:

The group suggested that the Vision should change to “Contribution to poverty reduction through competitive and dynamic agricultural sector”

Mission:

The group suggested that the mission should change to read “Developing a sustainable agriculture through commercialization with emphasis on small-scale/semi-commercialization”.

Objectives:

The group suggested that objectives should be prioritized and access to finance should be the first objective. The ranking should be done using PRSP document

Guiding Principles

The following comments were given as regards to the guiding principles

- Issues of HIV/AIDS and Gender should be included as one of the guiding principles
- The other guiding principle is of that all programmes will be implemented within the PRSP, PSIP and decentralisation frameworks.
- Demand driven approach will be advocated for development and delivery of services.
- Emphasis will also go to other players in the sector than government only
- Good governance and political-will should be part of the guiding principles

GAPS & OVERLAPS

The group observed that there are so many donors in food security and nutrition as compared to other areas.

The table on projects funded by donors need to be updated

The impact of HIV/AIDS and issues of low investments in farmer associations and cooperatives should be reflected in the document

The document lacks strong legal back-up/framework for Agriculture sector

The group also stated that other stakeholders like, health, water development, roads and transport, security/MASSAJ and Legal affairs should be brought in. These should be part of the steering committee

The group also made the following recommendations

- The MASIP document should have clear Monitoring and Evaluation indicators
- There should be separation of power between MASIP and the Planning Division of the Ministry of Agriculture and Irrigation
- Programmes and projects in the sector should be developed based on the MPRSP and the sector should develop a criteria for selection
- All the overlaps between MASIP and the Ministry of Agriculture and Irrigation should be cleared
- MASIP should increase independence and confidence of other stakeholders
- MASIP should seek legal mandate in its implementation

The group identified that following as the expectation of the private sector from the government

- Some degree of independence
- Macro-economic stability
- Exchange rate stability
- Conducive for investment
- Stable/low inflation rates
- Infrastructure development
- Political stability + will
- Empowered parliamentary committee on agriculture

On the other hand the group identified the following as the expectations of the government from the private sector

- Should pay taxes
- Should invest in the sector
- Should create jobs
- Undertake some social services/investments and
- Assist in capacity building

5.6 WAY FORWARD

Following the recommendation from various groups MASIP Secretariat will undertake the following activities as a follow up

- (a) The MASIP Secretariat will revise the document based on the comments given above especially on the objectives and guiding principles
- (b) The Secretariat will circulate tables 2 and 5 to all the donors for them to indicate their areas of support and estimated levels of funding

- (c) The Secretariat will consult with the Ministry of Finance and the Department of Economic Planning and Development to get more information and statistics on funding in the sector.
- (d) The MASIP Secretariat will continue involving all players in the sector and get feed back from them in order to improve the document and the MASIP process.
- (e) The secretariat will circulate the finalized document to all stakeholders for them to comment.

6.0. CONCLUSION

Though the workshop was poorly attended, it was encouraging that the participants critically looked at the document and provided valuable inputs to the process and it is hoped that this dialogue will continue in the future for the betterment of the sector and the nation.

Annex 7: IFDC - Malawi Agricultural Input Markets Development Projects (AIMs): Historical Fertilizer Consumption in MTs, 31/01/03

Type of Fertilizer	1991/92	1992/93	1993/94	1994/95	1995/96	1996/97	1997/98	1998/99	1999/00	2000/01	2001/02	2002/03
CAN	34,348	29,997	18,204	54,467	51,125	42,580	46,125	48,350	47,225	40,051	41,964	34,558
Urea	38,625	46,227	30,514	36,733	38,167	1,438	39,450	42,116	41,150	35,044	36,719	46,199
Ammonium Sulphate	3,364	2,977	1,865	3,148	13,900	6,855	7,510	6,950	8,120	6,675	6,994	12,113
Nitrate of Soda					79	44	50	69	65	50	52	60
Potassium Nitrate				738	162	112	95	122	116	100	105	648
Ammonium Nitrate					151	8,561	6,760	7,210	5,115	3,338	3,497	2,076
DAP	19,040	26,042	10,701	19,266	19,612	866	2,115	1,195	3,119	2,670	2,798	3,333
TSP					1,379	451	-					114
SSP					176	203	200	195	150	117	122	30
MAP												1,962
MOP				500	2,287	15,169	11,125	9,150	10,212	10,346	10,841	1,951
SOP				108	150	24	50					586
23:21:0:4S	33,000	33,494	18,757	9,280	30,067	27,189	35,145	33,188	41,120	36,713	38,467	39,773
3:02:01				400	188	357	-					
0:22:30				96	8							
B compound	400	346	263	349	245	100						
Super B compound				51	4,032	100						
C Compound				1,000	698	390	415	365	318	167	175	481
Super C compound				150	698	387						221
D Compound	2,817	3,421	2,676	8,054	21,588	11,613	10,114	14,150	14,251	13,350	13,988	18,393
Super D Compound				5,000	8,686	9,434	8,459	8,150	6,288	6,008	6,295	4,534
Super J Compound					1,053	491						
S Compound	88	101	92	1,300	1,461	1,065	965	1,114	1,255	1,001	1,049	170
X Compound					121	219						
Dolomite lime												1,075
Other Compound						23,826	18,348	10,452	13,148	11,348	11,890	216
Total	131,682	142,605	83,072	140,640	196,033	151,474	186,926	182,776	191,652	166,978	174,957	168,493

