



MOZAMBIQUE

**STUDY OF MARKETING CHAIN
(Maputo, Sofala, Manica, Zambezia)**

**MISSION
Ms Marion Silverthorne – USA**

**Beira – Mozambique
March - April 98**

BEST AVAILABLE

Executive Summary

1 Host Organization

The host organization for this assignment is ACDI/VOCA and funding is provided by the United States Agency for International Development (USAID) under the Income Strategic Objective 1 initiative. Primary contacts for the assignment are David L. Tschirley, Associate Professor, Department of Agricultural Economics at Michigan State University, and Orlando Nhantumbo, a spokesperson for the Commission for the Central Commercial Market of Xipamanine-Bazuca in Maputo. The duration of the assignment is six weeks, from February 23, 1998 to April 6, 1998.

2 Scope of Work

The scope of work for this assignment states that the volunteer will accomplish the following:

1. Conduct a detailed investigation of the marketing chain from producer to final vendor along the Manica – Maputo trading route.
2. Locate opportunities for producer associations and suggest how these associations can most effectively be linked into the Maputo markets.
3. Identify elements of the marketing chain in need of organizational assistance/association development.
4. Analyze the wholesale Maputo markets (paying particular attention to Xipamanine – Bazuca) and make recommendations for possible future organizational assistance.
5. Make initial efforts to sensitize market traders to the advantages of forming associations, through meetings/focus groups, in order to ascertain whether or not there is any potential for association development.

Over the course of the assignment I was able to address all scope of work requirements.

3 Summary of Recommendations

The following list summarizes recommendations for consideration by ACDI/VOCA:

- Provide market information to farmers, including price and demand.
- Provide agricultural information to farmers, including improved post-harvest storage practices, so they can have the option of choosing the best time to sell produce.
- Provide technical assistance to organizations working on programs to make it easier for itinerant traders to travel to outlying rural areas to purchase produce and transport it to markets.
- Provide traders with market information so they can make informed decisions related to buying and selling produce.
- Provide technical assistance to organizations working on programs to bring traders access to credit and training.

1 Host Organization Description

ACDI/VOCA Mozambique with its office in Beira, is implementing a five year program to strengthen indigenous rural associations through the provision of its unique volunteer technical assistance partnership. This partnership utilizes the combined expertise of Brazilian and North American specialists. Target activities include business planning, marketing and small scale value added processing. Ruth Campbell is the ACDI/VOCA Mozambique Program Director.

2 Marketing Chain Along the Manica – Maputo Trading Route

2.1 Overview

This study presents findings of my investigation of the marketing chain along the Manica – Maputo trading route from producer to final vendor. The purpose of this investigation is to identify strengths and weaknesses in the marketing chain, paying particular attention to opportunities for association development among producers in the central provinces of Manica and Sofala and market traders in the Xipamanine-Bazuca market in Maputo. The following figure shows the framework of the marketing chain, from producer to consumer. Note that there is not only one direct path for the farmer to get his produce to the consumer and that there are transporters (not shown in this figure) involved throughout the stages of the marketing process.

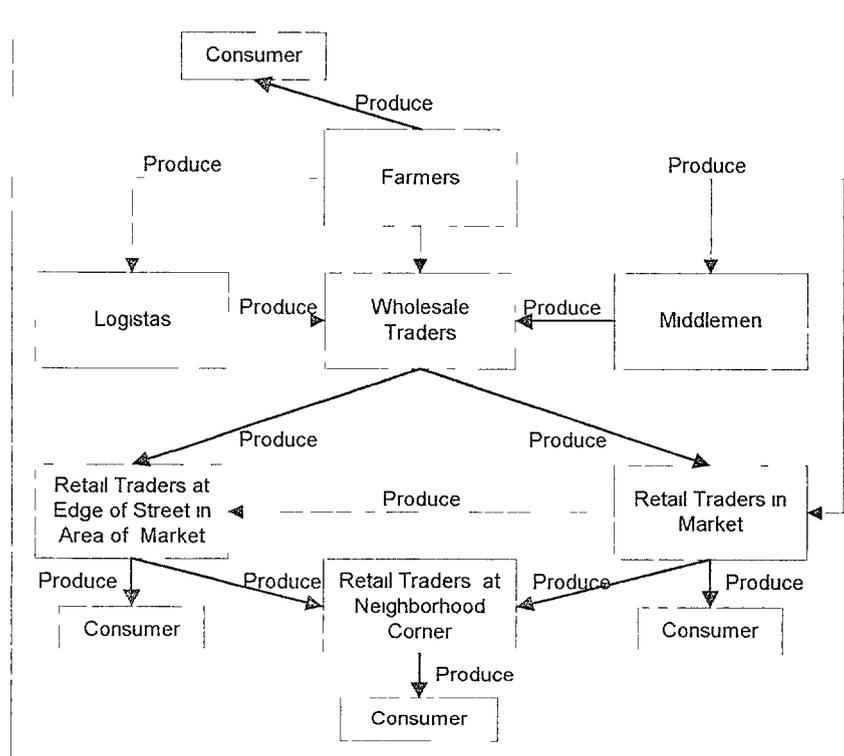


Figure 1
Marketing Chain Overview

Towards the beginning of this assignment, I realized that I was categorizing the major players, or links, in the marketing chain as having discrete roles and separate entities. In other words, traders trade goods and farmers grow crops. This is not, however, always true. Farmers sometimes engage in active trading. Sometimes a trader will spend several seasons farming, perhaps at a time when trade has not gone well. So, although I write about traders and farmers in this study, making them sound like two entirely separate camps, it is important to remember that I am writing this way only to make points more clearly and not to suggest that this separateness is the rule.

ACDI/VOCA, USAID and other organizations have made many articles and reports available to me. However, the intention of this study is not to review the literature and then present my conclusions, based on my reading. I have used these articles and reports as very useful and interesting background information, to increase my general understanding of factors affecting the marketing chain. As much as possible, points that I make in this study are based on what I actually saw and heard in discussions with people directly involved in the marketing chain, including farmers, extension agents, traders and truckers, and both governmental and private, non-governmental staff.

I arrived in Mozambique at a slow time of year for agricultural harvests, meaning that it was also a relatively slow time for buying, selling and transporting agricultural produce along the main trading routes. My schedule was as follows:

- **Weeks 1 and 2, Maputo** I met with USAID Income Strategic Objective 1 team members, my two primary contacts and also others in organizations such as the Ministry of Agriculture and Fisheries, the Ministry of Commerce, Industry and Tourism and the Municipal City Council.
- **Week 3, Beira** I met with staff at Mobeira and Food for the Hungry International (FHI) in Beira, then traveled to talk to traders and producers along the Beira-Chimoio trading route. Due to several days of illness this week, I was not able to make as many contacts as planned.
- **Week 4, Quelimane** I met with staff at World Vision International (WVI) and the Rural Association for Mutual Aid (OMAR) and traveled to talk to traders and producers in markets along the Quelimane-Alto Moloque trading route.
- **Week 5, Beira** I stayed in Beira, worked on this report and returned to Maputo later in the week.

