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# TRADEMALI REVISED WORK PLAN YEAR 2 SEPTEMBER 2004 – FEBRUARY 2006



This publication was produced for review by the United States Agency for International Development. It was prepared by TradeMali, implemented by Chemonics International Inc. in conjunction with its partners: Associates for International Resources and Development, CARE International in Mali, Geomar International, International Business Initiatives, and The Mitchell Group.

May 24, 2005

## **ABOUT TRADEMALI**

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*Prépare le Mali pour le monde – Amène le monde au Mali.*

TradeMali works to increase Mali's market positions regionally and internationally. The project is organized around two vital campaigns: The first, "Prepare Mali for the World," will assist Mali to create an inspiring policy environment and provide technical and managerial training to associations, agribusinesses, and selected government units to take advantage of potential opportunities. The second, "Bring the World to Mali," will generate real trade prospects by linking products and market buyers. Targeted products will include cereals, livestock, fruits and vegetables, and other agricultural-based products.

TradeMali is a three-year project with two option years at USAID/Mali's discretion. With offices in Bamako, Sikasso, Mopti, Segou, and Timbuktu, it is one of three long-term projects funded by the United States Agency for International Development/Mali working to improve agricultural productivity and incomes in Mali. TradeMali focuses on increasing trade in targeted agricultural sectors. Mali Finance works to provide wider access to financing for agricultural sectors and PRODEPAM seeks ways increase outputs of agricultural producers.

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TradeMali  
Contract No. 688-C-00-03-00068-00

This revised work plan is submitted by Chemonics International Inc. / May 24, 2005

## **ABOUT THIS REPORT**

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This revised work plan is based upon discussions and correspondence with the AEG team on the initial second year plan. The interchanges with the Mission were welcome and helpful. We will continue this sense of partnership by involving the CTO in project activities and TradeMali will provide the most advanced notice possible regarding events particularly about workshops, seminars, other types of fora and on the requirements for short-term consultants and external trips. The revision outlines TradeMali's plans over the 18 month period from September 2004 to February 2006 with the AEG team's comments taken into account. Each relevant part of the project is discussed, and the document includes an activities table immediately following each component.

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## ACRONYMS

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ABP	Agricultural Best Practices
ADRAO	Association pour le developement de la riziculture en Afrique de l'ouest
AEG	Accelerated Economic Growth
AFB	Abattoir Frigorifique de Bamako
AJEX	Association des Jeunes Exportateurs
AMAP	Agence Malienne de Presse et de Publicité
AMAQ	Agence Malienne de Qualité
AMELEF	Association Malienne des Exportateurs de Légumes et Fruits
APEFL	Association des Professionnels Exportateurs des Fruits et Légumes
ATRAPAL	Association des Transformatrices de Produits Agricoles Locaux
APCAM	Assemblée Permanente des Chambres d'Agriculture du Mali
BRC	British Retailers Consortium
BNDA	Banque Nationale de Développement Agricole
CAE	Centre Agro Enterprise
CBI	Centre for the Promotion of Imports from Developing Countries
CCIM	Chambre de Commerce et d'Industrie du Mali
CESPA	Centre de Service de Production Audiovisuelle
CILSS	Inter-State Committee for Fighting Drought in the Sahel
CIC	Centre International du Commerce
CLIC	Community Liaison Information Centers
CMC	Conseil Malien des Chargeurs
CNPI	Centre National pour la Promotion de l'Investissement
CNUCED	Commission des UN pour le Commerce et le Développement
CONOESAM	Coordination Nationale des Opérateurs Economiques du Secteur Agro Alimentaire du Mali
CSV	Crédit Stockage Vivrier
DGD	Direction Générale des Douanes
DGRC	Direction Générale de Réglementation et Contrôle
DNCC	Direction Nationale du Commerce et de la Concurrence
DNI	Direction Nationale de l'Industrie
DNSI	Direction Nationale de la Statistique et de l'Informatique

DTIS	Diagnostic Trade Integration Strategy
ECOCERT	Organisme de Certification des Produits Biologiques
ECOWAP	ECOWAS Common Agricultural Policy
ECOWAS	Economic Community of West African States
EDIC	Etude Diagnostique de l'Intégration Commerciale
EDM	Energie du Mali
EU	Union Européenne
EUREPGAP	Euro Retailer Produce GAP
FEBEVIM	Fédération nationale de Bétail et de Viande Rouge
GAP	Good Agricultural Practices
GERME	Gérer Mieux son Entreprise
GIE	Groupement d'Intérêt Economique
GoM	Government of Mali
HACCP	Hazard Analysis and Critical Control Points
HELVETAS	Association Suisse pour le Développement
IER	Institute d'Economie Rurale
IR	Intermediate Result
JITAP	Joint Integrated Technical Assistance Program
LCV	Laboratoire Central Vétérinaire
LNA	Laboratoire de Nutrition Animale
LNS	Laboratoire Nationale de la Santé
LTA	Laboratoire de Technologie Alimentaire
MA	Ministère de l'Agriculture
MCC	Millennium Challenge Corporation
MEP	Ministère d'Elevage et de la Pêche
MIC	Ministère de l'Industrie et Commerce
MISTOWA	Market Information System Trade of West Africa project
OHVN	Office Haute Vallée du Niger
OMA	Observatoire du Marché Agricole
OMBEVI	Office Malien du Bétail et de la Viande
OMC	Organisation Mondiale du Commerce
ON	Office du Niger
ORS	Office Riz Ségou

ORTM	Office des Radios et Télévision du Mali
PASAOP	Programme d'Appui au Service Agricole et aux Organisations Paysannes
PCDA	Projet de Compétitivité et de Diversification Agricole
PMP	Performance Monitoring Plan
PR	Performance Result
PRODEPAM	Programme de Développement de la Production agricole Malienne
ROESAO	Réseau des Organisations des Exportateurs du Secteur Agro-alimentaire
SLACAER	Service Local d'Appui-Conseil à l'Agriculture et de l'Équipement Rural
SMPC	Société Malienne de Produits Carnés
SNV	Société Néerlandaise Volontaire
SOGAS	Société de Gestion des Abattoirs au Sénégal
SPS	Sanitary and Phyto Sanitary Agreements
TEM	Tropical Expressions Mali
UEMOA	Union Economique et Monétaire Ouest Africaine
UNCTAD	United Nations Conference for Trade and Development
UNDP	United Nations Development Program
UNIDO	United Nations Industry Development Organization
URTEL	Union des Radios et Télévisions Libres
VSF	Vétérinaires sans Frontières
WTO	World Trade Organization



## SECTION I

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### Overview

TradeMali's first year produced successes in the mango filière and advancements in the red meat, rice, and potato sectors. Project staff identified exporters, other partners, and potential market opportunities; made exports and tested exporting operations; and addressed constraints and issues. Shea butter sector activities produced a study identifying potential areas for TradeMali involvement and recommendations to help the project target activities in this area.

Mali's long-term increase in agricultural exports (and ability to maintain current export levels) hinges not only on improvements in exporter abilities but also in those of related services and in production level interventions. Therefore, the project focused significant effort on working with private and public support organizations, and in seeking to identify and collaborate with production oriented agencies. Export promotion and commodity associations (e.g., AMELEF, APFEL, CONOESAM, and FEBEVIM) actively helped with the planning and development of filière activities and participated as partners in the project's export efforts. As the name implies, TradeMali promotes trade. Without strong ties to the designated trade promotion public agency, DNCC, its parent Ministry of Industry and Commerce, and the government's Integrated Framework strategy for trade promotion, the project would have worked in non-productive isolation. The project provided various assistance in the form of organizational reviews, critiques of analyses, and improvements to communication capabilities. Norms, standards, and quality issues are important components of competitive trade, and private and public sector establishments (e.g., AMAQ, DNI, and DGRC) played significant roles in project planning, interventions, and training. On-the-ground agencies (e.g., NGOs, BDS providers, ORS, ON, and OMA) reinforced the effectiveness of first-year project work and were, in turn, provided with opportunities to meet new clients, become involved in new sectors, or be exposed to new manners of providing services. Transport and infrastructural support are vital trade components. Shippers, their organizations (e.g., Conseil des Chargeurs, Syndicat des Transporteurs), the airport authority, and the railroad all contributed to first-year activities.

Much of the first year focused on identifying markets and market parameters; making contacts; verifying Mali's trade advantages and disadvantages, strengths and weaknesses; and prioritizing areas for immediate and medium-term intervention. Results reinforced the project's view that regional and international demand is strong for some products that Mali produces, but that development of Malian trade requires in-depth aid—rather than broad, sweeping efforts—on supply-side production issues. TradeMali maintains its demand-driven approach and strategy to deeply focus on a small, select group of commodities. Model commodity sectors and models within commodity sectors will be developed, and TradeMali will select and work with “winners” and

potential “winners.” Because many of the constraints (in transport, quality standards, management, packaging, and pricing) apply to most, if not all, commodity sectors, resolving issues for the targeted commodities and expanding their exports will offer opportunities and alleviate constraints for other similar horticultural, cereal, and livestock products. With this in mind, TradeMali will identify and analyze additional Malian agricultural commodities that have potential for increased regional or international market penetration and profitability.

From its initial work plan, the project has carried over four commodities for its second year efforts. The first set of these products (fresh mangoes and potatoes) is already being exported and has the potential to significantly increase export volumes in the medium-term but needs immediate assistance to maintain current export levels. Malian mango exporters are in danger of losing their entire European market owing to new stricter safety and health requirements. Export expansion requires new methods of post-harvest handling, packaging, and transport. Potatoes’ principal export market, the Ivory Coast, continues to be disrupted by an uncertain political and economic climate. Decreased potato exports are likely without new buyers, and potential new markets do exist. West Africa imports approximately 100,000 tons of potatoes each year from Europe. Mali could take part of this commerce but new markets demand new and better ways of doing business.