Annex 8a: Calculation of weighted mean prices for commonly used Fertilizers

Type of Fertilizer	July		January	
	Quantity	Weight	Quantity	Weight
CAN	41964	30.38	34558	22.88
Urea	36719	26.58	46199	30.59
NPK 23:21:0+4S	38467	27.85	39773	26.33
NPK 8:18:15	13988	10.13	18393	12.18
S/A	6994	5.06	12113	8.02
Total	138132	100	151036	100
Weighted Mean Price	1296.38		1342.955	

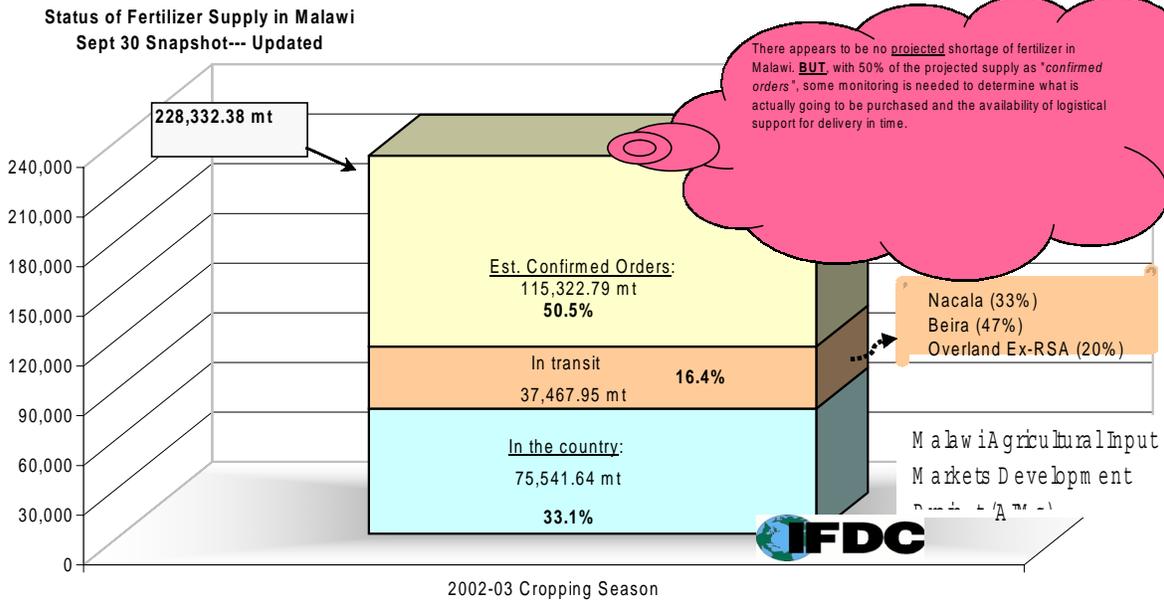
Source: IFDC – AIMs Project

Annex 8b: Calculation of weighted mean price for Maize seeds

