

Agro-based Industries and Technology Development Project-Phase II (ATDP-II)

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Submitted by:



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**ATDP-II Is A Project Funded By The United States Agency For International
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Executive Summary

The Louis Berger Group, Inc. was selected by USAID to implement the five-year Agro-Based Industries and Technology Development Project-II (ATDP-II) in January 2001. This Annual Report provides a review of ATDP's objectives, major accomplishments, planned results and key lessons learned during the first year of its operations from January 1, 2001 to December 31, 2001.

While the project officially started in January 2001, substantial programmatic work could not officially begin until the project's work plan was approved by a twenty-five (25)-member steering committee chaired by the Secretary of Agriculture. This meeting was not convened until June 2001. During the interim period, ATDP-II mobilized to set up its main office, recruited staff, developed its administrative apparatus and conducted a subsector surveys. After the work plan was approved in June 2001, ATDP-II established regional offices and began signing contracts with clients from August 2001.

Thus in reality at the time of the writing of this report, the project has only had four and a half months of programmatic activity in 2001.

During this period, the world has radically changed as a result of the tragic events in the United States. A declining world economy has now gone into recession with the world's three leading economies (U.S., Japan and the European Union) enmeshed in what is labeled a "synchronized downturn" with all three economies simultaneously experiencing layoffs, declining profits, increased bankruptcies and little or no growth. Bangladesh has been severely affected by this economic storm resulting in large-scale layoffs in the garment sector. Bangladesh's agribusiness sector has been particularly hard hit by the plummeting world prices of its second leading export earner, shrimp. Prices have fallen more than 40 percent. An election year, a change in Government and frequent strikes (hartals) has also exacerbated the problems for ATDP-II.

Objective

The objective of the ATDP-II activity is to promote the growth of privately owned agribusiness in Bangladesh, which can succeed in an open, competitive market environment. Project activities focus on improving the ability of private enterprises to develop, produce, market, and finance products and services in competitive markets. This will be done by:

- Direct enterprise assistance to selected agribusinesses
- Strengthening key financial and non-financial agribusiness support institutions
- Working towards improvements in relevant policies, laws, regulations and standards through both Government level and industry level interventions.

Based on our first year's targets, the anticipated results in terms of growth by our clients for 2001 were as follows:

- US\$13 million increase in domestic sales
- US\$5 million increase in export sales
- 7,000 new jobs created

Actual results are shown in the table below:

INCREASE IN DOMESTIC AND EXPORT SALES (US \$) AND NUMBER OF JOBS			
Sub sector	Domestic Sales \$	Export Sales \$	Jobs
Fisheries	6,025,628	(80,231,873)	557
Poultry	9,146,385	0	3,016
Grains	27,081	0	(5)
Horticulture	217,622	161,945	447
Livestock	0	0	0
Total	15,416,716	(80,069,928)	4,015

Exports have been adversely affected by the sharp decline in the worldwide price of shrimp.

Cost Share Policy

ATDP-II initiated a project cost-sharing policy for all its clients. The cost sharing percentage is decided based on the annual sales revenue of the client and ranges from 25 percent to 100 percent. The cost share contribution can either be in cash or kind (hotel accommodation for consultants, phone charges, transportation etc.). After introducing the policy, ATDP-II has successfully provided all technical assistance based on a cost share arrangement with its clients. In 2001, the minimum and maximum cost sharing by the clients ranged from 13 percent to 50 percent. The average cost share from all clients was 26 percent of the total cost of technical assistance provided to the clients.

Lessons Learned

ATDP-II's experience in its first year of operations has yielded a number of lessons about project design and implementation which will be taken into account in the future years to provide direct assistance to enterprise growth and development, support to agribusiness support institutions and effective policy reform including:

- Building business is a lengthy and involved process in which almost no steps/stage can be skipped. Nothing is assured. There are many factors that effect business development in the larger environment over which the project and entrepreneurs have

no control. Everything must be viewed within the context of time, place and condition.

- Intense poverty and an education system that focuses more on rote memory rather than critical thinking are formidable constraints to building a strong agribusiness base.
- Our project's key to success is to find entrepreneurs who fit into the 'innovators' and 'early adaptors'. Finding such entrepreneurs will take a very deliberate and methodical approach. However, once a base of such entrepreneurs is built, the take off stage can then move fairly quickly.
- Our experience in working with clients showed that most clients are willing to share cost. However, some of the strongest resistance to cost sharing comes from some of the most affluent people and organizations, who unfortunately seem to have developed an addiction to donor aid.
- Documentation and evaluation through the technical assistance forms and contracts has greatly contributed to findings suitable clients and to ascertaining their needs.

Report Overview

The first section of this review examines ATDP-II's objectives and then outlines in detail the results that were achieved. Section 2 presents the main accomplishments of each project component and their impact. Section 3 outlines ATDP-II successes about leveraging other resources to accomplish project objectives like the Agricultural Credit Fund, volunteer consultants from other USAID contracts and assistance from other donors with similar project objectives. Section 4 analyzes the lessons learned during the conduct of ATDP-II activity—what works well, what are the key constraints, and how best to work with the public and private sectors to catalyze agribusiness growth and development. Section 4 is meant to serve as an outline for future strategic design about how best to maximize project resources towards achieving the project goals. The report includes several tables and charts and further programmatic details are provided in the annexes.

1. Introduction

The Louis Berger Group, Inc. was selected by USAID to implement the five-year Agro-Based Industries and Technology Development Project-II (ATDP-II) in January 2001. ATDP-I culminated its activities in July 2000. This Annual Report provides a full review of ATDP-II's objectives, major accomplishments, planned results and key lessons learned during the first year of its operations.

Objectives

The objective of the ATDP-II activity is to promote the growth of privately owned agribusiness in Bangladesh, which can succeed in an open, competitive market environment. The project is funded jointly by the United States Agency for International Development (USAID) and the Ministry of Agriculture, Government of Bangladesh (GOB). Project activities focus on improving the ability of private enterprises to develop, produce, market, and finance products and services in competitive markets. This will be done by:

- Direct enterprise assistance to selected agribusinesses
- Strengthening key financial and non-financial agribusiness support institutions
- Achieving improvements in relevant policies, laws, regulations and standards through both Government level and industry level interventions.

Project Mobilization

Project mobilization commenced immediately upon contract signature and an advance team arrived in early February 2001 to set up the main office in Dhaka and recruit appropriate technical and administrative staff. A sub-sector survey was undertaken and an annual work plan based on this sub-sector analysis was submitted to the Project Steering Committee in May. The Steering Committee, headed by the Secretary of Agriculture (GOB), approved the annual work plan in June 2001. The anticipated results for 2001 were as follows:

- US\$13 million increase in domestic sales
- US\$5 million increase in export sales
- 7,000 new jobs created

After work plan approval in June 2001 ATDP-II established regional service centers in Jessore, Chittagong, Bogra and Sylhet and began signing up clients from August 2001. The original work plan had identified Comilla as the location for the fifth regional service center. Further investigation on the agribusiness potential of the country proved the northwestern part of the country as a high-growth area and justified the location of the fifth center in Thakurgaon over the Comilla region. The Steering Committee meeting in

December approved this new location. ATDP-II is in the process of investigating agribusiness opportunities in the greater Thakurgaon area.

During this period, the world has radically changed as a result of the tragic events in the United States. A declining world economy has now gone into recession with the world's three leading economies (U.S., Japan and the European Union) enmeshed in what is labeled a "synchronized downturn" with all three economies simultaneously experiencing layoffs, declining profits, increased bankruptcies and little or no growth. An election year, a change in Government and frequent strikes (hartals) has also exacerbated the problems for ATDP-II.

The possible effects of the economic slowdown on ATDP-II are highlighted in the opening paragraphs from our 2002 Work Plan:

Economically 2002 will be a difficult year for the world's developed economies and a very difficult year for Bangladesh. Recession is the dominant feature of the period. This will make it difficult for many businesses to survive, not to speak of growing and expanding. Success during such a period for many agribusinesses in both Bangladesh and in developed countries will be defined as simply the ability to survive, to maintain cash flow in the face of declining profits or no profits.

ATDP-II will pay special attention to the shrimp export industry in 2002 given its critical economic position. We will work to develop a "Seal of Quality" program that will hopefully allow the industry to recover and be competitive when the economic upswing returns...

Ultimately if agribusiness is to succeed in Bangladesh, it must differentiate itself from neighboring countries that produce similar products much more efficiently and at a lower price. It must find new opportunities to exploit niche markets. This calls for finding new products and services that can be marketed both domestically and internationally. Hence ATDP-II will pay a great deal of attention to finding new ideas and products in which investors and entrepreneurs in Bangladesh can become involved.

Annex E presents charts that show the loss in the shrimp industry. The shrimp sector is the primary agribusiness export sector with which ATDP-II is working closely. This sector is capable of helping us to achieve our contracted target of \$59 million in exports. If this sector continues its decline, it will be difficult to impossible for us to achieve this target, as there is no other agriculture commodity that can generate this kind of revenue. Failure of the shrimp sector will also cause us to miss our targets in terms of job creation. Our estimate shows that the shrimp sector was responsible for 500,000 jobs. With the economic downturn, simply trying to maintain jobs is going to be a challenge. In all probability, thousands of jobs will be lost. Thus, already in 2001 and probably for 2002, it will be very difficult to hit the yearly sales and job targets. Hopefully the industry will roar back like a lion in 2003 onwards, with ATDP-II assistance; thus helping to make up for the decline that is now being experienced. However, predicting the future is impossible at this time since shrimp is a luxury commodity. Once consumers reduce purchases, it may take time to get them to resume spending on it.

Further, Bangladesh shrimp industry is very fragile because of a long and unsanitary supply chain. Much of the problem in shortening the supply chain is based on habits and a fatalistic attitude, which are very difficult to change.

With the economic downturn and the massive layoffs in the garment industry, the possibilities of a domino effect on other sectors of the domestic agribusiness industry exist. With layoffs in a number of sectors, reduced purchasing power and slow to no-growth of the middle class, the ability to increase sales in subsectors in which ATDP II works (fisheries, grains--snack foods/bakeries, poultry, horticulture and dairy/livestock) will be difficult.

Theoretically, the global recession also poses opportunities. With tariffs being placed on a variety of imported luxury goods, opportunities may exist for import replacement. However the small and rudimentary state of most enterprises in the agribusiness sector may preclude these enterprises from taking advantage of the openings. Because of the ease of production, snack food and baked goods may have the best chance to replace imports as the prices rise.