The second set of products (red meat and rice) are not currently being exported in significant amounts by Mali but show promise due to the large volumes imported into the region by neighboring countries. A competitive price, comparable quality, and reliability are keys to opening these markets. A competitive supply price involves addressing production, processing, and post-harvest and marketing costs, yields, and management issues. These are medium- and long-term matters that TradeMali is tackling with the production project, PRODEPAM and MaliFinance in several filières.

The fifth commodity from the project’s portfolio of first-year activities is shea butter. The project paper on the shea butter sector<sup>1</sup> clearly shows that TradeMali would duplicate existing and planned donor and other project efforts. Given the identified constraints, TradeMali’s area of expertise and the involvement of other projects, TradeMali’s resources would be more efficiently and effectively used by concentrating heavily on the four remaining commodity sectors. Hence, activities in the shea butter sector will not be actively pursued during the project’s second year.

The project is working with exporters and exporting services purchasing products throughout Mali. However, because of the range of targeted commodities, the focus of PRODEPAM’s technical program, and opportunities to enhance synergy with other USAID projects, general areas of geographical emphasis for

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<sup>1</sup> Position Paper Filière Karité, TradeMali, May 2004.

TradeMali's activities have been identified. Mango activities will be principally centered on the Sikasso and Koulikoro regions. Potato efforts will involve the Sikasso region, Kati, and the Office de Niger. Rice will be focused on the Office de Niger, Segou, Mopti, and Timbuktu. The slaughterhouses in Bamako will be the heart of red meat activities.

Given the wide expanse of Mali's three Northern territories, project interventions there will be centered in the Timbuktu region and will concentrate on rice and anis. The handicraft activities will be brought to a logical conclusion and turned over to agencies focusing on the artisan sector. The camel cheese activity in Kidal will be brought to a point, early in the second year, where TradeMali can withdraw. Rice storage and marketing activities, similar to that undertaken by the project in Mopti and Segou, in collaboration with MaliFinance, and now PRODEPAM, will be pursued. Anis is replacing wheat in the Djiré area. Producers find it more profitable and anis has been exported to coastal markets for generations. Exporters feel that volumes can be increased. TradeMali will examine the market potential, while PRODEPAM works on the production aspects. The project will also search for other significant agribusiness prospects and these will be pursued if warranted.

Private and public agencies fostering trade will continue to be helped to increase their capabilities. The DNCC and Ministry of Commerce and Industry are TradeMali's principal public sector partners. As before, support will be dedicated to reinforcing the DNCC's ability to promote trade and to furthering the Integrated Framework process. The ministries of transport, finance, private investment, regional integration, agriculture, and livestock remain important partners in furthering exports. The project's numerous forums, workshops, and advisory and gender committee meetings continue to be useful in promoting public-private sector dialogue. Market and quality information services have crucial roles in trade development. The close collaboration established with private sector export associations and governmental agencies like OMA, DNI, DGRC will be maintained. Relations with field-oriented "offices," such as ON, ORS, OHVN, and PIRB, will be relied upon for cooperation in the rice, potato, and mango sectors.

Gender issues and concerns surfaced throughout the targeted commodity sectors. To get a better handle on addressing these matters, the project will adopt a "gender mainstreaming"<sup>2</sup> approach. A short-term expert will work with the TradeMali gender specialist on this concept who will then conduct gender mainstreaming analyses in the four targeted filières. Forthcoming recommendations will be implemented.

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<sup>2</sup> **Gender Mainstreaming** is a globally accepted strategy for promoting gender equality. Mainstreaming is not an end in itself but a strategy, an approach, a means to achieve the goal of gender equality. Mainstreaming involves ensuring that gender perspectives and attention to the goal of gender equality are central to all activities - policy development, research, advocacy/ dialogue, legislation, resource allocation, and planning, implementation and monitoring of programmes and projects" (Office of the Special Adviser on Gender Issues and Advancement of Women, United Nations).

Mali is fortunate to have several projects focusing on aspects related to agriculture and agricultural trade. Several areas of common interest exist with the two other AEG projects<sup>3</sup>. Potato, rice, and anise are areas in which TradeMali, PRODEPAM, and Mali Finance are jointly planning complementary efforts. Interaction with Mali Finance will also run across all of TradeMali's sectors and will depend upon the credit worthiness of individual exporters and other actors, and on the viability of planned business activities. In addition to USAID projects, the upcoming World Bank PCDA project, addressing infrastructure concerns in the horticulture and livestock sectors, fits well with TradeMali's export orientation. As such, the project continues to collaborate with PCDA in its design phase to eliminate duplication and promote synergy. The interests of the Dutch Embassy (cold storage), CBI (quality and exporting), Swiss (production), and French (phytosanitary issues) in the mango sector also correspond well with TradeMali efforts there and mutually supportive activities are planned once again for this season.

The "second year" program is described in the following sections. The schedule presented is an 18-month rolling plan (September 2004 – February 2006). TradeMali has found that the concurrent timing of the project's work plan, annual report, and end of agricultural season wrap-ups play havoc with the project's human resources. Changing the work plan writing calendar alleviates time and resource constraints, and permits a more efficient scheduling and use of technical staff. The work plan will be reviewed, and revised as necessary, at the end of 12 months. The Synergy Table, present in the first year work plan, has been eliminated. The amount of cooperative and synergistic activities to be undertaken makes this table unwieldy. Also, to demonstrate the relevance and importance that these relationships have with the TradeMali program, collaborative interventions are shown in the various filière and transversal work plans, which were created and validated by task forces made up of TradeMali, PRODEPAM, and Mali Finance staff.

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<sup>3</sup> See Appendix 1, Warren Chase email of September 7, 2004 Re: Concepts regarding SO 9 contractor integrated work planning.

## SECTION II

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### Strengthening the Policy and Institutional Framework for Trade (Sub-IR 1)

Building on the initiative of the six international organizations seeking to equip Mali with a coherent strategy and action plan for trade promotion, TradeMali is aligning all of its activities with the Integrated Framework approach, which has been implemented since early 2003. Having participated in the sectoral workshops of the Diagnostic Trade Integration Study (DTIS) to review and improve the action plan contained in the report, TradeMali will support efforts of the Ministry of Industry and Trade (MIC), in collaboration with other multilateral donors for validation of the DTIS. Following this validation, the project will actively assist the DNCC and the MIC in follow-up activities including finalizing the DTIS report, holding the national symposium on trade, which is expected to lead to the financing of priority activities in the IF action plan and the selection, design and monitoring of projects for Window II funding. In addition, TradeMali has incorporated the following DTIS recommended activities into its work plan (as new activities or as logical continuations from our first project year):

- underpin the ability of the private sector to promote exports and in commercial negotiations;
- strengthen the capacity of trade promotion organizations;
- reinforce the dialogue between the private and public sectors;
- aid in the creation of a national structure for the promotion of exports;
- promote private sector investment in the targeted agricultural commodities;
- facilitate access to credit for export activities;
- work to increase the professionalism and collaboration of the exporters;
- reinforce the capacity to adhere to the requirements of commercial export agreements;
- invigorate the promotion and notion of quality;
- provide information on norms and standards, quality and traceability;
- work on establishing applicable norms and standards conforming to sub-regional and international requirements;
- carry out cross-border marketing studies;
- help improve the quality of export statistics and commercial information;
- identify new export markets;
- buttress the capacity and enlarge the scope of OMA activities to include fruits and vegetables and the sub-regional markets;
- support export infrastructure including the cold chain and processing;
- evaluate the cold chain in general and the airport cold storage facility in particular in terms of the chilling requirements for selected commodities;
- furnish technical assistance in the targeted agricultural commodity sectors;

- support selected commodity sector structures;
- help organize the red meat export sector;
- review the prospects for reducing airport charges for exported fruits and vegetables and red meat;
- work to improve and simplify the customs and export procedures for marketing to the sub-region including the use of *certificates d'origine*;
- assist in obtaining appropriate packing materials;
- assist in the reduction of taxes on imported utility vehicles; and
- collaborate with working groups established to reduce illegal taxes and the number of checkpoints along export corridors;

Specific details on TradeMali's involvement in these DTIS activities are found throughout the work plan.

For the target commodity sectors, TradeMali will also seek to reinvigorate and provide support to the Orientation and Coordination Committee for the Promotion of Agro-Industrial Sectors—established by the government of Mali in December 2001 and housed in the Ministry of Private Investment—to implement the recommendations of sector action plans. TradeMali will help the DNI with the development or review of norms and standards for target agricultural products. TradeMali will also place particular emphasis on the improvement of the institutional framework supporting exports through the enforcement of existing texts or their review in order to adapt them to the new context of international trade—for example, the development of *cahiers du charges* and review of legislation determining conditions under which exports should be governed.

Improving the institutional framework requires reform designed to equip Mali with agencies that are efficient and credible enough to ensure trade promotion. To achieve this, TradeMali, upon the request of the MIC, financed a study of the National Directorate of Trade and Competition (DNCC) to identify its strengths and weaknesses and to make recommendations for restructuring of the institution. The results will be validated during a workshop in the last quarter of 2004. The MIC will be responsible for taking the necessary reviews and measures for enactment of recommendations; and TradeMali will provide continued advice and assistance, as required, in assisting the MIC to reach its decision. TradeMali will help strengthen the trade promotion institution (both the current DNCC and its replacement(s) if forthcoming) for the enforcement or review of existing regulatory texts, for the active promotion and facilitation of exports, and for bilateral and multilateral agreement negotiations by providing training to its staff. This training, which will be extended to the staff from other institutions and private operators, is all the more important now that the Economic Community of West African States is entering into the phase of preparing commercial texts and agreements. Mali and other member countries will need to influence the ECOWAS institutional framework.