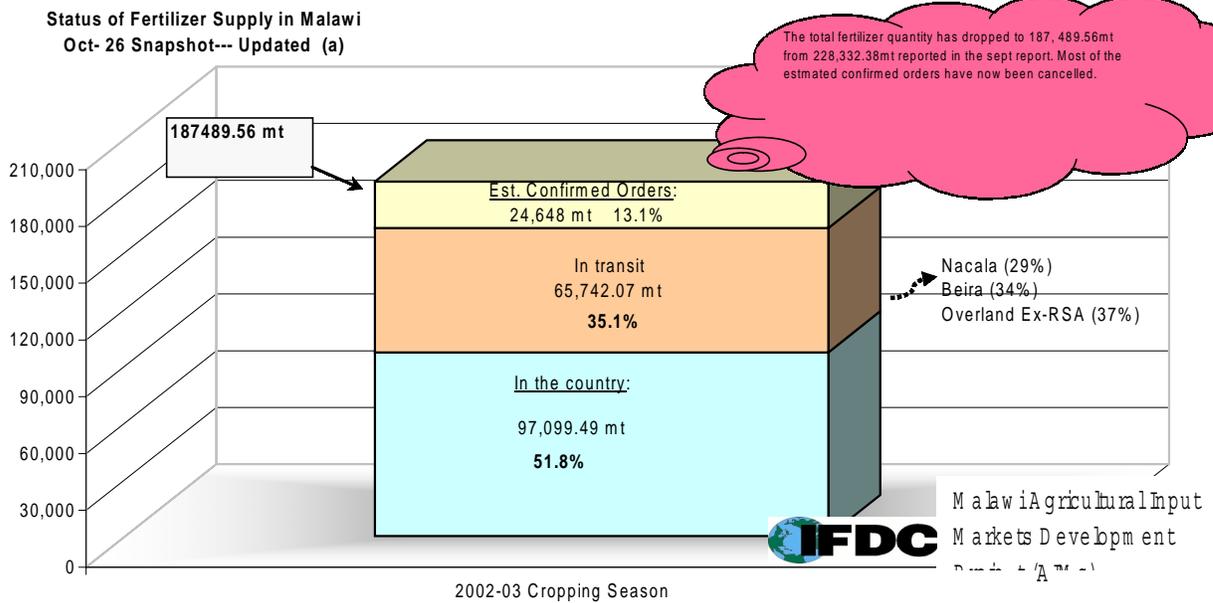
Type of seed	July			March		
	Hecterage	Tonnage	Weight	Hecterage	Tonnage	Weight
OPV	224910	4498	39	273161	5463	35
Hybrid	348910	6978	61	508254	10165	65
Total	573820	11476	100	781415	15628	100
Weighted Mean Price	663.50			860		

Note: tonnage calculation based on the recommended rate of 20kg per hectare.

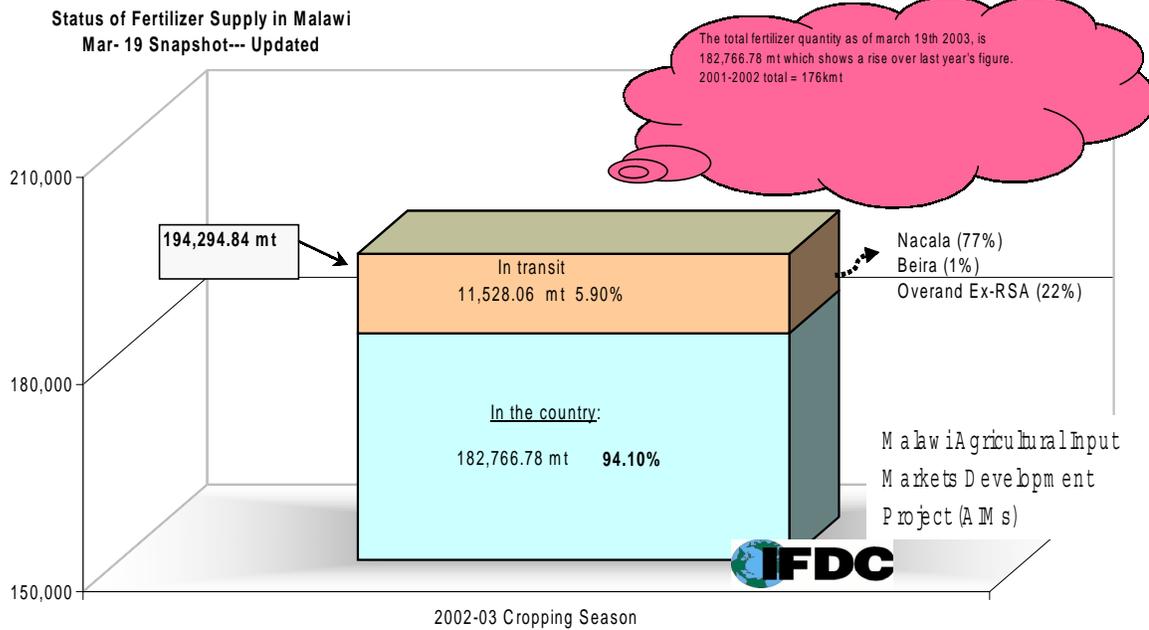
Annex 9a: This shows supply status as of 30th September 2002.



