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MIDDLE EAST PARTNERSHIP INITIATIVE (MEPI) MOROCCAN AGRIBUSINESS ASSOCIATIONS SUPPORT-FINAL REPORT

RAISE SPS COUNTRY DIAGNOSTIC REPORT # 37

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Prepared for USAID under RAISE Task Order 14, "Assistance for Trade Capacity Building in Relation to the Application of Sanitary and Phytosanitary (SPS) Measures", (Subcontract #4105-99S-006), under, USAID/DAI Prime Contract # PCE-I-00-99-00002-00, "Rural and Agricultural Incomes with a Sustainable Environment (RAISE)," by

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Funded by USAID's Bureau of Economic Growth, Agriculture and Trade (EGAT) and implemented by Development Alternatives Inc. (DAI), the RAISE SPS Project ("Assistance for Trade Capacity Building in Relation to the Application of Sanitary and Phytosanitary Measures") is Task Order 14 under the RAISE ("Rural and Agricultural Incomes with a Sustainable Environment") Indefinite Quantity Contract with DAI as Prime Contractor (Michigan State University, Abt Associates, Winrock International, and Fintrac Inc. are subcontractors). RAISE SPS assists farmers, processors, exporters, retailers and other participants in agribusiness supply chains enhance their competitiveness through achievement of international market standards. Concurrently, RAISE SPS assists regulatory, scientific, technical, and donor institutions better understand the effect of SPS issues and private sector-driven standards on economic growth and poverty reduction. USAID Missions and Bureaus can seek assistance from RAISE SPS by contacting Jim Yazman, USAID/EGAT Cognizant Technical Officer, at jyazman@usaid.gov.

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FINAL REPORT: NOVEMBER 2003–AUGUST 2005

This final report provides a summary of activities undertaken since the start of the MEPI Moroccan Agribusiness Associations Support Activity under the RAISE/SPS Task Order. Activities are discussed according to the task numbering system used in the MEPI Agribusiness Associations Support Work Plan and Schedule. The task numbering system builds from the scope of work provided by USAID, where section 3 contains the tasks to be performed in this task order.

TASK 3.1 MARKET ANALYSIS

Don Humpal, Development Alternatives, Inc's (DAI) Agribusiness Specialist, assisted in data analysis by Ms. Kathleen Jacques of Fintrac, Inc. carried out Bumpers and PD 71 analyses for the Citrus, Tomatoes, and Table Olives and Olive Oil. It was recommended that USAID not support activities directly related to the development of markets for Moroccan citrus or table olives, but that activities related to tomatoes, olive oil, and other fruits and vegetables could be pursued. Results of the analyses were completed in November 2003 and discussed with USAID. The results and recommendations of the analyses were shared with APEFEL, ASPAM, ASPEM, EACCE, and FICOPAM in December 2003 at a meeting of the Management Committee in Casablanca. USAID shared the results of the findings and recommendations with the management of IESC's Fast Track Marketing Project.

Over the life of the project, these documents were requested by many parties from the public and private sector in Morocco and the USA. While Moroccan export promotion authorities were not happy with the conclusions of the citrus and table olive analyses, the Moroccan private sector were more sanguine because they expected that these products would be excluded from the program based on their experience during negotiation of the U.S.-Morocco Free Trade Agreement.

TASK 3.2 IMPROVED KNOWLEDGE OF US MARKETS AND MARKET DEVELOPMENT

Mr. Humpal made preparatory trips to Morocco in November and December 2003 to work through themes, programs and arrangements for this portion of the work plan, assisted by Mr. Patrick Fachot, DAI consultant for workshops and operator visits. The concept was to provide updated market understanding for the members of the Moroccan fresh and processed fruit and vegetable industries in order that they could better interact with US buyers recruited to visit Morocco and during trade show and company visits to the USA.

TASK 3.22 WORKSHOPS

The workshop themes and programs were developed with members of the Management Committee from October through December 2003. Two workshops were held. All presentations were made using PowerPoint software and were burned onto CDs for distribution to USAID, the Associations, and the EACCE.

