

AFE-Mali Case Study: Facilitating Business Services for Shea Producers in Mali

Eric Derks
Action for Enterprise – Mali

October 2005



USAID
FROM THE AMERICAN PEOPLE

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The Implementation Grant Program (IGP) for Business Development Services, IGP-BDS Learning Network, Case Study #1, AFE-Mali Case Study: Facilitating Business Services for Shea Producers in Mali.

Printed in the United States of America

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Implementation Grant Program BDS Learning Network

Case Study #1

AFE-Mali Case Study: Facilitating Business Services for Shea Producers in Mali

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October 2005

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The Implementation Grant Program for Business Development Services (IGP-BDS) and the IGP-BDS Learning Network are funded by the Microenterprise Development Division of the United States Agency for International Development (USAID). The opinions expressed herein are those of the authors and do not necessarily represent the views of The SEEP Network, Action for Enterprise – Mali, or USAID.

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IGP-BDS Learning Network

The United States Agency for Development's (USAID) Microenterprise Development Division has been funding programs in microfinance and business development services (BDS) through the Implementation Grant Program (IGP) since 1995. As of 30th September 2004, over 90 grants have been approved for a total life-of-project funding greater than 100 million dollars. The current IGP-BDS grantees are an impressive group of organizations and projects that: cover almost every geographic region, consist of numerous value chains, use various approaches, and contain enormous potential to make a positive impact. These programs present an important learning opportunity on how to improve the design, implementation, and impact of BDS programs.

The USAID Microenterprise Development Division, in an effort to establish a participatory learning process, initiated a learning network for the IGP-BDS grantees. The SEEP Network, a non-profit organization in Washington, DC, is the secretariat for the IGP-BDS Learning Network. The SEEP Network provides resources for the IGP-BDS grantees to conduct technical exchanges, hold virtual discussions, organize an annual meeting, and learn about different approaches and tools that are being used in the various IGP-BDS grant programs. In addition, The SEEP Network generates opportunities for: peer exchanges, collaborative case studies, and conference participation for IGP-BDS Learning Network participants.

The goal of the IGP-BDS Learning Network is to be an excellent technical resource for the participants of the IGP-BDS Learning Network, furthering their program and organization objectives. Through the IGP-BDS Learning Network, lessons on sound practices will be captured and disseminated to the wider microenterprise development industry.

The IGP-BDS Learning Network was officially launched during a meeting organized by The SEEP Network

and held in New Delhi, India in December 2003. This Learning Network identified the following three learning themes, which frame the common challenges of the IGP-BDS Learning Network participants, and are aligned with the market development goals of the IGP-BDS grants.

1. How to effectively manage the market facilitation role and tasks across a range of market settings and market problems.
2. How to build win/win business relationships between MSEs and other key market players.
3. How to effectively stimulate demand for business services.

Each IGP-BDS grant operates on a performance basis, tracking progress against targets established at the outset of the grant. The semi annual reports also provide qualitative narratives that link programmatic performance to the overarching IGP-BDS Learning Network's agenda. The agenda aims to understand how to harness the power of increased MSE participation in growing markets to achieve positive and lasting development outcomes.

Six IGP-BDS Learning Network case studies have resulted from the first two learning themes. These cases were written against a set of guidelines adopted by the IGP-BDS Learning Network. These six case studies have initiated a process of learning linked to useful and practical outcomes. In the near future, the IGP-BDS Learning Network plans to: develop diagnostic tools that manage and track performance, document learning against current and future learning themes, and distill lessons on the links between better practice and performance.

- Marshall Bear, IGP-BDS Learning Network Facilitator
- Jimmy Harris, Deputy Director, The SEEP Network
- Jennifer Hansel, Program Associate, The SEEP Network

Action for Enterprise (AFE)

Because approximately 80 percent of Mali's population lives in rural areas, and nearly $\frac{3}{4}$ of rural dwellers live under the absolute poverty line, efforts in the country to accelerate broad-based economic growth must include basic agricultural and business development services. U.S. PVO Action for Enterprise (AFE) will facilitate existing and potential shea exporters/traders to serve as the prima-

ry providers of market access and quality control services. AFE will build and expand its on-going relationships with local exporters to increase their skills in market access and communication techniques (e.g. effective use of e-mail and the internet, customer service, brochure development, etc.) and the use of pricing and costing systems.