We highlight below our major quantitative accomplishments in the past year:

1.1 Quantitative Targets Achieved in 2001

A)

DOMESTIC AND EXPORT SALES (US \$) AND NUMBER OF JOBS									
Subsector name	Sales in year 2000			Sales in year 2001			Increased /Decreased		
	Domestic sales \$	Export sales \$	Jobs	Domestic sales \$	Export sales \$	Jobs	Domestic sales \$	Export sales \$	Jobs
Fisheries	13,206,272	293,065,231	4,686	19,231,900	212,833,358	5,243	6,025,628	(80,231,873)	557
Poultry	12,434,842	0	3,045	21,581,227	0	6,061	9,146,385	0	3,016
Grains	1,970,486	0	62	1,997,567	0	57	27,081	0	(5)
Horticulture	725,719	662,820	437	943,341	824,765	884	217,622	161,945	447
Livestock	0	0	0	0	0	0	0	0	0
Total	28,337,319	293,728,051	8,230	43,754,035	213,658,123	12,245	15,416,716	(80,069,928)	4015

B)

INCREASE IN DOMESTIC SALES AND EXPORTS AND INCREASE IN NUMBER OF JOBS						
Subsector	Achievement in year 2001			Target for USAID 2001		
	Increase/Decrease			Increase		
	Domestic sales (\$)	Export sales (\$)	No. of jobs	Domestic sales (\$)	Export sales (\$)	No. of jobs
Fisheries	6,025,628	(80,231,873)	557			
Poultry	9,146,385	0	3,016			
Grains	27,081	0	(5)			
Horticulture	217,622	161,945	447			
Livestock	0	0	0			
Total	15,416,716	(80,069,928)	4,015	13,000,000	5,000,000	7,000

The table shows that the total increased domestic sales of the clients of ATDP-II is (about \$ 15,000,000) in 2001, which is the 115 percent achievement against the target (\$13,000,000). The increased number of employees working with the clients is about 4000, which is about 57 percent achievements against the target (7000)

On the other hand, the major portion of the 'increased export sales' of the project, are supposed to come from our ' fisheries' clients as 'Shrimp' is the second largest export from Bangladesh . But, Bangladesh has been also hard hit by this economic storm caused as a result of terrorist attack in USA in September 2001, which has resulted a precipitous declining in foreign exchange earnings as a result of decrease in the world market. Prices have fallen more than 40 percent.

The table below shows that the three members of one association have introduced three products from the fish sector. Similarly, one client has introduced six products from the poultry sector; one product introduced by one client from Grain sector; and the clients of horticulture sector have introduced six products. Therefore, seven clients have introduced a total of 16 new products. The achievement against target in terms of ‘Number of New Products’ is 133 percent and in terms of ‘Number of Enterprises Entered into New Markets’ is 58 percent.

NUMBER OF NEW PRODUCTS INTRODUCED BY CLIENTS				
Sub sector name	Achievement in year 2001		USAID 2001	
	Domestic market	Export market	Domestic market	Export market
Fisheries	3 (introduced by three members of one association)		12	
Poultry	6 (introduced by one client)			
Grains	1			
Horticulture	6 (one product introduced by one client and another five products introduced by one client)			
Livestock				
Total	16		12	

ATDP-II clients have explored a total of 43 new areas in 2001. Therefore, the achievement against target in terms of ‘Number of New Markets’ is 358 percent and in terms of ‘Number of Enterprises Entered into New Markets’ is 25 percent.

NUMBER OF NEW MARKETS INTRODUCED BY CLIENTS				
Sub sector name	Achievement in year 2001		USAID 2001	
	Domestic market	Export market	Domestic market	Export market
Fisheries	1		12	
Poultry	41 (areas marketed by one client)			
Grains	1			
Horticulture				
Livestock				
Total	43		12	

The target for signing contracts in 2001 was 105. As the project started late and only had four and half months of implementation, 64 contracts have been signed with the clients in different subsectors. Therefore, 61 percent of the target was achieved.

CONTRACT SIGNING STATUS IN 2001		
Name of the sub sector	Contract Signing Target in 2001	Contract signed in 2001
Fisheries	37	35
Poultry	15	3
Livestock	4	2
Horticulture	30	8
Grains	15	7
ASI (Finance & Non Finance)	4	9
Total no of signed contracts	105	64

The table below shows that about 58 courses were planned by different sectors in 2001 out of which 35 were implemented. The achievement against target is 60 percent.

TECHNICAL ASSISTANCE AT A GLANCE					
Technical Assistance	No. of courses planned	No. of Courses Organized	Participants		Total Participants
			Male	Female	
Subsectors	50	27	451	20	471
Overseas	3	3	9	0	9
In house staff	5	5	63	21	84
Total	58	35	523	41	564

The technical assistance provided by ATDP-II was mainly focused; on the areas categorized below:

FOCUSED AREA	NO. OF ASSISTANCE
Quality Control	15
Business Development and Computer Management	10
Skill Development	10
Total	35

2. Major Accomplishments Against Planned Activities In 2001

ATDP-II has had some major accomplishments in the first year of operations as shown in the previous section. In some cases, these accomplishments were above and beyond what was in the project contract document and enhanced ATDP-II's positive image in the agribusiness community in Bangladesh.

The project design underestimated the time and effort required to liaison with the Government of Bangladesh (GOB). All major project initiatives had to be approved by the Steering Committee, headed by GOB, which met twice a year. Minor project activities had to be approved by the Project Coordination Committee comprised of officials from the Ministry of Agriculture and Finance, Bangladesh Bank, USAID and ATDP-II. ATDP-II spent an inordinate amount of time keeping the GOB appraised of all project activities and finalizing modalities for the control of the Agricultural Credit Fund-Development Fund (ACF-DF).

The positive aspect of this constant dialogue has been a complete buy-in by GOB regarding project goals and objectives. The Ministry of Agriculture and other stakeholders are very constructively engaged in seeing ATDP-II succeed. It also ensures that even after project conclusion and departure of the ATDP-II contractor, there will be some sustainability, as this effort will be continued by the Ministry of Agriculture to achieve agribusiness development for Bangladesh.

Cost Sharing Policy of ATDP-II

ATDP-II finalized its cost sharing policy during the third quarter of this year after a series of discussions with the subsector consultants. Percentage of cost sharing has been decided considering the annual sales revenue of the clients which ranges from 25% to 100%. It is mandatory that every client, no matter how small his or her sales revenue, has to make a minimum cost share contribution either in cash or in kind.

ATDP-II established that an addiction to donor aid has developed in many countries that has altered behavior and restricted the choices of many individuals and companies. To be successful in a competitive market environment, clients must be willing take risk, to make their own decisions, to assume leadership and to avoid becoming dependent on donor assistance. Our cost sharing policy is designed to insure that clients do not fall into the "aid trap". By having to purchase consulting services and to factor these expenditures into the cost of doing business, clients can determine whether their business will make or lose money. The client's business should be able to succeed or fail based on the normal factors affecting business and NOT based on whether you have access or not to donor aid.

Further cost sharing is a two-way street. It supports and strengthens the client's ability to control their own business by letting them participate in selecting the consultant they

need to address their business problems. It also means that they have the right to expect a high quality of service and support from ATDP II in return for their contribution.

The following scale is applicable to all consulting, training and visit support services provided by ATDP-II.

Annual Sales Revenue (in million Taka)	< 1.0	1.0-2.5	2.5-5.0	5.0-10.0	> 10.0
Cost Sharing Percentage	25%	35%	50%	75%	100%

All technical assistances (about 8 events) provided by ATDP-II has involved a cost share by the clients, after introducing the policy. In 2001, the minimum and maximum cost sharing of the clients were 13 percent and 50 percent accordingly. The average cost sharing from the clients was 26 percent of the total cost of technical assistance provided to the clients.

COST SHARING RESULTS FOR 2001

Sub-sectors	Date	Description	Total Amount TK.	Sharing %		Cost Sharing		Total Disbursed	Comments
				ATDP-II	Clients	ATDP- II	Clients		
Fisheries	21/08/01	Training on Feed Formulation & Storage for the feed millers, Khulna.	71,900	85%	15%	61,115	10,785	61,088	These costs were agreed with the clients before cost sharing policy was developed.
Fisheries	9/10/01	Training on Galda Shrimp Farming, Pabna	69,000	87%	13%	60,030	8,970	60,970	
Fisheries	16/10/01	Training on Financial Record Keeping, Khulna	50,200	70%	30%	35,140	15,060	35,104	
Fisheries	8/11/01	Training on Galda Farming by Farmers, Mymensingh	99,300	73.41%	26.59%	72,896	26,404	72,880	
Fisheries	25/11/01	Sea Food Show in Singapore for BFFEA, Chittagong	479,800	75%	25%	359,850	119,950	359,860	
Poultry	9/10/01 & 11/12/01	Training on Commercial Layer Farm Management, Gazipur	267,300	75%	25%	200,475	66,825	100,248 100,248	
Poultry	28/12/01	Technical Assistance on pellet feed production	147,200	50%	50%	73,600	73,600	73,644	
Grains	19/11/01	Technical Assistance on Product Quality on Bread & Biscuit	214,100	75%	25%	160,575	53,525	40,115	
		TOTAL	1,398,800			1,023,681	375,119	904,157	

Baseline Data Collection

ATDP-II collected its initial set of baseline data on enterprises from the subsector survey performed in April/May, 2001. This survey was conducted in each of the ATDP-II target sectors to identify the strengths, weaknesses and the potential of each sector and also to identify our initial set of clients from this survey. However, it became evident early on that in some cases the response from clients were solely for the purposes of getting on the ATDP-II short list of potential clients. On further investigation during contract signing it was evident that some of this initial data was inaccurate and the real baseline data would emerge from the first year of project operations. Accordingly, sector data collected by ATDP-II in 2001 will serve as the project baseline data for the remainder of the contract.

Best Practice and Manuals

During the first year of operations, the sector consultants spent a major part of their time building a working relationship with their clients through contract signings and delivery of technical assistance. This will create opportunities in the future to document “Best Practices” in the agribusiness sector in Bangladesh. Based on the needs identified by the clients, our poultry sector has already produced a training manual on: Commercial Layer Farm Management; Pellet Feed Formulation; and Quality Control. Other manuals produced by the project include the following subject areas: Computerized Business Management; and Business Planning and Management.

Project Achievements

The major achievements of the project in 2001 are outlined below and are based on the Intermediate Results contributing to the overall SO 5 objective:

2.1 Intermediate Result 1: Improved Competitiveness in Agribusiness

The table below provides a comparison between committed and actual results in the delivery of direct technical assistance to enterprises in 2001.

DIRECT TECHNICAL ASSISTANCE TO CLIENTS IN 2001	
Committed Results	Actual Results
Enroll and conduct diagnostic of priority clients	Survey completed by the subsectors and ASI consultants with about 20-40 clients from each area. On the basis of the findings, five potential subsectors have been identified. Contracts have been signed with 64 clients.
Complete first intensive TA	35 technical assistances provided, following the need identified in the ‘technical assistance form’ received

	<p>from the clients. These are: 21 training and 3 overseas in Fisheries 1 overseas visit in Horticulture 1 training in Grains 2 visits in Livestock 3 in Poultry</p>
<p>Conduct a multi-modal study of selected products to determine how many times these goods are handled during in-country shipment and means to reduce handling and associated costs.</p>	<p>On Hold. Not the priority need for the contracted clients at the moment.</p>
<p>Conduct diagnostic assessment of producer-to-consumer marketing chains to identify policies and practices that limit business growth, product quality and market efficiency</p>	<p>Survey on different subsectors conducted. Constraints and opportunities of the agribusiness sector identified.</p>
<p>Maintain and expand ATDP I's comprehensive database covering supply and demand for agribusiness commodities and products</p>	<p>Work started. Data base on supply and demand for different commodities and products was created. Will be used in the ATDP-II webpage.</p>
<p>Conduct first systematic training</p>	<p>Altogether 32 training have been provided - 18- fisheries 1- horticulture 1-Grains 2-Livestock 3-Poultry</p>
<p>Initiate investigation of forward contracting</p>	<p>Fisheries subsector has started working with the contract grower farmers and feed millers to establish backward and forward linkages with the shrimp processors</p>
<p>Complete potential market studies</p>	<p>Grains subsector with the help of expert from USA, has completed a 'market analysis on the potential of PP woven bags'. A report has been prepared by the expert dairy consultant on the market situation of dairy in Bangladesh.</p>

2.1.1 Fisheries

The Fisheries sub sector Annual Work Plan 2001 was designed to contribute towards diversifying and improving products, elevating the image of Bangladesh products in the international market, improving shrimp feed formulation and strengthening business management skills of entrepreneurs.