Annex 9b: Shows the impact on supply after the ministry's intervention on transport and port logistics.



Annex 9c: Shows supply status as of 19th March 2003.



NB: *In-country includes already used products plus stocks.*

April 2003



newsletter

AIMs Project– Implemented by



AGRICULTURAL INPUTS MARKETS DEVELOPMENT PROJECT (AIMs)

About AIMs

AIMs Project was launched on November 8, 2002 and is implemented by the IFDC, an International Centre for Soil Fertility and Agricultural Development in collaboration with the Malawi Government/Ministry of Agriculture and Irrigation (MoAI). It is funded and supported by United States Agency for International Development (USAID). The project is using a Market –Driven Approach to improve farmers access to agricultural inputs. The initial project life is three years.

Project Focus

The project will put more emphasis on the following four main components:

- Deepening of Policy Reforms and Studies
- Establishment and Implementation of regulatory Systems
- Developing Human Capital and Dealer Networks
- Market Information Systems (MIS)

Project Objectives

The project will work to achieve a number of objectives as follows:

1. Improve the policy environment for inputs suppliers
2. Enhance entrepreneurial skills of agricultural inputs dealers and develop a cadre of dealers that will become technology transfer agents
3. Facilitate improved access to finance by agricultural inputs suppliers
4. Establish a Market Information System
5. Enhance effective regulatory systems

A look at average local retail prices for selected fertilizers by pre-selected Dealers in Malawi.

As of February, 2003

Type of fertilizer	ADMARC (MK)	Rab Processors	Farmer's World (MK)
Urea	1,450	1,470	1,365
23:21:0+4S	1,600	1,650	1,560
CAN	1,300	1,260	1,235
Comp. D	1,500	1,625	1,650

Source: IFDC-AIMS

Training announcement, Malawi- May 19-23, 2003

IFDC, in coordination with IFDC-Malawi's Agricultural Input Markets Development Project (AIMs), will organize a training program on agricultural input marketing during May 19-23, 2003, in Lilongwe, Malawi. The program will focus on the challenges facing managers involved in agricultural inputs marketing in developing countries.

Program Fee: US\$1,000. Late Program Fee after April 4, 2003 is US\$ 1,150.

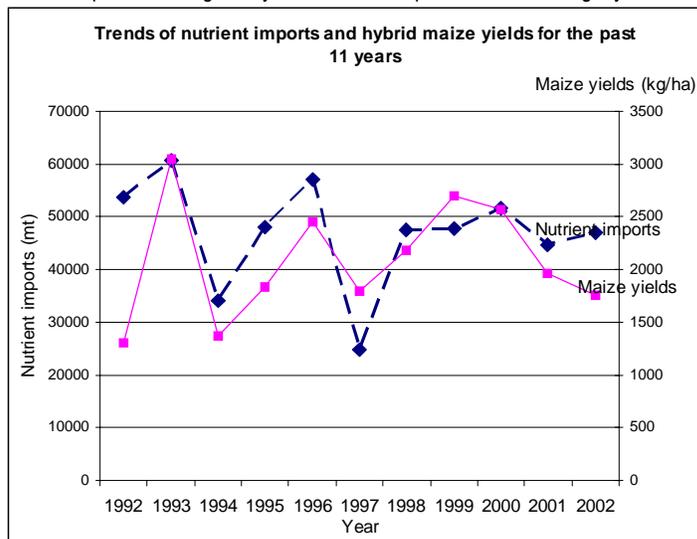
For more information:

Director, Training and Workshop Coordination Department, IFDC, P.O. Box 2040, Muscle Shoals, Alabama 35662 (USA).

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Malawi: An 11 year pattern of corresponding trends of hybrid maize yields and nutrient imports showing a very clear relationship. 1992 was a drought year.



Source: IFDC-AIMS

Maize crop situation outlook

The second crop estimates of the Ministry of Agriculture and Irrigation indicate maize production of 1.9 million metric tons against 2.032 reported during the first round while final estimates last year were 1.5 million. The maize crop situation is reported to be better in the Central Region than it is in the Southern Region because of the dry spell that was experienced during the critical crop stage of flowering. The performance of maize in the Northern Region is also reported to be affected by too much rains, hence, not as better as that of Central Region.

Out of a total area of 1,568,738 hectares, 508,254 hectares (32% of total maize area) is put to hybrid varieties while 787,373 hectares (50%) is put to local varieties with the rest of the hectareage put to composites. The national average yield for hybrid varieties for this round is 1,933 kg per hectare while that for local maize is 715 kg per hectare. Under normal circumstances, the average potential yield for most hybrids at farm level is 6,000 kg per hectare.