Introduction

The AFE-Mali project to promote business services to producers of shea butter in Mali began in late 2002 and will conclude in 2005. An assessment of the subsector showed that shea producers lacked access to higher-value markets and needed quality management services to help meet market standards. The assessment also showed that subsector intermediaries—exporters of shea butter and shea kernels—were best positioned to provide such

services and benefit from increased sales of a better-quality product. By facilitating exporters' capacity to connect with foreign buyers and manage shea butter quality, the project team anticipated that exporters would invest time and resources working with producers to improve product quality. The following case study takes a closer look at the progression of and changes to the facilitation activities that supported this objective.

Market Context and Problems

The AFE-Mali project works in a single subsector, or value chain, that extends from rural Malian producers of shea kernels and shea butter to large-scale, international manufacturers of chocolate and cosmetic products. Shea kernels and butter come from the fruit of the shea tree that is indigenous to a narrow band of African countries just below the Sahara Desert. The tree is not cultivated and lives for over 150 years, producing fruit after it reaches ten to fifteen years of age. Mali is the second-largest producer of shea behind Nigeria. The country's chief competitors on the international market are Ghana and Burkina Faso.

The Market

The vast majority of shea butter is consumed in producer countries as cooking oil, soap, or skin and hair cream. On export markets, shea is sought by the chocolate, cosmetic, and pharmaceutical industries. Annual global demand for shea butter is between 25,000 and 30,000 tons. Consumption of this volume by industry is:

- chocolate industry: 90 to 95 percent
- cosmetic industry: 5 to 10 percent
- pharmaceutical industry: about 0.05 percent

Most shea on the international market comes from industrially extracted shea butter. The traditional product made by rural village women has limited opportunity for export. It is most often used in soaps or is further refined for use by large cosmetic manufacturers. A high-value niche market for raw, village-produced shea butter exists among smaller cosmetic manufacturers, primarily in North America and Europe.

The Actors

The commercial actors in this global value chain are described below (see Annex 1 for a flowchart of global shea production and use).

Chocolate manufacturers: Depending on local regulations, chocolate manufacturers can complement the cocoa butter used to make chocolate with up to 5 percent of other vegetable fats. Shea is prized as a complement, or enhancer, to cocoa butter because it raises the melting point of the final product and hardens it.

Cosmetic/pharmaceutical manufacturers: These firms use shea in many forms. Larger industrial firms use only small doses of refined shea butter. Others use only the shea butter compounds that have therapeutic properties. Raw shea butter is used as an ingredient (or base) by small to medium-sized firms, again, mostly for toiletries and soaps and, sometimes, for creams and balms of up to 100 percent pure shea butter.

Refiners and laboratories: These firms prepare ingredients for specialized use by cosmetic firms and other industries. They purchase both village and industrially extracted shea butter.

Oilseed processors: There are four major oilseed processors, all but one of which is based in Europe, that dominate the value chain. These firms are increasingly involved in the trade of shea kernels in supplier countries, but their dominance lies in the extraction, processing, and supply of vegetable fats to other industries.

Traders/importers/distributors: These firms typically have strong links to African suppliers and most often trade in a range of tropical products. Many distributors specialize in products for one or more industries, e.g.,

cosmetics, and achieve economies of scale for what are typically low-value, high-volume products. However, several importer-distributors of high-value raw shea butter exist.

In-country exporters: There are between ten and twenty exporters in Mali who regularly trade in shea butter. An additional twenty or so trade in shea kernels. Most shea exporters handle several different products that, like shea, are not intensively cultivated, including gum arabic, cashews, hibiscus leaves, and beeswax. The principle trading partners for most Malian exporters are other traders and importers. Few exporters have the specialized knowledge of their products or the necessary industry contacts to trade directly with processors or manufacturers of final products.

Rural buyers: Rural buyers purchase and channel products from rural producers to national distributors and exporters. They are often part of a hierarchical network of buyers that purchases products at weekly rural markets and distributes them either to larger markets or to the network head, who stocks products until they are ready for transport. Exporters are often closely aligned with several rural buyer networks. The ties may be familial, going back several generations, or opportunistic, as when an exporter enters a new geographical area. Ties are also based on trust, as exporters often finance network purchases. Depending on the order, they often advance several thousand dollars at a time.

The size of networks varies greatly, depending on the size of a particular order or the magnitude of the agricultural campaign underway. For example, an exporter seeking sixteen tons of shea butter (one container) for an immediate order will likely employ one or two network leaders. Each network leader will then engage between five and fifteen buyers, who in turn engage five to ten additional buyers, who will buy shea butter in remote villages or set up purchase points in different corners of weekly rural markets.