The following list presents the scope of work requirements for this assignment:

1. Conduct a detailed investigation of the marketing chain from producer to final vendor, along the Manica – Maputo trading route.
2. Locate opportunities for producer associations and suggest how these associations can most effectively be linked into the Maputo markets.
3. Identify elements of the marketing chain in need of organizational assistance/association development.
4. Analyze the wholesale Maputo markets (paying particular attention to Xipamanine – Bazuca) and make recommendations for possible future organizational assistance.
5. Make initial efforts to sensitize market traders to the advantages of forming associations, through meetings/focus groups, in order to ascertain whether or not there is any potential for association development.

This report is not organized according to the five scope of work requirements but is, instead, organized according to some of the main factors affecting the marketing chain. The overlap between these scope of work requirements became evident to me as I gathered more and more information. I found I could not

present information on the marketing chain by drawing distinct boundaries around the issues associated with the requirements

2 2 Methodology

I met and had conversations with many people during the course of this assignment. While I understand some Portuguese I do not speak the language at all well, so ACDI/VOCA assigned an interpreter to assist me during the weeks I was in Maputo and Beira. Conversing 'through' an interpreter, even a good one, can be difficult, often resulting in misunderstandings and not being aware of nuances.

In addition, and quite understandably, not all people are willing to talk to a stranger about their business. For example, although most traders I met were polite, some women traders in Bazuca were openly disdainful of my attempts to establish rapport with them. It is not surprising to me that most traders are not willing to give accurate information about, for example, the amount of their working capital and their profits. Many times traders would give vague and misleading answers to my questions. I think that while some of the vagueness was due to their reticence to discuss their business affairs with me, much of it was due to the nature of the questions I asked.

My interview approach changed over the course of my time here in Mozambique, as I found that I obtained better information if I didn't ask direct questions. In fact, interviews often seemed to go best when I hardly asked any questions at all. The most informative conversations were those in which I introduced myself and then took the time to listen to traders talk in their own way about their work, not forcing the conversation in any particular direction. Another approach that worked well for me was to leave my notebook in my bag, out of sight, and not take it out during the conversation.

On my arrival in Maputo, Sidney Bliss, Income Strategic Objective I team member at USAID, suggested that I contact Nina Bowen, Ph.D. candidate in Anthropology at London School of Economics and Political Science. Ms. Bowen's doctoral thesis research focuses on the emerging structure and characteristics of trading networks in Zambezia province. Her study examines the post-war construction of the commercial relationships involved in trading networks and how these commercial relationships may reflect and/or create or re-create social relationships and trust. I was fortunate to have the opportunity to travel one week with Ms. Bowen, visit markets and talk to itinerant traders along the Quelimane-Alto Moloque trading route in Zambezia. Although this particular region is outside the geographic scope of this study, much of the information gathered from markets along the Quelimane-Alto Moloque trading route is directly applicable to the Manica-Maputo route.

I would like to add that when I traveled with Nina Bowen on the Quelimane-Alto Moloque trading route, I had the most success obtaining what appeared to be reliable information. This success was entirely due to the good working relationships Ms. Bowen has already established with these traders in the course of conducting her research.

2 3 Market Information

There are a number of NGOs and governmental organizations collecting, processing, analyzing and disseminating agricultural market information. At present, there appears to be little coordination between organizations in these data collection efforts. The following sections briefly describe some of the projects that collect, process, analyze and disseminate agricultural market information.

2 3 1 MAP/MSU Food Security Project

The Food Security Project is carried out jointly by the Directorate of Agricultural Economics (DEA) in the Ministry of Agriculture and Fisheries (MAP) of Mozambique and Michigan State University (MSU) Department of Agricultural Economics. In 1991 the DEA/MAP started an agricultural market information system, the System of Agricultural Market Information (SIMA). This information system was established and is being maintained by the Food Security Project with USAID funding. The principal MSU representative is David L. Tschirley, Associate Professor, Department of Agricultural Economics.

SIMA uses a network of agricultural extension staff to collect weekly price data on basic staple food at producer market, retail and wholesale levels in five regional and 20 local markets. SIMA has also established SIMAPS (System of Provincial Agricultural Market Information) to decentralize the collection of market information at the provincial level. Manica, Nampula and Gaza are the first provinces to benefit from this collection of information at the provincial level.

The Food Security Project maintains several publications concerning food security issues and one weekly agricultural market information bulletin, *Quente-Quente*. This bulletin presents prices for domestic and imported products such as maize, beans, groundnuts, rice, sugar, oil and wheat at about 18 different markets throughout the country. It also includes current regional and international prices for corn flour, wheat and rice, as well as projected prices for maize flour from the Chicago and South African futures markets. I was informed that *Quente-Quente* is intended for market traders and is distributed by hand on a limited basis by Ministry of Agriculture and Fisheries staff.

The MAP/MSU Food Security Project is also in the process of implementing a network of radios to disseminate provincial market information. The prices are radioed from a central location in the province to district agriculture extension staff in outlying market towns. The district extension agent then writes the prices on a bulletin board in the market.

In order to learn more about how price and quantity information are collected, I accompanied Francisco Montero, the chief enumerator for the MAP/MSU project, to the wholesale market at Xiquelene. Each Saturday he goes to both Bazuca and Xiquelene to obtain information from traders on price and quantity. Mr. Montero stated that he has known Orlando Nhandumba, one of my primary contacts in the Xipamanine-Bazuca market, since he started as a trader and has seen his trading business become successful, lose money and now slowly recoup some of the losses. The project enumerators use a standardized questionnaire that is now being revised to more accurately reflect the produce that is currently in the markets. This information is then entered into an SPSS data base.

Although *Quente-Quente* has limited distribution within wholesale markets, private sector and government agencies, some traders are familiar with it even though they don't read it on a regular basis. One trader I spoke to in Chimoió at the Textafrika car park, Manilo Fole, could not name the publication that he remembered containing market price information but did recognize the name, *Quente-Quente* when I mentioned it. He trades from Chimoió as far south as Inhambane and remembered seeing the publication in the market down there. He also informed me that even though he does not engage in import-export trade, he was interested in reading about prices in other parts of the world.

2 3 2 Marketing Management Assistance Project

The Marketing Management Assistance Project, is managed by Frans Van de Ven and is funded jointly by the United Nations Food and Agricultural Organization (FAO) and the European Union (EU). This

project supports the Department of Food Security in the National Directorate of Internal Commerce of the Ministry of Industry, Commerce and Tourism. The project collects information, enters it in a Lotus 1-2-3 data base, publishes several monthly and quarterly reports and bulletins and then disseminates them to NGOs, government agencies and donors. These publications comment on the agricultural, food supply and market situation, food aid commitments and present an overview of the planned versus actual commercialization.

Mr. Van de Ven gave me a copy of the project's draft policy discussion note, "Some Reflections on the Provision of Market and Trade Information in Mozambique: Current Situation and Future Development Prospects" (12/97). This report presents an overview of the collection, processing and dissemination of agricultural market information by private non-governmental and public sector organizations. The main point made by this report is that without standards set by a public sector entity to coordinate the "harmonization" of market information at the regional and national levels, scarce public and donor resources are not being used as effectively as they could be. This report recommends that the many organizations collecting, processing and disseminating agricultural market information form a small working group to formulate a medium range information development strategy to ensure collaboration, avoid duplication and overlap and maximize effort.