Additional appraisals of DNCC indicated that one of its shortfalls lies in the inadequate provision of information to private operators. Considering this observation, TradeMali will collaborate with DNCC and other policy institutions such as the General Directorate of Customs (DGD), the National Directorate of Industry (DNI), and the General Directorate of Regulation and Control (DGRC) to inform private operators about the contents of the bills of law related to agricultural product exports. For those legislative documents that are not in line with the new approach of global trade, TradeMali will support the DNCC, if necessary, in the review of texts governing the export trade in Mali. Assistance will also be provided to the DNCC in the development of its exporter's handbook. This handbook will be designed as a short manual and road map for export operations. Collaboration with OMA and WARP's MISTOWA project will supply regional market information including prices, exported quantities and contacts with potential importers. As part of its exit strategy, and at the request of the MIC, TradeMali will also house and train two DNCC employees so as to make the organization a fuller partner in project activities.

Dialogue between public institutions and private operators has become an essential element in the search for sustainable solutions to trade-related issues. CONOESAM, its sub-regional counterparts, MISTOWA, and the UEMOA Secretariat and staff will be called upon to work with TradeMali in addressing both ad hoc matters and structured impediments to sub-regional trade. Our experiences in the project's targeted commodities provide information, data and solutions relevant to other commodities in these same sectors. As such, TradeMali has established public-private commodity fora to discuss export related topics. So as to get first hand knowledge of various trade issues—including illegal practices and hassles along the corridors for targeted product exports—from time to time, the staff of the project's policy unit will accompany field staff on market prospection trips, tests and commercial shipments.

## SECTION III

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### Competitive Road Map by Filière (Sub-IR 2)

#### A. Potato Sector

Potato production in Mali dates back to the colonial period. Today, it is primarily cultivated in the lowlands in the region of Sikasso, in Kati for the Bamako market, and in limited amounts in the Office du Niger and Timbuktu region. More than 10 varieties are currently grown with the most popular being:

- The Clustar variety, because of its good storage qualities; and
- The Lister and Pamina varieties for their high yields and culinary tastes.

Though having a good internal market and exported to neighboring countries like Ivory Coast and Burkina Faso, the potato sector is mostly informal, loosely structured and receives limited technical assistance. Potato production and marketing face many difficulties, including:

- Low yields;
- Inadequate and inefficient irrigation systems (watered by calabashes and by hand) and land development;
- High costs and supply difficulties for production (fertilizer, seeds) and marketing inputs (packaging materials, pallets);
- Lack of adequate village storage;
- Problems with transportation to markets;
- Post-harvest handling issues;
- Limited financial capacity to mount marketing operations;
- Inadequate information on potential export market opportunities;
- Informal nature of commercial activities; and
- Individualized export transactions.

#### A1. Context of the 2004-2006 Work Plan

To explore potential avenues for sales, during its first year the project carried out a pilot export activity targeting a new route: the Sikasso-Bamako-Dakar corridor. Considerable quantities of potatoes are imported by Senegal, Ivory Coast, and Mauritania from the Netherlands. As Mali is one of the most important potato producers in the sub-region, it should be possible to secure a share of the market in these countries. With this in mind, a test marketing was undertaken to acquire the parameters in the Senegal market, corroborate the competitiveness of Malian potatoes (see CAE report on visit of Senegalese importers, May 2003), and analyze the Dutch supply chain from Europe to West Africa. In addition to establishing relations with potential importers, TradeMali wished to study the changes in the transport logistics arising from the recent privatization of the

Malian railroad company (Transrail) and the construction of the Bamako-Kayes-Dakar road. A careful review of logistic options revealed several routes for further examination: Ghana, Mauritania, and Togo, each providing valued-added prospects for calibrated, cured, and quality selected Malian potatoes. These new markets will be explored during the second year work plan period, as will possibilities in the existing markets in the Ivory Coast and Burkina Faso.

The pilot operation to Senegal allowed the project to define the parameters of the Senegalese market, logistical constraints, unofficial charges, and the quality and price targets that Mali will have to attain to successfully compete in new markets and increase sales in existing ones:

- During certain times of the year, the high farm gate price of Malian potato (100-150 FCFA) from February to April, and even higher from May onward (to reach 300 to 400 FCFA/kg in August to September), makes Malian potatoes non-price competitive during those periods;
- Inadequate transportation logistics (refrigerated trucks, adapted railroad cars, gen sets) and poor road conditions yields a damaged potato upon arrival;
- Poor conditioning of export potato arising from lack of market requirements needs to be addressed;
- Appropriate packing material is unavailable or is extremely costly (used Dutch potato bags are often re-utilized);
- Lack of export and marketing know-how and long-term perspective from many involved in potato marketing; and
- Existence of well-established marketing networks in Senegal, making market penetration more difficult.

The end-of-season workshop, within which this test operation was presented, helped the potato sector participants to prioritize constraints and activities into three principal groups: 1) institutional environment; 2) production; and 3) marketing. Thus helping define the project's activities for the coming second year period.

## **A2. Main Lines of the Work Plan**

The main lines of the work plan are categorized into four areas:

- Institutional environment;
- Production/research;
- Post-harvest handling; and
- Marketing/exports.

At the institutional level, efforts will be focused on the development of a national strategy for the potato sector, organizing actors in the sector and developing norms and standards. The national strategy for the sector is the domain of the Orientation and Coordination Committee for the Promotion of Agro-Industrial

Sectors which is tasked to assure coordination between the private and public sectors. As stated in the Strengthening the Policy and Institutional Framework for Trade (Sub-IR 1) above, TradeMali will provide support to this forum.

Towards the end of the first project year, TradeMali had begun the process of organizing the potato exporters into officially recognized cooperatives with a structured formal marketing program. This effort will continue and be reinforced. As individuals, exporters lacked the ability to effectively negotiate with transporters, producers and buyers and could not lobby government with one voice. Dealings with financial institutions for exporter credit were unsuccessful, and it was difficult for support agencies, like TradeMali, to provide a broad coverage of technical assistance and training. The lack of a coordinated marketing effort by individual exporters often resulted in an oversupply of markets and a lowering of prices. Without norms and standards, all degrees of quality were delivered which further added to the downward pressure on sales prices. The fact that the exporters operated “informally”—outside of the use of official export and customs documents—exposed them to coercion and demands for non-official payments. Legally constituted exporters’ associations will address these issues, as will TradeMali’s planned training and technical assistance in cooperative management, export planning and management, export and customs regulations, contract negotiations, and cost and profit analyses. The project’s collaboration with the DNI in the development of norms and standards for potatoes, corresponding to sub-regional requirements, will upgrade and then safeguard our export quality.

Collaboration between TradeMali and production oriented organizations is essential to the successful implementation of this work plan. TradeMali’s post-harvest activities depend on successful actions carried out by those involved on the production end. Synergies will be developed with PRODEPAM (which has potatoes as one of its targeted products) to improve yields, improve land development systems, reduce the costs of inputs; with IER and the Dutch Cooperation involved in applied production research; with private sector input suppliers providing seeds, fertilizer and production credit; with Mali Finance (which also is targeting potatoes) to help finance purchases of production inputs; and with the Office de Niger and the Office de Haute Vallée due to their role in production.

Our post-harvest activities concern improvements in curing, grading, packaging, storage and transport operations through training and technical assistance. Actions to be developed in synergy with Mali Finance to help equip conditioning/storage facilities and finance marketing inputs (packaging materials), potatoes for sales, and transport costs will complete the post-harvest measures.

As for product marketing and exports, efforts will be in the provision of market information, norms and standards, characterizing market parameters, facilitating commercial contacts, and export management training—including customs and export documentation and legal requirements. With the exporters, new sub-

regional markets will be explored in Ghana and Mauritania, market parameters defined, importers identified and formal relations developed. Research for opportunities to increase volumes and revenues in existing markets, like the Ivory Coast and Burkina Faso, will be undertaken and purchase agreements formalized and scheduled. TradeMali will take advantage of national and sub-regional organizations like OMA, MISTOWA, CONOESAM/ROESAO to help provide sub-regional market information and handle, on an ad hoc basis with the exporters, the demands for non-official export and customs payments.

In summary, TradeMali will

- Expand existing regional markets and identify potential markets;
- Provide training and technical assistance to exporters to take advantage of these opportunities;
- Support exporter and exporter-producer organizations including training in organizational development and management; and,
- Leverage involvement in the sector by collaborating with Malian and donor organizations and projects and concentrating in geographic zones having significant production and sales potential.

## **B. Mango Sector**

Mali was one of the early exporters of mangoes to Europe. Traditionally, the exports are sent by air (less than 1,000 tons per year over the past few years, 817 air shipped tons in 2004), and wind up in French markets—the primary destination of Malian air freight mangoes is the Rungis market in France. Only 25 percent is exported onward to neighboring countries like The Netherlands, Belgium, Switzerland, and Germany. The market for air-freighted mangoes is limited—in volume and time period—to special clients who accept to pay higher prices for higher quality fresh mangoes. This shipping method has the added risk of relying on a single transport company (Air France).

To significantly increase the quantities of exported mangoes requires the use of sea freight. Mastery of multi-modal maritime shipping is one of TradeMali's principal areas of focus. Since the early 90's, other countries started exporting large quantities of mango by lower cost sea freight. This new type of sea logistics facilitated rapid growth of the European market for mangoes, which is currently estimated at about 150,000 tons. During this period of increased demand, the level of direct exports from Mali, a landlocked country, remained stagnant and essentially limited to air freight. The primary destination of sea freight mangoes is Northern Europe where The Netherlands is considered a re-export platform towards Belgium, Germany, Scandinavian countries, and Eastern Europe. The main sea freight mango suppliers include Brazil (year round), Peru, Mexico, and other Central American countries, as well as South Africa. Among West African countries, Ivory Coast is the largest exporter (with more than 10,000 tons per year) and is the major competitor to Mali, as the mango season coincides in both

countries, from March to June. Though statistical data do not report the situation, it is thought that a significant portion of exports from the Ivory Coast, estimated at 4,000 tons by some sources, is composed of grafted Malian mangoes, purchased in Mali by Ivorian exporters—though Mali does not get full credit for exporting these mangoes, Malian mango producers are able to sell much more of their production due to these Ivorian buyers. Senegal is the second largest West African exporter, and its exports complement Mali's rather than compete, as the mango season in Senegal starts in June and ends in September.