Editor: Costa Mwale

Send your articles and comments to:

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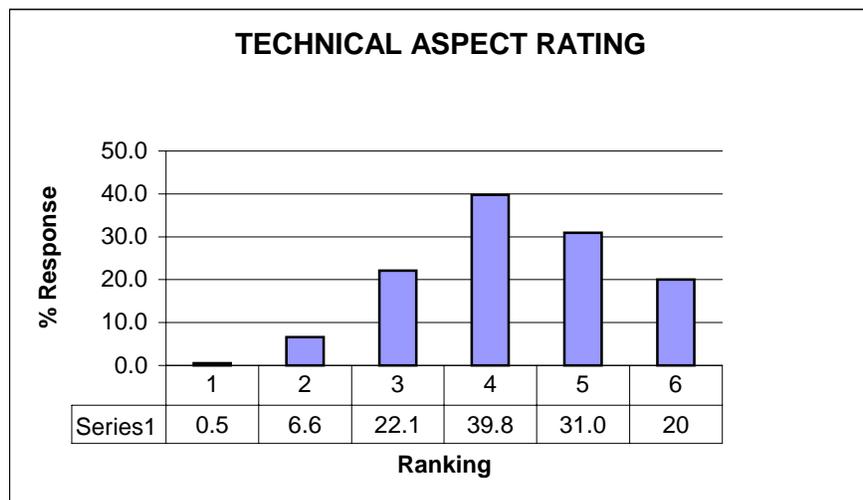
ANNEX 11: IFDC-AIMS PROJECT TRAINING EVALUATION REPORT

INTRODUCTION

The Training Section of **IFDC-AIMS Project** conducted a number of training sessions for Agro-dealers, and potential Agro-dealers in Association Building, Plants Nutrients, Crop Protection Products, and Fertilizers-Their Use, Safe Handling, Marketing and Distribution, and Fertilizer Information Sources. This paper is an overview of the assessment of the training by the participants, and their opinions in the course-contents to make the training sessions more resourceful to them (participants). This vital information was collected from Evaluation Forms that were issued to participants at the end of each training session.

TECHNICAL ASPECT RATING

The technical aspect assessment is primarily finding out if the objectives of the training sessions were clear, and achieved, their relevance to the needs of the participants and their country, if there was individual consultation with participants, knowledge gained from the program and new skills developed. The graph underneath illustrates the participants' evaluation.

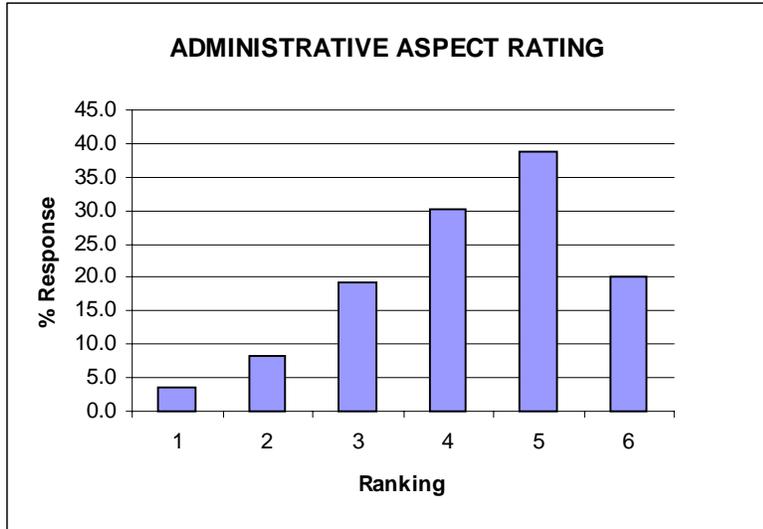


Ranking: 1 = Poor, 2 = Fair, 3 = Good, 4 = Very Good, 5 = Excellent, 6 = Average Rating.

The majority of participants (72%) rated the technical aspect from a range of Very Good to Excellent, 22.1% rated it Good, and 6.6% rated it Fair. Since the paramount objective of the training sessions is imparting of technical knowledge, we can safely conclude that the training sessions were very successful.