Task 3.22.1 Casablanca Processed Products

On January 27, 2004 the Workshop on the American Market for Processed Fruits and Vegetables was held at the Sheraton Hotel with 80 participants from the industry, government, academia, and government. The opening session was presided by Mr. Mohamed Chraibi, President of FICOPAM and Secretary-General of FENAGRI. The workshop was chaired by Mr. Abdelhak Bennani, Director of FICOPAM. Presenters included Mr. Humpal of DAI, Mr. Ron Tanner (Vice President of the National Association of the Specialty Food Trade), Mr. Najib El Layachi (Sous-Directeur des Produits Transformés of the EACCE), and Mssrs Gerard Trotereau, Pierre Fougerose and Mme. Fawzia Amaoui of GEFCO and EFSIS. Presentations were made in French and English with simultaneous translation.

Task 3.22.2 Agadir Fresh Products

On January 29, 2004 the Workshop on the American Market for Fresh Fruits and Vegetables was held at the Beach Club Hotel with 150 participants from the industry, government, academia, and government. APEFEL presided over the opening session with attendance by the representative of the Wali (Governor) of Agadir. Workshop sessions were chaired by a series of APEFEL, ASPERM, and government officials throughout the day. Presenters included Mr. Humpal, Mr. Patrick Hanemann (Principal of Farm2 Market and an Abt, Inc. consultant), Mr. Donald Husnik (Former Deputy Administrator of APHIS/PPQ and Abt, Inc. consultant), Mr. Najib El Layachi (Sous-Directeur des Produits Transformés of the EACCE), and Mssrs. Gerard Trotereau and Pierre Fougerose of GEFCO and EFSIS. Presentations were made in French and English with simultaneous translation.

Unplanned Task 3.22.3 Agricultural Transformation Conference

While all planned workshops were completed by early 2004, the Conseil Général de Développement Agricole of Morocco asked that Don Humpal participate in a consultative Agricultural Transformation conference in Rabat scheduled for December 2004. Following USAID approval, Mr. Humpal participated in the conference and presented a well-received paper for the session entitled: “What Reforms are Needed in the Fruit and Vegetable Sector (Quelles reformes pour la filière fruits et legumes)” on December 3, 2004. The paper emphasized the ways and means for Moroccan companies to broaden its partnerships with companies located in production zones that would enable Moroccan firms to participate in the 24-hour-a-day, 7-day-a-week, 12-month-a-year supply chains that are gradually taking over the supply of produce in the most valuable Northern and Southern Hemisphere marketplaces. Drastic changes are also needed in maritime and air transport regulation and ownership to enable these partnerships to evolve, much as the occurred with the regulation and ownership of the trucking industry in the 1990s.

TASK 3.23 US OPERATOR VISITS

US Operators from the fresh and processed products markets in the USA were recruited with some difficulty. Security fears have hampered final agreement and scheduling of these visits, but two other factors affected recruitment. For the fresh produce industry the low volume of fresh exports to the USA and their high air transport costs were perceived as serious constraints. For the processed industry Morocco was known for a few classic products, such as olives and our regulatory analysis had excluded olives from program support.

In the second quarterly report, DAI recommended that the visits be delayed until the late summer/early fall 2004 period. Don Humpal, Rich Magnani, and other DAI staff worked diligently on generating interest from US importers and distributors. Our target was direct importers and distributors who supply food service and retail outlets in the USA. Many of these operators face the “Walmart Effect”, the consolidation of retail, food service, and distributor networks to wring costs and other operating efficiencies out of the supply chain. While brokers and agents were interested in visiting, these actors operate as commission sales personnel who do not take physical or financial custody of products. In October we asked Mr. Tom Easterling to make a final push in November with US fresh and processed product buyers for trips that would be done before the end of December 2004.