Mali currently has only one reliable experienced exporter of sea freight mangoes, the *Tropical Expressions Mali (TEM)* company, which has been exporting from Sikasso via Ivory Coast since 2001. With adequate mastery of container logistics and having resolved some constraints related to the political situation in Ivory Coast, TEM exported 1,460 tons of the Kent and Keit varieties in 2004. TradeMali is working to increase the number of exporters using sea freight, as well as assisting TEM to increase its quantity of sea shipped fruit—prior to TradeMali's involvement, apart from TEM, there were timid attempts by other exporters to export sea freight mangoes from Bamako (via Ivory Coast) but these attempts were not continued.

### **B1. Context of the 2004-2006 Work Plan**

In 2003-04, support by TradeMali was provided in the form of technical assistance in management and training in post-harvest handling, transport and quality considerations, information on competition and performance in the French and Dutch markets, and logistical and technical support to cold storage and packing facilities at the Bamako airport. These initiatives aimed at creating better conditions to help Bamako-based export companies develop a program for sea freighted mangoes, using multi-modal logistics via Dakar or Abidjan, to Europe, and to improve the methods used in air freighted mangoes. As part of this process, two additional companies (including a new foreign investor invited by the project) exported three and four sea freight containers respectively, totaling 140 tons. The cold chain improvements yielded significant increases in the quality of the containerized fruit. As can be expected from first time operations, some losses were recorded at the arrival, due to the poor quality of packaging (cartons and pallets), however these problems can be rectified with proper materials and further training.

The Bamako-Dakar corridor that, in normal conditions of railroad and road transportation, would help Malian exporters reach European ports in a shorter period of time than through the Bamako-Abidjan corridor, could not be utilized. Mali did not have adequate material and equipment for cold chain road transport (modern refrigerated trucks, generators/clip-ons for refrigerated containers). An initial test shipment via the Bamako-Dakar road thus resulted in a loss of mangoes at the destination point, due to a disruption in the cold chain. As for the railroad, the *TransRail* company was unable to guarantee a delivery schedule needed by the transport and sea freight companies to program mango shipments to Europe.

Particular efforts are needed to improve planning for export shipments, which would help resolve many container logistics problems.

Another major element that will determine success of the upcoming export campaign is the ability of Malian producers and exporters to cope with European EurepGap quality requirements, which will be enforced in June 2005. Any exporter targeting the large European distribution channels (supermarket and hypermarket chains)<sup>4</sup> must:

- 1) Adopt a code of Agricultural Best Practices (ABP) and enforce a quality control regime that will determine production, conditioning, packaging, and shipping requirements, and this should be developed early during the year;
- 2) Establish a quality assurance and traceability system, which enables tracking of the origin of unsuitable products back to the producer, in case of complaints from European consumers; and
- 3) Obtain a recognized certification that allows access to these profitable and coveted large European distributors.

Accurate data collection about Malian mango exports (by air and sea freight) was a difficult process that TradeMali will continue to attend to to provide better information on arrivals and on competitors to ensure success for the upcoming seasons. In addition to maintaining our European market information services, we will institute, through OMA, a sub-regional service as well to better appreciate the scope and potential of Malian exports to neighboring countries.

The Malian mango sector has several issues in production, post-harvest handling and marketing that need to be addressed to make this fruit more advantageous and increase sales: traditional markets are often saturated due to large competing volumes from the Ivory Coast; poor knowledge of production techniques and orchard management—plus lack of extension service coverage—results in decreased yields; fruit fly infestations, insect attacks and improper spraying causes problems with phyto-sanitary controls; inadequate post-harvest handling and quality control, and substandard product presentation results in a less attractive fruit receiving lower prices; inappropriate cold storage and cold chain facilities and poor mastery of container logistics forces reliance on air freight with its accompanying higher marketing costs and limited window of profitability. Successful exports of Malian mangoes by sea freight require a new set of skills which TradeMali's program will tackle over the next 18 months. These include the following:

- Mastery of sea freight quality control (coloring, maturity, damage inspection, packaging format, grading, box marking, commercial presentation, pallet handling, container stuffing, and operation of refrigerated containers and the cold chain);

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<sup>4</sup> Though currently limited to the larger buyers, many experts believe that these requirements will become common throughout the industry in the near future thereby affecting all mango exports.

- Improved performance in harvesting and post-harvest handling (shorter collection periods, quality of materials, productivity of conditioning stations, technical skills of the pack house teams), which requires better management of logistics, post-harvest infrastructure, and competitive costs;
- Sea freight logistics, which imposes new working conditions and new options;
- Planning and coordination of export activities by quarter, using new communication and computer technologies;
- Compliance with importer quality requirements, including a traceability system which, through adequate mastery of Agricultural Best Practices (ABP), may pave the way to the large distribution market in Europe that require EUREPGAP, HACCP, and BRC adherence; and
- Financial management and creativity that goes beyond access to formal bank credit and allows for a variety of financing schemes for export campaigns.

## **B2. TradeMali's Program**

With an eye on the professionalization, promotion and long-term growth of the industry, TradeMali's work program for the mango sector during the next 18 months will be expressed in two major themes:

1. Improving the business climate and the institutional framework for the mango sector:
  - Establishing closer and more intense collaboration with the Orientation and Coordination Committee, housed in the Ministry of Private Investment, for the promotion of agro-industrial processing sectors;
  - Developing a strategic vision and a collaborative action plan for the mango sector, which will help define the priorities, prepare for the 2005 and 2006 campaigns, build capacity among professional associations, and better coordinate donor activities in the sector;
  - Reinforcing the capacity and the involvement of exporter organizations and support agencies and in particular those organizations involved in production related aspects;
  - Identifying and reinforcing the collaboration among actors, donors and services;
  - Alleviating logistical constraints and improving the logistical systems (cold chain, transportation infrastructures, and service delivery); and
  - Standardizing and improving Malian mango quality and developing export specifications.
2. Providing support to operators, from production to harvesting and handling, and to shipping and marketing:
  - Helping to establish profitable and replicable model businesses and business models;
  - Attracting new investment into the sector;

- Defining parameters for various target markets and helping implement a product traceability system;
- Identifying new international and regional markets to reduce dependency on the French market;
- Providing operators with information about destination markets;
- Helping exporters understand the export requirements for Malian mangoes, particularly regarding container logistics, in order to facilitate HACCP or BRC certification;
- Building capacity among exporters to better define their objectives and plan for export campaigns;
- Developing creative proposals for the financing of mango export campaigns and facilitating arrangements and partnerships with credit sources;
- Providing training and assistance to support agencies involved in production;
- Inventory farms in Sikasso and Koulikoro regions, and assess actual and potential orchard production;
- Training producers in Agricultural Best Practices and help them comply with the EUREPGAP requirements;
- Introducing new early varieties and helping improve existing orchards and the creation of new commercial plantations;
- Establishing a model systems for agricultural input and harvesting input management; and
- Providing training in orchard management and fruit-picking.

In summary, TradeMali will

- Identify other on-going initiatives and establish collaborative relations;
- Identify and increasingly involve other partners in the production related aspects of the mango sector;
- Strengthen firms, associations and support agencies;
- Facilitate export financing;
- Work on reducing infrastructural constraints; and
- Provide assistance in meeting importer requirements including those pertaining to EurepGap and BRC conditions.

The reader will note that the mango work plan is a highly ambitious. It is also a plan that is doable and necessary in light of more stringent importer requirements and strengthened competition. Some of the activities—highlighted in the work plan—are included in the action plan developed by the Mango Initiative Committee that was established following the TradeMali-sponsored Mango Days in August 2004. Though important, the highlighted activities are not priorities for the TradeMali team, and TradeMali will provide support to organizations addressing those needs. For other activities (particularly concerning production and infrastructure areas), TradeMali is relying on collaboration with the World Bank, and Dutch, Swiss, and French development agencies, as well as local support agencies like the Offices, projects, NGOs and private consulting companies and consultants.

### **C. Red Meat Sector**

The major constraint to red meat exports is the lack of an effective and competitive supply chain. Mali's livestock sector is rooted in tradition, dominated by informal practices, and driven more by speculative factors than formal market demand. Historically, little attention was given to developing Mali's animal resources with a view toward promoting the development of high-value commodity supply chains for export markets. Though occasional red meat exports have been undertaken, frequently by air and often for political or personal reasons; formal, regularly scheduled exports using commercial instruments have not occurred. Moreover, the inability of Malian exporters to position themselves competitively to penetrate regional red meat markets and the relative ease and long experience in exporting live animals have seriously limited development of the red meat sector and the promotion of the investments necessary to sustain a sound and cost-effective foreign trade in red meat products.

Preliminary analyses during TradeMali's first year of activity indicated that red meat exports destined for regional markets are currently limited by the following major factors:

- High total costs for red meat FOB Abattoir, Bamako, compared to average retail costs for red meat in most costal markets for those market segments where Malian meat could be competitive;
- Lack of processing facilities that fully comply with international norms and standards;
- Lack of a well-adapted and proven logistical infrastructure for meat exports; and
- The need to strengthen and closely monitor a certification process for meat and meat products destined for export, in compliance with international norms and standards.

#### **C1. Context of the 2004-2006 Work Plan**

Over the past 12 months, several political and economic initiatives have occurred, providing rare opportunities to promote the development of the red meat sector. First, the establishment of the Ministry of Livestock and Fishery in May 2004 clearly illustrated the importance the government places on developing the livestock sector. This action creates an opportunity for developing a dynamic political climate for the promotion of the livestock sector's different commercial commodity subsectors.