Shea kernel collectors and processors/shear butter producers: The collection and processing of shea kernels and the production of shea butter is almost completely dominated by women. Selling shea butter and kernels is an important source of revenue for rural women, used to pay for health, school, and other household expenses. Shea butter and kernels are not sold at local markets all at once, but on an as-needed basis.

Techniques vary for separating the shea kernel from the fruit and preparing it for storage. In most areas of

Mali, shea kernels, still in the fruit, are dumped and stored in deep pits until the owner needs money. She then removes a small quantity for processing or immediate sale. The nuts, which house the kernel, are depulped after removal and smoked dry before being broken open to extract the kernel. The kernel is sold as is or transformed into shea butter, for which the producer receives a higher price.

Another technique, less frequently applied, produces a better-quality kernel. In this technique, women first depulp and boil the shea nuts, then sun dry them before storing. This technique is often applied to kernels used to make shea butter for household consumption, as product quality and longevity is superior. Only a few ethnic groups apply this technique on a regular basis.

Shea butter processing is an extremely laborious task. The availability of mills and grinders in rural areas has significantly lightened the load of rural women. However, the final kneading (a brisk kneading or slow whipping) of ground shea kernel paste is still done by hand. On average, one woman can make five to ten kilograms of shea butter a day, which she may only do once or twice a week, depending on her other activities and need for cash. In the scenario of one exporter looking for sixteen tons of shea butter to fill an immediate order, contributions from over a thousand producers might fulfill the order.

Market Problems

Shea butter producers and kernel suppliers have very limited access to markets. The sole markets available to them are weekly rural markets at which they receive little to no extra value for higher-quality butter or kernels. These markets are not well connected to exporters, and through them, to potentially more lucrative markets. As a result, producers seldom make shea butter with anything but the local market in mind.

Another problem is that Malian shea kernels and shea butter do not meet the quality requirements of higher-value markets (this is more true for shea butter, as the global market for shea kernels is generally not very discerning). The quality of shea butter depends enormously on how the kernels are processed; storing rotting fruit in pits and smoking the nuts results in a highly unstable, odiferous product. Foreign buyers of raw shea butter prefer butter made from kernels that are boiled and sun dried, and they demand that quality levels be homogeneous from shipment to shipment.

Market Services

This project responded to market problems by facilitating the access of shea butter producers to both market services and quality management services. The goal of the project was to improve producer opportunities to sell higher-value shea butter at better prices.

Market services of the project include opportunities and channels for producers to sell shea butter at a better price and/or on a more frequent basis. Quality management services include technical guidance and equipment to improve shea butter production and quality.

In-country exporters were identified as the only service providers capable of effectively reaching a large number of producers on a sustainable basis. The project

thus relies on exporters' commercial interest in selling higher-value shea butter to motivate them to provide services to producers. The cost of these services is recouped in the price markup of shea butter sold to foreign buyers. Producers bear little to no cost burden for the services.

The most serious constraint to the provision of services is the exporters' risk of not recouping costs. Unless opportunities for selling better-quality shea butter are certain, exporters do not view such investments favorably. Their risk is compounded by a lack of detailed understanding of the market for better-quality shea butter, including quality standards, packaging requirements, and expected prices.

Facilitation Activities

This section looks at project facilitation activities on two levels. On a macro level, the project began facilitating services to shea butter producers but shifted to shea kernel suppliers. The suppliers proved a better fit for project activities because exporters had greater incentive to invest in services for them. On a micro level, the shift to shea kernel suppliers led to a rapid progression of facilitation activities, which changed in response to evolving relations between exporters and a specific foreign buyer.

Macro Level

During the first phase of activities, the project researched markets and promoted Malian shea butter to foreign buyers. At the same time, the project raised the capacity of exporters to take advantage of commercial opportunities and increased their understanding of the needs and requirements of foreign buyers. The project team expected that subsequent requests for quotes, buyer visits, and actual sales would demonstrate the profitability of the market for higher-quality shea butter and spur exporters to invest in producer services.

Despite great efforts, the market for shea butter did not prove profitable. However, a different opportunity arose that did appear profitable and succeeded in spurring exporter investments in producer services. This opportunity was for improved-quality shea kernels. The services exporters now provide seem poised to improve the quality of shea kernels and the market access of shea producers.