Key Activities in the Fisheries Sector in year 2001 were:

1. As a result of a concern about a potential ban on shrimp exports from Bangladesh because of reports that cholera was found in some shrimp shipped to France, a meeting was organized by ATDP-II to bring together the growers, processors and other key stakeholders (Government, agents etc). The purpose of the meeting was to discuss the actual situation in the industry and the actions that need to be taken to avert a crisis that could have profound effect on revenue and jobs in the country.

The Frozen Food Exporters Association (BFFFEA) was identified as an organization capable of leading the industry in this effort. However, it was pointed out that the organization would need a full time professional staff in order to develop and implement strategies that could position Bangladesh to compete with Thailand, China, India and other countries and to emerge as the number one supplier in the global market. After a series of discussions and meetings with the executive staff members of BFFEA, a general agreement was accomplished on the cost sharing policy of technical assistance and on the introduction of a seal of quality. A meeting was also held with the Ministry of Commerce with a view to arrive at a consensus on the introduction a common seal of quality program.

2. In the Khulna region, ATDP-II assisted the department of fisheries in forming seven Upozilla HACCP Monitoring committees (UHMC) at Paikgacha, Shyamnagar Asuany, Fakirhat, Rampal, Khulna Sadar and Rupsha. Each committee comprises the respective Upozilla Fisheries officer, 2 depot representatives, farmer representatives, the Upozilla Chairman and a BFFEA representative. The committee will assist the people working in different depots, feed mills and fish processing plants to make sure that they produce good quality products.
3. ATDP-II, in collaboration with the department of Fisheries and Bangladesh Frozen Food Exporter's Association (BFFEA), trained 166 shrimp depot operators and suppliers/farmer representatives on quality control. Contracts have been signed with 24 shrimp processors.
4. 13 feed millers, 8 farmers, 1 consultant from local Government Engineering Department and 2 participants from the Department of Fisheries were trained on better feed formulation. Shrimp /Galda feed millers have started realizing the need of appropriate feed formulation and feed storage. Necessary action plan will be prepared by the sector and the clients in near future. 11 contracts have been signed with feed millers.
5. With the active support and cooperation from ATDP-II, shrimp feed millers in the Khulna region have formed an association styled "Bangladesh Chingri Khadya Utpadankari Samity" (BCKUS). Registration of the association is under process.
6. Twenty one shrimp processing financial staff members (13 from Khulna and 8 from the Chittagong region) have been provided hands on training in computerized

business skills using MS Excel so that they can establish better financial documentation system to record their sales and profit on a regular basis. The factory people are now aware of the need of computerized business skills and some owners have already started using computers themselves.

7. 5-member delegation led by the Fisheries Sector Consultant Dr. Mahmudul Karim attended the Singapore Sea Food Exhibition and Conference organized by the Global Aquaculture Alliance, Missouri, USA. As a result of this trip:
 - The BFFEA members have established 27 export market linkages.
 - Large volume of useful information on shrimp hatcheries, farming, feed formulation and milling, value added product processing machinery, surumi processing and training on surumi production have been collected.
 - An agreement between the Bangladesh Frozen Foods Exporters Association (BFFEA) and Seafood International Association Singapore (SIAS) has been signed to reactivate and further strengthen the mutual cooperation between the two associations for new business promotion.
 - General Secretary of SIAS and Managing Director of Nippon Suisan (S) Private Ltd, the supposedly biggest surumi factory in the world, promises to offer technical assistance to Bangladesh in surumi production and buy all the surumi products if produced by Bangladesh in future.
 - Seafood International Association Singapore (SIAS) has shown keen interest to actively participate in the upcoming Sea Food Fair organized by the BFFEA in 2002.
8. The fisheries sub sector of ATDP-II is also preparing to build and demonstrate an effective and economically viable solar dryer for the Nazier Tek Matsha Bahumukhi Samabaya Samity, Kutubdia Para, and Cox's Bazaar following their request.

Quantitative achievements:

The sector has signed contracts with 35 individual clients and 2 groups of contract farmers comprising 67 members. The total increase in sales and number of jobs of these clients are shown in the tables below:

PARTICULARS	SALES IN YEAR 2000 (\$)		SALES IN YEAR 2001 (\$)		INCREASE/DECREASE SALES (\$)	
	DOMESTIC	EXPORT	DOMESTIC	EXPORT	DOMESTIC	EXPORT
Total Sales (\$)	13,206,272	293,065,231	19,231,900	212,833,358	6,025,628	(80,231,873)
Total No. of Jobs	4,686		5,243		557	
No. of New Markets introduced by two clients			1			
No. of new products introduced by three clients			3			

2.1.2 Horticulture

The annual work plan (AWP) 2001 for the Horticulture sub sector was prepared on the basis of a survey conducted in April 2001. The purpose of the survey was to identify potential clients and assess their needs. The survey identified four groups of potential clients, namely horticulture exporters, horticulture processors, aggregators and specialized cold storage operators. The goal was to develop rapport with groups in the subsector, sign contracts and to assist our clients to establish linkages for expanding their businesses.

Key Activities in the Horticulture Sector in 2001 were:

1. The sub sector consultant has been providing regular counseling to the contracted clients. A linkage has been established between K & K Co-operation an exporter and Cold Land Limited. Cold Land has agreed to supply K& K Co-operation with 500 kg green papayas on a trial basis, which K&K will package and export using the brand developed by Cold Land, with ATDP-II assistance.
2. As a result of a trip to Singapore by ATDP-II staff in June 2001, contacts were initiated with the Department of Asia Region and Trade Australia. Our horticulture consultant is exploring the potential of supplying Bangladeshi horticultural products to counter-cyclic markets in the Southern Hemisphere, e.g. Australia. This will be modeled on Chile's supply of fresh vegetables to the U.S. market in the winter

months. Further communication is going on in this regard in an attempt to interest some institutional buyers.

3. The consultant has initiated a linkage between OPCA, a vegetable aggregator and NRS, international exporters. OPCA has been selling their fresh vegetables in the local market and is interested in exporting their goods. NRS Trade International is a vegetable exporter that has gathered considerable experience over the last two years in exporting fresh and frozen vegetables. The owner of NRS also has a large fish factory in Chittagong, which was initially built for hilsa fish. Because of the scarcity of hilsa fish for the last two years, the factory was closed. The owner of the company has now decided to use it as a frozen vegetable processing plant, hence the need for quality fresh vegetables. The client has requested ATDP-II to help them on this. The Hortex Foundation is already working on frozen vegetable exports from Bangladesh and ATDP-II is in the process of initiating dialogue with them in this regard.
4. Technical assistance has been provided to two special cold storage investors: (a) Cold Land Limited at Gazipur and (b) Agro Fresh Limited at Bogra. They have been provided training and consulting services on storage techniques (Temperature, humidity control, type of product, maintaining shelf life etc.) for different seasonal fruits (lichi, mango, chilli's and carrots).

Quantitative achievements:

In 2001, 8 contracts have been signed with potential clients. Information about sales growth and number of jobs created for the contracted clients are as follows:

PARTICULARS	SALES IN YEAR 2000 (\$)		SALES IN YEAR 2001(\$)		INCREASED /DECREASED SALES (\$)	
	DOMESTIC	EXPORT	DOMESTIC	EXPORT	DOMESTIC	EXPORT
Total sales (\$)	725,719	662,820	943,341	824,765	217,622	161,945
Total no. of jobs	437		884		447	
No. of new market						
No. of new products from 2 clients (one product from one client and 5 products from another client)			6			

2.1.3 Poultry

2001 was a tough year for the growth oriented poultry industry. It has showed enormous potential, but also experienced all the major problems of an unregulated sector

undergoing tremendous expansion. The concern about the existence of Afla toxins in the animal feed temporarily undermined consumer's confidence in the industry.

The major work of ATDP-II in year one of operations was to identify potential clients, to assess their needs and begin to organize services to address these needs. A base line survey was conducted, which pointed out the need to focus on improving the quality of day old chicks and feed. Training programs and consultancies were developed to address both issues.

Key Activities in the Poultry Sector in 2001 were as follows:

1. A contract has been signed with Grameen's business development arm, Grameen Babsha Bikash (GBB), working in poultry production. GBB started its operation in 2000 with the view of improving the socio-economic condition of disadvantaged people by encouraging their participation in agribusiness and providing necessary financial and technical support to achieve success. GBB has requested that ATDP-II provide technical assistance in developing poultry business units in poultry villages. Following their request, ATDP-II consultant visited their operations in Comilla and has provided technical assistance to the client. ATDP-II assisted GBB to prepare a detailed business plan for submission to different donors to attract funding for this venture.
2. The sub-sector consultant has been working with Paragoan Poultry Limited, an ATDP-II client, and Standard Chartered Bank to expedite a loan to finance Paragoan's silo and corn storage project. As a result, the bank has decided to finance this through a syndicate bank loan worth Taka Fifty Crores (about \$ 8, 772,000). This is in the process of finalization and results are expected by the first quarter of year 2002.
3. A contract has been signed with Gazipur Poultry Malik Samity. On a request from the Samity, a training manual has been developed on the commercial layer farm management and pellet feed formulation. Demand based trainings have been provided to members of the Samity.
4. The consultant has provided technical support to Euro Bangla, a client based in Sylhet. The consultant visited the place and has provided counseling on different technical problems faced by the client such as breeder management, poultry husbandry, health of bird, litter management. The client has sponsored the total cost of the consultant's trip to examine his operation.

Quantitative achievements:

Three contracts have been signed with potential clients. Information about increased sales and number of jobs of the contracted clients is as follows:

PARTICULARS	SALES IN YEAR 2000 (\$)		SALES IN YEAR 2001 (\$)		INCREASED /DECREASED SALES (\$)	
	DOMESTIC	EXPORT	DOMESTIC	EXPORT	DOMESTIC	EXPORT
Total sales(\$)	12,434,842	0	21,581,227	0	9,146,385	
Total no. of jobs	3,045		6,061		3,016	
No. of new market	21		41 (introduced by one client)			
No. of new product	3		6 (introduced by one client)			

2.1.4 Grains

In, 2001, this sub sector was titled ‘Grains and Oil Seeds’. Initial thoughts were that ATDP-II could work with both the wheat processing industries and with mustard /rapeseeds oil (extraction). The goal was to identify niche markets and to stimulate business potential. However, the sector survey done by the consultant revealed that the extraction of mustard /rapeseed of edible oil were low volume and low growth industry in a state of decline. Thus, the project decided to drop the focus on oil seeds and to concentrate instead on wheat processing and wheat flour based products. Therefore, the sector has been re-titled “Grains”. The sub sector survey showed that the wheat industry is very dynamic with a high growth potential. Therefore, the work of ATDP-II in this subsector organized wheat related activities into three different segments namely: Flour mills; bakery and confectionary; and snack food segments.