2.3.3 MSF Consolidated Information System

Several NGOs are also involved in collecting, analyzing and disseminating market information. Among these NGOs, the Consolidated Information System (CIS), implemented and maintained by Medecins Sans Frontieres (MSF), is the largest and most comprehensive in terms of the volume of data collected. The MSF/CIS collects information from other NGOs and organizations working at field level throughout Mozambique to assess the food security and nutritional health of the population at the district level. This information is then entered into an MS-Access data base.

MSF uses the CIS data to publish the monthly *Bulletin of Food Security*. The objectives of this bulletin are to determine an overall level of risk using indicators related to the following:

- the adequacy of the food supply system (movement of populations, market functioning, harvests, food distributions, agricultural programs, food habits and food reserves), and
- the nutritional and sanitary health of the population (malnutrition rates, growth faltering, low birth rates, hospital and feeding center admissions, presence of cholera, measles and dysentery and the adequacy of the water supply).

I met briefly with Jean Francois Detry, the CIS team coordinator in Maputo, and he informed me that the main purpose of this bulletin is to draw attention to potential situations of need. For this reason, MSF distributes about 1,200 copies to donors, government agencies, NGOs and both provincial and district authorities.

2.3.4 Other Market Information

Other NGOs are also involved with collecting, analyzing and disseminating market information, including the following. Please note that this is not a comprehensive list:

- Food for the Hungry International (FHI) collects, analyzes and disseminates pricing information and also is in the process of implementing *Jornal do Mercado* bulletin boards in markets along the Beira-Chimoio corridor. In February 1998 FHI completed an agricultural baseline survey of 300 households in Nhamatanda and Marromeu districts in Sofala province to collect agricultural and socio-economic data for later use monitoring and evaluating FHI's

Development Activity Proposal funded by USAID. The data for this survey was collected in August 1997. The survey report includes 90 tables with detailed information, such as income sources, post-harvest storage and commercialization and the role of farmer associations.

- World Vision International (WVI) publishes a weekly retail price information bulletin covering various products in Zambezia and Nampula provinces. This price information is used by the WVI extension agents and is of benefit to farmers.
- Cooperative League of the USA (CLUSA) publishes a market information bulletin, *Market Information Collection System*, that contains information on buyers, input suppliers and retail prices for grain for five market areas in Nampula province. CLUSA uses this market information for their producer association development programs.
- I had a brief but very interesting conversation with Roland Van De Geer, the Ambassador to Mozambique from the Netherlands, about a project supporting community radio broadcasts with funding by the Netherlands. It is my understanding from this brief conversation that this is a community based and cost effective way to disseminate information of interest to rural communities, including market information, and reach a large number of people.

2.4 Manica-Maputo Trading Route

The trading route from Manica province to Maputo begins at the Mozambique-Zimbabwe border and heads east through the towns of Manica and Chimoio, then south at Inchope, a town on the border of Manica and Sofala provinces. At Inchope the road also connects with the road to Beira, a distance of about 135 km, and from there the road heads farther north to Zambezia, Tete and the northern provinces.

I have heard that the road varies from good to poor condition along the route. Although I traveled by road from Beira to Chimoio, unfortunately I was not able to travel by road from Maputo to Beira. The trip would have given me the opportunity to talk to traders and transporters at major transit points on the north-south route. The main markets along this trading route, north to south, are Manica, Chimoio, Inchope, Vilanculos, Maxixe, Inhambane, Chokwe, Xai-Xai and Maputo.

2.5 Maputo Markets

I visited three markets in Maputo: Xiquelene, Compond and Xipamanine. These three markets have large retail areas and smaller areas where the wholesale traders gather. Over the last five or so years these markets have expanded to a point where their boundaries almost overlap.

Xiquelene is said to be the largest Maputo market and has developed in an unstructured, informal way over the course of recent years. There are no walls around the market area and all the stalls are constructed on the ground with wood poles and use paper, cloth or a plastic tarp to protect from sun and rain. The market serves as a major transit point for people and goods. Compond has a small, walled central area and the market has expanded outside the walls. As with Xipamanine, traders have set up stalls along the edge of the residential area outside the enclosed market. Again, these stalls are built directly on the ground with wood poles. Compared to Xiquelene and Xipamanine, the tone of this market is quiet and orderly.

2.5.1 Xipamanine Market

Xipamanine market, a focus of this study, is located in the Urban District #2 in the northwest section of Maputo. According to a report by the Directorate of Construction and Urbanization of the Municipal Council of the City of Maputo, "Improvement of the Xipamanine Suburb" (January 1998), the suburb covers an area of 371 acres and includes approximately 4,000 houses with about 24,000 people. The

Xipamanine market is a busy, heavily congested area that is accessed by roads in poor condition. The market area includes the following:

1. There is a walled area in which approximately 2,500 retail traders sell their goods in stalls built on concrete flooring. Many of the stalls are covered with corrugated roofing material rather than paper, cloth or a plastic tarp.
2. There is an area surrounding the walls in which approximately 3,000 retail traders sell their goods in stalls built directly on the ground with no permanent flooring. These market stalls use paper, cloth or plastic tarps as roofing material.
3. There is yet another group of retail traders who sell along the edge of the road bordering the market. This group of traders displays their produce on cloth laid directly on the ground and does not use market stalls of any kind. I observed that many of these traders sell small quantities of fresh vegetables and do not stay in the market the entire day. While these traders sell their goods along the edge of the road, the fact that they occupy space where pedestrians walk contributes to the overall congestion of the market area. From time to time the police force these traders out of the market.
4. There are retail and wholesale stores (i.e., in buildings) on the roads surrounding the market especially on Rua Irmaos Roby.

The Central Municipal Council administers the walled portion of the market and the surrounding area is administered by Urban District #2. I met with Joao Marciano da Cruz, the administrator of Urban District #2. Mr. da Cruz informed me that his responsibilities are to ensure that there is order in and around the market, protect both customers and traders and organize the traders. He stated that the biggest problems he faces in carrying out his responsibilities are theft and assault, lack of a water supply and sanitation and noise. Mr. da Cruz stated that the noise from the market interferes with the elementary school across the street from the market.

The renovations listed in the Municipal Council report, "Improvement of the Xipamanine Suburb," include improving the area's roads and water system along with constructing public toilets and a new parking facility to serve market customers and traders. The plan states that work on the road and water systems and construction of public toilets will be funded by the Municipal Council while the construction of the parking facility will be funded by a private company. Mr. da Cruz informed me that there is also a plan to spread sand on the ground outside the walled portion of the market to improve drainage. Prior to spreading the sand, they will take a census of the traders, recording the name, the type of goods sold and the location. Then, according to the plan, the traders will have to vacate the market area so the sand can be spread. Traders will be allowed to return and set up their stalls only if their names are on the census list.

Regarding fees, Mr. da Cruz stated that at present each trader pays a daily tax of 500 Mts. to be able to sell in the market. He said that the fees are collected by members of the Municipal Council and the money collected goes directly to the central district office. From there, funds are distributed to the various urban districts. However, it appears that the daily tax rate varies according to the source of information. The retail traders themselves told me that they pay a daily tax of 1,000 Mts., twice the amount quoted by the market Administrator Mr. da Cruz. Other expenses for the traders include 500 Mts. to buy a cup of water (there is no public water supply) and 1,000 Mts. to use the toilet in one of the nearby residences.