Mr. Tom Easterling undertook an intensive campaign to promote visits to Morocco to be completed by the end of December 2004. During November he contacted 31 fresh produce and 26 processed product importers, beyond the 106 contacted earlier by DAI. Three fresh produce importers and three processed product importers expressed interest, but only two fresh and one processed product importer could make the trip in the required timeframe. Don Humpal then worked with Rachida Youmouri in Morocco, along with FICOPAM, APEFEL, EACCE, and individual Moroccan companies to establish an itinerary for the US visitors. Ms Youmouri accompanied Mr. Raul Millan of Bacchus Fresh International and Mr. Francisco Rodriguez of Del Monte Fresh Products as they made the trip to Morocco from December 1-6, visiting grower/packer/shippers, air and sea freight companies, regional and national regulators, producer organizations, and the SIFEL Agadir exhibition. Both were interested in Moroccan tomatoes and bell peppers, among other products. These visitors were both concerned by the phytosanitary and transport constraints to exports to the US. The US restricts tomato exports to the USA to two small regions in the country, both of which are outside the main winter vegetable zone of the Souss Massa. Ocean service and air freight service to the USA is seasonally constrained and expensive compared to other export origins. Mr. Millan was impressed with the Souss-Massa plasticulture and packing operations and offered to follow-up Moroccan requests for expansion of the authorized zones for exports with the USDA.

From December 12 through December 18, 2004 Ms. Youmouri guided Mr. Dan Sanchez of Atalanta Corporation to meetings with 12 processing companies, government officials, and processor organizations and transporters. Mr. Norman Barao of Donio cancelled his trip to Morocco at the last minute. While Atalanta was interested in a range of Moroccan products, Moroccan processors indicated that the decline of the US dollar against the Euro made sales to the US less attractive than in prior years. Some specialty items (sand truffles, capers, roasted peppers) were identified as having good potential. In January 2005, Mr. Humpal responded to additional FTA information requests from these buyers and from potential Moroccan exporters.

In sum, three major cycles of company recruitment were undertaken over the life of the project. In contrast to similar promotion work done in the 1990’s, the MEPI experience showed that rise of the Euro against the US dollar made the distant US market very much less attractive to Moroccan exports and to US importers. In addition, the consolidation of purchasing and distribution channels in the US driven by the supermarkets reduced the number of U.S. buyers actively exploring new sources of supply for many of the products offered by Morocco. In addition, the lack of solutions to the transport costs and phytosanitary barriers to entry to US fresh produce markets continues to depress US buyer interest.

TASK 3.24 MOROCCAN OPERATORS VISITS

Preliminary arrangements were made early in the project for three Moroccan operators from the Processed Fruit and Vegetable Industry and three Moroccan operators from the Fresh Produce Industry to visit the USA. The Management Committee asked in December that a larger number be supported by the activity, but the MEPI budget did not allow a larger number to travel. For technical reasons, DAI also believes that larger groups are simply less effective in visits that are truly commercially focused.

At the request of the management committee and USAID in mid-2004, DAI reworked the budget to permit up to 5 Moroccans to go on cost-shared visits to the US markets. Funds were freed from the Medfly task for this purpose. The Spring Fancy Food Show in Chicago in May proved not to be feasible for logistic reasons. The visit for a group of 5 Moroccans was organized by subcontractor Fintrac and built around the Summer Fancy Food starting on June 25 and running through June 27, 2004. At the last minute three participants withdrew. One of the three firms elected to be represented by staff from the Morocco booth. Good contacts were made in New York with promising follow-up by buyers. Fintrac prepared a comprehensive report that is a useful reference for Moroccan firms interested in the US speciality food market.

The fresh product producers from APEFEL were unable to identify a period for visits to the US during the late summer and fall of 2004 that did not conflict with either crop establishment or key European and Moroccan trade shows. Early 2005 repeated this experience. After several attempts to re-schedule with APEFEL it became clear that market fundamentals did not support exploration of the US fresh produce market. In addition to the soft US Dollar prices due to the weakening of the US Dollar against the Euro and the lack of reliable and cost-efficient air transport to the USA, the expansion of hothouse tomato and bell pepper production in Canada and the US South-West suggest that the main Moroccan products of interest no longer have an entry point to the US market.