The facilitation activities during the initial phase of the project were

- market research and promotion
- exporter identification and capacity building
- shea butter quality assessment and development of technical services
- assessment of constraints to market penetration

The project's role with respect to foreign buyers was to research their requirements and promote Mali as a competitive source of shea butter. The project identified and contacted buyers, beginning with the North American market and, over the next eight months, also explored the European and West African markets. Profiles of buyers were created that noted quality requirements, packaging preferences, and current volumes and prices. The project team also promoted services to entice buyers to develop business relations with Malian suppliers. These services included assistance with

- identifying suppliers
- facilitating communications
- troubleshooting logistical issues
- providing quality-control assurances
- visiting Mali, on a cost-share basis, to meet and select suppliers

With respect to shea butter exporters, the project assessed the pool of existing exporters who then helped the project identify activities. These activities fell into three categories:

- direct capacity building, which consisted of relaying market information and buyer requirements, developing skills in price calculation and quote preparation, identifying best practices for preparing samples, and promoting shea butter production best practices
- ongoing support, which often involved individual attention, for example, in quote preparation and/or price calculations
- facilitating linkages between exporters and potential buyers, shea butter producers, laboratories, packaging suppliers, freight forwarders, and other service providers

By the time the project began to explore the European and West African markets it had developed additional promotional materials. Through a web site, the project team presented buyers with supplier profiles, shea butter quality parameters, and available packaging. Price scenarios for different markets were also developed and shared with potential buyers. Through these efforts the project generated numerous requests for quotes, but few concrete orders resulted.

The reasons foreign buyers cited for their lack of enthusiasm for Malian shea butter centered on price, which was either higher than competitor prices in other countries or insufficiently low to warrant switching suppliers. Buyers also criticized shea butter quality as poor or inconsistent. Consequently, exporters only nominally increased their access to producer markets and were wary of recouping the cost of quality management services.

Given this unpromising direction, the project team sought a different strategy to promote services to producers. The team first took a closer look at Mali's competitiveness on the global shea butter market. The assessment revealed that neighboring countries had stronger links between traders and producers which resulted in better quality management and cost control. It was not surprising that these linkages provided advantages; the challenge remained how to promote them in Mali. The assessment also showed that competitors had greater access to better-quality kernels, namely, ones that were boiled and sun dried. Finally, it showed that Mali had higher transportation costs than other countries, especially Ghana.

At this stage, an opportunity arose to link Malian exporters with a buyer of good-quality shea kernels. The project had previously courted this company as a potential buyer, but the company no longer bought shea butter, preferring high-quality kernels instead. Nevertheless, the project maintained contact with the buyer, as the two parties shared an interest in better-quality kernels.

Given Mali's disadvantages on the shea butter market and the existence of a potential buyer of good-quality shea kernels, the project shifted focus and decided to promote market access and quality management services to shea kernel suppliers. The target beneficiaries remained the same socio-economic group of village producers. The service providers remained the same exporters. This time, however, project results were vastly different. Exporters readily invested in a range of services to suppliers to improve the quality of shea kernels even before final negotiations with the buyer in question.

Lessons Learned

Why were activities now moving forward when at first they stalled? The facilitation activities were roughly the same, as were the types of services being promoted.

Mainly, the market for shea kernels was sufficiently attractive and similar enough to past market opportunities that exporters could readily calculate the economic benefits. Exporters could also better evaluate the costs of services to shea kernel suppliers against anticipated revenues. The project helped exporters by fully explaining the risks and benefits of providing services to producers and proposing tangible quality-management services designed to increase the supply of better-quality kernels. In a proposed partnership agreement, the project and exporters finalized a strategy for improving shea kernel quality and elaborated the roles and responsibilities of each party. This process was instrumental in getting exporters to commit their own resources to the project.

Exporters were clearly more comfortable with the risks, which was a key lesson of the project. The combination of low international market prices and the complexity of improving shea butter quality had been unattractive. On the other hand, improving shea kernel quality required only an incremental change in processing practices. In addition, exporters believed they could meet the quality demands of the foreign buyer using existing buyer networks to transmit quality requirements and profit incentives to shea kernel suppliers. It was not certain that these networks could successfully transmit the same information regarding shea butter.

