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SUSTAIN Processing Round Table

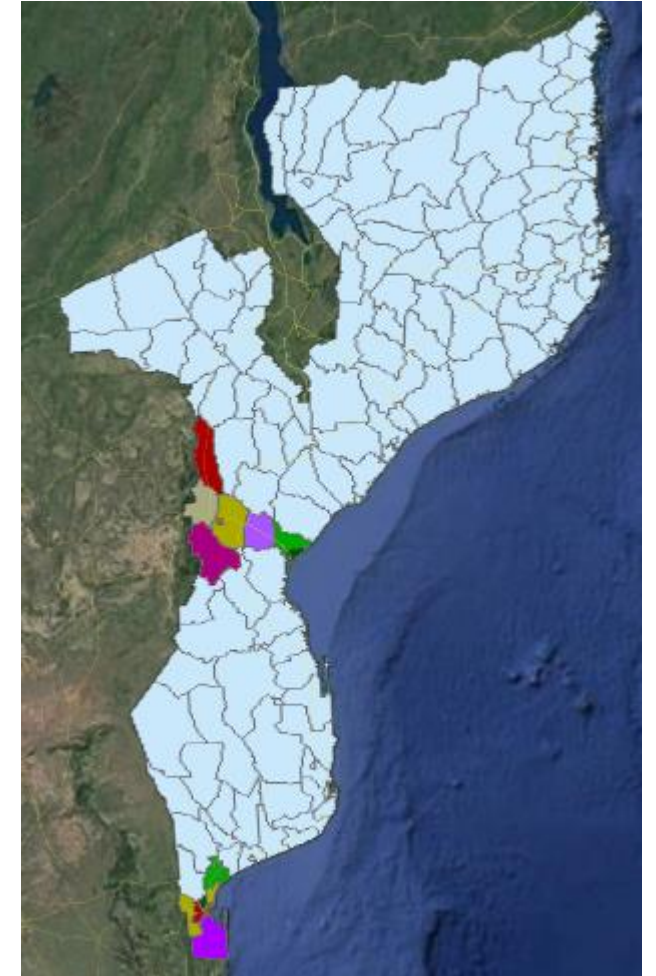
Nairobi, August 29-30, 2018

OFSP Processing in Mozambique

Round table processing

SUSTAIN Mozambique operational setup

- Intervention area: Two development corridors (Maputo & Beira)
- Targets:
 - 35,000 rural hh with vines and nutrition training
 - At least one processed product on the market with annual turnover of US\$80,000
 - 300hh connected to production chain
- Approach:
 - Rural households through national non-governmental implementation partners ADEM and UCAM with network of locally recruited facilitators
 - Selection of potential processors based on perceived capacities
 - Investment in recipe development, training, equipment, product promotion and commodity chain linkages
 - Partnership with EIL + CIP-Nairobi



Achievements: OFSP and nutrition trainings

Province	Distribution over 01/01/17 – 30/04/17					Total reached	Target mid 2017	% of target
	Gross data	Female headed	Target group	Repetition ^a	Net (30/4/17)			
Manica	12894	n.a.	12894	n.a.	12894	32843	23600	139%
Sofala	1977	n.a.	1977	n.a.	1977	8514	7400	115%
Maputo	2136	495	1575	150	1425	3606	4000	90%
Total	17007	495	16446	150	16296	44963	35000	128%

Nutrition trainings



OFSP producers



Province	01/01/2017 till 31/03/2017			Cumulative since start project			Target Mid 2017	%Target 31/03/17
	Events	Particip.	Female	Events	Participants	Female		
Manica	248	7770	n.a.	868	28080	15454	23600	119%
Sofala	27	993	n.a.	174	5478	3399	7400	74%
Maputo	0	0	0	47	1616	1189	4000	40%
Total	275	8763	0	1089	35174	20042	35000	100%