On the private sector side, several initiatives began as part of efforts to develop economically viable meat processing and exports enterprises. In this regard, the *Abattoir Frigorifique de Bamako*, which was privatized in 2003, is currently undertaking a technical evaluation and feasibility exercise intended to update its technical and infrastructure capacity to

meet international norms and standards for red meat product exports. In addition, an Ivorian company, the CAF'CAO, which is operating a new slaughterhouse, is making investments in infrastructure and training to enable this operation to prepare carcasses and boxed meat in compliance with appropriate export conditions and standards. The *Société Malienne des Produits Carnés (SMPC)*, has already started exporting carcass meat to Abidjan using the slaughtering services of the Abattoir Frigorifique. Each of these three companies intends to provide refrigerated logistics for the transport of red meat locally as well as export markets in the sub-region.

Other Malian companies have also been established, including the Pan African Livestock Development and Trading Company, and are actively prospecting sub-regional markets such as Ghana, Ivory Coast, and Senegal.

## **C2. Program Concentrations**

These opportunities are the context within which TradeMali developed its work plan for the next 18 months. As a consequence, and taking into account that sustainable and professional development of this commodity sector will require a step-by-step approach, the proposed program intends to build on the above-mentioned opportunities through the establishment of a dynamic and effective public-private partnership to promote the development of the red meat export sector.

Regarding the political aspects, TradeMali proposes to support efforts made by the Ministry of Livestock and Fishery to develop and implement a national strategy for the development and promotion of red meat exports. Logically, this strategy should facilitate the preparation of an action plan by the Ministry, in collaboration with the private sector, and in principle, this action plan should serve a basis for implementation of a coherent program for development of meat exports, involving a wide range of actors.

At the same time and considering initiatives already introduced by several private companies, the Ministry must ensure the enforcement of adequate procedures for the certification of export meat, in accordance with international norms and standards. In this regard, TradeMali plans to support GoM efforts to develop an adequate certification procedure in collaboration with the private sector. These efforts will culminate in a forum to be organized by TradeMali and the Ministry, to inform the private sector of intended certification procedures. The forum, coupled with the diffusion of information by the media, will precede the implementation of these measures. This activity is essential to support ongoing export efforts and to facilitate the opening of new export opportunities.

The private sector has just started to take seriously potential opportunities provided by meat exports. TradeMali is proposing to help these enterprises to evaluate opportunities and risks, and develop short and medium-term strategies to maximize their competitive advantage. To achieve this, TradeMali will assist these enterprises to better position themselves competitively in targeted markets by helping them assess the economic, financial, and logistical needs of their supply chains with respect to specific, targeted demand. Such analyses, specifically looking at the cost structure and margins for each link of the chain, should enable each enterprise to identify opportunities to reduce costs, adjust margins to become more competitive, and increase market share.

It should be noted, however, that the efforts needed to develop an effective supply chain for Malian red meat are principally related to animals being competitively priced and are clearly beyond the capacity of TradeMali alone. A competitive priced product relies heavily on production level interventions: to reduce production expenses, cost-effectively use feed rations and commercially run viable fattening operations. Consequently, TradeMali has begun to mobilize a wide array of partners from the public and private sectors, NGOs, other donor-supported development projects, as well as PRODEPAM and MaliFinance projects<sup>5</sup> to assist in this process.

For TradeMali, PRODEPAM, and MaliFinance, the achievement of shared objectives requires close collaboration. TradeMali envisages working with PRODEPAM to establish a supply network of high-quality animals and promote the implementation of supply contracts between suppliers and export companies and individual exporters. The objective is to formalize supplies to ensure greater efficiency for commercial clients and provide a basis for negotiating more competitive prices. To achieve this, intensive units will better manage their costs, and in particular, by effectively using quality rations that include high-quality blended animal feed concentrates. In addition, the modernization of commercial infrastructures requires preparation of investment plans and the development of partnerships between entrepreneurs and financial institutions. To this end, TradeMali is already collaborating with MaliFinance and intends to assist in preparing a market analysis as part of a comprehensive investment feasibility study that MaliFinance is coordinating with the Abattoir Frigorifique.

In summary, TradeMali is:

- Targeting private firms engaged in meat processing and marketing;

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<sup>5</sup> In addition, TradeMali is discussing with the World Bank-financed PCDA project about investing in commercial facilities for the agricultural and livestock sectors.

- Helping to upgrade their infrastructures by assisting in the elaboration of technical and financial studies;
- Collaborating with Mali Finance to facilitate contacts with financial institutions;
- Collecting and providing marketing information and conducting export marketing tests with the private sector;
- Assisting private sector operators to evaluate opportunities and risks, and develop strategies and plans; and
- Collaborating with PRODEPAM in its efforts to provide cost-effective feed rations and techniques.

To conclude, the success of developing red meat exports requires time and the active participation of professionals at all levels, rigorous management and integration of each link in the supply chain, and substantial investment. The strategy of the proposed program is to establish a solid base for progressive development that will lead to the creation a commercial sector based on formal and sustainable commercial transactions. To achieve this, TradeMali will begin by placing a priority on supporting the development of a favorable political environment that is based on a dynamic and transparent public-private partnership, on capacity building among all actors, enabling each partner to fully and competently play its respective role and on collaborating with organizations working on building commercial fattening operations.

#### **D. Rice Sector**

For the rice sector, activities focused on three principal activities during the first year: 1) the identification of Malian rice exporters, 2) an analysis of regional market opportunities for Office du Niger rice, and 3) the “Riz Crédit Stockage (CSV)” activity

Large volumes of Asian rice are annually imported into West Africa. Given the existing and potential production of rice in Mali, nearness to regional markets, and prior analyses, rice exports seemed to be a good business opportunity but official data showed low or nonexistent exports. TradeMali carried out a regional market study to determine the competitiveness of the Office du Niger rice. The study looked at various regional markets and production scenarios and determined farm gate, processing and transport costs. The analysis shows that the price of Asian rice available in various West African cities is significantly cheaper than all varieties of Malian rice and that rice produced in the Office du Niger is not currently competitive in these markets. This result was reinforced through discussions with Malian cereal exporters – stating that they saw no immediate prospects for profitable exports of Malian rice – and from

regional importers who stated that their consumers based purchases on price and that Malian rice was too expensive.

### **D1. Context of the 2004-2006 Work Plan**

The high cost of local rice comes from a number of factors: high farm gate prices that are not entirely based upon high production costs but rather on a strong and increasing national demand; low processing yields; and high transport costs. Addressing these cost considerations requires a medium- to long-term approach and the involvement of projects targeting the production phase. The TradeMali second year work plan was developed accordingly. In the marketing area, norms and standards will be refined, market information disseminated, and small-scale informal traders will be identified. A study on cross-border rice trade, in collaboration with cereal traders (CONOESAM and ROESAO) and local rice millers, will be carried out. A mainstreaming analysis of gender issues and implementation of recommendation(s) will better define TradeMali gender activities in the rice commodity sector, and training in marketing and exporting will be provided to cereal exporters to better prepare traders for future rice export opportunities.

Support for the “CSV” activity will be expanded, especially in the zones that PRODEPAM is targeting and in other high production areas. The CSV activity is designed to increase farmer income and facilitate product sales by: 1) helping small farmers organize, secure financing for storage, and store their product (rice) to negotiate better prices, rather than being forced to sell their entire production at lower prices during harvest time; and 2) providing traders and potential exporters with opportunities to easily obtain known quantities of rice from centralized supply sources, instead of having to buy from large numbers of scattered suppliers in diverse locations. Training material developed in the first year will be upgraded and a network of decentralized instructors developed through a training of trainers effort. With a mind to attracting additional associations and future expansion, the project, in collaboration with Mali Finance, will evaluate the building and equipment investment needs of eligible farmer groups.

In summary, TradeMali will

- Extend the Credit Stockage Vivier (CSV) program, in particular in the PRODEPAM program zones and other high production areas:
  - to new farmer participants, financial institutions, and technical support agencies;
  - continue to support those involved from the first year activity;
  - evaluate the building and equipment needs of current and potential activity members with a view to future expansion of volume and number of associated groups; and

- continue to collaborate with Mali Finance to involve additional financial institutions in the provision of credit for rice storage and for small-scale investments;
- Continue to distribute market information and evaluate export opportunities by:
  - Undertaking a study on cross-border rice trading in collaboration with filière members; and
  - Using OMA to survey, analyze and distribute information useful for Mali's export participation in the regional rice trade.

## **E. Other Potential Agricultural Export Commodities**

TradeMali's strategy is to intensely focus on a limited number commodity sectors and develop models. We have often pointed out that major constraints are cross-cutting and that resolving issues for the targeted commodities will address concerns for related export commodities. With this partly in mind, we will be investigating other products with a potential for export markets or for increasing export volumes, increased value added or increased profitability from marketing abroad. We will also look at additional products from the point of view of being able to address immediate issues that could unblock a stalled situation, like the case of pois sucre and incorrectly filed customs forms. Some key evaluation considerations:

- Collaboration with existing efforts of other organizations not duplication
- Is it an existing product and already exported?
- What is the potential in regional markets?
- Market requirements: varieties, prices, qualities, timing, packaging
- Supply chain situation
- What are the significant production issues and are these solvable?
- Social and economic impact
- Geographic focus
- Other major concerns
- Capacity of TradeMali to address the issues
- Capacity and availability of other agencies to handle issues outside the project's mandate
- Possibility of significant results within project time frame

## SECTION IV

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### Cross-Cutting and Special Activities

#### A. Gender

TradeMali has adopted the commodity sector approach to achieve its development objectives for mangoes, potatoes, rice, red meat, and the agricultural products of the Northern region. Interventions under the gender component will also follow the same commodity approach but with the purpose of mainstreaming for the most disadvantaged buyers in targeted sectors – generally women who are less present in the most profitable links of the sector chains.

#### A1. Mainstreaming of Target Sectors

The prerequisite for any mainstreaming action is to accurately define the roles and responsibilities of all actors as well as the specific constraints for the most disadvantaged group of actors. Gender mainstreaming studies will be undertaken in the four target sectors: mango, potato, rice, and red meat. These studies will lead to recommendations that the project will translate into concrete activities.

