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5. Author(s)
1. Robert V. Enochian
2. Robert E. Olson
3. Chemonics Internationl Consulting Division

6. Contributing Organization(s)

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STRENGTHENING SWAZILAND'S AGRICULTURAL MARKETING/AGRIBUSINESS INFORMATION SYSTEM

Contract No. 645-0229-C-00-9019

Prepared in association with:

United States Agency for International Development

and

The Ministries of Agriculture and Cooperatives;
Commerce, Industry, and Tourism;
Education; and Finance
Mbabane, Swaziland

Prepared by:

Robert V. Enochian
and
Robert E. Olson

Chemonics International Consulting Division
2000 M Street, N.W., Suite 200
Washington, D.C. 20036

June 1990

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Finally, our sincere thanks go to Pierina Manana who prepared several drafts of this report.

LIST OF ACRONYMS

ASC	Agricultural Statistics Committee
CAPM	Commercial Agricultural Production and Marketing Project
CCU	Central Cooperative Union
CSO	Central Statistics Office
CSRET	Cropping Systems Research and Extension Training Project
DAE	Department of Agriculture and Extension
DEPS	Department of Economic Planning and Statistics
DPU	Data Processing Unit
DVS	Department of Veterinary Services
EEC	European Economic Community
EWU	Early Warning Unit
FAO	Food and Agriculture Organization
GOS	Government of Swaziland
HVH	High Value Horticulture
IESC	International Executive Service Corps
IFAD	International Fund for Agricultural Development
ISEC	Information Section
ITC	International Trade Center
MAIC	Marketing/Agribusiness Information Committee
MAU	Marketing Advisory Unit
MCIT	Ministry of Commerce, Industry and Tourism
MEU	Monitoring and Evaluation Unit
MOAC	Ministry of Agriculture and Cooperatives
NAMBOARD	National Agricultural Marketing Board
NFPM	National Fresh Produce Market
NMC	National Maize Corporation
PTA	Preferential Trade Area
RDA	Rural Development Area
RSA	Republic of South Africa
SBS	Swaziland Broadcasting Service
SDB	Swaziland Dairy Board
SMC	Swaziland Milling Company
SMI	Swaziland Meat Industries
SNL	Swazi Nation Land
TDL	Title Deed Land
TPU	Trade Promotion Unit
UNCTAD	United Nations Center for Trade and Development
UNDP	United Nations Development Programme
UNISWA	University of Swaziland
USP	U.S. Peace Corps
VITA	Volunteers in Technical Assistance

SECTION I
INTRODUCTION

This study and plan to strengthen the agricultural marketing/agribusiness information system in Swaziland represents a key component of the first phase of the Commercial Agricultural Production and Marketing (CAPM) project. The purpose of the project's first phase is to establish an environment that will stimulate increases in small-scale commercial agricultural production and expand markets. An increase in the availability and dissemination of marketing/agribusiness information is seen as one of the principal means for achieving this.

Considerable marketing/agribusiness data has been collected by CAPM and some has been analyzed and published. However, much of it is not in a form readily available to users. As a result, the focus in this study and plan is on strengthening the existing system to enable producers and traders, including exporters, to make better marketing decisions. Such information is essential for the proper functioning of markets serving Swazi producers. If this is achieved, the data accumulated over time will serve the needs of policy analysts and planners as well.

The first seven sections of this document make up the study. They examine elements relevant to the existing agricultural marketing/agribusiness information system including the production and marketing system of small-scale farmers, NAMBOARD, and the fresh produce market at Nokwane, the Ministry of Agriculture and Cooperatives, and the Trade Promotion Unit. Section VIII consists of the marketing/agribusiness information plan, and contains recommendations and work plans.

SECTION II
OBJECTIVES OF AN AGRICULTURAL MARKETING/AGRIBUSINESS INFORMATION SYSTEM

A well-functioning agricultural marketing/agribusiness information system requires the regular collection and processing of appropriate information and the timely dissemination of results. The flow of marketing information from generation to user is shown in figure 1 on the next page. However, information from market activities and secondary sources may be obtained by the media and users directly, without going through a formalized system as shown in the figure. It may also be stored temporarily before it is released or disseminated, such as when data is stored in a database or filed in a library. Finally, the figure shows that dissemination can require multiple channels, as when research results are used by the extension service for training farmers.

In its broadest sense, marketing/agribusiness information has three major uses:

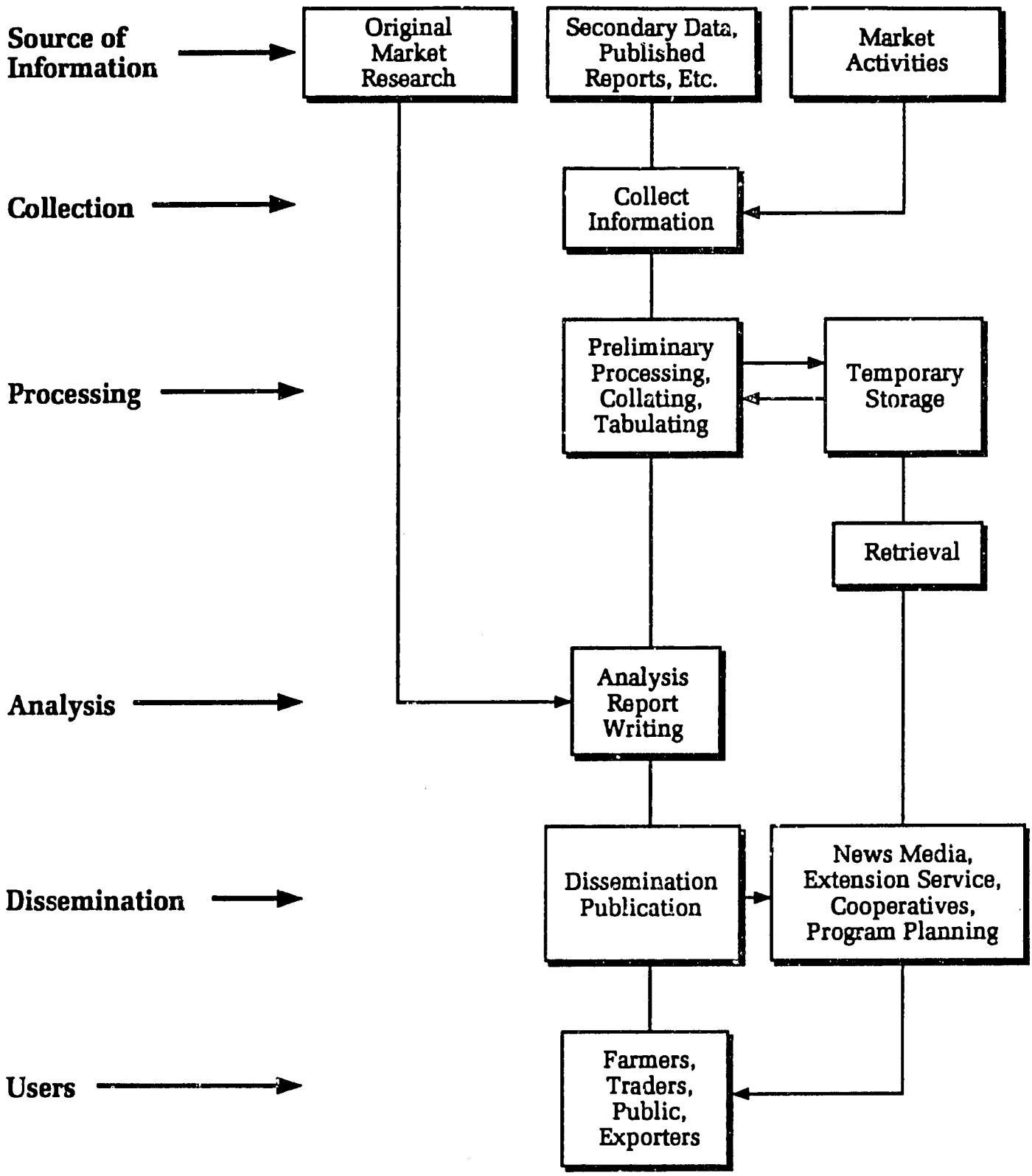
- For sector analysis and macroeconomic planning by government, when used in conjunction with other information
- For production and market planning by commodity producers
- For day-to-day marketing decisions by producers and marketing agents

Developing a plan to strengthen agricultural marketing information must take into account the information that should be included and the primary purpose for which the information is to be used. Only then can a judgment be made as to the kind of information to be developed.

Guidelines for determining which commodities to emphasize can be obtained from the government's General Plan and the overall goals of the CAPM project. The government's National Plan calls for expanded production of fruits, vegetables, chickens, eggs, and milk to replace imports of these products; more effective marketing of livestock; and expanded exports of agricultural products--especially those that benefit small-scale producers. The goal of the CAPM project is to support the development of agribusiness by encouraging and assisting private sector initiatives that are consistent with GOS policies.

The objective of increasing the production of the commodities identified in the National Plan suggests that the primary focus of the agricultural marketing information system

Figure 1: Marketing Information System



should be to provide market intelligence to producers and traders, including exporters, that would enable them to make better marketing decisions. This service would require an adequate system of communication between producers and traders (or other buyers) to allow the latter to be quickly and efficiently informed of product availability at different times and locations.

A comprehensive marketing information system should also provide information on how to assemble, sort, grade, package, store, and transport products to enhance their appeal to buyers and to sustain low postharvest losses. In addition, for products intended for the export market, it should include price information for like products in target markets, special requirements of buyers in these markets, sanitary regulations, customs information, tariffs, quotas, competition from other suppliers, and information on seasonal "windows" when suppliers from other areas are not able to supply these products. Provision of this information would be considered ideal but may be too costly to include initially.