I concentrated my information gathering on the traders selling outside the walled portion of the market, i.e. the area administered by Urban District #2 and spent several hours a day there over the course of about six week days

2 5 2 Bazuca Market

Bazuca is the wholesale food produce market situated less than 1 km from Xipamanine. I estimate that there are 10 traders who have store houses with walls, doors and roofs along the perimeter of this market. Others, the majority, position themselves in the center of the market space and directly in front of the store houses. These traders stack their bags of produce and use an umbrella for protection from the sun and rain. A small number of wholesale traders sell from stalls made of wood poles with paper, cloth or plastic. To one side of the center of the Bazuca market grouped together, are about ten women and young men selling new and used clothing.

Large trucks enter the market, unload their goods and exit the market by the U-shaped road way. Frequently, traders positioned in the center of the market area have to move their produce when one of the trucks comes in, to give the truck adequate space to maneuver.

2 5 2 1 Bazuca Traders

Orlando Nhantumbo, a spokesperson for the Commission for the Central Commercial Market of Xipamanine-Bazuca, was identified by ACIDI/VOCA as one of the two primary contacts for this assignment. Mr. Nhantumbo is a licensed trader, has his license prominently displayed and has been trading in the market for about ten years. Other traders I met with in Bazuca are Rebecca Mazive and Alzira Machel.

Traders generally pay 300 Mts per night to store each sack in one of the buildings (stores) at the edge of the market. Orlando Nhantumbo is unusual among the Bazuca market traders because he is licensed. Most traders are not, so they pay 500 Mts per day to display each sack for sale. Most of the women traders in the center of the Bazuca market are widows and women alone and have established good working relationships with the police who are stationed close by at the edge of the market.

2 5 2 2 Bazuca Association Development Potential

Although I tried many times to see him, I was able to talk at length on only one occasion to Mr. Nhantumbo. At this time I explained the purpose of this study and asked some questions about the general way he conducts his business. I also took the opportunity to present some information on the benefits of forming an association with other traders in the market. He showed some interest and agreed to speak to other traders such as Rebecca Mazive and decide on a time when they could gather to discuss the possibility of forming an association. The next time I saw him in the market he told me that several traders would be interested in discussing associations and could meet the next day at 3:00 p.m. I arrived in Bazuca the next day ready for the meeting to discuss the benefits of forming an association, only to find that neither Mr. Nhantumbo nor Mrs. Mazive was there even though both said they would attend and encourage others.

Based on what my experience with these traders, it would appear at first glance that there is no potential for association development and possible future organizational assistance. However, in this case there is a problem with drawing a conclusion based on observations made over the course of two weeks. I concluded that the problem lies in the approach used. Two weeks is not nearly enough time. Using only two weeks, any conclusions drawn regarding the potential for association development and possible

future organizational assistance would exist in a vacuum and not in a meaningful context. As stated in Section 6.2 of this report, where recommendations for issues and problems faced by traders are discussed, my recommendation is for a volunteer to work with an organization which is already involved to some degree in association development for mobile traders. Then determining the potential for association development and possible future organizational assistance could be carried out within the framework of an organization that has an interest and a presence in the community.

In conclusion, I found these informal sector traders in Bazuca market to be uninterested in discussing the possibilities of association development. I do not know if their unavailability means that they are, in fact, uninterested or if it means they were too busy at the time to pursue the topic.

3 Traders

This section describes my observations on how informal sector traders obtain market information and how they purchase from farmers. From conversations with traders in Bazuca, Chimoio, Beira and also in Zambezia province, I learned that they operate independently and are competitive with each other but that they will often form temporary relationships or arrangements, to finance or expedite the purchase of goods. These traders are mobile. Although they may be based in one location for a period of time, they move according to the availability of goods to buy and the opportunity to sell.

3.1 Making Business Decisions

The following diagram shows an overview of the market information flow for traders. The sections below describe how some of the traders I met use the market information available to them to make business decisions.

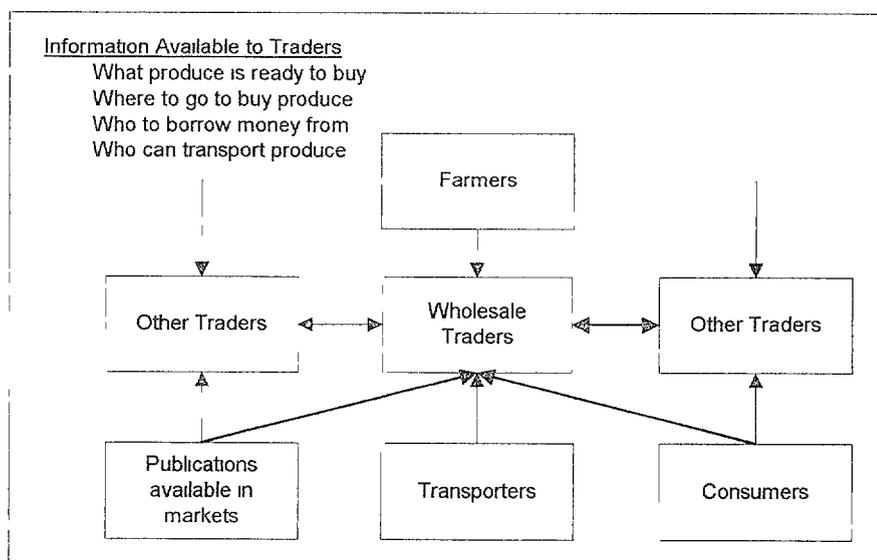


Figure 2
 Traders and Market Information

3.1.1 Orlando Nhantumbo - Bazuca

Mr. Nhantumbo in Bazuca market informed me that he obtains information from his own contacts up north who telephone him with information on what produce is available. Most of these contacts are

traders and some are farmers representing themselves. Sometimes the contacts will come south to Maputo bringing samples in 50 kg bags. After checking the quality of the produce, Mr Nhantumbo will then talk to his local retail contacts to determine if it is a good time for him to buy the produce and sell it in Maputo. He will often travel north to buy and transport the produce himself and said that he usually travels with a truck returning north empty. In this way he can purchase the produce and not worry about finding a way to transport the produce back to Maputo.

Regarding price information, Mr Nhantumbo reads *Quente-Quente* when it is delivered to the Bazuca market. He uses the information in this bulletin to help him decide in his decision on what price to pay when he buys the produce. But he makes his final decision based on what he himself knows about the market.

Like many of the other traders, Mr Nhantumbo buys his produce from the following locations:

Location	Produce
Niassa	Beans
Tete	Garlic
Gurue	Tea
Nampula	Groundnuts
Chimoio	Maize
South Africa	Potatoes Onions

3 1 2 Alzira Machel - Bazuca

Alzira Machel is the trader who explained to me that most of the women selling in the center of Bazuca market are widows or women alone and that she herself does not travel to purchase goods. She said her contact up north lets her know by phone when a truck of produce is coming to Bazuca. She receives the call at someone's private phone right here in the market.

3 1 3 Rebecca Mazive - Bazuca

Rebecca Mazive, about 45 years old, is a trader who sells her produce in the center of Bazuca market almost directly in front of Orlando Nhantumbo's store. She buys maize from Chimoio, tea from Nampula and sugar, beans and maize flour from Swaziland. She told me that she generally travels with two other women on these buying trips.