It is important that in addition to communication activities targeting all sectors, more specific activities be carried out toward women entrepreneurs (in all sectors) through their professional associations, to help them reach the same level of information as men about investment opportunities in project targeted sectors. For this reason, women will not only be invited to participate in activities designed for actors in the sectors, but also, we will take advantage of all forums gathering women entrepreneurs (workshops, conferences, etc.) to introduce TradeMali's activities. The objective of this approach is to help those women who desire and have the means to act as investors in the profitable links of the sector.

#### A2. The Women's Advisory Committee

Early after project start-up, a gender advisory committee was established to assist the project in taking gender issues into account. It is composed of 10 resource persons working in the agricultural sectors or in a support organization or public service, who are interested in project activities. During Year 2 of the project, the Gender Advisory Committee will be revamped into a Women's Advisory Committee, as part of the mainstreaming effort, and participation will be extended to other women's professional associations and to other support organizations such

MaliFinance and PRODEPAM. The committee will meet twice each six month period.

### **A3. Supporting Women for Financing**

One of the major constraints to the development of agricultural sectors is difficult access to credit funds. Financial institutions consider the agricultural sector to be a high risk one. Therefore, this is a common constraint that affects producers, on-farm buyers/collecting agents, traders/exporters, and other service providers. A review of the situation reveals that women producers or traders have more problems accessing credit than men, due to their social and economic status. In general, it is more difficult for women to meet bank criteria for personal contributions to project financing and loan guarantees (for which land is often required).

TradeMali's activities in this area will include the following:

- Inventorying/disseminating information about funding sources for women entrepreneurs and establishing contacts between women and identified sources; and
- Providing assistance to women promoters in synergy with MaliFinance and PRODEPAM.

### **A4. Capacity Building Among Women Entrepreneurs in Targeted and Related Commodity Sectors**

The majority of women entrepreneurs manage family and artisanal microenterprises, most of which are informal. There is a need to improve the management of these small enterprises to increase access to credit and promote their development and growth. To this end, women will participate in training and communication activities designed for operators and, if need be, specific training sessions will be conducted to build capacities in business management themes (GERME or Marketing Cents) including marketing, financial management, stock management, accounting, cost estimation, and business plan development. Also, if needed, communication activities will be developed for women entrepreneurs, including production technical data sheets, guides and manuals about the business climate, financing, support organizations, and trade related texts and regulations.

### **A5. Gender Specific Activities Under the “Northern Initiative”**

TradeMali project activities in the North are concentrated on four sectors: rice, anise, camel milk, and crafts.

## The *Anis* Sector

*Anis* and *cumin* are two spices that are grown only in the districts of Diré and Goundam and are profitably traded between Mali and other countries in the sub-region: Ivory Coast, Niger, Togo, Ghana, Benin, and Nigeria. To assess the potentials of this sector, in May 2004 TradeMali organized an Anis Day, which brought together about 30 participants including producers and exporters as well as support organizations (Africare, IER, SLRC, and SLACAER). This workshop helped establish the number of quantities sold and exported, identify constraints related to exports, and develop an action plan for the development of this sector. A market study for the sector is set for Year 2 of the project. To understand the gender dimension in the implementation of activities in the sector, it appeared necessary to analyze specific roles and constraints of men and women. Therefore, the terms of reference for the market study will integrate an analysis of the gender dimension.

## Crafts

The “*Art et Métiers du Livre*” group in Timbuktu comprises about 100 members from various social groups: goldsmiths, painters, Arabic calligraphers, and blacksmiths. Their goal is to reproduce the designs and images of manuscripts from the Centre Ahmed Baba and various libraries in the city of Timbuktu. Women reproduce these manuscripts on leather, with golden, silver, and copper sheets and make paintings that they sell through the libraries where they obtain the manuscripts.

Support provided by TradeMali during Year 1 of the project helped the group undertake procedures for its official recognition so that it can work in a formal framework. This group faces difficulties that constrain its development but TradeMali is able to offer limited assistance:

- The libraries, particularly the Centre Ahmed Baba, assume rights over the paintings and levy considerable commissions on sales, leaving the women with only the bare minimum of profit.
- The paintings do not sell well because there is a lack of promotion and the final product is not adequately worked and presented. During Year 2, TradeMali plans a one-time effort to help the group improve the quality of its products by organizing, with the American Cultural Center, an exhibition of the paintings with the aim of promoting the group’s products and having them receive consumer comments on the work quality. Afterwards, local and regional organizations specializing in handicraft activities will be approached to provide further assistance.

## Camel Cheese

During the first project year, TradeMali was approached by a Kidal based NGO to collaborate on a camel cheese activity. The main vocation of Northern Mali's nomadic people is camel husbandry. TradeMali's primary objective for this intervention is to help improve utilization of the camel in a sustainable manner and on a commercial basis to increase revenues of camel raisers and their families. After considering several alternatives, TradeMali decided to begin with the production of a traditional product that is likely to have potential for improvement to meet a high local demand and eventually export toward neighboring countries. In fact, the first step will be to improve the traditional production system to establish, in the future, the basis for commercial exports of camel milk through ultimate processing into soft pasta cheese.

Currently in Mali, cheese is produced by a few women's groups in an artisanal and occasional manner in very small quantities. Considering positive experience with commercial production of camel cheese in Niger and Mauritania, it seems that this product can be produced, using recognized quality and conditioning norms so as to meet domestic demand first and external demand later. Therefore, a step-by-step approach was selected, which helps improve this sector while ensuring that the necessary basic resources are available to produce a high-quality product, capable of penetrating the Southern markets of the country, mainly Bamako, and even neighboring countries in the future.

During Year 1 of the project, producer groups (with 54 percent composed of women) in Kidal received training in hygienic milking of camels and in the production of camel cheese through techniques learned by our consultant in Niger. Microbacterial analyses performed on cheese samples were promising, which indicates that the groups are improving. The commercial tests carried out early in Year 2, in border and Northern town markets, showed that the product was well accepted and profitable. However due to the distance and resources involved in working with groups in Kidal, TradeMali will not continue our efforts there during the second year. Instead, the project will explore possibilities for similar activities in the Timbuktu region where we have the majority of our Northern effort.

## B. Communications

TradeMali's communications strategy is designed to provide information, raise awareness, advocate, and build the capacities of actors in the targeted commodity sectors to achieve the overall objectives of the project, that is, increased exports of selected agricultural products and increase capacities to export. This strategy has

three overall components, which complement communication activities planned within each sector (see commodity sector work plans).

### **B1. Access to Relevant and Timely Information for Commodity Sector Partners**

- Collecting, processing, and disseminating technical and market information about targeted sectors;
- Providing support to help operationalize Web sites for Office du Niger and the DNCC;
- Preparing and publishing a quarterly information newsletter about targeted sectors; and
- Involving the press in project events (training, professional meetings).

### **B2. Promote Export Opportunities**

- Holding regular meetings with public and private organizations and partner projects, for instance ministries or their departments, ON, OMA, CONOESAM, APECAM, CCIM, CMC, PASAOP, AMELEF, APFEL, AMAQ, AJEX, PRODEPAM, Mali Finance, CILC, HELVETAS, JEKASY;
- Sharing the content of the annual work plan, results, and identified opportunities with the Project Advisory Committee, the Project Gender Committee, and the National Orientation and Coordination Committee; and
- Collaboration with a Malian economic journal/newspaper and regional newspapers/journals to report on events and promote export and trade.

### **B3. Build Export Capacity**

- Training of operators in targeted commodity sectors in harvesting, conditioning, storage, and transportation techniques;
- Training exporters and their organizations in export planning;
- Management training for exporters and their organizations; and
- Training journalists in the written, oral, and audiovisual press in writing articles on agricultural exports.

## **C. Northern Initiatives**

TradeMali's activities in the North will be more focused and better defined this year. During its first year, project concentration in the North involved: introducing Credit Stockage Vivrier (CSV) for rice, identifying potential export commodities, and building a network among businesses and public agencies in the Timbuktu area. Major activities for 2004-2005 are built upon this base and are planned principally around: the rice credit storage program which will be expanded; marketing and research activities with anis and cumin; a possible

shifting of the camel cheese activity to the Timbuktu region; and continued research into possible other target agricultural commodities.

To accomplish planned work in these filières, two interns will be recruited and stationed in the region. They will be hired as interns or “stagiaires,” recruited to work specifically in rice (CSV) and the anis-cumin sub-sectors. They are scheduled to be posted in Diré and will work with the PRODEPAM project as well. A third intern is being considered to work in handicraft for a temporary period and would be posted in Timbuktu. The stagiaires are identified through a national youth employment program (APEJ) that recruits young graduates of technical schools and helps place them in new entry-level job opportunities. Costs of the stagiaires are shared between the Government of Mali, CARE, TradeMali, and PRODEPAM.

### **C1. Anis and Cuimin**

One group of agricultural products that are grown predominately in the Timbuktu area (mostly the Cercle of Diré) and exported are anis and cumin, short shrubs that yield leaves and seeds and are consumed as condiments. They are sold in Mali and exported as well to neighboring countries (Niger, Bourkina Faso, Togo, Benin, Gabon, Nigeria, and Ivory Coast). Annual production estimates are based on average yield per hectare (1.5 ton/ha) and with approximately 517 hectares under production. This will yield at least 700 tons of mixed leaf and seed. There are perhaps 2,000 small producers and traders involved in the production, processing, and trading of anis and cumin in the region.