Key activities in the Grains Sector in year 2001 were as follows:

1. A team consisting of the grains consultant, the financial consultant and an economist from the Louis Berger Group in Washington worked together with a client, United Petro Chemicals Ltd. to develop a business plan to manufacture Polypropylene (PP) woven bags for both domestic consumption in the fertilizer and grain industries and export to certain buyers in Australia that need the same specifications. A detailed Market Study was also completed outlining the demand and potential of new plants manufacturing PP woven bags in Bangladesh. This could result in additional sales of \$ 2.4 millions a year and could create 140 fulltime new jobs by 2005. ATDP-II is continuing its assistance to this client for project setup and operations.
2. Assisted one bakery client named Satata Bakery to develop one new product, which will be distributed in Dhaka city, a new market for them. ATDP-II will assist this client to improve the quality of their existing product and reduce unit production cost by utilizing new ingredients. The client will be helped by the sector consultant to improve their management skills by introducing improved baking methods.

Quantitative achievement of this subsector in year 2001:

Seven contracts have been signed with potential clients. Information about increased sales and number of jobs of the contracted clients is as follows:

PARTICULARS	SALES IN YEAR 2000 (\$)		SALES IN YEAR 2001 (\$)		INCREASED /DECREASED SALES (\$)	
	DOMESTIC	EXPORT	DOMESTIC	EXPORT	DOMESTIC	EXPORT
Total sales(\$)	1,970,486	-	1,997,567	-	27,081	
Total no. of jobs	62		57		(5)	
No. of new market			1 (introduced by one client)			
No. of new product			1 (introduced by one client)			

2.1.5 Livestock

The primary activity in 2001 was to undertake a sector survey during the third quarter of the year to identify the potential of the dairy industry in Bangladesh. This survey revealed that the dairy industry is not a high-growth, high volume industry and thus cannot contribute substantially to achieving the goal and objectives of ATDP-II in terms of sales, exports or number of jobs created. The survey showed that there is no scope for large-scale commercial dairy production that will make the country near self sufficient in milk and compete with cheap and good quality powdered milk from outside Bangladesh. Even if the Government decides to subsidize the industry at great cost to the taxpayers by banning the import of powdered milk, the quality of dairy cattle is so poor, feed resources so scarce, infrastructure so limited and the lack of dairy culture so widespread that this would not be an area where the project can achieve any successes in the near future. Again, this does not preclude micro level, poverty alleviation programs such as Heifer Projects International or a Give a Cow. However, such work is outside of the scope of the project and best handled at the grass root level by NGO's.

Therefore, as this sector cannot contribute substantially to the goals and objectives of ATDP-II, the subsector consultant will spend most of his time working with poultry subsector while continuing to investigate opportunities in the livestock subsector.

Key activities in the Livestock Sector in year 2001 were:

1. As mentioned above, a subsector survey was conducted by the consultant resulting in a detailed report on the status of the dairy sector in Bangladesh.

2. A consultant with a multiple range of skills provided assistance to the dairy industry, the feed and animal nutrition industry and corn/maize industry (researching the possibility of improving cattle feed). He provided the Government with input on its livestock policy paying special attention to cattle breeding and nutrition. He also advised several large-scale dairy producing clients such as Milk Vita on better feed formulation, dairy and liquid nitrogen operations. He also advised Quality Feeds on nutrition and animal ration formulation and provided advice to potential clients in the maize sector. He also formulated a report on how the subsector should work in the future given all this new information. The report is expected in early 2002.
3. It has been decided that the subsector consultant will spend most of his time working with the poultry subsector (he has a strong background in poultry) while continuing to investigate opportunities in the livestock subsector. So far, two contracts have been signed with the potential clients in the livestock sector to provide technical assistance in identifying their problems of liquid nitrogen plant and in improving quality control procedure.

2.2 Intermediate Result 2: Improved Agribusiness Support Institutions

The table below provides a comparison between committed and actual results to agribusiness support institutions in 2001.

ASI SUPPORT ACTIVITIES IN 2001	
Committed Results	Actual Results
Modify agribusiness lending training modules	Reviewed agribusiness lending training modules. Report written
Implement first training program with 1 st tier banks	On hold. Under discussion with banks.
Stage a forum between fresh products exporters and air cargo carriers on service needs and carrier constraints.	Cancelled. Not the priority need of the clients this year.
Select initial group of key ASI partners	Selected. Criteria for selecting clients in non-financial ASI have been setup. 9 contracts have been signed in both non-financial and financial ASI.
Select initial group of ASIs for training	Selected. Need based training have been provided to 7 ASIs.
Identify and evaluate previous/existing economic advocacy efforts	Evaluated and report written. Some issues need to be readdressed. Some new areas identified.
Hold team building meeting with ASIs to confirm, add and prioritize advocacy issues and identify policy advocates	Meeting held with Narayangonj Ata Maida Malik Samity and BFFEA. Policy issues identified.
Develop database on financial resources for agribusiness	Report has been written by the financial consultant on the database of financial resources available for agribusiness.
Organize hearings and stakeholder	Several meetings have been conducted with clients and

workshops to discuss key policy constraints	different stakeholders. Some policy issues are identified.
Establish credit risk information network for financial organizations	Information reviewed. List of service providers will be incorporated in the ATDP-II webpage.
Support development of issues sheets and advocacy campaign strategies	Three issues identified. BFFEA has started working on 'Quality Control 'issue. ATDP-II is working on' human recourse development' through proposed MBA program and Agribusiness plan competition. Strategies for advocacy campaigns under process.
Jointly develop database of service providers	Data base has been developed. Will be used in the ATDP-II webpage
Develop database of possible joint venture partners and international ASIs for possible linkages	On hold. Will be worked out in the year 2002
Facilitate establishment by select ASIs of quality seals program	Work started with BFFEA on quality seals program.
Create an agribusiness internship program	Two interns received practical orientation to develop them as agribusiness executives.
Identify policy advocates and initiate advocacy campaigns	Industry related policy issues identified.
Facilitate international/domestic ASI linkages	Through overseas trip to Singapore organized by ATDP-II, BFFEA signed an agreement with Seafood International Association Singapore(SIAS)to further strengthen the mutual cooperation between the two associations for new business promotion.

The Agribusiness Support Institutions (ASIs) comprised two segments: Non-financial and Financial. In the non-financial area, the primary objective of year 2001 was to identify potential associations or education institutions capable of providing services to their members and playing an advocacy role for agribusiness development in Bangladesh. A baseline survey was conducted with 16 ASIs and selection criteria were formulated for their receiving ATDP-II assistance. Based on the criteria, potential clients were selected and contracts were signed.

On the financial ASI side, 2001 was a very difficult year for doing business in the banking and financial sector. Though ample money exists for loans to agribusinesses, entrepreneurs have been reluctant to borrow money because of high interest rates, perceived low returns on agribusiness projects as compared to the return received from trading and a plethora of hidden charges, fees or bribes that have to be paid to access bank funds.

The key activities in improving agribusiness support institutions in 2001 were as follows:

1. ATDP-II project has initially selected three private banks with whom to explore partnership opportunities. They are Prime Bank Ltd and Bank of Small Industries and Commerce Limited. Contacts have been made with the three banks and discussions

are being held. Some other banks are also being approached. Two banks namely, Prime Bank and Rajshahi Krishi Unnayan Bank submitted their technical assistance forms. A memorandum of understanding was signed with Prime Bank in the New Year.

2. A study was conducted on the present condition of market information system for Bangladesh's agribusinesses. The finding of the study indicates that currently no agribusiness linkage system exists in Bangladesh. To address this issue, ATDP-II will coordinate the development of trade promotion centers in each of our regional offices with a computer and web surfing capability for use by entrepreneurs. ATDP-II will also build a web page that will be updated on a periodic basis.
3. Several meetings were held with Bangladesh Agriculture University and IBA to find out the feasibility of introducing a Masters/MBA program in Agribusiness. Proposals have been prepared and approved by the authorities. A feasibility study on introducing this program is under process detailing possible partners in the U.S. and regionally.
4. A draft proposal has been prepared for a sustainable and innovative agri-business plan competition, which is now under process. This business plan competition is designed to create awareness among entrepreneurs that they need to have a sound business and financial plan for successful project implementation. ATDP-II will be working with the winners to provide them technical assistance and some seed capital to assist them during project startup.
5. Altogether eight contracts have been signed with different clients of non-financial sector. Some of them have already introduced a sustainable member service for the businesses run by their members.
6. ATDP-II has introduced internship program under which two interns were placed to work with the project. The intern received practical orientation to develop them as agribusiness executive.

The case study below details ATDP-II actions in empowering an industry association (Bangladesh Frozen Foods Exporters Association) at a time of crisis to bolster its leadership role to save the complete industry from devastation:

UNITING TO PREVENT A CRISIS

AN EFFORT TO ASSIST THE SHRIMP EXPORT INDUSTRY THROUGH SUCCESSFUL INTERVENTION OF THE INDUSTRY ASSOCIATION

Shrimp is Bangladesh's second largest export worth about US\$ 300 millions in annual exports. In May 2001, a highly pathogenic bacteria was detected in a consignment of Bangladeshi frozen shrimp sent to France. As a result, France was considering banning shipments of frozen shrimp from Bangladesh on a scale similar to the disastrous EU ban in 1997.

Both USAID and ATDP-II technical staff recognized the tremendous negative impact such a ban would have on the shrimp industry in particular and the Bangladeshi economy as a whole and saw a proactive role that ATDP-II could play in addressing the issue. ATDP-II staff recognized the important role that the industry association, the Bangladesh Frozen Foods Exporters Association (BFFEA) could play to ensure quick action and sustained monitoring of this problem and initiated immediate discussions with all relevant stakeholders in order to avert this crisis. A preliminary set of suggestions were developed focusing on the issue of quality in the shrimp processing industry and included:

- Offer immediate ATDP-II assistance to BFFEA
- Use this crisis to start a national branding program to build a "Guaranteed Clean" quality seal that would be recognized and trusted internationally
- Mobilize sanitary inspection teams to shrimp factories to ensure compliance with sanitary regulations
- Self policing and spot checks throughout the supply chain from the producer to the processor

These initial suggestions evolved as ATDP-II staff met with the various stakeholders. The ATDP-II Fisheries Specialist had several meetings with the president and members of BFFEA, Director of the Quality Control Division, Department of Fisheries, and the USAID technical officer for ATDP-II to address this problem and create awareness for immediate positive action.

The series of discussions resulted in a number of recommendations for strengthening BFFEA's capacity to address quality control in the shrimp industry. It was agreed that ATDP-II will work with BFFEA to strengthen its leadership capacity within the shrimp industry. ATDP-II, in cooperation with BFFEA, has initiated the following actions to address this issue:

- Introduce 'Seal of Quality' program through BFFEA
- Organize HACCP monitoring teams at the field level
- Organize HACCP training for different stakeholders in the supply chain starting from the farm gate to the processor.
- Field level monitoring covering a wide geographic range.

