ANNUAL REVIEW MEETING C:AVA.

Grace Mahende
Country Manager-C:AVA
Tanzania Food & Nutrition Centre (TFNC)
NRI, UK.
Content

- Background
- Major accomplishment
- Achievement
- Winding up plans
- Scaling up
- Scaling out
Map of Tanzania Showing Cassava Growing Region
The High Quality Cassava Flour value chain in Tanzania is characterized by:-

Markets; Mainly the food industry substituting wheat in the biscuit manufacturing and small scale bakery sectors and pure HQCF or cereal blend in Agri-food industry.

Level of processing; Small scale community processing based on sun drying to provide high quality grits and/or flour.

Locally processed cassava into flour for home use.
## HQCF Market Segments

<table>
<thead>
<tr>
<th>Agri-food</th>
<th>Biscuit</th>
<th>Baking</th>
</tr>
</thead>
<tbody>
<tr>
<td>DSM</td>
<td>DSM</td>
<td>MTWARA</td>
</tr>
<tr>
<td>FRABHO</td>
<td>Bakefood</td>
<td>Mana bakery</td>
</tr>
<tr>
<td>Kadodoo Sembe</td>
<td>International</td>
<td>Confectioneries</td>
</tr>
<tr>
<td>Ibitungwa</td>
<td></td>
<td>(many)</td>
</tr>
<tr>
<td>Power foods</td>
<td></td>
<td></td>
</tr>
<tr>
<td>MTWARA</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Micro-enterprising (9)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Quarter Sales trends.

Market trends by segments

HQCF (ton)

June       Sept       Dec       Feb

Agri food Mtwra
Agri food DSM
Biscuit
Biscuit Segment

Bake Food International based in DSM.

Started with 2tons that grew to 5ton irregular bases it grew to 20tons/month on regular base in 2012. This is 40% of potential HQCF utilization capacity of 50ton/month.
Biscuit factory
Price trends in the market segments

Prices in Market segments

TZS/kg

Period

2009/2010
2010/2011
2011/2012

Biscuit segment
Agrifood segment (DSM)
Agro Enterprises segment (Mtwara)
Bakery
Communication and Promotion

Cassava commercialization awareness creation event

National level The cassava week in September. Events during the month included; media promotional programme on radio and television, field trips and exhibition.

Regional level. Agricultural show in Lindi Region and SIDO trade fare in Mtwara.

Both farmers, processors/Agro processors and end users participated.
Training during the week
Baking demonstration used as promotional tool.
Baking training conducted to 89(99% female) entrepreneurs; in mini bekary, restaurants and home based businesses, Mtwara 60, Masasi 29.
Recipes demonstrated included Biscuit, Madeirra cake, queens cake, maandazi, chinchin, bagia and flitters.
HQCF is widely used in; biscuit, chinchin, maandazi and cake.
Baking training session at SIDO Mtwarra
Shop Selling cassava value added products in Mtwara
Community processing networking

Community processors networking formed at ward level. Eligible to agri based farmer groups, cassava farming is a must. Major functions of the network,
Coordinate collective marketing disseminate market information, organizing transport, supervise processing, quality monitoring, cassava farming.

<table>
<thead>
<tr>
<th>District</th>
<th>Network formed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mtwara Rural</td>
<td>5</td>
</tr>
<tr>
<td>Masasi</td>
<td>5</td>
</tr>
<tr>
<td>Newala</td>
<td>3</td>
</tr>
<tr>
<td>Tandahimba</td>
<td>3</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>16</strong></td>
</tr>
</tbody>
</table>
Network strengthening

A learning visit to MVIWATA in Morogoro Region was done in February. Participants in the study tour were both network leaders and service provider representative.

Places visited:-

Pinneapple association in Kinole village, these trade with AZAM the Bakhressa group of companies juice factory in Dar es salaam.