Two technologies as complementary strategies

Juice

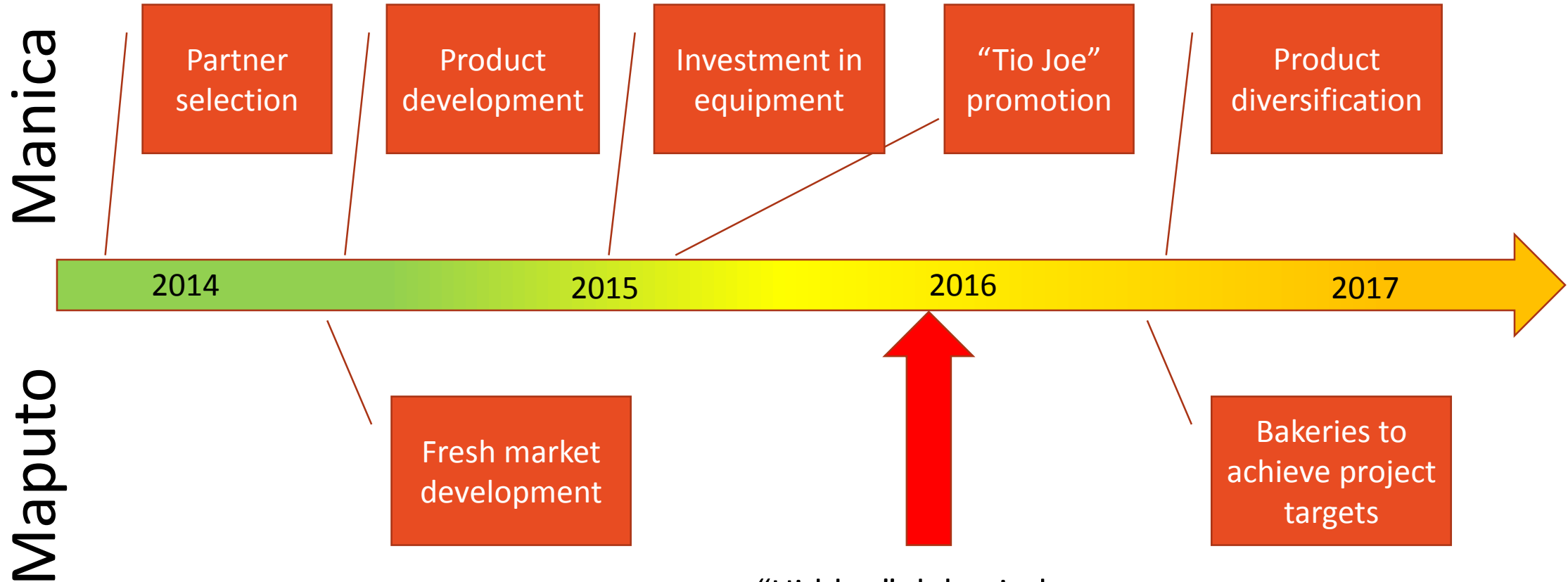
- Successfully piloted in Rwanda
- Recipe development and taste testing in Maputo and later Manica
- Relies on imports (bottles, ascorbic acid)
- Demanding in hygiene, business management

Bakery products

- OFSP/Soy biscuits as innovative recipe
- Potential to increase viability of soy and OFSP processing
- Puree making on the basis of existing investment
- On-site root processing and transformation in bread/pastry