Collected periodically and stored in a computerized database for easy retrieval, some of this information would be useful to producers for production and market planning, and to policy analysts and planners for setting import quotas and conducting economic or policy analyses. These uses, however, must await the collection of data over two to three years in order to identify seasonal relationships between supplies and market prices. Therefore, at this time, these uses will be considered secondary to assisting producers and traders to make short-term decisions on market selection, appropriate preparation of products for market, and price negotiation.

Once it is decided what commodities to include in the agricultural market information system initially, the present system must be studied to determine how it can be improved. Things that should be considered are what information to collect, how frequently, by whom the information should be disseminated, and what provisions to make for special studies of commodity markets and export opportunities.

It should be kept in mind that an appropriate marketing information system is but one of the developments that must take place to help encourage commercial production by small-scale farmers, the primary target for the information system. The next section addresses the production and marketing system of small-scale producers.

SECTION III
THE PRODUCTION AND MARKETING SYSTEM OF SMALL-SCALE FARMERS

Swaziland's principal industry is agriculture, which provides employment to about 70 percent of the population. It is also the largest source of foreign exchange, obtained mainly through exports of sugar, fresh and processed citrus products, canned pineapple, and frozen or chilled beef. Nevertheless, a significant proportion of the country's food needs are met by imports, largely from the Republic of South Africa (RSA).

There are two categories of farmers in Swaziland: those on Swazi Nation Land (SNL) and those on Title Deed Land (TDL). SNL farmers, who make up the majority, are small-scale producers who farm 2 to 3 hectares or less using traditional farming methods. Their main crops are white maize, the staple food of the country, vegetables, commercial crops including cotton and tobacco, and livestock.

TDL farmers can be divided into two groups. One includes farmers who produce on extensive land holdings (estates) that are integrated with packing and processing operations. These farmers produce sugar, citrus fruits (mainly oranges), pineapple, livestock, and other crops. The other group includes farmers who own up to 50 hectares of land and produce crops and livestock products for the commercial market using modern technology. The latter group dominates the commercial production of some crops such as potatoes even though SNL farmers produce them as well.

Most small-scale farmers are widely scattered and located in areas that are relatively far from significant markets. Most have limited access to roads, no means of transporting products to market, and limited access to a working telephone. Furthermore, the system of land tenure severely restricts the unit size that would be economically viable for commercial production of many crops on these farms, especially in an unprotected market. Because of these factors and because many of the people who live in these farm households have more profitable nonfarm employment opportunities, production labor is mostly provided by older men, women, and children. As a result, these farmers produce largely for their own needs.

Without donor and government assistance, production for the commercial market by most of these farms would probably not be an economic alternative. Recognition of this has led to the implementation of many donor-supported programs such as rural area development programs, development of irrigation schemes, the provision of extension services, and training for improvement of production practices. The government also has sponsored programs

for low-cost credit, subsidized tractor services and transportation, and levies to restrict imports of competing products.

When there are surpluses, small-scale farmers rely on market traders who resell their produce mostly in one of the major municipal markets. When there are no restrictions on imports, these traders prefer to buy from farmers in the RSA with whom they can communicate by telephone and be assured of a full truck-load of produce at a single location, frequently at lower prices.

Nevertheless, traders are the most important outlet for most small-scale farmers. However, the small-scale producer often sells to the first trader who comes along because it is uncertain when, or if, another trader will appear. Furthermore, farmers usually have no information on what their produce is selling for in the major Swaziland or RSA markets, putting them in an unfavorable bargaining position.

The government's goal to reduce Swaziland's dependence on food imports by helping SNL farmers increase production and exports is constrained by the lack of timely marketing information available to them. Such information could provide farmers with guidelines on which commodities to produce; how they should be assembled, sorted, packaged, stored, and transported; when the demand for them is greatest; and what constitutes a fair price.

To help small-scale farmers with marketing and to ensure a secure outlet for their produce, the GOS established the National Agricultural Marketing Board (NAMBOARD) in 1985, giving it broad regulatory, facilitative, and commercial powers. NAMBOARD is discussed in the next section.

SECTION IV
NAMBOARD AND THE NOKWANE MARKET

NAMBOARD was created by the government in 1985 to promote increased local production of so-called "scheduled" agricultural products. These are products on which imports can be controlled by issuance of import permits and assessment of import levies. If NAMBOARD believes local production is adequate for satisfying local demand it can, and sometime does, temporarily deny import permits for specific scheduled products. This is done on the basis of personal judgments of price behavior and local production without the support of formal analysis.

The board of directors of NAMBOARD can recommend products for scheduling and specific import levies to the Minister of Agriculture, who appoints board members and is authorized to approve or disapprove these recommendations. Once approved, NAMBOARD is authorized to issue permits and collect import levies, the use of which is determined by the board within the guidelines specified by the act that created NAMBOARD.

Scheduled products currently include maize, maize products (including animal feeds), rice, and fresh fruits and vegetable. Poultry and eggs are being considered for inclusion in the list.

The current levies are 3 percent on maize and rice, 5 percent on maize products (excluding animal feeds which currently are not levied), and 6.75 percent on fresh fruits and vegetables (recently lowered from 7.5 percent). The levy paid by an importer of scheduled products is based on the quantity and value of the products declared by the importer at the border. Reportedly, these quantities and values are frequently understated.

Importers of scheduled products holding a valid trading license must register with NAMBOARD to receive an import permit. Trading licenses are issued by the regional administrative officers in each of the four regions by authority of the Ministry of Commerce, Industry and Tourism (MCIT). The annual license fee is E30 per year, and allows a trader to sell in one of the four regions of Swaziland: Hhohho, which includes Mbabane and Pigg's Peak; Manzini, which includes Mahlanya; Lubombo, which includes Siteki; and Shiselweni, which includes Nhlangano. To sell in another region, a trader must apply for and receive a license for that region. Although this requirement would tend to restrict movement of produce among regions when there are price differentials, it is not strictly enforced.

Import permits are issued for one month and limit the kind and amount of produce that can be imported. New permits may be

granted only upon surrender of expired permits, which contain information on official customs declaration of kind and quantity of produce imported.

Concurrent with the creation of NAMBOARD, the Swaziland National Fresh Produce Wholesale Market was built at Nokwane with financial assistance from the International Fund for Agricultural Development (IFAD). The goal was to provide a guaranteed outlet for locally produced fruits and vegetables and thus promote their local production, especially by small-scale farmers. To complement the market, IFAD also supported the rehabilitation and upgrading of 12 irrigation schemes throughout the country for vegetable production. With IFAD support, packing sheds have been built at each scheme to facilitate vegetable assembly and packing. The sheds, however, remain largely unused and commercial production from the schemes has not reached full potential. Additional pack sheds of a different design are being planned for the Vuvulane project in the Lubombo Region and for an additional scheme that IFAD plans to rehabilitate. When complete, there will be a total of 14 schemes with packing sheds.

NAMBOARD began operations in the Nokwane market in May 1987. It was to become an independent entity in 1990 but there is much operational and financial overlap. Currently, three wholesale agents are authorized to operate in the market. These agents buy fresh produce on their own account in the RSA and receive fresh produce from local producers on a consignment basis. All produce sold through the market is subject to a 5 percent fee that goes to the market. Local producers are also charged 5 to 7.5 percent commission for selling their produce. This arrangement tends to favor the selling of produce owned by the agents over produce consigned to them by local producers. In addition, most local producers do not like the consignment system because of uncertainty on how much payment they will receive and the delay--often two or more weeks--in receiving payments.

Furthermore, the produce imported by agents is not subject to the import levy. This concession was originally granted to encourage the use of the Nokwane market as an assembly and distribution point for imported produce. Its continuation, however, has angered other importers who claim it is discriminatory. This preferential treatment of the Nokwane agents also tends to inhibit them from developing local sources for produce.

Incentives to induce smallholders to use the Nokwane market have included: appointing an information officer to provide limited information on cleaning, sorting, and packing methods for produce; hiring a field person to provide better communication between producers and the market; and provision of subsidized transport to haul produce to the market. So far, these measures have failed to encourage a significant flow of local produce through the Nokwane market.

A. Plans To Encourage Use of the Nokwane Market

IFAD specialists are working with the Nokwane market and NAMBOARD to find additional ways to encourage local producers and traders to use the market. These include:

1. Establish a better means of communication between producers and traders, especially between the Nokwane market and the IFAD irrigation schemes, by installing a two-way radio system at each packing shed and at the Nokwane market. Since there is no electricity at most of the schemes, the power source for operating the radios at these sites will be photovoltaic solar panels. Radios require a great deal of maintenance but were chosen over telephones because of the time required to obtain service, the unreliability of service in Swaziland, the cost, and potential employee abuse.

2. Have agents at Nokwane purchase produce outright from the schemes and from other producers rather than using the consignment system.

3. Fund farmer associations in the schemes, provide group credit, and encourage group action for marketing such as produce assembly, cleaning, and sorting.

4. Provide visual aids to farmers to encourage better produce cleaning, sorting, and packing.

5. Post selling prices for produce sold through Nokwane and other markets at the packing sheds in the schemes and telephone this information to extension workers near the schemes, who will then post the information on notice boards provided by the IFAD project.

In December 1988, a Horticultural Campaign Committee was established consisting of representatives from MOAC, NAMBOARD, Nokwane market agents, and the Taiwan Mission. Its purpose was to develop ways to improve market access for locally grown produce, especially the flow through the Nokwane market. Some of the ideas proposed by this committee and some of the measures tried were similar to those listed above. They included recruiting farmers to time their plantings to correspond with favorable market timing, providing low-cost transport services, and providing market information to farmers. Although this committee continues to function, there has been no follow-up to ensure these measures continued. As a result, there have been no continuing significant gains.