A collective market centre.
Interaction at the Kinole market
Network strengthening

Diary goat keeping in Mgeta

Yoghurt shop in the village
Network linkages with intermediary

Objective was to improve network operations, broaden understanding in marketing of their product not to replace intermediary.

The intermediary still provide a link between networks and end users, they are involved in milling, packaging, transportation and delivery of consignments to end users.
Grits milling at Kejo enterprises
Mentoring of SMEs

Cassava processing activities were opened at SIDO Mtwara with two objectives, one was to utilize the cassava grown at Naliendele and second to demonstrate HQCF to SMEs in Mtwara. The demonstration had attracted more cassava processing enterprises from 5 in 2010 to 9. One of these is being mentored to take over the processing activities at SIDO.
Mentoring SMEs cont...
Local processing

Primary processing is done in the villages by farmers, bulking is done in the villages and milling in town centers.

The makopa flour is sold within Mtwarra, to Mozambique and this season to Mwanza.

<table>
<thead>
<tr>
<th>Market levels</th>
<th>Average price in TZS</th>
</tr>
</thead>
<tbody>
<tr>
<td>At village level</td>
<td>70</td>
</tr>
<tr>
<td>Wholesale price at millers</td>
<td>265</td>
</tr>
<tr>
<td>Retail price</td>
<td>400</td>
</tr>
</tbody>
</table>
Local processing (Makopa)

Makopa bulking in the villages

Makopa processing enterprise in Mtwarra Rural District.
# Target achievement 2011-2012 (Feb)

<table>
<thead>
<tr>
<th>Milestone</th>
<th>Target</th>
<th>Achievement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Farmers</td>
<td>1115</td>
<td>1152 (103%)</td>
</tr>
<tr>
<td>Processors (HQCF)</td>
<td>689</td>
<td>437 (63%)</td>
</tr>
<tr>
<td>Processors (Makopa)</td>
<td>353</td>
<td>526 (149%)</td>
</tr>
<tr>
<td>HQCF (ton)</td>
<td>202</td>
<td>177.8 (87%)</td>
</tr>
<tr>
<td>Makopa (ton)</td>
<td>NA</td>
<td>265</td>
</tr>
</tbody>
</table>
Lesson

Building up of confidence/trust of actor in a value chain development is gradual.

This has an implication to elements like:

- Quality management
- Quantities traded.
- Financing (operational capital)
- Size of operations along the chain.
Scaling beyond C:AVA

- Service providers integrated plans,
  TFNC - training on cassava utilization
- NARI - In Improving Cassava Productivity and Utilization in Tanzania to be implemented in Southern and lake zone.
- SIDO
  ODOP (One District One Product), is going to support Mtwara Rural and Newala in cassava value chain.

PSPF (Private Sector Programme Funding). Mentoring cassava SME in Mtwara region. This year 3 cassava SME are facilitated two (Sehemu mills in Newala and Rukia) in cassava processing and one in cassava utilization (Mana mini bekary).
Scaling up beyond C:AVA

- The non CAVA groups under the support of UPT (5) and KIMAS(6) to be linked in the developed cassava value chain.

- DISTRICTS:- Integration of cassava value chain into District Agricultural Development Plans (DADPs) financial year 2012/13.

Planned interventions include seedling multiplication, support CPGs with high capacity jack, water storage tanks and renovation of the mild steel graters.
Scaling up in C:AVA

Continue focusing in HQCF.

- Improved planting material multiplication
- Strengthen quality control for grits and HQCF
- Mentoring SMEs
- Strengthen community processors network
- Financial support in the value chain.
- Promotion and Advocacy.
Scaling out

Model for scaling out.

1. Continues the sun drying.
2. Product diversification.

Focus area for interventions

1. Improving cassava productivity (Planting material multiplication)
2. Product development and utilization
3. Promotions and Advocacy
Thank you

Farmers in Namahinga village happy showing the Tulieni cassava roots recommended for processing by the C:AVA result landrace evaluation.