TASK 3.3 IMPROVED ORGANIZATION AND OPERATIONS OF PROFESSIONAL ASSOCIATIONS

TASK 3.31 ALTERNATIVE MODELS FOR PROFESSIONAL ASSOCIATIONS AND COOPERATIVES

CDs with the Case Study report and the Powerpoint Presentation on alternative models for professional associations and cooperatives were delivered to USAID, as well as to EACCE for distribution to the Associations.

Task 3.31.1 Case Studies

Ms. Nancy Tucker, Vice President of the Produce Marketing Association, and a Fintrac, Inc. Associations Expert Consultant and Ms. Mary Duncan, Fintrac Associations Expert, prepared case studies of US fresh and processed fruit and vegetable associations, cooperatives, and marketing order organizations. This work was completed in November 2003 and a presentation was developed.

Task 3.31.2 Consultation

Ms. Nancy Tucker and Mr. Humpal presented the results of the case study research and their own association experience in four working sessions. One of the sessions was held with representatives of

the Board and the staff of APEFEL in Agadir on December 8, 2003. The second session was held with representatives of the Board and staff of FICOPAM and FENAGRI in Casablanca on December 9. The third session was held with representatives of the Board and the staff of ASPEM in Casablanca on December 10. The fourth and final session was held with the Managing Director and Director of Development of the EACCE in Casablanca on December 10. Additional consultations on trade show strategy were held with APEFEL at SIFEL in Agadir on December 7 and with FICOPAM on its future SAM (Moroccan Food Show) strategy on December 11. The EACCE requested that Mr. Humpal refine some of the recommendations on the alternatives for association re-structuring. This work was done in the course of Task 3.32.

TASK 3.32 FICOPAM IMPROVED PRODUCER-PROCESSOR RAW MATERIAL SUPPLY.

Over the past decade there has been a deterioration in the quality of raw material supply and returns to both producers and processors over the past decade as foreign competition on key markets has reduced prices for processed products and farmer and processor margins suffered. This task was intended to explore ways that improved productivity and percent yield of higher quality grades of raw material could be achieved using a three-pronged approach: increasing crop yields, increasing the value added in sorting and grading at the farmer level, and establishing a fair basis for negotiating delivery prices based on delivered quality and quantity.

Mr. Humpal worked with FICOPAM in late 2003 and early 2004 to refine the objectives and the scope of this task. At the January 8, 2004 Management Committee Meeting, FICOPAM asked that the strong contractual and legal orientation of the original scope be modified to select a few pilot activities to improve raw material supply. Table olives were excluded by the Bumpers analysis, so gherkin cucumbers (cornichons) and capers were selected. IAV Hassan II was identified as the best supplier of services for this activity. Budget review showed that there was only enough money to undertake one of the two suggested FICOPAM pilot activities. USAID was asked to authorize the change in approach to the scope of work and FICOPAM was asked to select which activity is the priority choice. Implementation needs to begin in March 2004.

DAI modified the original scope with USAID approval to select a few pilot activities to improve raw material supply of capers to processors. Implementation began under the leadership of Dr. Mohamed Rahmani of IAV Hassan II in April 2004 in a series of workshops with producers, intermediate collectors, and provincial authorities in Meknes/Sidi-Kacem, Safi, Fez, Taounate, Taza, and Safi. Dr. Rahmani also led workshops with processors, provincial authorities and regulatory agencies in Marrakech, Fez, and Safi. Dr. Rahmani and a group of surveyors also began a field survey of production, raw material marketing, and processing of capers.

After analysis of these workshops and the preliminary findings of the caper field survey, Dr. Rahmani led a national synthesis workshop on capers under the auspices of the MEPI/USAID program and FICOPAM in Rabat. The workshop brought together producer organizations, processors, and regulators together on June 7. The debate centered on a proposed model for industry organization, improved production techniques, and marketing platforms. Intense discussion among participants at the workshop led to a modified model with the following elements:

- Creation of joint producer-processor committees in each caper region;
- Organization of a quality-consciousness campaign in the main caper producing regions;

- Establishment of a raw material pricing schedule based on quality criteria;
- Development of specialized caper buying floors in the main markets and operate them over a period long enough to cover early, main, and late harvests;
- In collaboration with EACCE, determine the traceability requirements to be set for capers with producers, buying agents, and processors; and
- Training of caper producers in the improved harvesting, handling, and delivery of capers to processing plants.