The actions proposed in the current IFAD plans seem likely to encourage more commercial production by SNL farmers. However, unless they are well coordinated, accompanied by training, and monitored until they are well established, it is doubtful the measures will result in long-lasting gains.

B. Marketing Information Available from the Nokwane Market

Records are kept of all produce sold through the Nokwane market. For every product delivered to the market a receipt is prepared indicating the date, who it was received from, the receiver, the quantity received, and whether it was local or imported. For every sale an invoice is prepared that shows the quantity, price, and consignment number. Copies go to the accounts section and to the agents who receive payment for produce sold.

A copy of each sales invoice also goes to the Information Section of NAMBOARD. This section was set up with technical and financial assistance from the IFAD project. It consists of the following personnel:

- 1 supervisor-data analyst who manages and programs the computer system
- 2 computer operators
- 1 information specialist who provides market information to farmers and the press and prepares NAMBOARD's annual report

The Information Section produces a daily report of the quantity of each product sold through the market (also separately for RSA and Swazi produce), the maximum and minimum sales prices and the weighted average price. Information for selected products is faxed to the Times of Swaziland (a national daily newspaper) for daily publication.

In addition to NAMBOARD, several units within MOAC have or could have a role in an agricultural marketing information system. These are discussed in the following section.

SECTION V
MOAC UNITS WITH A CURRENT OR POTENTIAL ROLE IN A MARKETING INFORMATION SYSTEM

A. Marketing Advisory Unit

The principal organization in the government that collects, analyzes, and disseminates agricultural marketing information is the Marketing Advisory Unit (MAU) located in the Ministry of Agriculture and Cooperatives. This unit consists of 7 persons as follows:

- o 1 senior marketing officer (economist), head of unit
- o 1 marketing officer
- o 1 market information specialist, IFAD
- o 1 market information volunteer, UNDP
- o 2 market reporters
- o 1 secretary

Daily information from Nokwane compiled on a weekly and monthly basis is provided to the MAU with returned import permits, which contain information on prices and quantities of scheduled products imported from the RSA.

The MAU also compiles information from NAMBOARD, other units within MOAC, other commodity boards, agricultural publications, and reports including some from the RSA. It also collects information on prices and quantities of produce sold in other Swaziland markets.

For the past year--after a three-year hiatus--the MAU has collected prices and quantities of fruits and vegetables sold by traders in the Mbabane municipal market. The quantities sold are estimated by recording the difference between the quantities of each product arriving in the market and the quantities the traders leave with each day. This is done five days per week. Recently two market reporters were added to the staff of the MAU so this service could be expanded to the Manzini market, which currently is covered four days per week; the Mahlanya market, two days; and the Nhlangano market, one day.

The MAU also receives information on sales prices of livestock sold by the three government cattle fattening farms and rural sales yards. These data are collected by the Department of Veterinary Services and compiled and processed by the Data Processing Unit of that department. Information on local procurement and total sales of milk through the Swaziland Dairy Board (SDB) plant--including imports--is received from the senior dairy specialist for MOAC.

This information is used to prepare and publish the following reports for free distribution upon request.

1. Periodic MAU Reports

a. Monthly Fresh Produce Market Information Bulletin

Contains wholesale fruit and vegetable price information from the Nokwane and Mbabane markets and weekly arrivals and sales of fruit and vegetables in the Mbabane wholesale market, both total and imports. There are plans to expand this bulletin to include similar information from the Manzini, Mahlanya, and Nhlangano markets.

b. Quarterly Livestock Market Information Bulletin

Contains monthly sales and live weight prices of livestock by grade and class at government fattening ranches and rural sales yards.

c. Annual Review of Livestock Data and Market Trends

Contains monthly and annual information on livestock sales, prices at all sales yards and fattening ranches as well as trends for the past several years. It also contains monthly and annual prices and quantities of milk procured by SDB from local producers as well as the monthly and annual volume of milk production by the SDB processing plant. Production figures include reconstituted milk powder imported from the Republic of South Africa.

d. AGRIVIEW

A quarterly publication that contains information on price trends and quantities for agricultural commodities, articles on commodity markets, feasibility studies for crops and products, and general agricultural news. The only periodical in Swaziland dealing with agricultural issues, the report goes to over 500 government officials, banks, agribusiness firms, and others. It is currently prepared by a UNDP information specialist whose term of employment ends in about two months. To date, no provisions have been made to continue this report.

2. Unpublished MAU Reports

The following reports are prepared by the MAU for internal use by NAMBOARD for policy analysis and for making recommendations on levies and other matters. Some of the information from these reports is used by NAMBOARD to prepare its annual report. The reports are also distributed to other agencies within MOAC.

a. Imports of Scheduled Products under NAMBOARD

An annual report is prepared from import permits returned to NAMBOARD by importers and traders. The report includes information on quantities and values of imports of all scheduled products--fruits, vegetables, maize (white and yellow), maize meal, rice, and animal feeds. Imports of fruits and vegetables by Nokwane agents and by independent traders (hawkers) are shown separately. By comparing the prices of imports declared by independent traders and Nokwane agents, the report also analyzes the reported under-declaration of import value and its implications in terms of lost revenue to NAMBOARD and threats to local producers.

In addition, the report covers animal feed, which prior to 1988 was a scheduled product subject to a 5 percent levy. At the end of 1988 the levy was abolished because it was decided that it adversely affected the cost of feeds and thus the production of broilers and eggs, which the GOS is attempting to encourage.

b. Business Results of the Swaziland Fresh Produce Market

An annual report is prepared from daily reports of the Nokwane market. It contains the following information:

- Monthly variation in sales in value and in quantity sold by each of the three agents
- Monthly throughput in metric tons of fruits and vegetables separately and in total
- Annual throughput of imported and local produce by product category
- Quantities of local produce delivered to the market from IFAD schemes, Vuvulane, TDL farms, and other locations by product category
- Quantities of products that spoiled as percentages of total throughput and of local produce
- Quantity and value of exports from the Nokwane market
- Price and sales trends for the past two years for the six major products sold through the Nokwane market--potatoes, onions, cabbages, tomatoes, apples, and bananas
- A brief discussion of the small and declining percentage of local products going through the Nokwane market, reasons for it, and actions that could attract more produce to the market

3. Plans for Disseminating Wholesale Fruit and Vegetable Prices

Except for the reports described above and the daily newspaper reports of prices received by agents in the Nokwane market, marketing information is not disseminated in a timely and systematic way.

Timeliness is especially important for highly perishable products such as fresh fruits and vegetables. Therefore, monthly, quarterly, and annual release of produce prices would be of value to a producer mainly for comparing prices received from buyers with the general performance of market prices. Analyzed over time, this information could help identify periods of favorable market opportunity and thus guide production planning. The information is of limited value, however, for making day-to-day marketing decisions.

Recognizing this, MAU is seeking approval from NAMBOARD and MOAC to post the prices collected in the regional markets on a regular basis on notice boards provided by IFAD. This will be done by market reporters each day they visit the markets and extension workers at the IFAD packing sheds. MAU will also release prices to newspaper and radio station.

If the quality and condition of the products in the different markets is not comparable, the reasons must be explained or identified by a grading system that can be easily understood and consistently applied by all parties. Graded RSA produce also produced in Swaziland are potatoes, onions, tomatoes, and bananas. Currently, Swaziland has no grades or standards but has developed provisional ones for potatoes and onions. Work is underway to develop them for tomatoes and bananas, and NAMBOARD is considering using these in reporting prices.

B. Information Section

The Information Section (ISEC) is responsible for preparing and/or editing and releasing MOAC reports, training materials, and news releases. Most of its information is prepared in the form of leaflets on subjects such as obtaining credit, banana production, and weed control. These leaflets are intended primarily for extension workers, individual farmers, and farmer groups.

The section is also beginning to develop videotapes for use in workshops and training programs. Video cameras, monitors, and editing equipment have recently been acquired for this purpose.

ISEC also prepares news releases for the Times of Swaziland and the Observer, Swaziland's two daily newspapers. Although MOAC is allotted a full page in each issue of the SiSwati edition

of the Times (published every day except Sunday), ISEC cannot provide enough agricultural information to fill the space. The Times is eager to receive agricultural marketing and agribusiness information for both the Siswati and English editions.

ISEC also prepares weekly half-hour radio programs in Siswati for the Swaziland Broadcasting Service (SBS). The head of ISEC believes that five-minute programs broadcast five or six times per week would be more effective. However, SBS allocates free air time to several public interest organizations and any modification to the present allocation would have to be negotiated between the director of the SBS and a high-level MOAC representative.

Since many small-scale farmers do not receive daily newspapers, the value of reporting market information there may not be as great as short, regular radio broadcasts (90 percent of farmers have radios). If the newspaper reports are regular, however, the information will be read by some farmers and disseminated to others by word-of-mouth.

Preparation of a report, news release, or training leaflet can be initiated by the Information Section or any MOAC unit. At present little to no information on agricultural marketing is included. ISEC has a shortage of skilled staff and must rely on MOAC subject matter specialists for preparing its products.

C. Extension Service

The Extension Service employs 140 field extension workers throughout Swaziland to provide information and training to farmers on appropriate production practices.

With appropriate training these workers would be an appropriate conduit for information on trends in market prices, handling and marketing practices, and production planning that would help farmers get better prices for their produce. Another approach to disseminating information might be to have extension marketing specialists in each region work directly with farmers and farm groups on marketing issues and problems.