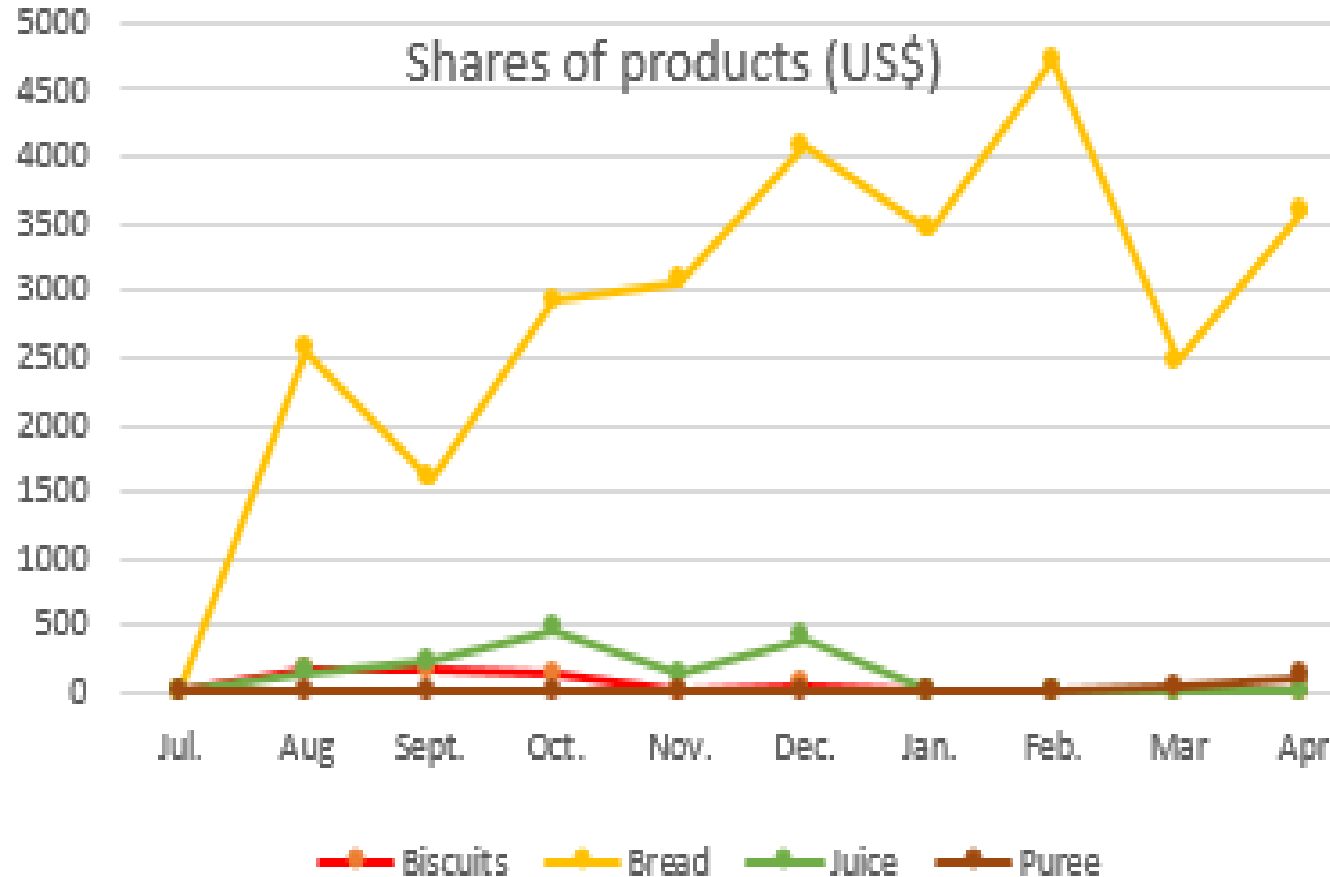


Processor development over project life-span



“Hidden” debts induce economic crisis, currency devaluation, collapse of purchasing power

Achievements – Value chain



- Processing started only in August 2016
- 2 corridors
- 4 products (juice, biscuits, puree, bread/bakery)
- 2 chains (roots to end product and roots to intermediary product)
- US\$30,500 turnover in 8 months (56% of target)
- 93% of all value is bread
- <130 farmers connected

Status of OFSP processing initiatives

Business	Product	CIP	Raw material	Status	Main difficulty
Zebra Farm	Juice, puree, bakery	RTPC	Roots	Struggling	Diverse
Papu	Bakery	RTPC	Roots	Stopped after 6 months	Internal, product
Nautilus	Bakery	-	Roots	Continues	Scaling out
Bico de Ouro	Bakery	-	Roots	Continues	Internal
Dondo	Bakery	C	Puree	Stopped after trying	Internal, distance
Manga	Bakery	C	Puree	Stopped after while	Distance
Bom Pão	Bakery	RT	Puree	Stopped after training	Internal
Elizabeth	Bakery	Zebra	Puree	Stopped?	Supply?
Tambara 2	Bakery	Zebra	Puree	Stopped?	Supply?
Dossivit	Culinary	C	Roots	Start-up	Lack of investment

CIP's role: Recipe development, Training, Equipment, Product promotion and Commodity chain linkages

Processor experiences

Maputo Bakery

- Located at strategic position in better-off neighbourhood
- Established “household name” in the city
- Made his own bread recipe after tasting CIP’s prototype
- “Special breads” as opportunity to escape price regulations and attract market segment
- Buys roots on open market through its own middleman
- Processes ... kg/month

Manica processor

- Recommended by local government
- Supported by AgDevCo and GAIN as soy processor pilot/pivot
- Investment by CIP in equipment, training and recipe development
- Started with juice but moved into puree/bakery when macro-economic conditions changed
- Has his own farm and producer network set up by CIP
- Processes .. Kg/month

Lessons learned

For CIP

- Be responsive to changes in the macro-economic context
- Fresh root supply is crucial; having a large, quality supply pool helps;
- Variety specific end products limit your options
- Assess needs of the partner: they may be outside your scope
- Small investments may have more impact
- Be open to learn from entrepreneurs

For the business operators

- Dedicate time and concentration to trainings
- Be able to assess the quality of equipment
- Ensure adequate staff, stock and process management
- A diversified product portfolio adds opportunities and reduces risks
- Action radius is limited
- Margins are narrow and there is no pot of gold

Constraints and opportunities

Constraints

- Root washing and peeling is labour intensive and does not fit well in certain business cultures
- Labourers feel underpaid and entitled to theft
- Import dependency kills a business
- High expectations from root producers, partners

Opportunities

- There is a clear demand for OFSP products
- New OFSP varieties compete successfully at farm level raising fresh root supply
- There are good recipes and processing technologies
- Perhaps there is a pot of gold somewhere



ASSANTE
SANA