2.3 Intermediate Result 3: More Market oriented Policies, Laws, Regulations and Industry Standards

The table below provides a comparison between committed and actual results in policy, regulation and industry standard activities in 2001.

POLICY, REGULATION AND INDUSTRY STANDARDS ACTIVITY IN 2001	
Committed Results	Actual Results
Begin to conduct regional workshops to present findings of diagnostic assessment of producer to consumer marketing chains	On hold.
Identify "win-win" policy issues and organize according to three tier criteria through workshops and a survey	Few issues identified through different survey and meetings with different stakeholders (such as BFFEA, Chittagong Chamber of Commerce, Narayangonj Ata Maida Malik Samity etc)
Promote and involve advocates in policy reform process	Association identified to work with. 'Seal of Quality' program started.
Cost effective media coverage	ATDP-II webpage established. Information dissemination on 'Fisheries' and 'Poultry' through radio explored. Press conferences of project activities.
Develop policy brief for national-level officials, reporting on the analytical findings of the diagnostic assessment and regional workshops; present findings	HACCP team developed in the thana level for 'fisheries' sector. Preparation going on to organize regional workshop.
Conduct training in advocacy techniques and certification of international standards and specifications	Overseas visit organized by ATDP-II to Singapore. Agreement has been made with SIAS and BFFEA. Information shared on 'International Seal of Quality' program.
Complete analysis and recommendation for promulgation or derogation of priority formal government standards and specifications, industry and grades	Several steps taken to address this matter. Such as: formulation of regional level HACCP team in collaboration with Govt. officials.
Organize ad hoc coordinating committees in pilot sites for regional initiatives	In Khulna region, ATDP-II assisted the Department of Fisheries in forming seven Upozilla monitoring committees (UHMC) at eight places.
Disseminate information on the impact of formal policies	Survey completed and report written. Meetings held with different stakeholders. Importance of policy issues discussed
Assist stakeholder groups in drafting reform position papers	On going

The year 2001 was a period of political transition for Bangladesh. There were three separate governments, four different Secretaries at the Ministry of Agriculture and the Additional Secretary directly in-charge of ATDP-II changed twice. In addition, ATDP-II only began to sign contracts with clients at the end of the third quarter, after the approval of the work plan by the Steering Committee. Some initial technical work started with potential clients of ATDP-II after work plan submission.

As a result of this transition, ATDP-II decided to concentrate its efforts on industry related and education related policy reform rather than government related policy reform. With the elections over a permanent Government is finally in place. Hence, we believe that 2002 will be a good year to continue both industry related and government related policy activities. The following policy issues have been identified and were worked on in 2001:

Agribusiness Human Resources Development Policy Initiative: ATDP-II proposes to conduct a feasibility study to determine the viability of an Agribusiness MBA program. The plan is to:

- Study the current situation and produce a policy paper with a projection of the demand and supply for an independent agribusiness curriculum.
- Review the findings with appropriate government agencies, public and private universities, the private sector and other organizations such as Chambers of Commerce. On the basis of this review, determine the best advocacy strategy for moving forward.

Fisheries/Shrimp Sector Policy Initiative: The development and early introduction of a “Seal of Quality” for the BFFEA has been recommended. The Seal of Quality is a comprehensive program designed to assure buyers that shrimp products, marked with the quality seal, meet the highest sanitary and environmental standards.

Flour Policy Initiative: ATDP-II, in association with the Flour Miller Association will play a positive advocacy role in convincing the concerned ministries and the National Board of revenue (NBR) to adopt a new policy. The initiative includes:

- A policy dialogue to appraise the concerned officials and policy makers
- One to one dialogue with the department of finance and Board of Revenue

Livestock Policy Initiative: Based on a detailed livestock sector paper prepared by ATDP-II, discussions have been initiated with the Department of Livestock to consider privatizing Artificial Insemination services and restricting Embryo Transfers procedures which are very expensive and have a low success rate. The case study below details ATDP-II actions regarding this policy initiative:

POLICY DILEMA: GOVERNMENT’S ROLE IN CATTLE BREEDING IN BANGLADESH

Bangladesh has a very large cattle population numbering about 24 million heads. Only 6 million of these are females. In spite of the presence of such a large number of cattle, Bangladesh lacks a modern specialized beef industry or a well-established dairy chain. Per capita consumption of beef/meat in Bangladesh is lower than the FAO recommended 14.6 kg per year.

ATDP-II conducted a study to identify the constraints in the beef and dairy sectors. The relevant findings are:

- In Bangladesh average milk production is around 1.25 liters per cow compared to 10 and 26.5 liters per cow in Kenya and the USA respectively
- Existing breeding policy permits open nucleus breeding program with improved *Deshi* cattle for extensive traditional system and 50% *Friesian*-50% *Deshi* cattle for intensive dairy production
- The survey made it clear that the Department of Livestock Artificial Insemination (AI) techniques need to be reviewed. Presently, AI is accomplished by a combination of locally collected liquid semen as well as frozen semen
- Artificial insemination by the public sector cannot attain desired results due to inferior quality of semen, sub standard equipment and inefficient inseminating techniques
- Fresh bull semen is hazardous and spreads diseases. The perishable nature of semen leads to a high wastage.
- AI with fresh bull semen is very risky
- Public Sector AI covers only about 15 percent of AI requirements in the country at a great cost. The rest of the requirement is met privately

Based on the findings of this study, ATDP-II has initiated discussions with the Department of Livestock to achieve the following goals to encourage both the dairy and meat processing industries in Bangladesh:

- Government should restrict itself only to a regulatory role through HAACP monitoring and other interventions. This will encourage private sector development in both the dairy and meat processing sectors
- The Government is being encouraged to close all public sector bull studs and breeding stations countrywide
- Private sector entrepreneurs must be allowed to import and sell world-class genetics (frozen semen) from bull studs in developed countries that are guaranteed to be disease free and of a high quality thereby improving the breed of the locally available cattle
- A ban on the use of fresh semen by both the public and private sectors

2.4 Administrative Achievements

The table below provides a comparison between committed and actual results in project management and administrative milestones achieved in 2001.

ADMINISTRATIVE MILESTONES ACHIEVED IN 2001	
Committed Results	Actual
Local currency management system set up	Completed
Renovate and improve Internet site	Addressed and on going
Establish proposed cost-sharing mechanism for proposed TA services	Cost sharing policy has been developed. Clients are sharing cost following the policy.
Newsletter	Need analyzed. Preparatory work started.
Office set up	Field Offices in Jessore, Chittangong, Bogra and Sylhet set up in July, August and October. Field office at Thakurgoan is under discussion
Analyze and establish guidelines for guarantee fund	Agreement with Government of Bangladesh that the Agricultural Credit Fund will be made

	available to the contractor for preferential agribusiness loans. USAID has already started a guarantee fund so ATDP-II will not duplicate this effort.
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3. Leveraging Other Resources

The project has initiated contacts with a wide range of partners to enhance ATDP-II’s impact and results. These include other donors like the World Bank and DFID; Government of Bangladesh; and other stakeholders working in agribusiness sector such as Bangladesh Agriculture University, Institute of Business Administration, Grameen Bank, Grameen Babsha Bikash Kendra; and finally other USAID funded projects such as JOBS, ICLARM, and Farmer to Farmer Project etc. ATDP-II is also in negotiations to sign several memorandums of understandings with area banks to encourage agribusiness loans for our clients.

ATDP-II has already used a volunteer from Winrock for delivering technical assistance in the grains sector on extrusion technology. Further negotiations are on for another volunteer from Winrock who will be working on poultry feed initiatives. ATDP-II is also exploring ways to work with the JOBS program to identify areas of collaboration. Our fisheries consultant has had several exchanges of ideas and details with the ICLARM project especially in the area of fresh water shrimp production.

The Government of Bangladesh is also closely involved with ATDP-II. Through the Agricultural Credit Fund-Development Fund (ACF-DF), the government is committed to contribute the taka equivalent of US\$ 1 million for training and trade promotion activities. As a result of the Government’s increasing confidence with ATDP-II activities, it is also making available the remaining balance of the original Agribusiness Credit Fund (ACF) which was a leftover from ATDP-I. ATDP-II plans to use these resources for agribusiness plan competition, new initiatives, feasibility for MBA program and technical assistances planned to be provided to the clients.

4. Key Issues and Lessons Learned

ATDP-II’s experience in its first year of operations has yielded a number of lessons about project design and implementation which will be taken into account in the future years to provide direct assistance to enterprise growth and development, support to agribusiness support institutions and effective policy reform including:

Concept of Business: Building business is a lengthy and involved process in which almost no steps/stage can be skipped. Nothing is assured. There are many factors that effect business development in the larger environment over which the project and entrepreneurs have no control. More over, intense poverty and an education system that focuses more on rote memory rather than critical thinking are formidable constraints to

building a strong agribusiness base in Bangladesh. It makes it difficult to find talent with real business backgrounds to implement projects. Similarly it makes it difficult to find out talent with real business experience to staff businesses. Therefore, everything must be viewed within the context of time, place and condition.

Early Success in Agro processing: Our project's key to success is to find entrepreneurs who fit into the 'innovators' and 'early adapters'. Finding such entrepreneurs will take a very deliberate and methodical approach. However, once a base of such entrepreneurs is built, the take off stage can then move fairly quickly. The project has already started providing assistances to their clients through training on wider range of agribusinesses to help them improve their business management, technical management, financial management and sales. The project have signed contracts with some potentials clients who could hopefully set examples for early successes, which then will transmit market incentives backward to their suppliers and further down to farmers.

New Initiatives: If agribusiness is to succeed in Bangladesh, it must differentiate itself from neighboring countries that produce similar products much more efficiently and at a lower price. It must find new opportunities to exploit niche markets. This calls for finding new products and services that can be marketed both domestically and internationally. Hence ATDP-II will pay a great deal of attention to finding new ideas and products in which investors and entrepreneurs in Bangladesh can become involved. ATDP-II has taken initiatives to explore the possibility of agribusiness plan competition and feasibility of MBA program among the agro processors.

Importance of Cost Sharing: ATDP-II established that an addiction to donor aid has developed in many countries that has altered behavior and restricted the choices of many individuals and companies. To be successful in a competitive market environment, clients must be willing take risk, to make their own decisions, to assume leadership and to avoid becoming dependent on donor assistance. Our experience in working with clients showed that most clients are willing to share cost. However, some of the strongest resistance to cost sharing comes from some of the most affluence people and organizations, who unfortunately seem to have developed an addiction to donor aid.

Encouraging Cooperation through Contracts: Documentation through the technical assistance forms and contracts has greatly contributed to findings suitable clients and to ascertaining their needs. This system helps both ATDP-II and its clients to evaluate their performance time to time and to value each others contribution to the growth of agribusiness sector in Bangladesh.