D. Department of Cooperatives

This department promotes and assists in the formation of cooperatives and provides technical assistance to cooperatives to help solve their production, management, and marketing problems. The department has a marketing officer in each of the four MOAC regional offices who reports to the senior cooperative officer of the region.

The marketing officer works with farmer associations and individuals farmers, including those that produce crops and

livestock, to help them find markets for their produce, negotiate with buyers to get the best price, and confirm the agreed-upon price.

One marketing officer reported that he lacks the ability to communicate effectively with most of the cooperatives and farmer associations because of a lack of telephone service and the lack of a vehicle. He said this is a common problem for all marketing officers. He also reported that because of the consignment buying system of the Nokwane market agents, farmers tend to send their lowest-quality produce there and sell the better quality to traders for cash.

These officers could be resources for informing farmers of market price trends and other marketing information as well as assisting with training programs to improve product handling and marketing practices.

E. Central Cooperative Union

Although the Central Cooperative Union (CCU) is not a MOAC agency, it could have a role in providing marketing information to farmers. CCU sells farm inputs (fertilizer, pesticides, seeds, etc.) to farmers and also purchases and assembles maize from small-scale farmers for transport and resale to the National Maize Corporation at the gazetted price, or, in the informal market. It conducts its operations through 22 depots in Rural Development Areas (RDAs) throughout Swaziland and through the Manzini CCU supply store. Farmers come to these depots and to the Manzini store to purchase input supplies; they therefore would be good locations for disseminating market prices and other information. The CCU marketing manager and assistant marketing manager have indicated interest in disseminating timely market prices and other marketing information.

F. The Monitoring and Evaluation Unit and the Agricultural Statistics Committee

The Monitoring and Evaluation Unit (MEU) is the principal agency in MOAC that collects, processes, and publishes data on crop production, farm income and expenditures, rural demographics, etc. Field data collection is carried out by 22 enumerators in a sample of about 660 households in the RDAs.

In July 1988 the MEU organized a provisional committee of government producers and users of agricultural statistics to review and recommend ways to improve the agricultural statistical information system. The committee was organized in response to concern that although a wide range of statistics was being collected, the information was fragmented, untimely, and unreliable. Furthermore, few results had been published since 1984.

These problems were seen to have been caused by several factors including lack of a perceived need for timely and reliable information by planners and program managers, inadequately maintained data processing capacity, and low skill levels of data processing personnel. Also, skilled personnel were underutilized because of overlapping and fragmented responsibilities and lack of coordination among departments.

After recommending measures to restructure and strengthen the agricultural statistical information system, the committee was made official and named the Agricultural Statistics Committee (ASC). It is chaired by the head of MEU and has additional representation from MEU, MAU, the Early Warning Unit (EWU), the Malkerns Research Station, the DPU of the Department of Veterinary Services, the Department of Cooperatives, the Extension Service, and the Central Statistical Office in the Department of Economic Planning and Statistics (DEPS).

The committee coordinates, initiates, and monitors data collection and processing in an effort to achieve a more efficient agricultural statistics information system. It advises MOAC directors, DEPS, and the government statistician on agricultural statistical matters. The committee meets once a month and has made progress toward rationalization of the system. Its first issue of the quarterly Agricultural Statistics Bulletin will be published in July 1990.

G. Review, Clearance, and Publication of Marketing/Agribusiness Information in MOAC

1. Release of Data by the Originating Agency

Some of the data that can be used in a marketing information system are collected for special studies, census or other general purposes, or in connection with a regulatory or service activity. In any case, such data must be released by the collecting agency before it can be processed, stored, analyzed, and prepared for publication for an information service. Consequently, an information service must depend on cooperation among a number of primary data originating sources as well as collect information from secondary, i.e., published, sources.

2. Technical Review

Some data, ıch as market prices, need to be released directly by originating sources without delay. Once the validity of the methods used to collect the data is established, extensive technical review is not necessary. Other information needs technical review and in some cases policy clearance before publication.

While reports prepared by MOAC usually receive review before publication, the process does not seem to be clearly established, leading to delayed reports or invalid analyses.

3. Commitment to Publish

The strategy of CAPM relies greatly on the response of farmers and agribusinesses to increase the production and marketing of agricultural products. The success of this strategy depends on dissemination of the information being collected, processed, stored, and analyzed in the information system. A continuing commitment from senior officials to routinely publish the information developed is essential.

4. Role of a Proposed Agricultural Marketing/Agribusiness Information Committee

The process of review and publication of marketing/agribusiness information could be facilitated with technical and policy review with the establishment of a Marketing/Agribusiness Information Committee (MAIC) in MOAC. This committee, would be an operational rather than a coordinating committee, meeting on call of the chair to process information for release rather than at preset times. As the system develops, a schedule specific for each report would be set in advance for handling review and release.

The composition of the committee would vary depending on the topic under review. The only continuing officers assigned to the committee would be a supervising director (probably the director of agriculture and extension), a permanent chair (a senior-level marketing/agribusiness specialist), and a senior journalist with marketing/agribusiness orientation and training. The other members of the committee would be MOAC specialists from relevant departments.

After circulating newly developed information to relevant technical specialists, the committee would meet to discuss the outcome of the reviews. Acting on the advice of the committee, the chair would recommend the report for release and, if necessary, seek the approval of the supervising director who would be responsible for releasing the information.

The MAIC would play a facilitating role for release of information, formalizing and streamlining a review process that now occurs on an informal basis. Routine market price and quantity information would continue to be released by MAU and the NFPM. Research reports and extension bulletins would continue to follow established review and publication procedures.

SECTION VI
TRADE PROMOTION UNIT

The Trade Promotion Unit (TPU) in the Ministry of Commerce, Industry and Tourism (MCIT) is the principal government agency that collects, processes, and disseminates marketing/ agribusiness information to producers and businesses interested in developing export markets for Swaziland products, including those of agricultural origin. This unit was set up in early 1989 with assistance from the International Trade Center (ITC) of the United Nations Center for Trade and Development and the European Economic Community (EEC). It consists of 5 persons as follows:

- o 1 senior export development officer (head of unit)
- o 2 export development officers
- o 1 trade information officer (approved but not yet employed)
- o 1 librarian

There are also two advisors working with this group: a commonwealth secretariat trade information specialist and an EEC export market development specialist. Until recently an ITC marketing specialist worked with this unit but is now working for the Ministry of Finance on customs union trade negotiations.

This unit has two major functions. One is to collect, review, file, make available, and disseminate export marketing information. The other is to conduct research and actively promote the development of export markets for Swaziland products.

The marketing information function is carried out by collecting market information and research reports from European, North American, and Preferential Trade Area (PTA) countries (18 Eastern and Southern African countries). The type of information collected is based on a survey of Swaziland exporters and other potential users including banks, the Chamber of Commerce, and government agencies.

The information collected includes prices in different markets, countries supplying these markets, channels of distribution, packaging and other requirements of importers, commodity reports, and information on trade negotiations, especially on products for which Swaziland may be a potential exporter.

Several methods of disseminating this information have been developed or are being developed. These include the following:

1. The quarterly magazine Swaziland Trade News, first published in January 1990. The second issue has been delayed but will be in print soon. A third issue is nearing completion. The

magazine contains information on export market opportunities including prices in European markets of products of interest to Swaziland; export promotion activities; world export developments; and licensing, permit, and documentation requirements for exports. The magazine is distributed free to all Swaziland exporters, the Chamber of Commerce, all embassies to Swaziland, (including those in Harare, Maputo, Pretoria, and Nairobi), import promotion offices worldwide, and Swaziland missions in the EEC, the United States, Japan, Kenya, Mozambique, the United Kingdom, and the RSA.

2. Country and product profiles, 10 to 12 pages long. These are extracted from documents such as Great Britain's publications on foreign trade. A profile for cut flowers in European markets is being prepared.

3. A computerized database to respond to questions on export opportunities in the 18 PTA countries of Eastern and Southern Africa. This database includes information of trade flows (exports and imports) trader profiles including products of interest, quantities required, reliability of the traders, etc., and trade control measures such as policies on imports.

Two additional databases pertaining to the PTA countries are a bibliography on trade information sources and a database on tenders, which will provide information on the types and quantities of products being offered by country. The objective is to promote tendering of products for export.

4. Small seminars and workshops for exporters to exchange information ranging from export infrastructure and institutions to specific information on packaging, documentation requirements, quality control measures, etc. These seminars and workshops will draw on resource persons from local organizations as well as international organizations such as C.O.L.E.A.C.P., an EEC-funded organization that promotes exports of tropical, off-season vegetables, fruits, flowers, ornamental plants, and spices to European countries from Africa, the Caribbean Region, and the Pacific Basin.

5. A Trade Information Library, containing marketing reports, wholesale price reports, trade journals, customs regulations, special commodity studies, and export and import data by country of origin and destination. For use by the TPU, exporters, and the public, the library also files the weekly ITC market price reports of fruit and vegetable sales in EEC markets. This report is received each week by telex and photocopied for distribution to NAMBOARD. The library also receives the ITC monthly market news report, which summarizes prices in the weekly reports and also excerpts articles from European journals such as Fresh Produce Journal, International Fruit World, and Eurofruit.

The library has a full-time librarian and is open during government office hours. The marketing information advisor is training the librarian to maintain the computerized databases but is concerned there will be no funds available to continue purchasing the reports the TPU now receives when he leaves.

The market development function of the TPU is carried out by conducting market research on products and in markets for which Swaziland has export potential; by getting Swaziland exporters to participate in trade shows; by organizing trade missions to countries that are potential market outlets for Swazi products; and by putting Swazi exporters in contact with importers in European and other markets.