3 1 4 Anastasio Guilherme Viera - Chimoio, Manica

I spoke with Anastasio Guilherme Viera, about 40 years old, at the Textafrika car park in Chimoio. He sells to buyers who come to Chimoio from Beira and as far south as Bazuca market in Maputo. He seems to be able to sell his goods quickly and says that buyers arrive in Chimoio from the south about every other day. He also sells maize to Moberia in Beira and to the brewing company in Chimoio.

Mr Viera is the second trader I spoke to in Chimoio who is familiar with *Quente-Quente* and would like to read it more often. He also expressed an interest in receiving more current price information, especially when the harvest campaign is in full swing and the competition to find buyers gets tighter.

3 1 5 Ines Lucas - Mocuba, Zambezia

Ines Lucas is a woman about 50 years old, has traded since 1983 and appears to be a successful trader. She comes from Maputo and other family members, such as her daughters and nephew, are also involved with the business. She has a bank account in Maputo. She pools her financial resources with those of

others in her family. At the moment she is selling fish in Mocuba, a town about 160 km north of Quelimane. At other times she has sold maize and groundnuts in the Maputo markets and has also traveled to Swaziland to buy sugar and other consumer goods to sell in Maputo. When I asked what she thinks she needs most to be more successful in her business, she stated, "I need money."

At the time I spoke to Mrs. Lucas in Mocuba, the first crop of maize was in the process of being harvested about 100 km to the north and the price was in the process of falling rapidly during the four days I spent in the region. This new maize was quite wet in the sacks. The presence of so much moisture means that the maize will not last long in storage, so it has to be sold very quickly. Traders were buying quickly with the plan to sell as quickly as possible in the Mocuba and Quelimane markets. When she can find drier maize to buy a little later in the harvest season, Mrs. Lucas said that she is considering using pesticides to fumigate the maize to retard spoilage. This was the first time a trader I spoke to mentioned the possibility of using pesticides.

Mrs. Lucas informed me that she has enough working capital now to consider using pesticides to protect the maize from spoilage. She stated that her nephew can obtain pesticides in either Beira or Chimoió from one of the large companies. The news that this trader is considering using pesticides brought to mind several issues:

- The capacity to store produce is important mainly because it puts the trader (or farmer) in the enviable position of choosing the time to sell, rather than being forced to sell right away, no matter what market prices are.
- Are other traders using pesticides and other forms of environmentally safe, effective means to prevent crop damage?
- Are the traders familiar with the safe and proper usage of pesticides?
- How much pesticide "leakage" is there at large companies, such as the brewing company in Chimoió?

3.1.6 Rosaria Artur - Mugulama, Zambezia

I spoke to Rosaria Artur, a 35-year-old woman, on two occasions in Mugulama, a small town on the main road to Alto Moloque. She was born in Inhambane and has a family and house in Maputo. She also has a bank account in Maputo. She said that she is renting a house in Mugulama at this time for the sole purpose of recovering some money her business lost last year. Her plan is to recoup her losses and return to Maputo next year, using that as the base of her trading business.

Mrs. Artur told me that many traders do not get involved in the early harvest maize trade that is currently underway. They prefer to wait for the "real" maize harvest which starts in July. She said that this harvest now is "just a game" compared to the later harvest. The harvest starting in July is much more competitive in every way, especially regarding transport. For this reason, she will usually rent an entire truck before she buys her sacks of maize, rather than buy the maize first and then find a truck to rent.

Mugulama was a very busy place when I visited on the way north to Alto Moloque and then again, on the way south to Quelimane. Farmers were bringing in sacks of maize, groundnuts and cassava; traders were accumulating sacks for shipping, and truckers were loading sacks onto their trucks. I found that traders in Mugulama were making buying decisions based on price information that was only about 24 hours out of date. In other words, traders in Mugulama, 260 km from Quelimane on a road that varies from good to bad condition, were only one day behind Quelimane in their price information.

In spite of stiff competition among traders it appears that there is some collaboration and sharing of information regarding price setting. I heard one trader in Mugulama tell another that he wanted to talk to her later in the day so they can agree on a price for the next day.

Making an inference the speed with which the Quelimane price information was passed along the trading route by traders, farmers and truckers is, in all likelihood, slower than the speed at which price information is passed along the road from Maputo to Beira and from Beira to Chimoio. The southern roads are in general in better condition and most important have a greater flow of traffic. The increased traffic alone means that price information can be passed along at a greater speed.

3.2 Financing Trade

Most of the traders I met shared the following characteristics concerning the issue of finance:

- Traders often join together with other family members to increase their working capital and obtain market information.
- They 'go to the bush' in order to recoup their losses. I heard this statement several times and was told that they go to the bush at a time when they cannot afford to stay in a large town or city. They then trade in produce that is relatively inexpensive to buy and can be sold quickly.
- Regarding working capital, 8 Million Mts is the highest amount currently in use by the traders I met. Most traders seem to work with less, from 3 to 4 Million or less. Some traders told me that when times were hard (and they went to the bush), they were able to rebuild their trading business using only 200 000 Mts.
- Many traders informed me that at times when they do not have much working capital they receive credit from both farmers and the truckers who transport the produce. The traders then repay their loans when they sell the produce in the market.
- Several of the Maputo traders said they group together to pool their money to go south to Swaziland or north to Chimoio to buy produce. Sometimes the traders will travel together and at other times they will send a representative to buy on their behalf.
- When I asked several traders how they decide how much money to bring with them when they travel to buy produce they told me that this really was not a decision that they made. They said they spend whatever money they have. This is an example of what I consider a "vague" answer to a question that I did not ask in the best way possible.
- Traders show resourcefulness when faced with economic problems. One trader who brought 100 sacks of maize to Quelimane and bought them at a price higher than the market price said he has enough capital this year to pay 200 000 Mts per month to fumigate and store 100 sacks at the Institute of Mozambiquan Cereals (ICM) in Quelimane. He then plans to sell the sacks in Malawi or Milange in western Zambezia province. He said that last year he had the same problem with buying too high but did not have enough working capital to afford the storage and fumigation fees so had to sell at a loss.

Some NGOs, such as World Vision International, have programs to help traders get access to credit. I met with Anne Janson at the WVI Quelimane office and received information about their loan program to traders. This program makes credit available to individual traders rather than an association or group of traders. The trader goes through a selection process and training program (which includes budget preparation) in order to qualify for the credit program. The amount of the first loan is 1 Million Mts, to be repaid in 15 days. If the loan is repaid in full and on time the loan amount is then doubled. The repayment schedule stays the same (15 days) and the amount borrowed is doubled each time with a 4 Million Mts ceiling.

Participants in the credit program are also encouraged to save money to buy post-harvest processing equipment, such as manual grain mills and oil presses. An initial deposit of 20 % is required to buy the equipment on credit. Mrs Janson informed me that since this loan program started last year, her staff of six credit officers, one supervisor and one mechanic has supported the processing of 103 loans totaling 180 Million Mts. According to a recent monthly analysis, the 10 people currently receiving credit have an average monthly profit of \$160.

4 Farmers

This section describes how farmers obtain market information as illustrated in the following diagram, farmers are isolated at the end of the market information chain and they have limited information available to them.