ANNEXES

A. PROJECT AT A GLANCE:

From January-December 2001

Sector	Projected Activity	Status	Achievements / Remarks
Mobilization plan	Ensure a quick & effective start -up of project by sending an advance team to establish an office, hire staff and begin Subsector analysis	Completed	
	Dhaka office established	Completed	
	Develop contracts	Completed	
	M&E system established	Completed	
	Local currency management system established	Completed	
	Set up five offices	4 completed; 1 pending	Work plan approved by Steering Committee in June. Field Offices in Jessore, Chittangong, Bogra and Sylhet set up in July, August and October. Field office at Thakurgoan is under discussion
	Submit draft annual work plan to USAID & GOB	Completed	Work plan approved in June which legally set the basis for beginning to do work
Fisheries	Conduct potential client survey of fisheries	Completed	Surveys used as basis for work plan
	Train quality control staff at Khulna in factory sanitation & internal HACCP auditing	Completed	
	Train quality control staff at Chittagong in factory sanitation & internal HACCP auditing	Completed	

Fisheries	Assist in forming model thana level HACCP monitoring teams (THMT) in 4 major shrimp districts in two regions	Completed	A training program was prepared and organized in active collaboration with BFFEA and DOF quality Control Division. Eight field level HACCP training for 280 shrimp depot operators and shrimp suppliers in 8 thanas: Chakoria, Cox's Bazar, Paikgacha, Shamna
	Organize field level HACCP training for shrimp depot operators and suppliers in collaboration with DOF	Completed	Two field levels HACCP training were held at Chakoria and Cox's Bazar Sadar. Altogether, 80 shrimp depot operators and shrimp suppliers participated in this training
	Organize a workshop at Khulna on HACCP with all participant technicians and DOF FIQC staff to review benefits and determine future actions	Shifted to the year 2002	Will be organized after completing the HACCP training in Khulna and Chittagong.
	Train 20-40 fish feed millers in better feed formulation	Completed	16 persons were trained. Association formed. Contracts are signed
	Train processors in computerized business skills using MS Excel	Completed	5 days hands-on training for 7 financial staff of shrimp factories of Kulna completed. Training with 10 persons from Chittagong regions completed
	Explore possibility of identifying with GIS, sites with underground sources of saline water of 10-14 ppt for new freshwater shrimp hatcheries	Shifted to 1st quarter 2002	
	Develop business plans with 5 core clients	On going	

Fisheries	Arrange hands-on training on new value added products	Shifted to year 2002	
	Organize visits for shrimp processors and entrepreneur(s) to two international sea food shows	Completed	Participants attended to shows at Singapore. 20 market linkage established
	Train client processors' contract farmer associations in improving farming and post-harvest handling	Completed	Contract has been signed with BFFEA
	Training on cost effective fish drying, salting and dehydration methods to improve quality, increase shelf life and appropriate packaging of finished products	Completed and on going	Preparation completed. Training will be conducted in January 2002
	Export Feasibility of processing crab at shrimp factories	Shifted to next year	
	Sign contracts with clients		37 contracts have been signed with clients including BFFEA
	Others activities		Case study has been written on the situation of the organization of shrimp industries
Poultry	Complete potential client survey of poultry industries	Completed	35 clients interviewed for potential client selection
	Experimental pilot program to publish poultry subsector price information on daily or weekly basis	On-Going	Preparatory discussions with poultry industry taking place; further linkages need to be established
	Evaluate 20 hatcheries who received the training from ATDP-I and assess the future needs of training on poultry parent stock and hatchery management	Completed	Evaluation report is written.

Poultry	Conduct subsector mapping workshop of the feed and commercial farm industries	Task being reviewed	A number of GIS activities have been implemented in Bangladesh and these need to be investigated
	Experimental pilot program to publish poultry sector price information on a daily or weekly basis	Shifted to year 2002	Discussion with poultry association was not useful. Alternative approaches being considered.
	Conduct survey of targeted readers to determine usefulness of the poultry input information published in the new paper.	Postponed	Task to be undertaken once poultry input information is published
	Provide TA to selected clients on pellet feed mill installation & pellet feed formulation.	Completed	
Poultry	Sign contract with clients	On going	Five contracts signed including Grameen
	Short term consultant reviewed and updated the existing poultry feed formula. Recommendation for upgrading existing quality control lab.	Completed	2 clients (Quality Feed Ltd & Usha Feed Ltd).
	Organize 4 training program on farm management training with collaboration of two association	Completed	
	Prepare material for a documentary on processed broiler	Cancelled	
	Begin planning for pellet feed market promotion event for pellet manufacturer with 100 farmers	Shifted to year 2002	Due to terrorist attack in USA, consultant cancelled his trip
	Intermediate bank lending to 3 core clients	Shifted to year 2002	

Poultry	Facilitate attendance of 5 processors and feed millers in international trade show	Shifted to year 2002	Participants are interested to share cost
	Follow up training need assessment for 20 hatcheries with a training targeted to a specific problem	Shifted to 1st quarter of 2002	
	Strengthen market linkages between feed ingredient providers and feed millers	On-Going	Discussions were held with relevant associations; discussions need to continue
Horticulture	Identify 9 new “core” clients	Completed	
	Link grower associations for specific products (chilli,okra,french beans, pointed gourd etc) with 5 exporters	Completed	Linkage established with two exporters
	Arrange contracts with 30 identified exporters and processors.	On-Going	Met 15 potential clients; attempting to identify “innovators” & “early adapters”.
Horticulture	Provide 2 exporters TA in processing & marketing of frozen vegetables.	Shifted to next year	Contract signed with one exporter
	Provide 4 clients TA in post harvest handling of fruits and vegetables in specialized cold storage units	Completed	4 clients trained in specialized post harvest handling techniques which will help to reduce storage losses by at least 20%.
	Organize training on post-harvest vegetable handling for supply chain agents (in-house expertise).	On going	Will be provided after signing contracts
	Organize a study tour for 5 exporters to develop market Knowledge and linkages in targeted markets.	Cancelled because of terrorist attack in New York	Contracts signed with 5 exporters

Horticulture	Conduct sales & marketing studies on new products/ market opportunities for 4 cold storage investors	Completed	
	Develop business plans with 3 core clients for financing	Ongoing	Application form has been received. Process is going on
Grains	Conduct bakery/confectionary & flour mill survey and write report	Completed	Survey finished and report written
	Conduct oilseed subsector survey & write report	Completed	Survey finished and report written
	Process improvement training through crafted TA module for 5 millers	Cancelled	Program has been changed according to the need of the flour millers.
	Sign contracts with 10 clients	On going	7 contracts signed
Livestock	Initial regional private/public policy reform workshop	Task will be reviewed	Permanent government is in place now. Approach to policy issues under review. Needs of the companies with whom we sign will con-tracts, will be the driving force behind policy. Contracts signings only beginning
	Complete survey and analyze results and sign contracts with 10 potential clients	Completed	30 potential clients surveyed on milk production, milk processing, sweetmeat making and beef fattening. Report is under preparation. 2 contracts have been signed
	Short term consultant reviewed and updated the existing poultry feed formula.Recommendation for upgrading existing quality control lab.	Completed	2 clients (Quality Feed Ltd & Usha Feed Ltd).

Livestock	Explore opportunities to work with dairy processors and farmer groups to negotiate repeating forward supply agreements	On-going	Technical assistance forms sent to ten clients.
Policy	Begin review of ATDP/IFDC policy data	Completed	
	Hold discussions with Frozen Food Exporters Association, Cold Storage Association & Jessore Chamber of Commerce on policy issues and initiatives	Completed & on-going	Extensive meetings held; Case study written. Contract signed with BFFEA.
	Continue discussions with Secretary of Agriculture on genetic engineering and modification policy and further investigate the state of readiness of the country	Started/Temporarily suspended	Discussion began with Sectr. of Agri. But unfortunately Secretary was changed. Proposal presented to see that a slot for biotechnology be reserved under the long – training program.
	Hold discussions to determine the viability of the idea of the Rapid Action Policy Working Group	On going	
	Dairy consultant arrives to begin to work with processors on management & milk quality	Completed	
	Dairy consultant returns to install LN2 plant and to do an assessment of policy work done: examines milk quality issues and breeding policy	On hold	Will be reviewed and revised following first dairy consultancy in December
	Begin works on 2 policy briefs with a backup analysis.	On-going	Developing policy briefs on lab equipment for flour millers and on equity fund for banks

ASIs	Select initial group of key ASIs clients	Completed	4 key ASIs selected
	Identify priority training needs of key ASIs clients	Completed	6 priorities TA/training needs of ASIs identified.
	Meet with target ASIs to discuss advocacy issues & develop a list of policy issues	Completed & On-Going	Met with ASIs and sub subsector consultants. Some policy issues identified
	Determine whether agribusiness linkage info system exist	Completed	Investigation indicates that a focused and efficiently managed information linkage system does not exist.
	Identify and develop data base of financial resources available to agribusiness clients	Completed	Financial resources identified
	Review agribusiness lending training modules	Completed	Modules reviewed thus far not adaptable
	Develop relationship with clients & sign contract with them	On-Going	Discussions held with 3 banks; new bank also identified. 7 contracts signed with Non financial ASIs.
	Provide suggestions to GOB on innovative uses of ACF	Completed	
	Conducted initial baseline survey of financial ASIs	Completed	
	Determine the info needed by the ASIs on service providers. Subsequently develop a system to use services by them	Completed	List of service providers would be incorporated in ATDP-II webpage.
	Identify priority training needs of loan officers	On hold	Under discussion with banks
	Implement first training program with client banks	Cancelled	

ASIs	If agribusiness linkage info system exists, examine extent and quality of the agribusiness linkage info system. Determine whether any action needs to be taken to make the system more effective	Completed	It has been found that no such system exists. Report is written
	Initial activities to establish agribusiness linkage info system	Shifted to 1st quarter 2002	Will be undertaken based on recommendations of the report under preparation
	Organize stakeholders meeting on at least 1 policy issue	Completed	Organized workshop with Narayangonj Flour Millers Association
	Implement short-term overseas training.	Completed	
	Introducing MBA in Agri business	On-going	PPC approved; Request for proposal advertised; Proposal being reviewed

B. LIST OF THE CLIENTS

Fisheries

Sl. No.	Name of the Contracted Clients	Status of Contracts
Shrimp Feed Millers		
1	Agrani Grower Fish Feed	Contract signed
2	PCL Ltd.	Contract signed
3	Progoti Fish Ltd.	Contract signed
4	Progoti Fish Ltd. (Project-2)	Contract signed
5	Ratna Fish Feed	Contract signed
6	Rubel Fish Feed	Contract signed
7	Sher-e-Bangla Fish Feed	Contract signed
8	Uzzal Fish Feed	Contract signed
9	Tripti Fish Feed	Contract signed
10	TATA Fish Feed	Contract signed
11	Surza Bhandar poultry & Fish Feed Industries	Contract signed
Shrimp Processor (Khulna)		
1	Satkhira Foods Ltd.	Contract signed
2	Sigma Sea Foods Ltd.	Contract signed
3	Sobi Fish Processing Industries Ltd.	Contract signed
4	Southern Food Ltd.	Contract signed
5	Unique Ice & Foods Ltd.	Contract signed
6	Lockpur Fish Processing Co. Ltd.	Contract signed
7	Modern Sea Food Industries Ltd.	Contract signed
8	M.U. Sea Foods Ltd.	Contract signed
9	National Sea Food Industries Ltd.	Contract signed
10	New Foods Ltd.	Contract signed