SECTION VII
CONCLUSIONS AND RECOMMENDATIONS OF THE STUDY

A. Conclusions

A cost-effective marketing/agribusiness information system needs to build on existing activities conducted by MOAC, MCIT, and NAMBOARD. MOAC has taken steps to satisfy the requirements for a well-functioning system but not all the requirements, especially the dissemination of information, are being met. The reasons for this include insufficient personnel; lack of an effective and efficient means of communicating information to users; and, perhaps most importantly, lack of a perceived need for this information by policy makers.

The recommendations that follow address the need to replace or enhace analytical capacity in the marketing/agribusiness information system. Three new positions are proposed, better use of the media is recommended, and commodities to consider for price reporting are reviewed. The section ends with a suggested role for CAPM.

B. Recommendations

1. Process and Disseminate Wholesale Prices for Fruits and Vegetables

An example of information that is collected, processed, stored, and analyzed but for which public dissemination is practically nonexistent is wholesale market prices of fresh fruits and vegetables. Plans have been made by MAU to prepare and disseminate a report integrating the wholesale prices from the Nokwane market and the selling prices of traders in the four regional markets, but MOAC and NAMBOARD seem reluctant to give approval, especially if comparisons are made between prices at the Nokwane market and others.

Prices in the Nokwane market and those in four regional markets should be compared. If no significant differences exist, or if differences can be satisfactorily explained, MAU should seek approval from MOAC and NAMBOARD to disseminate the report as planned.

The report should be prepared and disseminated daily, if possible, or at least two times per week. The responsibility for preparing the report and disseminating the results should be that of the MAU marketing information specialist (currently an IFAD advisor who is training a marketing officer in the MAU to take over this function). He should be assisted in this function by a statistical clerk/typist.

Each day the information officer at NAMBOARD should fax the wholesale selling prices of the Nokwane market to the Information Section of MOAC. The information would be given to the marketing information specialist to prepare the daily report. The clerk would fax the report to the information officer at NAMBOARD for posting in the Nokwane market and to the Times of Swaziland for publishing in the English and SiSwati editions. A copy of the report should be provided to the agricultural officer (information) of MOAC for incorporation in MOAC's weekly SBS radio broadcast. Approval should also be sought to have the report published in the Observer (Swaziland's other daily newspaper). The report should also be given to the market reporters to distribute to traders in the regional markets.

The clerk should telephone the information to the five extension workers who cover the 12 IFAD irrigation sites with pack sheds and eventually to the Vuvulane site and other irrigation sites planned for rehabilitation. The information will be posted on notice boards placed at the pack sheds to be built in these locations. If, or when, a two-way radio system is installed at these sites, radios should be located in the MAU offices for price dissemination.

Approval and cooperation should be sought to post prices in the CCU supply store in Manzini, which has a telephone, and at CCU depots that are near fruit and vegetable production areas. These reports should also be supplied to the cooperative marketing officers in each of the four regions, who can be reached by telephone, for posting in appropriate locations and for informing fruit and vegetable farmers with whom they come in contact.

There should be a campaign to inform users of the significance of the information and of any differences in prices among regions and between the Nokwane market and the regional markets. The CAPM long-term marketing specialist working with MOAC should assist the MAU in preparing the information to be included in this campaign and determining how it should be disseminated. The extension service should have a role in disseminating this information.

Finally, MAU should seek assurance from MEU that each issue of the new Quarterly Agricultural Statistics Bulletin will include information on fruit and vegetable market prices and imports trends.

2. Add a Horticultural Crops Marketing Specialist to the MAU

Information provided to farmers on low-cost means of minimizing postharvest losses and enhancing the appeal of products is limited and reaches only a small percentage of farmers. A possible exception to this is the work being done by

the Horticultural Campaign Committee and the Taiwan Mission. Their work, however, reaches only a small percentage of small-scale vegetable farmers and there has been little follow-up to see if the farmers it reaches understand its importance or to ensure that the practices become well established.

An expansion of the compilation, processing, and analysis of this information, as it applies to Swaziland conditions, would require a horticultural crops marketing specialist with high-level skills in biological and physical or engineering aspects of marketing.

The horticultural crops marketing specialist should research these conditions and by collaborating with the Information Section of MOAC, prepare marketing information bulletins and videotapes on crops for domestic and/or export markets. These would be used as training materials for extension workers, cooperative market officers, and exporters.

The specialist would work with the Extension Service, the Department of Cooperatives, NAMBOARD, and the Trade Promotion Unit to exchange information and remain informed of seminars and workshops in which he would be expected to serve as a resource person. He would also monitor the training programs of the Extension Service to ensure that information on appropriate marketing practices is continually included.

3. Add an Agricultural Marketing Economist to the MAU

A major concern is whether the services provided by the TPU will continue when the terms of the two advisors working there end. These advisors are providing on-the-job training for their Swazi counterparts in the collection, preliminary processing, storage, and dissemination of export marketing information.

Even if this work can continue with the present Swazi staff, the capability of providing rigorous economic analyses to identify which crops Swaziland should supply to new export markets is lacking. An agricultural marketing economist with experience in conducting microeconomic analyses should be added to the Marketing Advisory Unit of MOAC for this purpose.

The economist would first identify agricultural crops with significant export market potential then establish databases of wholesale market prices for those crops in European and Southern African markets, going back a couple of years. Three sources for this information, available from the TPU and NAMBOARD, are the ITC weekly and monthly market news reports, the C.O.L.E.A.C.P. price reports of sales in European markets, and the weekly RSA wholesale price report. Time series of prices for each commodity with export potential would be prepared to identify the months in which prices tend to peak. This information could then be

provided by extension workers to farmers to help them schedule harvest times that coincide with peak market periods.

The marketing economist should also conduct and/or compile analyses of production and marketing costs, including costs of sorting, packaging, transportation, documentation, and selling to meet the requirements of targeted markets. These costs could then be compared with the reference prices identified by the wholesale price databases to ascertain which products have the greatest potential and in which markets and times.

The results of these analyses should be prepared with assistance from the Information Section of MOAC and disseminated to exporters, importers, and farmers. Two channels for this dissemination should be AGRIVIEW and Swaziland Trade News.

The results should be presented in a format that can be used by extension workers and by the TPU in seminars and workshops. The marketing economist should maintain close liaison with the Extension Service and the TPU and be available as a resource person at such events.

4. Make Better Use of the Private Sector News Media to Disseminate Agricultural Marketing Information

The Times of Swaziland recently reintroduced the regular and frequent publication of fresh produce prices sold through the Nokwane market, and the business editor is eager to publish more agricultural marketing information. The Times also has agreed to devote a full page to agriculture in the SiSwati edition, which is published six days a week, but the Information Section of MOAC is frequently unable to assemble enough information to fill this page. The MAU should work with the Information Section to ensure that the daily fresh produce price report is included here.

A goal should be set by MAU and the TPU to prepare at least one short article a week on an agricultural marketing issue relating to domestic and export markets for publication in both the English and SiSwati issues of the Times. Articles could range from topics as diverse as how to handle and store eggs to retain freshness to the European market for roses. Other subjects could include prices and conditions in RSA markets for commodities that are abundant in Swaziland during certain seasons, why Swaziland exports and imports potatoes to and from the RSA, etc. These articles could be prepared by MAU and TPU staff and submitted through MOAC's Information Service.

Swaziland's other daily newspaper, the Observer, should be asked by MAU and TPU to publish the daily fresh produce price report and other agricultural marketing information supplied by the MAU and TPU.

The weekly radio program in SiSwati should broadcast this information as well. MAU should approach ISEC with a request. The possibility of shorter, more frequent broadcasts on market prices should be explored with the director of the SBS. This should be initiated by CAPM. If approvals are forthcoming, MAU must work with ISEC to produce the material for these programs.

5. Commodities to Consider for Price Reporting

A serious question for a small country like Swaziland is how much marketing information is needed and for which commodities. An answer can be found in the GOS's goal to become self-sufficient in food. This implies that attention must be given to maize, the staple food of the country and an important crop for SNL farmers, whose welfare is also of major concern to the government. Because other goals are to increase production of chickens, eggs, and milk and to improve the marketing of cattle, livestock is an important consideration.

Surely more and better information on market prices for these commodities would be useful, but for different reasons. The price of maize, for example, is gazetted and all NMC purchases are at this price. There is also a large "informal" market for maize in which the price is higher than the gazetted price but lower than retail. If the informal price were known in different parts of the country, arbitrage between areas could be more efficient. On the other hand, because the country is small and maize is grown by most SNL farmers, processing the information through a formal information system may not be necessary.

For milk, a minimum price to be paid the producer is set twice a year by the minister of MOAC based on recommendations of the Swaziland Dairy Board (SDB). A maximum price to be paid the processor and a maximum retail price are also set. Although all milk is supposed to be sold through the SDB, there is an informal, albeit illegal, market for milk sold at prices other than the minimum producer price. It is questionable whether a price reporting system for sales in this market could be initiated.

Some egg prices are reported to the Times of Swaziland by the Nokwane market, but there is no grade designation for the prices reported. Eggs imported from the RSA are said to be "surplus" eggs that come out of storage and are not as fresh as local eggs. If reporting of egg prices is expanded, this allegation should be investigated before it is decided what prices should be reported.

The only prices reported for cattle are for those sold at auction at one of the three government fattening farms or rural sales yards. These sales represent a very small portion of the

total, most of which results from private sales between producers and butchers or abattoir operators. Prices at government auctions may or may not be representative of most, but they provide a reference to sellers and buyers. Since most private sales are at diptanks where farmers bring their cattle for disease control treatment, an informal system to disseminate prices for private cattle sales may adequate.