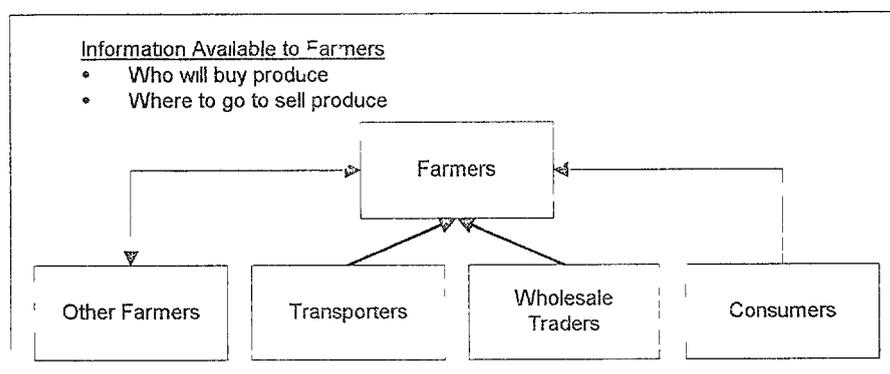


Figure 3
 Farmers and Market Information

Some organizations such as Food for the Hungry International and ORAM are implementing and maintaining programs that are designed to increase the availability of market information for farmers and thus increase their ability to negotiate for fairer prices. What generally happens is that the farmer is at the mercy of the trader and will accept the price the trader offers. In addition, when there is plenty of agricultural produce available, such as at the maize harvest time, traders expect farmers to bring their produce to markets along the main roads. It is only when there is less produce available along the main routes that traders will travel to outlying, less accessible areas to purchase.

I met with farmers in three different market towns: Boane, Chuuio and Mocuba. My interpreter in Beira, Antonio Joaquim Manuel, traveled to Gorongosa district in Sofala province and Sussundenga district in Manica province to interview farmers and gather information for this report. Common themes we both heard include:

- Farmers say they have to accept the price that the trader offers
- Farmers say do not know the prices that traders are paying in other areas including markets
- Farmers say they prefer a fixed price for produce. This is only the second marketing campaign without minimum prices for agricultural produce here in Mozambique
- Farmers say they can get a better price if they do not sell their produce when everybody else is selling
- Farmers say they do not know how to calculate their expenses and profits

- Farmers say they often give full or partial credit to a trader whom they know, letting the trader pay them after the produce is sold
- Farmers say they often transport their produce to the trading post or market, rather than having the trader come to the farm gate
- If they had transport, farmers say they would take their own produce to market to sell
- Farmers say they do not have information on what the demand is for produce so they don't know how much to plant. For example, the farmer in Boane said they produced maize but nobody came to buy it, so it is rotting. With Boane on a good road and so close to Maputo, my impression is that rotting surplus might not be restricted to very rural, hard to reach areas with poor road systems
- Although some farmers work in an association while they're growing the crops, they say they sell them as individuals. The implication is that they thereby lose potential advantages that group sales might have
- Many farmers say they receive little or no information from extension agents. One elderly farmer said that the last time he received information was back in 1975 when the Ministry of Agriculture provided some information and help transporting produce

4.1 Examples of Programs Assisting Farmers

The following sections briefly describe two of the programs assisting farmers, Food for the Hungry International and ORAM.

4.1.1 Food for the Hungry International

FHI programs in Sofala province are designed to promote rural enterprise and association development, improve marketing and storing produce and introduce appropriate technology. FHI maintains a pricing information system in which data is collected, analyzed and disseminated to FHI extension agents, Ministry of Agriculture and Fisheries extension agents and farmers. FHI disseminates price information to farmers by *Jornal do Mercado* bulletin boards. These bulletin boards are installed in markets in Sofala province along the Manica – Beira road and give price information by location and type of produce. Although I saw several bulletin boards in place while I traveled on the Manica – Beira road on March 19 – 20, the actual price information had not been entered yet.

I met with Joao Paulo de Sousa, a member of the FHI staff in Beira, who works with farmer associations in Nhamatanda (on the main road west of Beira) to improve post harvest processing, storage and commercialization. FHI is working with the Union of Associations and Cooperatives (UDAC). UDAC is a registered association that helps farmers with land tenureship registration. UDAC membership is composed of 17 farmer associations, totaling approximately 360 individual farmers. FHI has training programs for the farmers. These programs are designed to "train the trainers," so information and skill transfer is primarily the responsibility of the associations, themselves.

4.1.2 ORAM

ORAM is a national NGO that works primarily with land tenure. ORAM helps farmer associations in all the provinces to go through the cumbersome, expensive process of registering land. The land is registered in the name of the association, and then the association divides the land into sections for members of the association.

I met with Lourenco Inacio Duvane, the ORAM delegate in Quelimane. Mr. Duvane briefly described a program that ORAM would like to design to help farmers get a better price for their produce. The

program under consideration connects the farmer directly to the market, bypassing contact with traders and middlemen. I have several unanswered questions about this approach:

- Who will the farmers sell their produce to?
- At what level does ORAM expect the farmer to enter the market?
- At what level is it most appropriate for farmers to enter the market?

Mr. Duvane also expressed the concern that ORAM has become reactive rather than pro-active, responding to the needs of farmers and associations. It appears that there is an opportunity to help ORAM with organizational issues such as strategic planning and goal setting. In their eagerness to respond quickly to requests, ORAM's goals and objectives might be in need of revision.

4.2 Information from Market Towns

The following sections present the information we obtained from three different market towns on main roads: Boane, Chimoio and Mccuba.

4.2.1 Boane

The road from Maputo to Boane is paved and in very good condition. The drive takes about 45 minutes. I met with Albino Honware, chief extensionist at the office of the District Director of Agriculture and Fisheries, who explained he has eight extension agents working for him. He said he has not been paid on a regular basis since a large irrigation project finished in 1993 and because he and his extension agents are not considered government employees.

I also spoke with one of the extension agents working for Mr. Honware, who said that the extension agents are not motivated to work properly because they are not paid on a regular basis. He added that since there is no budget to cover training expenses, he doesn't conduct training with his groups of farmers. This extension agent made it clear that his involvement with the farmers is minimal.

Even though the farmers in the Boane area live quite close to Maputo (and its large markets) and there are excellent roads between Boane and Maputo, I was told that the farmers have problems "at all stages" of production. These problems include crop planning, management, and harvest. In addition, the small scale farmers in the Boane area also compete with the nearby large agricultural companies.

The farmers in this area sell their produce to buyers who come directly to the field, to the farm gate. I spoke to one farmer who grows tomatoes, cabbage, beans, green beans, onions, maize and *piri piri*. When asked how she decides how much of a certain crop to plant, she said she gets her information from the extension agent. It was my impression, however, that the extension agents seldom saw the farmers and therefore rarely gave them information of any kind.

Farmers in this area have the following expenses:

- A monthly charge (180,000 Mts) for the use of the irrigation system,
- Fertilizer and seed, and
- The cost of a tractor to plow the field (750,000 Mts for 5 hours of tractor time)

Regarding transport, the farmers I spoke to said that one solution is for the association to have a contract with a truck to take the produce and several farmers representing the group to the Maputo markets. According to the extension agent, it is considered unusual for an association to group together to sell the produce, as the association members traditionally prefer to sell as individuals.

