ANNUAL REVIEW

C:AVA TANZANIA

Tanzania Food and Nutrition Centre
Grace Mahende – Country Manager

March 2011

Introduction

- Strategy
- Revised milestone for Tanzania & Achievement
- Activities highlight
- Success and challenges
- Key lessons
- Action plan

STRATEGY
Vision of success

- **Farmer and processors benefit from sun dried HQCF production**. By 2013, 1424 farmers and 1187 processors benefiting by an average of \$93 and \$125 per year respectively

- **Farmer benefits from sale of fresh roots to processors for alternative value chains**: By 2013, 2136 farmers (30% women) benefit by an average of \$ 81 per year.

- **Community processors for alternative value chains (Makopa flour).** By 2013, 1059 members (70% women) benefit by an average of \$359 per year.

STRATEGY

Tanzania strategy is based on:

Developing markets in the agri-food industry, biscuit manufacturing and small scale bakers sectors.

Community based sun drying to provide high quality grits and/or flour

Linking the market into the producers through Micro agri-food processors/intermediary.

Milestones 2010-2011

	Target	Archievement
HQCF	69 tons	72
Processors HQCF Processors Makopa	115 353	380 452
Farmers	850	

Activities undertaken

Training of Trainers on HQCF processing

Members from the village processing groups

Member from service providers

Activities

Training on marketing and business skills to CPGs by SIDO.

Orgatisation strengthening to the CPGs and Famer groups

Participartory variery performance evaluation to CPGs and farmers done by Naliendele.

Equipment assessment by SIDO

Activities

- Baking demonstration -17 bakers in Dar



Activities

- Linking processors and end markets

CPPs linked to 7Microprocessors in Mtwara

Micro processors are linked to 5 agro-processors in Dar

HQCF/GRITS sales March 2010 –March 2011

Market segment	Quantity purchased (ton)	Average price
Agro food processors -Power foods -FRABHO -KALMON Enterprises -VML Global -Makukwe -Agroway enterprise -Zuhura Food processing - QUMARU food processors Direct sales (CPG, KEJO)	11.5 35 5	Grits 625 HQCF 750
Biscuit making -Bakefood Intenational	24 HQCF	500
Restaurants -Mona -Break point -Millenium	1.5	800
Total	**72**	

Success

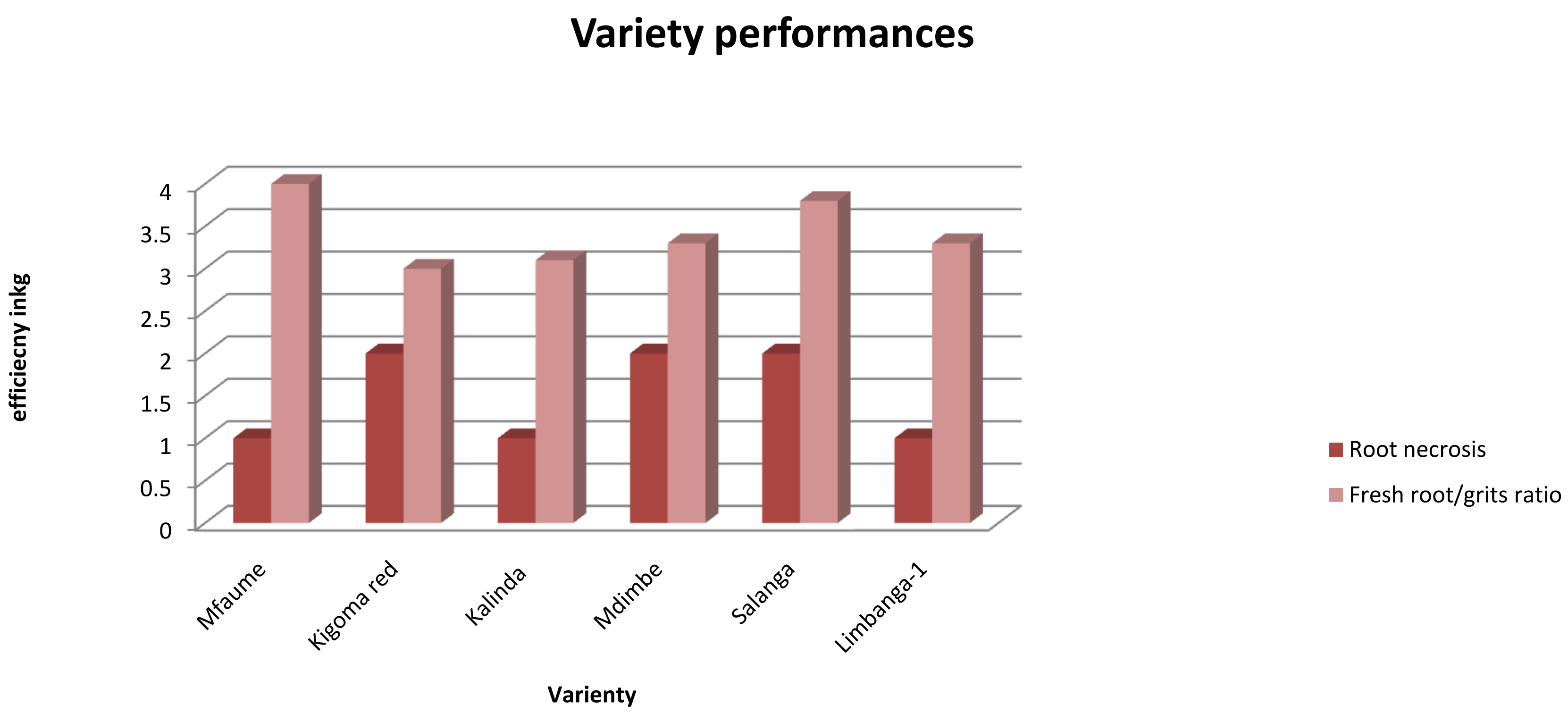
-Working value chain in high quality grits and flour from Mtwara to end markets in Dar.