There is no price reporting of live chicken sales or livestock feeds. These are high-priority commodities to include in an expanded list because of the interest by small-scale farmers in the poultry enterprise and the potential for developing a feed industry in Swaziland. Moreover, poultry products may be added to the list of scheduled products. This would generate new data on the poultry exports and imports.

Before new commodity price collecting and reporting is initiated, the system being developed for fresh fruits and vegetables should be perfected. Furthermore, if and when a capability exists to collect and report selling prices of additional commodities, a survey should be undertaken to determine the need for the information, how it would benefit buyers and sellers, what other beneficial and/or unintended consequences may result, how the data can be obtained efficiently, and how and by whom it would be processed and disseminated. If it is seen to be a useful service, the plan and justification for it should be presented to the Agricultural Statistics Committee for review, whose concurrence should assist in getting approval for the plan's implementation.

C. A Role for CAPM

The general role for CAPM in strengthening the agricultural marketing information system would be to provide momentum and technical assistance to initiatives already underway or planned and to assist in initiating the actions recommended above. This can be accomplished by the following measures:

1. Provide opportunities for training Swazi counterparts to replace advisors and consultants with a role in carrying out the functions of the existing agricultural marketing information system.

2. Monitor the initiatives that have been undertaken or planned. Identify the required needs to continue these initiatives and find ways to satisfy them. The marketing information advisor in TPU, for example, estimates US$5,000 per year will be needed to continue receiving the periodicals, special reports, telexed market news reports, etc., now received free because of the advisor's "connections." So far, no provision has been made for this required funding. Another example is to explore alternative ways to continue preparation

and publication of AGRIVIEW and Swaziland Trade News, when the terms of the advisors responsible for preparing these periodicals end.

In the case of AGRIVIEW, there is an opportunity for positive and immediate action because the editor will remain in Swaziland after his contract expires and will be available for part-time employment. CAPM should maintain and improve AGRIVIEW by employing the editor on a part-time basis, financing the development of a mailing list to include small-scale, commercially oriented farmers, and assisting in stimulating the preparation of articles within MOAC.

3. Explore ways in which the three persons proposed above for MAU (statistical clerk/typist, horticultural crops marketing specialist, and agricultural marketing economist) can be recruited and funded. It may be possible to identify qualified candidates already working for the government who require further training. In this case, CAPM will need to identify ways that training can be obtained, whether and for how long counterparts will be needed, and how can they be provided. Organizations such as Volunteers in Technical Assistance (VITA), the International Executive Service Corps (IESC), and the Peace Corps may be low-cost sources for counterparts.

4. Assist in start-up of databases for wholesale prices of agricultural commodities in selected European and Southern African markets that are of export interest to Swaziland. Assist in training a counterpart to continue these databases. Once initiated, the databases could be maintained by the MAU statistical clerk/typist recommended for information dissemination above. (The information would be used by extension workers for training on production planning and by the MAU agricultural marketing economist for the feasibility studies described in following item.)

5. Assist the agricultural marketing economist proposed for the MAU in initiating studies of production and marketing costs of selected agricultural commodities for potential export markets and to ascertain the feasibility of Swaziland becoming a supplier to these markets.

6. Undertake exploratory studies of proposed new market price reporting initiatives and ascertain the need for and feasibility of initiating such programs. If it is decided to initiate a new price reporting program, work will begin with the MAU to help get the program started.

SECTION VIII
SUMMARY OF THE MARKETING/AGRIBUSINESS INFORMATION PLAN

This section summarizes the plan for strengthening the marketing/agribusiness information system and is based on the results of the study summarized above. The study concluded that a cost effective system for meeting the information service requirements of CAPM needs to build on the existing activities conducted by MOAC, MCIT, and NAMBOARD.

The section has three parts. The first, presented as a timeline, summarizes ongoing activities and indicates the CAPM-related units participating in them. The second summarizes the action steps recommended by the study for strengthening the system. The third part summarizes the CAPM activities designed to strengthen the system as a timeline.

The study found that the dissemination of market information in a form suitable for use by farmers and traders is one of the most pressing needs for meeting CAPM's objective of facilitating commercialization of agriculture and the development of agri-business. However, coverage of commodities, market stages, and locations within the country is not complete. Improvements need to be instituted to improve the reliability of data collected. Significantly, the most progress toward "real time" collection and availability of market information data pertaining to domestic markets has been made for fresh produce, particularly vegetables. Considerable data are available for the RSA and overseas markets for fruits, vegetables, spices, and flowers. These will be areas of focus for CAPM development activities during the next two years.

However, the potential for utilizing the data for analysis and preparing them in a form suitable for dissemination has barely been touched. Therefore, the emphasis in the plan for CAPM's participation in strengthening the market information system is heavily dependent on analysis and dissemination, particularly in developing systems that can be further developed and disseminated by private sector enterprises.

The study identified new positions to replace analytical capacity of the advisory staff formerly provided by UNDP/FAO. The eminent loss of the editor of AGRIVIEW is especially serious. Resources to support additional positions are not included in the Chemonics contract to implement CAPM and MOAC is subject to restraints on the employment of new staff. Therefore, supporting the activities outlined in the plan will require transfers of staff from within MOAC and additional resources. It is proposed that the Peace Corps be requested to provide three volunteers: a horticultural marketing specialist, a marketing economist, and an

agricultural journalist. The plan also assumes that AGRIVIEW be continued and improved, with CAPM supporting the editor's position on a part-time basis beginning September 1, 1990. This will include widening distribution of the publication to include small farmers.

The plan recognizes the importance of private sector media and educational institutions, including extension services and UNISWA, in disseminating information. Achieving this requires cooperation between the GOS, the media, and training institutions. Only the government has access to data required for the information service and this needs to be processed into a form suitable for release.

The plan assumes that the short-term CAPM training program will include training for MOAC and other GOS staff in the fundamentals of collecting, analyzing, and disseminating marketing/agribusiness information. It is also expected that the CAPM training program will provide user instructions in the interpretation and application of such information to business decisions.

The intensity of support provided by CAPM will vary among the activities described in the plan. Some will require modest additional effort while others will need support from other donors. The CAPM long-term marketing specialist will devote about one-third of his time during the next two years to implementing the marketing/agribusiness information program. He will concentrate on analyses of price trends, seasonal price variation, locational price differences, and comparative advantage and export potential for commodities of interest to CAPM activities, particularly as they relate to identification of potential enterprises for small farmers and the conduct of market trials. He will also devote a great deal of time to facilitate the establishment of functional systems for processing and disseminating market information.

A. Ongoing Activities

Figure 2 presents a summary of the ongoing activities of the agencies involved in the marketing/agribusiness information system.

B. Recommended Actions

1. Expand Analysis of Market Price Relationships

a. Nokwane and Regional Markets

Analyze differences in prices reported by the Nokwane and the regional markets to determine if differences are