The product workshop held last year in Diré produced a *Comité de Pilotage* for the filière composed of producers, processors, and exporters of the spices. The *Comité* met regularly during the past five months and produced a medium-term Filière Action Plan that includes: (1) a pilot export operation to a European importer, (2) steps to improve processing to better separate the seeds from leaf residue, and (3) justification to conduct a study of regional markets. In addition, the plan called for several events geared to increase product quality to better penetrate the regional market. A stagiaire and the TradeMali team will work with the *Comité* and members of the filière to implement parts of the action plan. PRODEPAM is interested in promoting production and will share the costs of the intern. TradeMali will continue to collaborate with the regional Ministry of Agriculture’s extension service, and expand the circle of partners to include AVRDC-ADRAO and IER.

### **C2. Processed Camel Milk**

Economic opportunities are extremely limited in Mali’s Northern regions, but with the second largest camel herd in Africa, developing the production and commercialization of camel-based products represents a potential major economic opportunity for a large number of Mali’s nomadic population, especially young people. It was within this context that TradeMali responded to a request from

USAID and a local PVO based in Kidal to assess the possibility of producing and marketing cheese produced from camel milk.

RADEC – the local PVO – and TradeMali developed a pilot program that began in July 2004. The first phase of this program focused on training targeted local groups in techniques to produce a marketable camel-milk cheese. The second phase will test market acceptability of this product early in the second year. To date more than 250 women and 200 men have received training, more than 250 kg of cheese have been produced using 1,500 liters of camel milk and microbiological analyses are underway to determine its hygienic quality. Due to the distance and resources involved in working with groups in Kidal, TradeMali will not continue our efforts there long after the marketing tests. Instead, the project will explore possibilities for similar activities in the Timbuktu region where we have the majority of our Northern work.

### **C3. Rice**

Most of the activities in rice in the North will focus again on *Credit Stockage Vivrier*, a form of warehouse financing that was introduced in Year 1. Working with a stagiaire, the Northern team will expand its outreach to include 10 new villages, in addition to expanding the membership and operational efficiency in the five villages that participated in the financing scheme in Year 1. Additional time and resources will be devoted to establish a contract with one reliable financing institution (SFD) to accompany this component. TradeMali will continue to partner with MaliFinance, which was of significant assistance during Year 1, and will evaluate the building and equipment needs of current and potential activity members with a view to future expansion of volume and number of associated groups. TradeMali will collaborate as well this year with PRODEPAM as that project fosters improved and increased rice production.

### **C4. Handicraft**

During Year 1, the project identified several handicraft items from the North that had export potential, particularly in light of their attractiveness to tourists visiting from overseas. Activities in Year 2 will be limited in scope and time with TradeMali phasing out of assistance to handicraft filières. The process will be conducted through a three-step approach:

- 1) Oversee the installation of computer equipment provided through a USAID grant to three “Chambres des Metiers” of the North (Timbuktu, Gao, and Kidal), which includes digital picture capabilities;
- 2) Organize IT training to members of the *Chambres* as a way to increase their capacity to promote quality items that could be marketed through Internet; and
- 3) Assist the filière to identify and collaborate with organizations specializing in the development of handicraft sectors.

## **ANNEX A**

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### Exchange of Correspondence on Work Plan Year Two

- 1. Correspondence of December 3, 2004**
- 2. Correspondence of February 16, 2004**

**From:** Camara, Amadou L(Bamako/AEG) [mailto:acamara@usaid.gov]  
**Sent:** Friday, December 03, 2004 11:55 AM  
**To:** Joel Schlesinger  
**Cc:** McCarthy, Dennis (Bamako/AEG); Harvey Schartup; Dembele, Mamadou A.(Bamako/AEG); Sheila Shih-Hua Tang; Brett Carter; Harvey Schartup  
**Subject:** RE: Workplan 2

Dear Joel,

I am very happy with your responses and we grant provisional approval of the year 2 workplan.

We had a very critical look at certain at the rice sector issues during the presentation that Abdoul Barry, Arouna Diallo and Harvey gave us yesterday about the rice competitiveness study and potential rice sector activities. We will be contacting you and Harvey by Tuesday next week with the Mission position on the direction to give to the rice sector activities of TradeMali, and any additional project staffing considerations we may have.

Bon weekend!

Amadou

#### USAID/AEG Comments on the draft Work Plan No.2 of TradeMali

TradeMali will implement activities as presented in the second year work plan unless otherwise modified by statements made below. Throughout the course of the year, we will welcome the participation and suggestions of the CTO in making activity-related decisions. We will strive to provide the CTO the most advanced notice possible, particularly about workshops, seminars and other types of fora.

With these understandings, USAID/Mali will now provisionally approve the second year work plan. Final approval is subject to the below mentioned presentations (points 4 and 13, notably) which will occur before the end of this calendar year. We propose not to add any additional written sections to the work plan until the presentations are complete and final decisions are made.

Thank you for submitting your second year work plan. We appreciate the hard work you put in this. Now that USAID has read the good versions of the annual report and the draft work plan, we are pleased to share with you our specific comments.

1. Need to identify and propose research/studies regarding regional market potential of additional agricultural commodities which could possibly have regional market opportunity in addition to the four identified already. This means that Work Plan should include an activity researching what other commodities Mali may have a comparative and/or competitive advantage in exporting to the regional markets, i.e. horticulture crops, tomatoes, onions, etc, etc,?? Particular emphasis on what commodities produced in the North might be researched including horticulture crops etc.

We agree to carry out initial research and consult with the CTO to identify additional potential regional commodity exports for more in-depth study. We will note this in the final work plan. OK

2. AEG/CTO will propose a list of deliverables derived from the draft work plan, discuss them with TradeMali before they are agreed upon. Drop the deliverable column in tables since they will be changed to reflect new definitive deliverables proposed for this year's work plan in view of contract change to cost reimbursement mechanism. Just as an example regarding lobbying efforts; we would want to see a deliverable indicating some definitive product like "legislative proposal", lobbying literature produced and presented to whom, Action Plan (Road Map) for Potato export, Action Plan (Road Map) for Red Meat exports, lobbying efforts of exporters re; illegal taxes and payments (who, where with whom?), for norms and standards issues; we need definitive deliverables, etc, etc.

We welcome the full participation of the CTO in the development of project activities. We believe the anticipated contract modification from fixed price to cost plus fixed fee will facilitate this collaboration. OK

3. See how to add a column to the tables indicating the related actions from last year's work plan for each action proposed in this year's work plan. We need to see in brief fashion how the proposed work follows from last year's work.

We will add this column in the final work plan (OK).

4. We need a presentation by TradeMali to AEG about the planned work on handy crafts export before we can agree to this work.

We will make a presentation of our ideas for this activity to AEG prior to the end of the current calendar year (OK). Modifications to the final work plan will be made if necessary (OK). We will complete the handicraft activity currently underway (? We need to discuss).

5. We understand that the Stagiaires/Interns in the North are Malian professionals. Describe clearly the support/back-up they will get from TradeMali and its partners (e.g. PRODEPAM, Mali Finance, etc...).

We will verbally brief the CTO of the plans to support stagiaires/interns in the North prior to the end of the current calendar year. (OK)

6. Additional full time person needs to be stationed in the North, thus having two long term professional full time people in the North to backstop North efforts.

We agree that stationing a second full time person in the North would provide greater support to activities in that region. Presently, our budget cannot support the creation of a position not anticipated at the time of contract award (Why?). We will be pleased to

discuss with the mission its ideas for pursuing this in the context of overall project priorities (OK. Staff reshuffling/restructuring is a possibility).

7. Clear detailed Plan, including specific deliverables, on how TradeMali is planning to support the efforts of PRODEPAM in the following sites;

1. Dire (Timbuktu region) Anise work.
2. Potato work in the Sikasso area, Office du Niger and North (Timbuktu region).
3. Rice in Office du Niger, Ségou, Djenné and Timbuktu region.

(Note PRODEPAM Work Plan for further information, specifically pg 5 of PRODEPAM Work Plan).

We propose that AEG convene a synergy meeting of the Mali Finance, PRODEPAM, and TradeMali Chiefs of Party to present their plans for collaborative work in the geographic and commodity areas listed above (OK). During that meeting specific arrangements and mechanisms should be agreed to ensure that the CTOs are kept aware of collaboration among the projects. Minutes of this meeting will serve as a written record of mutual project efforts (OK). For that reason, no further written sections will be added to the work plan document.

8. Clear detailed plan is needed, including specific deliverables, on how TradeMali and Mali Finance are planning to support each other's efforts.

We propose that this item be considered along with item number 7 above. (No, this should be very specific and well coordinated in terms of timing and area for each commodity).

9. We are not convinced the work on illegal taxes and other informal barriers to cross-border trade will lead to any significant changes given past work (under CAE project and CLUSA) on these issues. We believe that these costs should be included in the overall business cost of exporters to determine the competitiveness of Malian exports.

We agree that significant change in this area may be difficult to achieve. In association with item number 13 below, we will make a presentation to AEG regarding possible interventions in this area. (OK)

10. The scope of work for any new workshop proposed in the year-2 work plan needs to be discussed by the CTO and jointly approved before its implementation. For example, AEG/CTO has many comments on the planned red meat forum. This forum needs to be postponed until we agree on its SOW.

We agree and welcome the full participation of the CTO in reviewing scopes of work and in technical meetings throughout the year. We will strive to provide the most advanced notice possible. (OK)

11. For rice, we recommend that TradeMali take a close look at the informal exports of rice, research it and get the whole story about it. Specific market niches and activities (i.e.

processing, packaging, etc...) to target those niches need to be identified. What role could industrial rice milling enterprises play in the promotion of Malian rice exports? How can TradeMali work with marketing associations such “Faso-Jigi” of PACEM in Ségou or other associations in the other regions/zones. Then we can together draw some conclusions about how to promote rice exports under current circumstances

We agree to add this study to the final work plan and we understand the mission position that this activity may not have a significant impact (in terms of exports quantities) in the short-term.

12. Gender Mainstreaming needs to be clearly articulated in all areas.

TradeMali is organizing a gender mainstreaming workshop in the near future to which mission representatives have been invited. At that time we hope to define this concept more clearly and will share with the mission throughout the year our plans to incorporate gender mainstreaming in our activities. The report of the workshop will serve as an attachment to the work plan. (!?)