-Consistent in quality of HQCF produced

-Equipment capacity improvement

-Identification of land races with high dry matter and low disease incidence

Landrace evaluation



Challenge cont

In baking HQCF do not seem as a profitable wheat substitute because of the small quantities.

In biscuit industries the price is blocking the entry.

In other food processing price is a barrier to market growth

Challenge

PRICE AT TWO MAIN LEVEL

Village processing units.
Cassava roots
50-153
Grits 350-400
HQCF 500-1000

End markets
Buy
Grits 600-650
HQCF 500-750
Sale
HQCF 1200-2000

Disincentive

Barrier to growth

HQCF Markets

Sector	Current demand/month	Potential/month
Agroprocessors/Retail market DSM FRABHO VML Power foods MTWARA Micro-enterprising (6) CPG Direct sales	 2.75 1 1 3 2	 3 (+40) 5 4 6 2
Sub total	9.75	20 (+40)
Biscuit making Bakefood International	 8	 50
Small scale bakers Jafary Bakery		 1
Total /Month	**17.75**	**71(+40)**
Total /annum	**213**	**852(+480)**

Market strategy

- Agro processors

-Facilitate negotiations on prices in both ends

- Bakers

- follow up to raise interest and provide training

- Biscuits

-Facilitate price negotiations (Uganda experience)

-transportation

- CPGs

-Sustain quality produce (SIDO,TBS),

-meet quantities demanded by expanding the drying area

Strategy

- Re forming the CPG- open enterprise, common drying facility, common storage
- CPGs networking
- Strengthening linkages
- Expanding markets and networking

Strategy

- Focus on agro-food processing

Why

–Prices offered are high up to 750/kg for HQCF

And biscuits

Why

Size of the potential market

Action Plan

- In order to meet these targets C:AVA must help convert more of the potential demand for HQCF into actual demand. In order to do this C:AVA will:
- Strengthen relations/ linkages between processors-intermediaries and end-users
- Raise awareness and understanding about HQCF targeting end users and consumers
- Work on systems for quality and quantity assurance

Action plan

Activity lead	Activity details	Lead
Quality and quantity assurance systems for 18+ groups	Each processing group to be visited at least every 2 weeks during main drying period.	SIDO DALDOs NGOs
Strengthening linkages and relationships along the value chain	Facilitating and encourage direct communication between actors Strengthening processor group to group linkages	C:AVA country office
Access to markets and market information	Implement sector specific plans for agrofood, Biscuits manufacturers and small scale bakers. Identify new and monitor existing markets	C:AVA country office/ SIDO
Promotion and Communication	Develop and implement a low cost promotion/ communication plan, with other cassava initiatives	C:AVA country office
Taking forward production strategy	Interface with Naliendele ARI and others cassava production strategies.	Dr Mkamilo, DALDOs
Monitoring, record keeping and reporting	Updating excel spreadshet	C:AVA country office