4.2.2 Chimoio

At the Textafrika car park in Chimoio I spoke to a small group of farmers, mostly young men, who were transporting sacks of cassava into the market. There were several older men in the group who said they do not get any price information or for that matter information of any kind regarding crop production, harvest and commercialization. These farmers with the fixed price system were still in place. They stated that they never negotiate with traders and always accept the price the trader offers.

4.2.3 Mocuba

I spoke to two farmers at the market in Mocuba at the time when they arrived on bicycle to sell their sacks of maize. The harvest had just begun and for a couple of days the price per *lata* was in the process of falling 10,000 Mts a day. They had traveled together a distance of 40 km to bring their maize to the market. When I first met them, they said they had already talked to some traders in the market and refused offers that were too low. They also said that they had the option of selling the maize close to home but decided to carry the maize the full 40 km because they were certain they could get at least 5,000 Mts more.

I talked to these traders again, when I noticed that the sacks were no longer tied to the back of their bicycles. They told me they had decided to sell their maize in the Mocuba market for the same price they would have received had they sold the produce close to home.

4.3 Information from Rural Areas

This section presents an overview of the information gathered by my interpreter, Antonio Joaquim Manuel in Sofala and Manica provinces. His assignment was to go to villages in outlying areas, with poor access to main roads, and obtain information on problems they face, such as how they get price information and how they transport their produce. Common problems faced by farmers in rural areas are as follows:

- o Some farmers do not speak Portuguese and so are sometimes at a disadvantage when dealing with traders.
- o Most farmers living in rural areas have very poor road access.
- o Transport is considered expensive and slow. Where there are poor roads, farmers often rely on carts pulled by cattle rather than motorized trucks or cars. Farmers also transport produce by bicycle.

4.3.1 Gorongosa District - Sofala Province

Mr. Manuel spoke at length to three farmers in this district who grow food for their families and then sell whatever surplus they have. Only one of the three farmers is in an association, the *Associação dos Pequenos Camponeses* based in Gorongosa, the district center. This farmer said he has a hard time transporting his produce to Gorongosa where the association sells the farmers' produce. The other two farmers said they would join if there were an association in their area.

Mr. Manuel did speak to one farmer in another district in Manica province, Gondola, who said he grows food to feed his family and specifically to sell to traders. He used to belong to a farmer association but all the cash the farmers contributed was stolen, so he left the association. This farmer added that he would still be interested in joining an association to have access to some financial support and farming knowledge.

All three farmers said they face post-harvest storage problems and would like to be able to store their produce without it spoiling so quickly. They do not receive any information on agricultural practices or market prices. Sometimes traders from the nearby town will come to the village to purchase but most often they themselves, transport the produce to the town not knowing for sure if there is a buyer waiting. On the other hand, one farmer stated that buyers from Beira, Inhambane and Maputo come all the way to his village to buy at times when maize is hard to purchase along the main roads and in the market towns. This farmer said that later in the harvest season, when maize is scarce the farmer is in a position to negotiate and has some control over the selling price.

4.3.2 Sussundenga District - Manica Province

Mr. Manuel spoke to three farmers in Sussundenga district. These farmers talked about the problems they face with not being able to get information on prices, post-harvest crop spoilage and the expense of paying for transport into the nearest market place. The farmers appear to lack information on good farming practices such as site selection and crop management techniques.

One farmer mentioned that he often exchanges some of his maize with traders for sugar, soap, salt and other household goods not available in his village. It is interesting to hear of this barter system being used. According to Nina Bowen, barter occurs in the absence of money, where there is no overarching monetary system, and also where a common currency does in fact exist but people either prefer not to use it or there is just not enough currency to go around. Ms. Bowen also informed me that there is a clear relationship between the importance of barter and the limitations of the money supply.

5 Transporters

This section gives a brief description of the role that transporters play as links in the marketing chain. Following is a list of common characteristics and concerns.

- The driver is not always the owner of the truck.
- Truckers often establish credit relationships with traders, logisticians and middlemen. When a truck comes into the market with a load that the trader has yet to pay for, the trader will often borrow money on the spot from friends in the market.
- Transport is in greater demand as the harvest season progresses.
- Local transport drivers in towns along the main roads say that long haul truck drivers have the advantage of being able to take on loads and pocketing the money themselves, when they are returning with a reduced load or an empty truck. For example, local drivers in Mocuba complain that because the town is on the national road, long haul drivers heading south are in a position to offer a lower price to haul sacks than they are because they have either unloaded or have space available for some sacks. The profit from taking on sacks at a local town (i.e., not the destination for the goods being transported) goes directly to the driver and not to the owner.

In Alto Moloque, on the main north-south road in northern Zambezia province, I had the opportunity to learn about an innovative approach to improving rural transport problems. The Mozambican Association for Rural Development (AMCDER), a national NGO, has teamed with a private company to purchase six 12 ton trucks. These trucks are currently based in Alto Moloque. The day-to-day management of the company is handled on a contract basis by a man who has extensive business and transportation experience. The company, Transloque, has established set rates for hauling produce according to the distance and road condition. The minimum load is 10 tons. The fact that this company

is based in the northern part of Zambezia province means that more rural areas will have access to transportation than was previously possible.

6 Problems and Issues

According to the statement of work for this assignment, the most common request made to ACDI/VOCA Mozambique is, "Show us how to get a better price for our produce." Following is a list of problems and issues related to getting a better price for produce. For each problem I have suggested a recommendation for improving the situation. These recommendations are based on the information that I gathered during the course of my six week assignment traveling in Maputo, Sofala, Manica and Zambezia provinces.

I would like to emphasize that I repeatedly found that farmers usually do not have accurate price information. It also appears that they often find it difficult to obtain information on agricultural practices that might help them get better prices, such as the proper use of pesticides. For this reason I have placed the recommendations directed towards farmers at the beginning of the list.

Again, it is also important to note that farmers and traders are sometimes roles played by the same person. For this reason the problems and issues that follow with their recommendations for further action by ACDI/VOCA tend to overlap.

6.1 Farmers

Problems and issues relating to farmers can be grouped under two main headings: farmers lack adequate market information and they have difficulty getting their produce to market. Following is a list of common problems that farmers share with recommendations for their improvement. Please note that these problems were discussed at greater length in previous sections of this report.

The anticipated impact of addressing these problems is increased access to markets, resulting in increased rural household income.

Problem 1 Farmers have to accept the price that the trader offers and do not know the prices that traders are paying in other areas. Also, farmers say they do not have information on what the demand is for produce so they don't know how much to plant.

Recommendations

- Work with agriculture extension agents to provide price information to farmers and also information on the factors affecting the price decisions made by traders. Farmers would then be in a better position to plan their crops, negotiate with traders to receive better prices for their produce and understand factors affecting price changes.
- Work with organizations disseminating price information to farmers via community based, innovative and cost effective ways, such as community radio broadcasts.

Problem 2 Farmers want the option of holding back their produce so they can get a better price. They say that sometimes they can get a better price if they do not sell their produce when everybody else is selling when prices are often lower.