13. We would like to have the following presentations asap at USAID in order for us to have better understanding of a few selected activities posed in the Work Plan;

1. Proposed role of TradeMali over the next 18 months re; “contributing to regional initiatives to reduce illegal taxes and payments on exported products”.
2. Planned role of TradeMali over the next 18 months in supporting the promotion of Red Meat exports with proposed partners such as; “Abattoir Frigorifique de Bamako, Ivorian company CAF’CAO, Societe Malienne des Produits Carnes (SMPC)”, Pan African Livestock Development and Trading Company” and others.
3. Role of TradeMali in “helping operationalize the existing national action plan for rice promotion adopted in 2003”.
4. Role of TradeMali in “the validation process of the DTIS/IF”
5. TradeMali approach to policy dialogue/reform in general and on specific policy issues (i.e. illicit taxes, road blocks, etc...).

We will make a presentation of our ideas for this activity to AEG prior to the end of the current calendar year. Modifications to the final work plan will be made at that time if necessary. (OK)

Before the above issues are discussed and conclusions are drawn, we recommend that TradeMali not engage in any new activity.

Thank you!

Amadou Camara  
CTO/TradeMali

**From:** Camara, Amadou L(Bamako/AEG) [mailto:acamara@usaid.gov]  
**Sent:** Wednesday, February 16, 2005 3:59 PM  
**To:** Harvey Schartup  
**Cc:** Bowles, Bettie(ACCRA/A&AO); Coulibaly, Mamadou Z (Bamako/A&AO); McCarthy, Dennis (Bamako/AEG)  
**Subject:** Fianl comments on Workplan2/TradeMali

Harvey,

Following the initial Mission comments on the workplan Two and the presentations your team made for the Mission in December 2004, we conducted a second round review of the workplan and arrived at the conclusions in the attached document.

Approval of the workplan will be granted based on your agreement with these final comments/recommendations and the submission of a revised version.

If you have any questions, please contact me.

Amadou

### **Results of USAID's Review of TradeMali Workplan Two**

#### **1. Regarding the rice subsector, the following was agreed:**

**a) AEG comment:** continue/extend the "Crédit Stockage Vivrier-CSV" program,

**TradeMali Response:** we agree and this is being done.

**b) AEG comment:** extension of this program should be done primarily in rice production areas where the PRODEPAM project is promoting irrigated rice production, and in high-impact rice production zones,

**TradeMali Response:** we agree and this is being done.

**c) AEG comment:** Mali Finance should be brought into this program to facilitate the producers' organizations' access to financing for warehouses, weighing scales, pallets, processing equipment and the stock,

**TradeMali Response:** we agree and this is being done.

**d) AEG comment:** That TradeMali design and implement training modules in basic grain marketing and storage techniques for producers' organizations and traders,

**TradeMali Response:** we agree and this is being done.

e) **AEG comment:** the result indicator for rice should be changed from “Volume of rice exported, MT” to “Volume of **processed rice traded**, MT disaggregated by volume exported and volume traded domestically”

**TradeMali Response:** we agree and the indicator will be changed.

f) **AEG comment:** The Mission requires that TradeMali conduct a study on cross-border rice trade. The SOW is to be approved by the CTO prior to the study. TradeMali is expected to work very closely with the regional network of traders (ROESAO) and its Malian branch (CONOESAM), industrial rice millers to identify activities which need to be conducted to promote rice exports. A list of traders of ROESAO and CONOESAM contacted needs to be included in the study report which the Mission should receive by end of June 2005.

**TradeMali Response:** we agree and this will be done.

## 2. Regarding red meat

a) **AEG comment:** it was agreed that TradeMali is doing the right thing by targeting the private firms (slaughterhouses) engaged in meat processing and marketing. Upgrading the infrastructures by conducting the necessary technical and financial studies (business plans), establishing contacts with financial institutions, collecting and providing marketing information, conducting marketing-tests, and facilitating the supply of good animals to the slaughterhouses are among the key activities to be conducted by TradeMali, in collaboration with PRODEPAM and MaliFinance.

**TradeMali Response:** we agree

## 3. Handicrafts

a) **AEG comment:** it was agreed that TradeMali should put an end to this activity after the current assistance to the Chambres des Métiers in Gao, Kidal and Tombouctou is completed. TradeMali is required to establish contacts between the West Africa Trade Hub (WATH) in Accra and the Malian handicraft sector to determine the assistance this WARP project can offer in the framework of AGOA.

**TradeMali Response:** we agree

## 4. Camel milk cheese:

a) **AEG comment:** the Mission has decided that TradeMali should put an end to this activity. The resources to be spent on this activity are deemed to largely exceed the benefits from the activity.

**TradeMali Response:** we agree that the activity should be terminated in Kidal. Though the camel cheese marketing test was positive—with sales to both local and cross-border markets—and provided profits and increased income for nomadic herders (both women and men), the location in Kidal made it costly for TradeMali to provide assistance. In Timbuktu there is interest from herders and the NGO Vétérinaires Sans Frontières in this. We propose to evaluate the costs and benefits of implementing the camel cheese project in Timbuktu where our other Northern activities are located.

## 5. Road maps

a) **AEG comment:** a road map for the promotion of the export of the targeted products is awaited from TradeMali by the end of February 2005.

**TradeMali Response:** a road map for potatoes has been provided to AEG. Road maps for mangoes and rice will be done.

## 6. Gender

a) **AEG comment:** Current gender mainstreaming activities need to be pursued and strengthened. The Mission needs to be regularly informed on the gender activities of TradeMali.

**TradeMali Response:** we agree

## 7. Regarding the policy and institutional issues, the following was decided:

a) **AEG comment:** To focus on the alleviation of policy and institutional constraints encountered by traders during the export/ marketing of their products, and on the implementation of existing policies that would help trade if used; in this context, the Trade Policy Specialist needs to participate in market prospection tours and market-tests organized by the TradeLinks Unit,

**TradeMali Response:** we agree that the policy aspects of prospection tours and market-tests will be taken into consideration.

a) **AEG comment:** TradeMali needs to tell the Mission which activities, policies and else that are contained in the final action plan of the DTIS it will work on, and put this in the second year workplan. It is recommended that TradeMali work with Sikoro Keita and the CTO on this.

**TradeMali Response:** We will provide this in our revised work plan.

a) **AEG comment:** The Mission also requires that TradeMali (the Policy Specialist) work closely with the WARP projects (MISTOWA and WATH) to develop activities for the benefit of Mali (Market information-OMA, and traders' organizations-CONOESAM),

monitor regional trade opportunities and trade policies (CILSS, WAEMU and ECOWAS), to produce periodic reports and disseminate relevant trade information to traders and the Mission.

**TradeMali Response:** agreed.

## 8. Budget column

**a) AEG comment:** The workplan currently includes a budget column for each of the proposed activities. This is good. If these figures need to be updated in light of the comments herein, please do so.

**TradeMali Response:** the budget column will be updated but is only a guide for internal TradeMali use.

## 9. Deliverables

**a) AEG comment:** The CTO will develop a list of “deliverables” based on the final agreed upon version of the workplan. This list of deliverables will be reviewed by the Mission and agreed upon with TradeMali. It will constitute an integral part of the workplan and will be taken into account in evaluating TradeMali’s accomplishments for the award fee determination.

**TradeMali Response:** we agree.

## 10. Regional market potential for other agricultural commodities

**a) AEG comment:** The Mission requires TradeMali to identify, propose and conduct research/studies regarding regional market potential for other agricultural commodities than the ones being currently targeted. The SOW for such a study is to be approved by the CTO prior to its beginning. The results of these studies, which are expected to be completed by end of May 2005, will help both TradeMali and the Mission to decide whether to delete/add new products to our list in the coming years.

**TradeMali Response:** we agree with the studies and are in the process of doing the preliminary work.

## 11. Potatoes & Mangoes

**a) AEG comment:** TradeMali’s first year activities in the potato and mango sectors need to be pursued and strengthened:

In order to significantly increase **potato exports** to the sub-region, TradeMali needs to:

- focus primarily on existing regional markets by expanding them,
- identify potential new regional markets,

- strengthen the producers/exporters organizations,
- ensure that producers/traders of potato and exporters of potato receive adequate assistance in cooperative management, export planning and management, market information, national and regional export policies and regulations, the search of financing for production, storage, conditioning, transport and export of the product,
- establish close working relationships with the WARP/MISTOWA project and the traders' networks (ROESAO, CONOESAM), and with PRODEPAM and MaliFinance, and
- focus on areas with high production potential such as the Sikasso region and Office du Niger.

**TradeMali Response:** we agree with the above and are in the process of implementing the agreed activities.

Regarding the **mango sector**, TradeMali needs to:

- Identify the other on-going initiatives in Mali (Agence pour le Developpement Social, Agence pour l'Emploi des Jeunes, other donors) and seek collaboration with them,
- identify partners who can devote resources to the production aspects (TradeMali resources should be primary used to finance post-harvest activities),
- strengthen the exporters associations,
- facilitate export financing,
- help reduce the infrastructural constraints, and
- improve norms and standards, and traceability issues.

**TradeMali Response:** we agree with the above and are in the process of implementing the agreed activities. Until partners are identified who can devote resources to the production aspects, TradeMali will have to remain involved at the agronomic level.

## **ANNEX B**

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### Gantt Tables

TradeMali presents the following Gantt work plan charts outlining our activities for the second project period, September 2004 – February 2006. The tables are organized by commodity sector and cross-cutting issues rather than performance result, which enable USAID/Mali and TradeMali to monitor progress more closely.

**Table 1. Policy Sector**

**Table 2. Potato Sector**

**Table 3. Mango Sector**

**Table 4. Red Meat Sector**

**Table 5. Rice Sector**

**Table 6. Gender**

**Table 7. Communications**

**Table 8. Northern Initiatives**