Figure 2. MARKETING/AGRIBUSINESS INFORMATION SYSTEM PLAN TIMELINE
ONGOING ACTIVITIES, 1 July 1990-30 June 1992

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ACTIVITIES                                  QUARTER> ::  Jul- :Oct-:Jan-:Apr-:Oct-:Jul-:Jan-:Apr-::
                                                     ::   Sep : Dec: Mar: Jun: Dec: Sep: Mar: Jun::
                                                     ::   90  : 90 : 91 : 91 : 91 : 91 : 92 : 92 ::
                                                     ::
                                                     ::      :    :    :    :    :    :    :    ::
  DATA COLLECTION                                    ::      :    :    :    :    :    :    :    ::
                                                     ::      :    :    :    :    :    :    :    ::
Fresh Produce Wholesale Prices and Sales             ::      :    :    :    :    :    :    :    ::
  Nokwane                                            ::NFPM-->:--->:--->:--->:--->:--->:--->:--->::
  Mahlanya, Manzini, Mbabane, Nhlangano              ::MAU--->:--->:--->:--->:--->:--->:--->:--->::
                                                     ::      :    :    :    :    :    :    :    ::
Scheduled Products Exports and Imports               ::NAMB-->:--->:--->:--->:--->:--->:--->:--->::
Cattle Prices and Sales                              ::      :    :    :    :    :    :    :    ::
  Government Fattening Ranches                       ::      :    :    :    :    :    :    :    ::
  and Rural Sales Yards                              ::DVS--->:--->:--->:--->:--->:--->:--->:--->::
                                                     ::      :    :    :    :    :    :    :    ::
Milk Prices, Local Procurement and Imports           ::SDB--->:--->:--->:--->:--->:--->:--->:--->::
                                                     ::      :    :    :    :    :    :    :    ::
Egg Wholesale Prices                                 ::NFPM-->:--->:--->:--->:--->:--->:--->:--->::
                                                     ::      :    :    :    :    :    :    :    ::
Export Markets                                       ::      :    :    :    :    :    :    :    ::
  Prices, Source Countries, Supply Countries         ::      :    :    :    :    :    :    :    ::
  Distribution Channels,Importer Requirements        ::      :    :    :    :    :    :    :    ::
  Trade Negotiations                                 ::      :    :    :    :    :    :    :    ::
  Europe, N America, PTA, COLEACP                    ::TPU & HVH-->:--->:--->:--->:--->:--->:--->::
                                                     ::      :    :    :    :    :    :    :    ::
  ITC                                                ::TPU & CAPM->:--->:--->:--->:--->:--->:--->::
                                                     ::      :    :    :    :    :    :    :    ::
RSA Produce Markets                                  ::NAMB-->:--->:--->:--->:--->:--->:--->:--->::
                                                     ::      :    :    :    :    :    :    :    ::
Agricultural Statistics                              ::      :    :    :    :    :    :    :    ::
  Farm Input Prices                                  ::MEU--->:--->:--->:--->:--->:--->:--->:--->::
  Commodity Market Prices                            ::MAU--->:--->:--->:--->:--->:--->:--->:--->::
  Agricultural Production                            ::MEU, DEPS, EXT, DVS-->:--->:--->:--->:--->::
  Coordinate, Initiate and Monitor                   ::ASC--->:--->:--->:--->:--->:--->:--->:--->::
                                                     ::      :    :    :    :    :    :    :    ::
Crop Forecast                                        ::EWU--->:--->:--->:--->:--->:--->:--->:--->::
                                                     ::      :    :    :    :    :    :    :    ::
  PROCESSING AND ANALYSIS                            ::      :    :    :    :    :    :    :    ::
                                                     ::      :    :    :    :    :    :    :    ::
Market Prices and Sales                              ::      :    :    :    :    :    :    :    ::
  Fresh Produce                                      ::NFPM & MAU->:--->:--->:--->:--->:--->:--->::
  Cattle Prices and Sales                            ::DPU & MAU-->:--->:--->:--->:--->:--->:--->::
  Milk                                               ::EXT & MAU-->:--->:--->:--->:--->:--->:--->::
  Other Commodities                                  ::MAU & EXT-->:--->:--->:--->:--->:--->:--->::
                                                     ::      :    :    :    :    :    :    :    ::
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Figure 2. MARKETING/AGRIBUSINESS INFORMATION SYSTEM PLAN TIMELINE
ONGOING ACTIVITIES, 1 July 1990-30 June 1992 (Continued)

```
ACTIVITIES                          QUARTER> ::  Jul- :Oct-:Jan-:Apr-:Oct-:Jul-:Jan-:Apr-::
                                             ::   Sep : Dec: Mar: Jun: Dec: Sep: Mar: Jun::
                                             ::   90  : 90 : 91:  91:  91: 91 :  92:  92::
                                             ::-------------------------------------------::
                                             ::       :    :    :    :    :    :    :    ::
Export Market Opportunities Overseas         ::HVH & TPU-->:--->:--->:--->:--->:--->:--->::
                                             ::       :    :    :    :    :    :    :    ::
International Competition                    ::HVH & TPU-->:--->:--->:--->:--->:--->:--->::
                                             ::       :    :    :    :    :    :    :    ::
Export Market Opportunities Southern Africa  ::NAMB & TPU->:--->:--->:--->:--->:--->:--->::
                                             ::       :    :    :    :    :    :    :    ::
Farm Enterprise Production Costs             ::MEU, MRS, MAU, EXT--->:--->:--->:--->:--->::
                                             ::       :    :         :    :    :    :    ::
Livestock Numbers                            ::CSO, EXT. DVS, MEU--->:--->:--->:--->:--->::
                                             ::       :    :         :    :    :    :    ::
Livestock Production                         ::CSO, EXT. DVS, MEU--->:--->:--->:--->:--->::
                                             ::       :    :    :    :    :    :    :    ::
Crop Production                              ::CSO, EXT. DVS, MEU--->:--->:--->:--->:--->::
                                             ::       :    :    :    :    :    :    :    ::
                                             ::       :    :    :    :    :    :    :    ::
Coordinate, Initiate and Monitor             ::ASC--->:--->:--->:--->:--->:--->:--->:--->::
                                             ::       :    :    :    :    :    :    :    ::
DISSEMINATION                                ::       :    :    :    :    :    :    :    ::
                                             ::       :    :    :    :    :    :    :    ::
Ministry of Commerce, Industry and Tourism   ::       :    :    :    :    :    :    :    ::
Swaziland Trade News                         ::TPU--->:----:----:----:----:----:----:----::
Seminars & Workshops                         ::TPU---> ----:----:----:----:----:----:----::
Country Profiles                             ::TPU--->:----:----:----:----:----:----:----::
Library                                      ::TPU--->:----:----:----:----:----:----:----::
                                             ::       :    :    :    :    :    :    :    ::
Ministry of Agriculture and Cooperatives     ::       :    :    :    :    :    :    :    ::
Reference Files                              ::MAU--->:--->:--->:--->:--->:--->:--->:--->::
SiSwati News Releases                        ::ISEC-->:--->:--->:--->:--->:--->:--->:--->::
AGRIVIEW                                     ::MAU--->:--->:--->:--->:--->:--->:--->:--->::
Video Tapes                                  ::ISEC-->:--->:--->:--->:--->:--->:--->:--->::
Bulletin Boards                              ::NFPM and MAU--->:--->:--->:--->:--->:--->::
Leaflets                                     ::ISEC-->:--->:--->:--->:--->:--->:--->:--->::
Produce 1/2 Hour Radio Program               ::ISEC-->:--->:--->:--->:--->:--->:--->:--->::
Quarterly Reports                            ::       :    :    :    :    :    :    :    ::
                                             ::       :    :    :    :    :    :    :    ::
Private Sector                               ::       :    :    :    :    :    :    :    ::
Newspaper Articles                           ::TIMES and OBS--->:--->:--->:--->:--->:--->::
Weekly Radio Broadcast                       ::ISEC & SBS->:--->:--->:--->:--->:--->:--->::
Nokwane Prices                               ::TIMES->:--->:--->:--->:--->:--->:--->:--->::
Cattle Prices                                ::TIMES->:--->:--->:--->:--->:--->:--->:--->::
```

significant and consistent. Provide an explanation for these differences before these prices are disseminated and compared. Responsible agencies: MAU.

b. Commodities for Export or Domestic Markets

Prepare analysis of year-to-year comparisons and seasonal patterns of prices for commodities not presently covered, beginning with dehydrated horticultural products. Responsible agencies: MAU, NAMBOARD, CAPM.

2. Post Prices at Input Supply Locations

Prepare a plan in conjunction with the CCU management for posting prices of fresh fruits and vegetables at the CCU depots and near irrigation schemes and CCU supply stores. Provide similar information to other suppliers. Responsible agencies: MAU assisted by CAPM.

3. Work with Cooperative Marketing Officers

Work with the cooperative marketing officers to develop a system for disseminating market prices and other marketing information for fresh fruits and vegetables. Responsible agencies: MAU assisted by CAPM.

4. Produce Radio Market Information Segment

In cooperation with the SBS and ISEC, include five minutes of information on market prices and other marketing information on the weekly agricultural radio program. Responsible agencies: MAU.

5. New Quarterly Bulletin of Agricultural Statistics

Prepare market prices of fresh fruits and vegetables and imports of scheduled products for inclusion in the new Quarterly Bulletin of Agricultural Statistics. Responsible agencies: MAU with MEU.

6. Shorter, More Frequent Radio Programs

Investigate the possibility of having MOAC acquire 5 or 6 five-minute slots of air time on SBS per week for disseminating market prices and other timely market information. Responsible agencies: ISEC assisted by CAPM.

7. Prepare Articles for the Press

Prepare short articles on domestic or export agricultural marketing/agribusiness issues for publication in the Times of Swaziland, the Observer, and other private publications such

as the Farmers Weekly (published in the RSA and read by many farmers in Swaziland). When feasible, extract information from these articles for inclusion in the weekly (or, if approved, the daily) radio broadcasts. The articles should be no less than monthly. Responsible agencies: MAU and TPU, assisted by CAPM.

8. Publish Price Information in the Observer

The Times of Swaziland currently publishes daily fresh fruit and vegetable prices provided by the Nokwane market. The Observer should be approached with a request to publish this as well. Responsible agencies: NAMBOARD and MAU, assisted by CAPM.

9. Continue Publication of AGRIVIEW and Swaziland Trade News

Agriview and Swaziland Trade News, two periodicals prepared by the MAU and TPU respectively, may not continue when the terms of the two expatriate advisors who now prepare them end. Every effort should be made to provide the necessary support to ensure continuation of these reports. Responsible agencies: CAPM.

10. Overseas Market Information

An estimated US$5000 per year will be needed to ensure continuation of the trade information now received free when the term of the trade information advisor ends. This information, which includes market newsletters, periodicals, and special reports on export markets, is needed to maintain the Trade Information Library and several computerized databases on export markets. This situation should be monitored and the means explored to continue receipt of these reports. Responsible agencies: CAPM.

11. Add a Statistical Clerk/Typist

Disseminating fresh fruit and vegetable market prices being collected and processed by MAU will require strengthening MAU's internal capacities. It is recommended that this be achieved by adding a statistical clerk/typist trained to disseminate fresh fruit and vegetable prices and maintain databases of prices for agricultural commodities in selected export markets. Responsible agencies: MAU assisted by CAPM.

12. Add a Horticultural Crops Marketing Specialist and an Agricultural Marketing Economist

On August 15, 1990, two advisors who are highly qualified in conducting research and extension work in marketing will have completed their assignments and will not be replaced. It is recommended that a horticultural crops marketing specialist

and an agricultural marketing economist be added to the MAU staff to conduct such research and to work with the extension service, the TPU, and the news media to assist in disseminating research findings. Responsible agencies: CAPM.

13. Expand Commodity Coverage

The need for reporting prices of live chickens, eggs, animal feeds, cattle prices in private sales, maize, and milk in the informal market should be explored with the ASC. A survey should be conducted to determine if and when such price collection and reporting would benefit buyers and sellers, and how the data could be obtained, processed, and disseminated. Recommendations should then be made to ASC on how a program should be initiated. Responsible agencies: CAPM and MOAC.

14. Encourage Publication of Marketing/Agribusiness Information

Work with the sources of agricultural marketing/ agribusiness information within the GOS to encourage the preparation and release of marketing/agribusiness information for dissemination to users via various media. Responsible agencies: CAPM, with MAU, MEU, extension services, and other MOAC agencies.