Recommendations

- Work with organizations to provide technical assistance to organizations facilitating the link between farmers and markets.
- Work with organizations to provide technical assistance to organizations training farmers in the proper use of post harvest technologies, including the use of effective, environmentally safe

pesticides. Farmers could then store crops more successfully, and therefore have the option of choosing the best time to sell.

Problem 3 Farmers say that transport is expensive and often hard to obtain.

Recommendation

- Work with organizations to provide financial assistance to itinerant traders to strengthen the capacity of the market to reach the farmer. The impact here would be to make it easier for farmers who live in areas accessed by roads in such poor condition that it becomes difficult to sell their produce to actually sell their produce and not be faced with an unplanned for surplus. Bring the traders to the farmers, not the other way around.

Problem 4 Farmers say they can get a better price for their produce if they sell it themselves, without the intervention of a trader, but do not know how to obtain and manage this direct link to the market.

Recommendations

- Work with organizations to provide both strategic planning and market trade technical assistance to NGOs, such as DRAM already working to facilitate the formulation of direct links between farmers and markets. In this case, the NGO would benefit from improved strategic and business planning skills. It appears that there is a need in the NGO world for acquiring some of the basic planning skills used in the business world, where the actions that a company takes are designed to achieve clearly stated goals and objectives.

6.2 Traders

Problems and issues relating to traders can be grouped under two main headings: traders lack access to working capital and they lack adequate market information. Following is a list of common problems that traders share, with recommendations for their improvement. Please note that these problems were discussed at greater length in previous sections of this report.

The anticipated impact of addressing these problems is increased access to markets resulting in increased rural household income.

Problem 1 Traders lack adequate access to the kind of market information that helps them make decisions related to buying and selling produce.

Recommendations

- Work with organizations disseminating price information to farmers via innovative and cost effective ways, such as community radio broadcasts. This would give traders greater access to market information.
- Work with organizations who have a presence in the community and can provide credit and training programs to traders, to investigate creative approaches for providing regionally specific credit and training programs for mobile traders, including traders in the Bazuca market. This would give traders greater options to participate in credit and training programs. Design the training programs in short focused segments that are relatively easy to absorb very quickly.
- Work with NGOs and government organizations to revise the format and language of market information bulletins such as *Diário-Quente* so the language used and format presented are targeted more towards market traders than towards NGOs and government organizations. More traders, especially those with less formal education would use the market information already available.

- Work with organizations to increase the number of copies of market information bulletins such as *Quente-Quente* and also increase the frequency, so the bulletins contain more timely information. More traders would obtain timely market information on a more regular basis.
- Work with organizations collaborating to share market and trade information currently collected by NGOs and governmental organizations in Mozambique. Coordinate Worldwide Web links to facilitate information sharing and exchange.

Problem 2 Traders lack access to working capital

Recommendations

- Work with organizations to provide financial assistance to itinerant traders to strengthen the capacity of the market to reach the farmer, making it easier for farmers who live in areas accessed by roads in such poor condition that it becomes difficult to sell their produce. A constraint to implementing this recommendation is the problem of getting collateral from traders (i.e., property of some sort). Informal sector traders are mobile and do not always own property. Moreover, they are not always in the same location, so provisions should be made so traders can make payments in different locations. However, benefits from providing financial assistance to itinerant traders enabling them to travel to farmers in outlying areas would be shared by traders and farmers.
- Work with an organization to design and implement mobile training programs for itinerant traders, ensuring that these programs are accessible to traders in rural market towns and cities throughout the country. Offer skill training in very small segments or chunks, so traders can learn something useful easily and in a very short period of time. The impact here is that individual traders have the freedom to take into account their own situations, can exercise training options and are not required to follow one prescribed training path.
- Work with an organization to encourage traders to group together to purchase and transport produce, such as the traders in Bazuca market. Traders would get better prices.
- Work with an organization to determine the feasibility of designing a "mobile" credit and training program that uses vehicles (similar to bookmobiles for libraries) to bring the program to the traders, making it easier for the trader who is not usually in one place for very long. The notion of bringing the program or service to where the consumer is and not the other way around is not new in the business world. To use an example, banks install ATM machines in places where consumers are, like supermarkets and stores, and not only inside bank buildings.

7 Issues for Further Consideration

Following is a brief list of issues for further consideration. These issues are really questions that are outside the scope of this assignment but are in my opinion worth considering at some time.

- How serious are post harvest losses? People talk about these losses but I was unable to get a clear picture of their magnitude.
- At what point and at what level are training programs for traders the most cost effective? This question concerns whether training is most cost effective when it is targeted towards groups or towards individuals and furthermore what level of traders should be trained? For example, it might be most cost effective to train groups of experienced, entrepreneurial traders who have large amounts of working capital with which to work.
- If programs are to help farmers sell their own produce without the intervention of traders or middlemen, at what level should farmers enter the market? Moreover, what would be the economic impact on traders?

-
- What role do transporters play in the marketing chain? I was not able to find much information about their licenses. Part of the problem is finding truck owners, rather than drivers to interview. As previously stated, drivers of trucks are not always the owners.

3 Key Contacts

Name	Responsibility	Organization	Location
Jim Singer	Manager	Procter & Seaboard Corporation	Beira
Joao Paulo de Sousa	Marketing	Food for the Hungry International	Beira
Alberto Honware	Chief Executive Officer	Director of Agriculture and Fisheries	Boane
Alzira Machel	Wholesale Trade	Xipamanine - Bazuca market	Maputo
Cecilia Ruth Bila	Agricultural Engineer	Ministry of Agriculture and Fisheries National Directorate of Rural Extension	Maputo
David L. Tschirner	Project Lead Food Security Project (PSA/MSU/USAID), in the Ministry of Agriculture and Fisheries Directorate of Agricultural Economics	Dept. of Agricultural Economics Michigan State University	Maputo
Francisco Montero	Chief Executive for Food Security Project (PSA/MSU/USAID), in the Ministry of Agriculture and Fisheries Directorate of Agricultural Economics	Beira - Xiqueque markets	Maputo
Frans Van De Ven	Chief Technical Advisor Marketing Management Assistance Project in the Ministry of Industry, Commerce & Tourism National Directorate of Internal Commerce	Ministry of Industry Commerce and Tourism National Department of Internal Trade Marketing Management Assistance Project COPS MOZ/055/EC	Maputo
Jean Francois Detry	Consolidated Information System Coordinator	Medecins Sans Frontieres	Maputo
Joao Marciano da Cruz	Administrator of Urban Districts 1 & 2	CCM	Maputo
Orlando Nhatutu	Wholesale Trade member of Commission of the Central Commercial Market of Xipamanine-Bazuca	Xipamanine - Bazuca market	Maputo
Rebecca Mazive	Wholesale Trade	Xipamanine - Bazuca market	Maputo
Sidney Bliss	Iconic Strategic Objective 1 Team Member	USAID Mozambique	Maputo
Arne Jarson	Trading Loans	World Vision International	Quelimane
Jan de Moor	Technical Advisor	Rural Association for Mutual Aid (GRAM) - Zambezia	Quelimane
Lourenco Inacio Duane	Delegat	Rural Association for Mutual Aid (GRAM) - Zambezia	Quelimane
Nira Bowen	PhD candidate Anthropology studying small scale traders & trading networks in Zambezia province	London School of Economics and Political Science	Quelimane