11	Oriental Fish Processing and Culture Ltd.	Contract signed
12	Prince Sea Foods (Pvt.) Ltd.	Contract signed
13	Rupali Sea Foods Ltd.	Contract signed
14	Amam Sea Food Industries Ltd.	Contract signed
15	Aqua Resources Ltd.	Contract signed
16	Asian Sea Food Ltd.	Contract signed
17	Bangladesh Sea Food Industries Ltd.	Contract signed
18	Bionic Sea Food Exports Ltd.	Contract signed
19	Delta Fish Ltd.	Contract signed
20	Fresh Feed Ltd.	Contract signed
21	Gemini Sea Food Ltd.	Contract signed
22	International Shrimp Export (Pvt.) Ltd.	Contract signed
23	Jahanabad Sea Food Ltd.	Contract signed
24	Khulna Frozen Food Export Ltd.	Contract signed
	Total No. of signed contract with clients	35
Others		
1	Trinomool Manobic Unnayan Sagstha, Kashinathpur, Pabna 34 members	Contract signed
2	Golda Chingri O Matshachasi Samity, Phulpur, Tarakand 33 members	Contract signed
3	Bangladesh Chingri Khaddyo Utpadonkari Samity 11 members	Contract signed
4	Bangladesh Frozen Food Exporters Association	Contract signed
Client list of the association is shown in ASI unit		

Poultry

Sl. No.	Name of the Contracted Clients	Status of Contracts
1	MM AGHA Ltd.	Contract signed
2	USHA Feed Ltd.	Contract signed
3	Quality Feed Ltd.	Contract signed
	Total No. of signed contract	3
Other		
1	Gazipur Poultry Shilpa Malik Samity, Konabari, Gazipur, 40 Members	Contract signed
2	Grameen Babosha Bikash, Mirpur Dhaka-1216, 71 Members	Contract signed

Grains

Sl. No.	Name of the Contracted Clients	Status of Contracts
1	Sotata Bakery	Contract signed
2	Famous Bread and Confectionery	Contract signed. No assistance started
3	Lakhya flour Industries	Contract signed. No assistance started
4	Mark Flour Industries	Contract signed. No assistance started
5	Sifa Industries	Contract signed. No assistance started
6	Peoples Foods & Allied Industries (Pvt.) Ltd.	Contract signed. No assistance started
7	North Bengal Maize Processing	Contract signed
	Total No. of signed contract	7
Other		
1	Narayanganj Ata Maida Malik Samity(NAMMS)- 70 members	Contract signed. No assistance started
Client list of the association is shown in ASI unit.		

Horticulture

Sl. No.	Name of the Contracted Clients	Status of Contracts
1	Agro Fresh Ltd.	Contract signed
2	Fatema International Export	Contract signed
3	Cold Land Limited	Contract signed
4	NRS Trade International,	Contract signed
5	Humanitarian Agency for Development Services (HADS)	No works started
6	Costal Sea Food,	Contract not signed but assistance is started
7	Organization for the Poor Community Advancement (OPCA)	Contract signed
8	Agro Process (Bangladesh) Ltd	Contract signed. No works started
	Total no. of signed contract with clients	8
Others		
1	Bangladesh Fruits Vegetables and Allied Products Exporters Associations (BEVAPEA) (250) members	
Client list of the association is shown in ASI unit.		

Livestock

Sl. No.	Name of the Contracted Clients	Status of Contracts
1	Humanitarian Agency for Development Service (HADS)	Contract signed .Visit done by ATDP-II expert consultant
2	BMPCUL (Milk Vita)	Contract signed .Visit done by ATDP-II expert consultant
	Total no. of signed contract with clients	2

ASI (Agribusiness Support Institutions - Non-financial and financial)

Sl. No.	Name of the Contracted Clients	Status of Contracts
	Fisheries	
1	Trinomool Manobic Unnayan Sagstha, Kashinathpur, Pabna (Trinomool) 34 members	Contract signed
2	Galda Chingri O Matshachasi Samity (Phulpur) 33 members	Contract signed
3	Bangladesh Frozen Foods Exporters Association 24 members	Contract signed
4	Bangladesh Chingri Khaddyo Utpadonkari Samity 11 members	Contract signed
	Poultry	
5	Gazipur Poultry Shilpa Malik Samity 40 members	Contract signed
6	Grameen Babosha Bikash, Mirpur Dhaka-1216 71 members	Contract signed
	Grains	
7	Narayanganj Ata Maida Malik Samity(NAMMS) 70 members	Contract signed .No assistance started
8	Bangladesh Fruits Vegetables and Allied Products Exporters Associations (BEVAPEA) 250 members	Contract signed .No assistance started
9	United Petro Chemicals Ltd	Contract singed
	Total no. of signed contract with clients	9

C. LIST OF THE MATERIALS PUBLISHED BY ATDP-II

- 3.1 Brochure
- 3.2 Cost sharing policy of ATDP-II
- 3.3 Summary of Work Plan 2001
- 3.4 Uniting to prevent a crisis: Case Study of an effort to assist the shrimp exports industry- Dr. Mahmudul Karim and Jed Diemond
- 3.5 Some Observations on the potential for a Modern Commercial Beef Industry in Bangladesh-Dr. Nathaniel F. Makoni
- 3.6 The Potential for Commercial Dairy Production and Processing in Bangladesh-Dr. Nathaniel Makoni
- 3.7 Market Study of the Polypropylene Woven Bag Industry in Bangladesh-Joyjit Deb Roy
- 3.8 Draft Business Plan for PP Woven Bag- Joyjit Deb Roy
- 3.9 Training manual for Commercial Layer Management-Dr. Golam Murshed
- 4.0 Training Manual for Commercial Broiler Farm Management- Dr. Golam Murshed

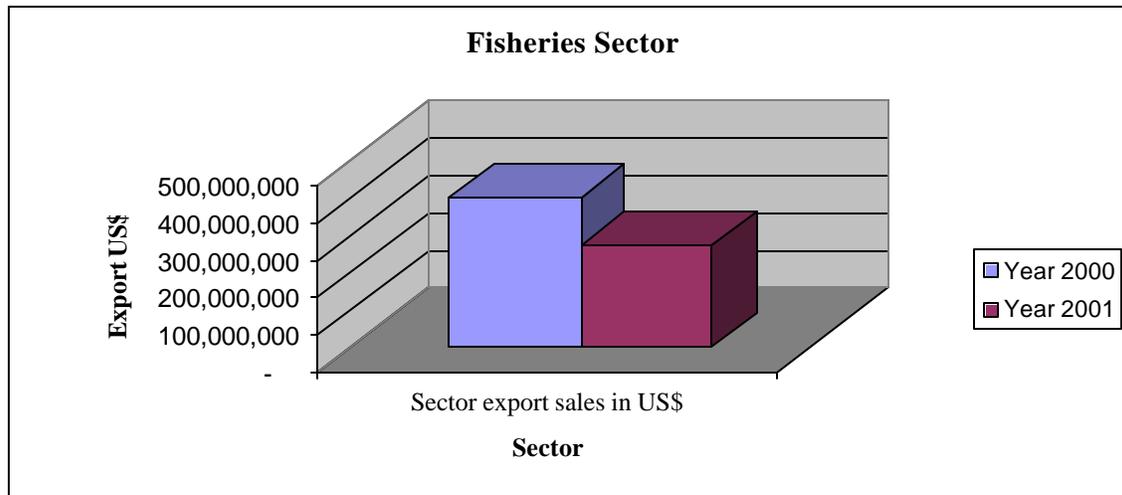
D. LIST OF THE CLIENTS SURVEYED FOR MULTIPLIER EFFECT OF THE PROJECT

Sector	Client Name and Address
Poultry	<ul style="list-style-type: none">1. Quality Feeds Ltd. House # 14 Road # 7, Sector # 4, Uttara Model Town, Dhaka-1230 Tel: 02 8916024, 8920989, 89212242. Usha Feeds Ltd. House # 6/2 , Block # F, Lalmatia, Kazi Nazrul Islam Road, Dhaka-1207 Tel: 02 9118815, 81184623. M M Agha Ltd. House # 177 Khatungonj, PO Box 255, Chittagong

Sector	Client Name and Address
Horticulture	<ol style="list-style-type: none"> <li data-bbox="505 296 1377 436"> 1. NRS Trade International House # 84, Block # B, Mohanagar Housing Project, Wapda Road, Rampura Dhaka Tel: 02 7281846 <li data-bbox="505 478 1349 583"> 2. Organization for the Poor Community Advancement (OPCA) P.O: Choitoyannarhat, Mostan nagar, Chittagong Tel: 017 7710469 <li data-bbox="505 625 1240 730"> 3. Fatema Export International House No-17, Road N-27, Sector No-7, Uttora, Dhaka 02 8911225
Grains	<ol style="list-style-type: none"> <li data-bbox="505 806 1154 911"> 1. Northern Bengal Maize Processing Mills. House # 13, Station Road, Tejgaon, Dhaka-1215 Tel: 02 9128445, 018 228369
Fisheries	<ol style="list-style-type: none"> <li data-bbox="505 993 1149 1098"> 1. Aqua Resources Ltd. A-7, BSCIC Industrial Estate, Shiromoni, Khulna Tel: 041 785271 <li data-bbox="505 1140 1000 1245"> 2. Fresh Foods Ltd. 3/2 Haji Mohsin Road, Khulna-9100 Tel: 041 722485, 725085 <li data-bbox="505 1287 1122 1392"> 3. International Shrimp Exporters Ltd. Castle Salam Building, 8 KDA Avenue, Khulna Tel: 041 725128, 720128 <li data-bbox="505 1434 1127 1539"> 4. M U Sea Foods Ltd. BSCIC Industrial Estate, Jhumjhumpur, Jessore Tel: 0421 6438

E. ECONOMIC EFFECTS IN SHRIM PROCESSING INDUSTRY IN BANGLADESH

a) Fisheries Sector



The table shows that the sales of fisheries sector have declined 32 percent.