ADMINISTRATIVE ASPECT RATING

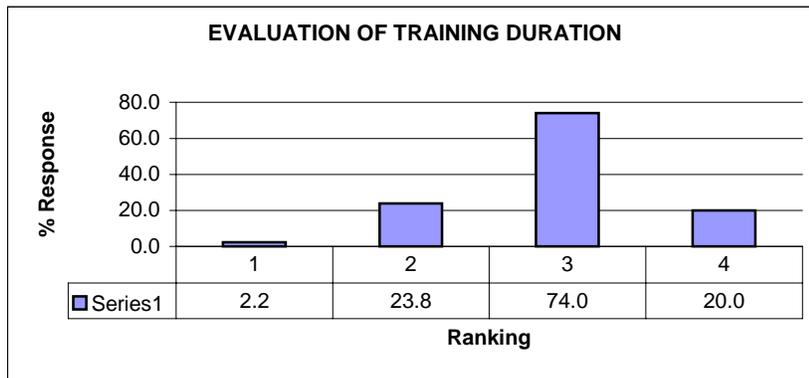
The administrative aspect deals with the planning of the activities, accommodation and food. This is an essential aspect as most participants were travelling from far away places and depended solely on the accommodation and food provided by the organizers during the training sessions. The majority of participants (38%) rated the administrative aspect of the project excellent, 30% very good, about 19% good, while about 8% rated it fair, and only 3% rated it poor.



Ranking: 1 = Poor, 2 = Fair, 3 = Good, 4 = Very Good, 5 = Excellent, 6 = Average Rating.

EVALUATION OF TRAINING DURATION

This is a sub-section of the administrative aspect of the training. It basically examines the conduciveness of the length of daily schedule, and the program in general. This evaluation is imperative particularly that the training sessions bring together people from different academic, and professional background, hence we cannot take every participant for granted in the delivery of course content. See the graph underneath:

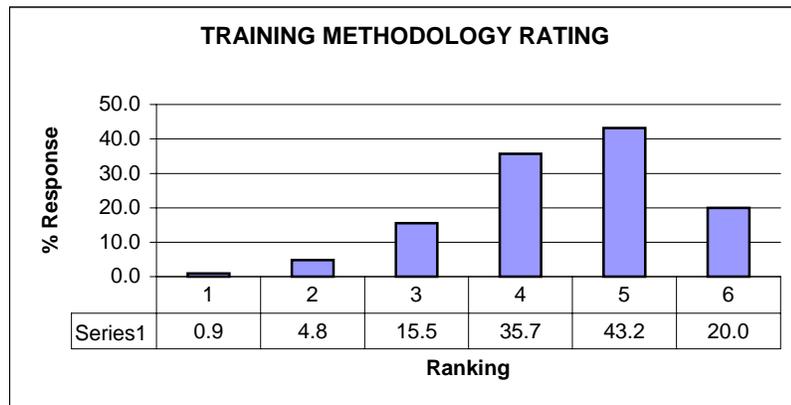


Ranking: 1 = Poor, 2 = Fair, 3 = Good, 4 = Very Good, 5 = Excellent, 6 = Average Rating.

The majority of participants (74%) rated the duration of daily schedule and the program in general just right, 23.8% rated it too short, while only 2.2% of the participants rated it too long.

METHODOLOGY ASPECT RATING

This aspect deals with the actual lectures, presentations, value of reference material, and quality of discussions.

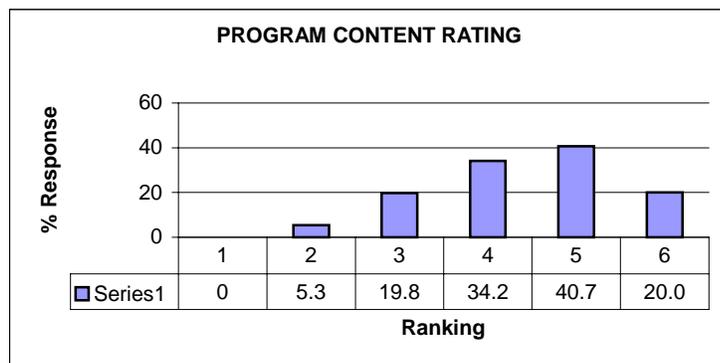


Ranking: 1 = Poor, 2 = Fair, 3 = Good, 4 = Very Good, 5 = Excellent, 6 = Average Rating.

The majority of participants (43.2%) rated the methodology of presentation as excellent, 35.7% rated it very good, and 15% rated it good, while only 4.8% rated it fair, and less than 1% rated it poor. This is an outright indication that the methodology used in the lectures, and presentations is approved overwhelmingly by the participants.