15. Establish a Marketing/Agribusiness Information Committee

Facilitate the process of review and publication of agricultural marketing/agribusiness information in MOAC through the establishment of a Marketing/Agribusiness Information Committee. Responsible agencies: CAPM MAU, MEU, extension services, and other MOAC agencies.

C. Strengthening Activities

The following page summarizes the recommended activities above in a timeline form.

Figure 3. MARKETING/AGRIBUSINESS INFORMATION SYSTEM PLAN TIMELINE
STRENGTHENING ACTIVITIES, July 1990-30 June 1992

```
ACTIVITIES                          QUARTER>  ::  Jul- :Oct-:Jan-:Apr-:Jul-:Oct-:Jan-:Apr-::
                                              ::   Sep : Dec: Mar: Jun: Sep: Dec: Mar: Jun::
                                              ::   90  : 90 : 91 : 91 : 91 : 91 : 92 : 92 ::
                                              ::
                                              ::       :    :    :    :    :    :    :    ::
DATA COLLECTION                               ::       :    :    :    :    :    :    :    ::
                                              ::       :    :    :    :    :    :    :    ::
Expanded Commodity Coverage                   ::       :    :    :    :MAU AND CAPM->:---<::
                                              ::       :    :    :    :    :    :    :    ::
Overseas Market Information                   ::CAPM, HVH-->:--->:--->:--->:--->:--->:---<::
                                              ::       :    :    :    :    :    :    :    ::
PROCESSING AND ANALYSIS                       ::       :    :    :    :    :    :    :    ::
                                              ::       :    :    :    :    :    :    :    ::
Expand Analysis of Market Price Relationships::        :    :    :    :    :    :    :    ::
Potential Commodities for Export Markets      ::CAPM MS AND MAU->:--->:--->:--->:--->:---<::
Nokwane and Regional Markets                  ::NFPM, MAU AND CAPM--->:--->:--->:--->:---<::
Potential Commodities for Domestic Markets    ::CAPM MS AND MAU->:--->---->---->---->---->::
Assign Peace Corps Hort Specialist to MAU     ::       :    :    :    :USP>---->---->---->::
Assign Peace Corps Economist to MAU           ::       :    :    :    :USP>---->---->---->::
Assign Statistical Clerk/Typist               ::       :MAU----->:--->---->---->---->---->::
                                              ::       :    :    :    :    :    :    :    ::
DISSEMINATION                                 ::       :    :    :    :    :    :    :    ::
                                              ::       :    :    :    :    :    :    :    ::
Price Posting at Input Supply Outlets         ::       :    :NFPM, MAU AND CAPM->--->:---<::
Involve Cooperative Marketing Officers        ::       :CAPM---->:--->:--->:--->:--->:---<::
                                              ::       :    :    :    :    :    :    :    ::
Contribute Market Information Radio Segment   ::       :MAU, ISEC:--->:--->:--->:--->:---<::
Shorter, More Frequent Radio Programs         ::       :    :ISEC:    :    :    :--->:---<::
Contribute to New Bulletin of Agr Statistics ::       :    :    :MAU and CAPM->:--->:---<::
                                              ::       :    :    :    :    :    :    :    ::
Encourage Publication                         ::CAPM-->:--->:--->:--->:--->:--->:--->:---<::
Articles for the Press                        ::       :    :    :    :    :    :    :    ::
Price Information in the Observer             ::NFPM, MAU AND CAPM--->:--->:--->:--->:---<::
                                              ::       :    :    :    :    :    :    :    ::
Support Part Time Editor and Distribution     ::HVH & TPU-->:--->:--->:--->:--->:--->:---<::
AGRIVIEW                                      ::       :    :    :    :    :    :    :    ::
Assign Peace Corps Journalist to ISEC/MAU     ::       :    :    :    :USP>---->---->---->::
Agribusiness Information by Private Media     ::       :    :    :    :    :    :    :    ::
                                              ::       :    :    :    :    :    :    :    ::
Facilitate Review and Release of Information ::CAPM-->:--->:--->:--->:--->:--->:--->:---<::
                                              ::       :    :    :    :    :    :    :    ::
TRAINING                                      ::       :    :    :    :    :    :    :    ::
Marketing Component Farm Mgt Course for       ::        CAPM MS-<:    :    :    :    :    ::
National Extension Specialists                ::       :    :    :    :    :    :    :    ::
Agribusiness Course for MAU Officer           ::CAPM--<:    :    :    :    :    :    :    ::
ST Training MAU and ISEC Staff & EXTENSION    ::       :    :CAPM---->:--->:--->:--->:--->::
LT Training MOAC Marketing Specialist         ::       :    :CAPM>--->:--->:--->:--->:--->::
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ANNEX A

INDIVIDUALS AND ORGANIZATIONS CONTACTED

INDIVIDUALS AND ORGANIZATIONS CONTACTED

Mr. Gordon Bailey	IFAD Marketing Advisor, Nokwane Market
Mr. Narenda K. Bharadwaj	Senior Export Promotion Advisor, TPU/MCIT
Mr. Paul Davidson	Wholesale Agent, Nokwane Market
Dr. James Diamond	Research and Extension Training, MOAC
Mr. Absalom Dlamini	Assistant Commissioner, Cooperative Development Department
Mr. Leo M. Dlamini	Marketing Manager, Central Cooperative Union
Mr. Fernando Dludlu	Head, Data Processing Unit, DVS/ MOAC
Mr. Duke Dube	Senior Poultry Officer, MOAC
Ms. Khanyi Dube	Information Officer, NAMBOARD
Dr. Tesfaye Gebremeskel	Head, Monitoring and Evaluation Unit/MOAC
Mr. Don K. Hlophe	Agricultural Officer (Information), MOAC
Mr. Sam Hlophe	Senior Agricultural Economist, Economic Analysis and Planning Unit/MOAC
Mr. Manfred G. Jeebe	Marketing Information Specialist, MAU, MOAC
Mr. Charles Jenkins	Private Enterprise Officer, USAID
Mr. Patrick Lukhele	Director of Agriculture and Extensions, MOAC
Mr. Shadrack Mabuza	Marketing Officer, MAU, MOAC

INDIVIDUALS AND ORGANIZATIONS CONTACTED
(continued)

Mr. Levai Makhanya	Senior Cooperative Officer, MOAC/ Manzini
Mr. Job Mavuso	Senior Dairy Officer, MOAC
Ms. Phumzile Mdladla	Senior Marketing Officer, MOAC
Mr. Daniel Myeni	Cooperative Marketing Officer, MOAC
Ms. Siphiwe Nkambule	Editor, SiSwati Edition, Times of Swaziland
Mrs. Amy Nxumalo	Commercial Officer, Domestic Trade Division, MCIT
Mr. John Paton	Marketing Advisor, MCIT
Mr. Neil Patrick	Agricultural Economics Advisor, Research Division, MOAC
Dr. Charles Pitts	Team Leader, CSRET Project
Dr. M.S.R.V. Krishna Rao	Trade Information Advisor, TPU, MCIT
Dr. Dennis Sharma	Agricultural Development Officer, USAID
Mr. Aubrey Shongwe	Executive Secretary, NAMBOARD
Ms. Dumile Sithole	Manager, Nokwane Wholesale Market
Mr. Harry C. van den Burg	UNDP Volunteer, Market Information, MAU
Mr. Cowin Vilakati	Senior Area Manager, CCU
Dr. George Winter	Dean of Agriculture, UNISWA/Luyengo
Ms. Daniela Withers	Business Editor, Times of Swaziland
Mr. Bodo Zimmermann	Assistant Marketing Manager, Central Cooperative Union

ANNEX B

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ANNEX C

TERMS OF REFERENCE

TERMS OF REFERENCE
SHORT-TERM CONSULTANCY: Marketing/Agribusiness Information System
Commercial Agricultural Production and Marketing (CAPM) Project

OBJECTIVE/OUTPUT

The objective of the consultancy is to assist in the design of a marketing/agribusiness information service.

The marketing/agribusiness information system to be designed under the CAPM project will supplement the data and information currently collected by various units of the GOS. A system requiring minimal additional cost is desired. The criterion for defining the scope of information to be included will be the relevant to meeting the objectives of the further commercialization of agriculture and development of agribusiness.

The system is intended to collect, store and make available regularly selected current and historical data (price series, e.g.) of wide interest and enhance the capacity to find answers to specific economic and technical questions as they arise.

The expected output is a report summarizing the consultant's findings concerning identification of information needed, scope, proposed sources, methods of collection, analysis and publication of the information.

STATEMENT OF WORK

The work includes the following tasks:

1. Review Results of the CAPM Baseline Studies and other studies for implications of the kind of information needed.

2. Review marketing/agribusiness information currently issued by the GOS.

3. Assess the elements of such a system currently in place.

4. Interview staff of units collecting, analyzing and issuing marketing information and participate in a discussion of the topic with the Interministerial Working Group.

5. Participate in a planned conference of users of marketing/agribusiness information.

6. Interview a small number of agribusinessmen and medium- and small-scale farmers similar to the ones included in the CAPM primary baseline survey.

7. Contribute to the preparation of the plan summarizing the design of the suggested marketing/agribusiness information system working jointly with the long-term CAPM marketing specialist.

DURATION AND TIMING OF ASSIGNMENT

This consultancy will require eight weeks beginning in mid-April 1990.

QUALIFICATIONS

The consultant should have an M.S. or higher degree in agricultural economics. The consultant should have 10 years or more of relevant experience in marketing analysis, market surveys and collection and dissemination of marketing and agribusiness information. Highly qualifying experience would be service with marketing units similar in functions to the Marketing Advisory Unit. Such experience in Southern Africa would be highly desirable.