Fisheries sector Vs Clients achievement	Year 2000	Year 2001	Difference	% of decline
Sector export sales in US\$	401,160,000	274,000,000	(127,160,000)	32

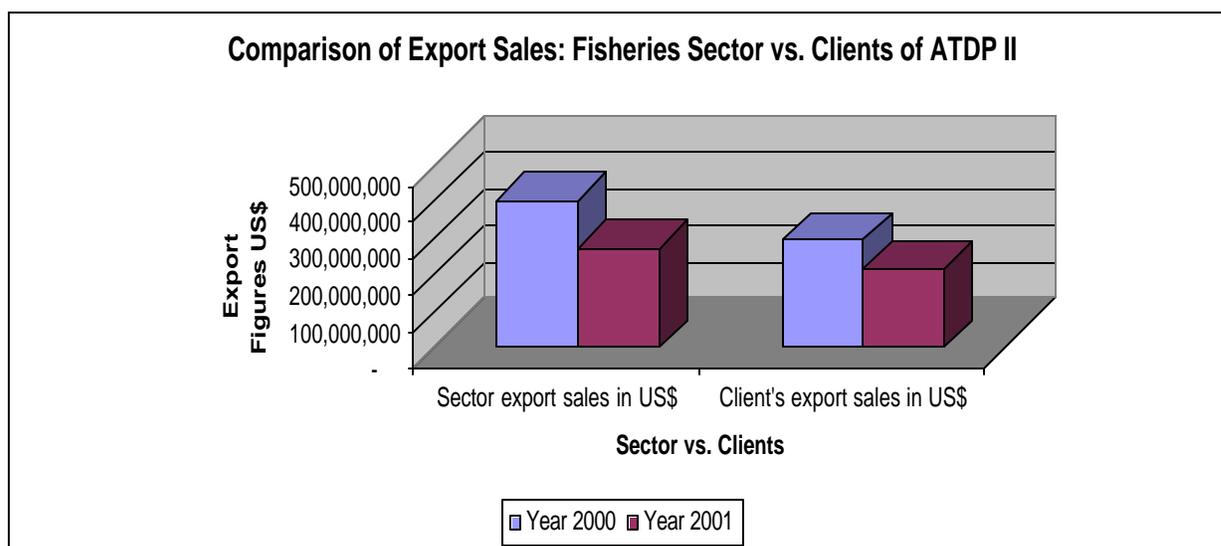
b) Export Sales of ATDP –II Clients



The table shows that the export sales of the clients of ATDP-II have declined 27%.

Client's achievement Comparison	Year 2000	Year 2001	Difference	Decline in %
Export sales in US\$	293,065,231	212,833,358	(80,231,873)	27

c) Comparison of Export Sales: Fisheries Sector vs. Clients of ATDP II



The table shows that the declined rate of export sales of the clients of ATDP-II is less (27 percent) than the of Fisheries sector. (32 percent)

Fisheries sector Vs Clients achievement	Year 2000	Year 2001	Difference	% of decline
Sector export sales in US\$	401,160,000	274,000,000	(127,160,000)	32
Client's export sales in US\$	293,065,231	212,833,358	(80,231,873)	27

F. LIST OF THE TRAINING/TECHNICAL ASSISTANCES ORGANISED BY THE PROJECT

SL. No	Course Title	Subsector	Training Objectives	No. of Participants	Participants' Identification	Type of Participants	Venue	Place of Event	Date	Duration
1	Project Orientation	Training Unit	Raise common understanding of the project issues and develop team building spirit	20	Project staff	Project staff	BRAC INN	Dhaka	22-23/04/2001	2 days
2	Business Planning & Mgt.	Training Unit	Understand basic principles of business.	15	Project professionals	Project staff	BRAC INN	Dhaka	24-26/04/2001	3 days
3	Upazila level HACCP(Chokoriya)	Fisheries	Better handling of shrimp & depot sanitation	40	Shrimp depot operators	Private sector	Upazilla Auditorium	Chokoria	2/7/2001	One day
4	Upazila level HACCP (Coxs Bazar)	Fisheries	Better handling of shrimp & depot sanitation	40	Shrimp depot operators	Private sector	ADB Hatchery Complex	C. Bazar	3/7/2001	One day
5	Data Collection Methods & Performance Indicators	Training Unit & M&E	Understand techniques of performance indicators in data collection methods	20	Project staff	Private sector	TTT, Dhanmondi	Dhaka	5/7/2001	One day
6	SIAL ASIA FOOD SHOW in Singapore	Horticulture/ Fisheries	Develop market linkages	3	Project staff	Private sector	Shingapore	Shingapore	3-5/6/01	2 days
7	Study Tour to USA	Ag. Secretary	Enhance knowledge in agribusiness	1	Secy. MOA	Govt.	USA	U S A	15-30/6/01	15 days
8	Accounting & Finance In Business	Training Unit	Enhance knowledge on Financial Aspect of Business Plan	13	Project professionals	Private sector	TTT, Dhanmondi	Dhaka	17-19/7/2001	3 days
9	Upazila level HACCP (Pikgacha))	Fisheries	Better handling of shrimps & maintaining sanitation of depots	27	Shrimp depot operators	Private sector	Pikgachs	Pikgachs	1/8/2001	1 day

SL. No	Course Title	Subsector	Training Objectives	No. of Parti-cipants	Participa nts' Identifica tion	Type of Participa nts	Venue	Place of Event	Date	Duration
10	Upazila level HACCP (Shamnamar)	Fisheries	Better handling of shrimps & maintaining sanitation of depots	30	Shrimp depot operators	Private sector	Shamnagar	Shamnagar	2/8/2001	1 day
11	Upazila level HACCP (Assasuni)	Fisheries	Better handling of shrimps & maintaining sanitation of depots	30	Shrimp depot operators	Private sector	Assasuni	Assasuni	3/8/2001	1 day
12	Upazila level HACCP (Rampal)	Fisheries	Better handling of shrimps & maintaining sanitation of depots	30	Shrimp depot operators	Private sector	Rampal	Rampal	4/8/2001	1 day
13	Upazila level HACCP (Fakirhat)	Fisheries	Better handling of shrimps & maintaining sanitation of depots	27	Shrimp depot operators	Private sector	Fakirhat	Fakirhat	5/8/2001	1 day
14	Upazila level HACCP (Khulna)	Fisheries	Better handling of shrimps & maintaining sanitation of depots	22	Shrimp depot operators	Private sector	Khulna	Khulna	6/8/2001	1 day
15	Entrepreneurship Development in fish Farming	Fisheries	Enhance knowledge in fish farming & business skills	14	Fish farmers	Private sector	Lakshmpur	Lakshmpur	7/8/2001	1/2 day
16	Feed Formulation & Storage	Fisheries	Manufacturing galda shrimp feed by maintaining nutritional proportion and necessary requirements	25	Feed millers	Private sector	Khulna	Khulna	21-22/8/01	2 days
17	Computerized Business Mgt.	Fisheries	Enhance computer skills in accounting & finance and exploring mrket information for BFFEA staff	7	Finance staff of BFFEA	Private sector	APTECH Khulna	Khulna	26-30/8/01	5 days

SL. No	Course Title	Subsector	Training Objectives	No. of Parti-cipants	Participa nts' Identifica tion	Type of Participa nts	Venue	Place of Event	Date	Duration
18	Computerized Business Mgt.	Fisheries	Enhance computer skills in accounting & finance and exploring mrket information for BFFEA staff	7	Finance staff of BFFEA	Private sector	APTECH Khulna	Khulna	2-6/9/01	5 days
19	Computerized Business Mgt.	Fisheries	Enhance computer skills in accounting & finance and exploring mrket information for BFFEA staff	8	Finance staff of BFFEA	Private sector	APTECH Chittagong	Chittagong	16-20/9/01	5 days
20	Training for Trinomool Beneficiaries	Fisheries	Enhance knowledge on Galda shrimp farming	26	Trinomool beneficiar ies	Private sector	Pabna	Pabna	11-13/9/01	3 days
21	Field trip for Trinomool Beneficiaries	Fisheries	Enhance knowledge on Galda shrimp farming	14	Trinomool beneficiar ies	Private sector	Khulna	Khulna	8-11 /10/01	4 days
22	Improve writing & Business Communication in English	Training Unit	Enhance knowledge in improved writing & business communiication skills	16	Project staff	Private sector	British Council	Dhaka	25-27/09/01	3 days
23	Mgt. Of Commercial layer farm	Poultry	Transfer technology on modern commercial layer farm management	40	Layer farmers	Private sector	Kona bari	Gazipur	14-18/10/01	5 days
24	Mgt. Of Commercial layer farm	Poultry	Transfer technology on modern commercial layer farm management	40	Layer farmers	Private sector	Kona bari	Gazipur	14-18/10/01	5 days
25	Internship in Agribusiness	F-ASI & Poultry	Acquire parctical knowledge in agribusiness	2	MBA Students	Private sector	ATDP-II Head Office	Dahka	15/9-15/11/01	

SL. No	Course Title	Subsector	Training Objectives	No. of Participants	Participants' Identification	Type of Participants	Venue	Place of Event	Date	Duration
26	Financial Record Keeping	Fisheries	Enhance knowledge in financial record keeping	15	Feed millers	Private sector	DOF Conferance Room	Khulna	20-22/10/01	days
27	Galda shrimp farming (Mymensingh)	Fisheries	Enhance knowledge on galda shrimp farming	35	Association members	Private sector	Phulpur	Mymensingh	11-13/11/01	3 days
28	Field trip for Galda farmers of Mymensingh	Fisheries	Enhance knowledge on galda shrimp farming & business skills	14	Association members	Private sector	Khulna	Khulna	21-23/11/01	4 days
29	TA on Post Harvest Handling	Horticulture	knowledge in shrimp post harvest handling	5	Cold storage	Private sector	Bogra	N/A	Split in different stages	Round the year
30	TA on post harvest Handling	Horticulture	Enhance Knowledge in shrimp post harvest handling	5	Cold storage	Private sector	Gazipur	N/A	Split in different stages	Round the year
31	Pellet feed mill Installation	Poultry	Pellet feed production	2	Feed mill operators	Private sector	Chittagong	Chittagong	16-29/12/01	12 days
32	TA on Product Quality Development	Grain	Develop product quality	40	Flour millers	Private sector	Narayanganj	N/A	Oct to Jan	30 days
33	Singapore Seafood Exhibition	Fisheries	Establish market linkages	6	Shrimp processors from BFFEA	Private sector	Singapore	N/A	26-30 Nov.	5 days
34	TA to conduct Training & advisory services in dairy, Feed & liquid nitrogen plant	Livestock	Enhance knowledge in producing better quality feed	N/A	HADS, USHA, BRAC & Milk Vita	Govt. & private sector	Dhaka	DK, Pabna, Thakurgaon	6/12/01-01/01/02	27 days
35	Examine the potentials for SOQ programme .	Livestock	Examine cattle breeding situation & alternative policies for govt. & private sector	N/A	HADS, USHA, BRAC & Milk Vita	Govt. & private sector		DK, Pabna, Thakurgaon	6/12/01-01/01/02	Done within the above time frame
	Total			639						

Note: Remu = Remuneration

Resource person's remuneration includes only fees & material cost

Others: Include fooding, stationery, venue charge, equipments renting & copping charge etc.

Shade: Assumes that the funds are covered form respective pool

Acronyms used:

ADB	Asian Development Bank	KLN	Khulna
ASI	Agribusiness Support Institution	MOA	Ministry Of Agriculture
BCSA	Bangladesh Cold Storage Association	M & E	Monitoring And Evaluation
BFMEA	Bangladesh Frozen Foods Exporters Association	MBA	Masters of Business Administration
Ctg	Chittagong	NAMMMS	Narayangonj Ata Moyda Mill Malik Somity
DOF	Department of Fisheries	N/A	Not Applicable
EPB	Export Promotion Bureau	N	North
Expt	Expatriate	NF	Non Financial
F	Financial	PM	Person Month
FIQC	Fisheries Quality Control	RDRS	Rangpur Dinajpur Rural Service
HACCP	Hazard Analysis Critical Control Point	SOQ	Seal Of Quality
HADS	Human Agency For Development Services	TA	Technical Assistance
		TTT	Training and Technology Transfer
		US	United States

Prepared on
13/01/02
Small changes were made in
15/1/02

UHMC Upazila Haccp Monitoring Committee

Training Unit