PROGRAM CONTENT RATING

The program aspect rating sought to find out if the contents in general of the presentations made by IFDC staff are sufficient. See the graph underneath for tabulated evaluations on program content:

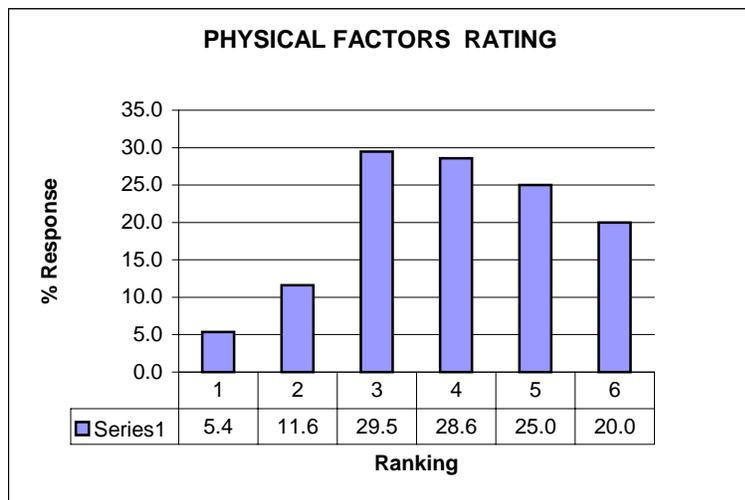


Ranking: 1 = Poor, 2 = Fair, 3 = Good, 4 = Very Good, 5 = Excellent, 6 = Average Rating.

The majority of participants (40.7%) rated the program excellent, 34.2% rated it very good, 19.8% rated it good, 5.3% rated it fair, and nobody (0%) considered it poor. The content could therefore be classified as adequate.

PHYSICAL FACTORS RATING

This aspect centres on the physical environment of the training session facilities. The graph beneath illustrates the evaluations.

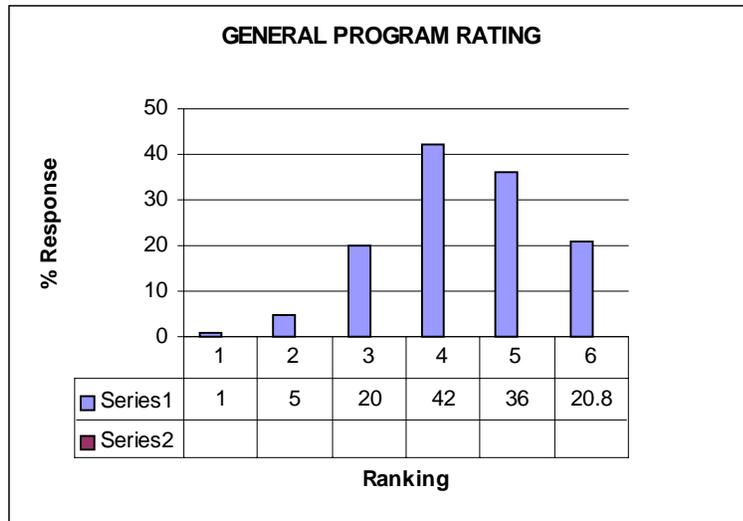


Ranking: 1 = Poor, 2 = Fair, 3 = Good, 4 = Very Good, 5 = Excellent, 6 = Average Rating.

The majority of participants (29.5%) rated the training sessions’ facilities good, 28.6% rated it very good, and 25% rated it excellent, while 11.6% rated it fair, and 5.4% rated it poor. The above graph indicate a slight slump down on the evaluation in comparison to ratings of other aspects, and this is attributable to prolonged and frequent blackouts the country has encountered during the months of February through April. The project, however, has purchased a stand-by inverter to permit use of electronic equipment for training in the course of blackouts.

GENERAL PROGRAM RATING

The objective of this aspect is to solicit a general evaluation of the whole training program. The graph beneath indicates the general program rating:



Ranking: 1 = Poor, 2 = Fair, 3 = Good, 4 = Very Good, 5 = Excellent, 6 = Average Rating.

In general, 42% of the participants rated the project very good, 36% rated it excellent, 20% rated it good, while 5% rated it fair, and only 1% rated it poor.

TOPICS THAT SHOULD BE INCLUDED

- Crop Protection Products and Pests Management
- Extension Services Approach and Methodology
- Crop Specific Fertilizers and Their Application Rates

RECOMMENDATIONS

- There's need for more audio/visual facilities in Marketing Presentations
- Samples of fertilizers and other inputs should be physically introduced to the training participants
- Course duration should be extended beyond two days to permit more concentration.
- A field visit to one of the agro-input companies within the training area should be arranged.