Dr. Rahmani finalized the analysis of the caper field survey and produced the draft report in early July. Don Humpal reviewed the report and consulted with Dr. Rahmani on its revisions. The final survey report was delivered in late July 2004.

The final phase of the caper raw material supply activity began in July 2004 with the development of field training materials for use with producers and caper processors. Dr Rahmani worked with the Provincial Directors of Agriculture (DPAs), representatives of the Ministry of Interior (caids), the Agricultural Production Service (SPA), the Rural Works Centers (CTs), and EACCE to hold the following training sessions:

- **SAFI:** August 10 through 12, 2004 with the support of the Safi DPA staff. Sixty-two (62) farmers and four (4) local extension officers were trained from three rural communes (CRs): Khat Azakane (the CT of Sebt Gzoula), Kéhmis Nga (the CT of Sebt Gzoula) et Lamrassla (the CT Jamaâ Shaim).
- **Fès:** September 27 through 29, 2004, with the support of Fès DPA staff. Sixty-eight (68) farmers and five (5) local extension officers were trained from three rural communes (CRs) located near the Ain Kansara, Ajajra and the Hamria CTs;
- **Taounate:** October 19 through 20, 2004, with the support of the Taounate DPA staff. Sixty (60) farmers and six (6) local extension officers were trained from two rural communes (CRs) located near the Tissa and the Karia sub-CTs.

The training sessions led to agreements at the level of the rural commune leaders (caids) to establish specialized caper market platforms and to build producer cooperatives in the areas where farmers had received training. The training sessions were delayed beyond the expected times (August and September) because of the complexities of involving *commune rural* level authorities in their organization, which required permission from the Ministry of Interior, the interruption of summer holidays in August, and scheduling of DPA staff for field work.

Following the training sessions described in Quarterly Report 4, Dr. Rahmani began preparation of the synthesis report on the joint MEPI/USAID-RAISE/SPS/IAV HASSAN II/FICOPAM caper work. He delivered a draft synthesis report to Mr. Humpal for review in early November 2004. Following review and revision, Mr. Humpal prepared an English summary to accompany this French-language report: “Amélioration de la productivité et de l’approvisionnement des unités industrielles en câpres : Rapport de synthèse” This report was transmitted to USAID in December 2004.

This activity provided a framework with detailed provisions for using an improved grading and sampling system for the purchase of capers. Provincial authorities and rural commune caids agreed to establish caper marketing areas where caper quality sampling can be done under EACCE and DPA supervision. The DPAs pledged to help establish caper cooperatives in the core zones of caper

production. Processors have agreed with the EACCE, DPA, and farmer and trader representatives to new size-grade based sampling and pricing procedures. If implemented over the next two to three production years, there should be an increase in the production of the more-valued (i.e. smaller-diameter) capers that will provide better incentives for investments to improve caper productivity at the farm level and along the caper handling points in the value chain to the processors.

Mr. Rahmani worked with FICOPAM on preparations for the upcoming spring/summer caper harvest. The American Society for Horticultural Science accepted an abstract for an oral presentation co-authored with Don Humpal on Moroccan capers for the July 2005 International Meetings. No MEPI/RAISE/SPS funds will be used to support the preparation and delivery of this presentation, but MEPI and USAID/RAISE/SPS will be credited with support to the field work on which part of the presentation is based

TASK 3.33 TRANSPORT SOLUTIONS FOR MOROCCAN EXPORTS TO THE USA

Mr. Humpal prepared the scope of work for this study and identified expertise in Morocco to undertake the work. Mr. Gerard Trotereau Managing Director of GEFCO, a freight forwarding company, M. Zaki El Wakili, Transit Manager for GEFCO, Mr. Pierre Fougere of EFSIS an air freight company and staff did the study of maritime, air, and intermodal solutions to increased freight traffic to the USA. Presentation of the results of the study at the Casablanca and Agadir workshops in January 2004 was followed by a good response from the private sector to diversify the shipping lines that they used and to study ways to develop an air charter solution for the shipment of fruit and vegetables to the USA.

Comments from industry during the presentation were highly favorable. Comments from government members of the management committee were highly critical. The reason for this disparity of viewpoints was that the proposed solutions were entirely private sector in concept and management. It would have required substantial investments in market development in the USA, the development of firm supply contracts, and the development of mutual liability groups of shippers with pledged collateral to structure forward contracting for chartered flights. The key assumptions of this approach were that Morocco would get expanded regional phytosanitary clearance for its tomato and other vegetable crops and that the "Open Sky" cargo negotiations opened route availability to the USA on a direct round trip or triangle basis through Europe. Ideally, a follow-up activity focused on resolving the air transport problem to the USA and improved ocean freight service would be undertaken by another project.

TASK 4 MEDFLY CONTROL

It was agreed in December 2003 with the Management Committee that the funds originally intended to support work with ASPAM (the citrus producers association) would be used to seek ways to improve Medfly control. The Medfly is considered by USDA/APHIS/PPQ to be a quarantine pest on most fruit produced in Morocco. Past efforts to grow and ship pink tomatoes to the USA were hamstrung by the exclusion of the Souss Massa, the main center for export fruit and vegetable production in Morocco. The Management Committee asked that a technical consultation be held with key organizations in Morocco to identify a pilot activity that could be supported by the available MEPI funding. On January 30th, 2004 a meeting was held to discuss the Medfly dossier, identify who held information important to the development of an updated request to USDA/APHIS on Medfly control, and determine what a priority set of activities would conclude. Participants in the meeting

included: DPVCTRF, EACCE, APEFEL, CHA/IAV Hassan II, USDA/FAS, and USAID. DAI's Don Humpal, and Abt's Don Husnik and Pat Hanemann provided consulting assistance from MEPI, along with IAV CHA Professors Abelhaq Hanafi (IPM) and Ahmed Mazih (Medfly entomology).

A follow-up program with three main components was identified:

1. A documentary search for published articles, documentation, and data to be synthesized before the arrival of USDA experts expected in March:
2. Reinforcement of the trapping network already established by DPVCTRF since October 2003, in order to meet the trap density requirements of the published tomato protocol ; and,
3. Trials on forced Medfly infestation of higher value cluster and cherry tomato varieties, and, if funding is available, fruit-cutting studies of the level of natural infestation of open-field tomatoes in areas of high argan tree population, where high Medfly populations build up in warm weather.

A small follow-up committee headed-up by the DPVCTRF was scheduled to meet on February 6 to review this plan, budget its costs, and identify potential sources of funding.

Despite general agreement on a way forward that was reached with multiple parties in January 2004, the agreement dissolved during two follow-up meetings among key participants. In April, following three months of deadlocked discussions, DAI recommended that the budget reserved for Medfly control be allocated to Task 3.24 Moroccan Operator Visits to increase the allowable number of visitors from 3 to 5 per trip.

(Paragraphs 4-7 in the scope of work carry no tasks, and are, therefore not reported on here.)

TASK 8 REPORTS AND DELIVERABLES

- A. Workplan. All deliverables in the work plan were completed with the exception of the visit by Moroccan Fresh Produce operators to the USA. The fresh produce associations in Morocco and individual members of the industry concluded that the USA market was unlikely to provide a growth opportunity to them and opted out of this activity.
- B. Quarterly Progress Reports. Five quarterly reports were submitted as this project extended from a 6-month effort to one closer to two-years. Originally, only two quarterly reports were to be produced.
- C. Quarterly Financial Report. Five quarterly financial reports were submitted to USAID under separate cover. The balance of unspent funds intended to support the fresh produce industry visit will be returned to USAID.
- D. Final Report. This document is the final report.
- E. Additional as per RFP.
 - E.1. Public Diplomacy Action Plan. The Public Diplomacy Action plan requires that all reports, presentations, and signage at public events bear the MEPI logo (i.e. the acronym MEPI). This requirement was met on all publications, presentations, and signage.

- E.2. 2-page Web-Postable Executive Summary. An executive summary was prepared in HTML format in October 2005, after the completion of all activities.