ADDITIONAL COMMENTS

The trainings have been welcomed positively, and an eye-opener to the agro-dealers.

**IFDC-AIMs PROJECT
HALFYEAR TRAINING EVALUATION**

Program Evaluation Forms

n=118

Technical Aspects	Poor	Fair	Good	Very Good	Excellent		
Fertilizer Information Sources 12th December 2003	0	1	13	24	18	n=9	
Association Building Workshop 13th December 2002	0	6	3	20	30	n=9	
Karonga Fertilizer Training 29-30 January 2003	0	3	32	31	19	n=15	n̄ =151.
NASME 6-7 March 2003	2	14	43	63	38	n=27	
NASFAM - POSAM 18-19 March 2003	0	22	58	113	82	n=40	
SORAAM 26-27 March 2003	2	4	18	50	47	n=18	
Total	4	50	167	301	234		n=118

Administrative Aspects	Poor	Fair	Good	Very Good	Excellent		
Fertilizer Information Sources 12th December 2003	0	1	0	4	3	n=9	
Association Building Workshop 13th December 2002	0	0	2	2	4	n=9	
Karonga Fertilizer Training 29-30 January 2003	0	3	7	6	11	n=15	
NASME 6-7 March 2003	2	2	12	15	12	n=27	n̄ =45.
NASFAM - POSAM 18-19 March 2003	6	12	22	26	11	n=40	
SORAAM 26-27 March 2003	0	1	1	16	48	n=18	
Total	0	8	19	44	69		n=118

Duration	Too Long	Too Short	Just Right		
Fertilizer Information Sources 12th December 2003	1	0	14	n=9	
Association Building Workshop 13th December 2002	0	0	16	n=9	
Karonga Fertilizer Training 29-30 January 2003	1	6	23	n=15	
NASME 6-7 March 2003	1	12	33	n=27	
NASFAM - POSAM 18-19 March 2003	1	28	51	n=40	n̄ =44.
SORAAM 26-27 March 2003	1	7	28	n=18	
Total	5	53	165		n=118

Methodology	Poor	Fair	Good	Very Good	Excellent		
Fertilizer Information Sources 12th December 2003	1	0	4	11	8	n=9	
Association Building Workshop 13th December 2002	0	2	1	6	12	n=9	
Karonga Fertilizer Training 29-30 January 2003	0	3	12	10	20	n=15	
NASME 6-7 March 2003	1	5	13	29	24	n=27	
NASFAM - POSAM 18-19 March 2003	1	5	12	44	59	n=40	
SORAAM 26-27 March 2003	0	1	10	20	22	n=18	n̄ =67.
Total	3	16	52	120	145		n=118

Program Content	Poor	Fair	Good	Very Good	Excellent		
Fertilizer Information Sources 12th December 2003	0	0	5	8	3	n=9	
Association Building Workshop 13th December 2002	0	1	0	4	11	n=9	
Karonga Fertilizer Training 29-30 January 2003	0	1	4	4	5	n=15	
NASME 6-7 March 2003	0	2	14	16	15	n=27	
NASFAM - POSAM 18-19 March 2003	0	7	19	36	52	n=40	n̄ =48.
SORAAM 26-27 March 2003	0	2	6	15	13	n=18	

Total	0	13	48	83	99	n=118
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	Poor	Fair	Good	Very Good	Excellent	
Physical Factors Related to Program						
Fertilizer Information Sources 12th December 2003	0	2	6	0	0	n=9
Association Building Woorkshop 13th December 2002	0	0	1	4	3	n=9
Karonga Fertilizer Training 29-30 January 2003	0	0	4	4	8	n=15
NASME 6-7 March 2003	0	3	8	9	4	n=27
NASFAM - POSAM 18-19 March 2003	6	6	10	11	5	n=40
SORAAM 26-27 March 2003	0	2	4	4	8	n=18 ñ =22.
Total	6	13	33	32	28	n=118

	Poor	Fair	Good	Very Good	Excellent	
In General I would rate this program						
Fertilizer Information Sources 12th December 2003	0	0	1	6	1	n=9
Association Building Woorkshop 13th December 2002	0	0	1	2	5	n=9
Karonga Fertilizer Training 29-30 January 2003	0	2	1	6	4	n=15
NASME 6-7 March 2003	0	1	5	12	4	n=27
NASFAM - POSAM 18-19 March 2003	1	2	10	9	14	n=40
SORAAM 26-27 March 2003	0	0	2	7	8	n=18
	1	5	20	42	36	n=118 ñ = 20.8