Another important factor was that this market opportunity represented a relatively low risk for the foreign buyer. Compared to most shea butter importers, the shea kernel buyer had years of experience in West Africa. Furthermore, the kernel buyer already intended to expand the company's network to include Malian suppliers at a later date. The project's support to exporters convinced the buyer to enter Mali earlier than planned. The local representative for the company noted that if the company had more resources, it would undertake similar activities itself. A combination of the buyer's perceived value of project activities and shared interest lowered the company's risk and moved the opportunity forward.

In a final note, lower risk for the buyer and the exporters reduced the project's own risk of success. Risk, however, appeared unavoidable. The project did, and continues to, gamble on this opportunity. Before bringing the buyer and exporters together, the project team promoted the opportunity to both parties independently, building enthusiasm and even proposing interventions. Before implementing activities, however, the project team sought signs of commitment from the buyer and the exporters. In this manner, the project mitigated its own risk and likely lowered the risk levels of the other parties even further.

Micro Level

This section looks at project facilitation activities for shea kernel suppliers in detail. A graphic representation of these activities, their duration, and intensity is found in Annex 2.

Promotion of new market opportunity: The exporters and the project team developed a strategy to encourage shea kernel suppliers to improve their kernel processing techniques, for which they would be paid more. Drafts of this strategy were shared with the buyer who commented on aspects of the plan. The final version, complete with roles and responsibilities of the project and exporters, formed the basis of a partnership agreement, signed by each exporter. In addition, each exporter projected the quantities of improved shea kernels they intended to sell. These projections were shared with the buyer to demonstrate the magnitude of the opportunity and the commitment of the exporters.

Identification and assessment of exporter supply zones: Based on the exporters' projections, the location of their buyer networks, and historic shea kernel yields of certain areas, the project team helped exporters identify

and delineate target zones for the provision of quality management services. The project team, together with each exporter, then met with several women's groups (shea kernel suppliers) in each supply zone to assess the feasibility of mobilizing them to sell better-quality kernels for a better price.

Facilitation of buyer-exporter relations: Facilitation activities concentrated on long-term management of buyer-exporter relations, punctuated by focused interventions. In order of occurrence, the interventions were:

- an introductory meeting between two exporters and senior management of the foreign buyer
- a day-long workshop with the foreign buyer's representative, exporters, and leaders of rural buyer networks
- a visit with the foreign buyer to one exporter's supply zone to meet with shea kernel suppliers
- individual meetings between exporters and the foreign buyer

Building the capacity of exporters to provide quality management services: The project built the capacity of exporters to train and organize their rural buyer networks and helped develop radio communiqués and fliers to promote better kernels for a better price. To train buyer networks, the project team developed training materials and prepared each exporter to lead an associated workshop. The workshops covered

- criteria for shea kernel quality
- policies and procedures for financing operations, purchasing kernels, assessing kernel quality, and packaging and readying kernels for shipment
- promoting the market offer to shea kernel suppliers
- communicating quality requirements and providing technical assistance to shea kernel suppliers

The project shared the costs of radio spots and the printing of fliers, as these approaches were new and had not yet been tried by exporters. Costs were kept low and materials simple so that exporters could replicate the materials for future shea kernel campaigns.

Strengthening exporter operations: Working individually with exporters, the project team developed financial tools to calculate operating costs and manage cash flow and debt levels. These tools immediately served to facilitate price negotiations with the foreign buyer and

ascertain price ranges for purchasing shea kernels. Over the course of the campaign, the project and exporters will use these tools to track actual expenses and produce income statements.

Tracking market prices: As market prices for shea kernels fluctuate on a daily basis, the project team agreed to monitor market prices in rural centers and communicate this information to the foreign buyer and the exporters. The buyer, who has not yet established such mechanisms in Mali, expressed a need for this information, which the buyer and exporters could both use to make purchasing decisions. This activity, planned for late 2004, will be a one-time activity of the project, intended to further eliminate risks for both parties and thereby ensure a smooth start to their relationship.

Assessing operations and monitoring impact: The project will monitor the impact of services on shea kernel suppliers via periodic surveys on prices received, quantities supplied, techniques applied in processing kernels, and participation in the market offer of the exporters. The project will also assess exporter operations in terms of effectiveness and profitability to suggest improvements for future seasons and promote the strategy to other exporters.

Comments

A good deal of project effort, especially during the first shea kernel campaign, has been focused on strengthening linkages between the foreign buyer and the exporters.

Project activities were designed to support this relationship, such as tracking market prices and building the capacity of exporters to negotiate prices. Apart from the more focused interventions noted above, building these linkages required steady attention to the expectations and issues of both parties in order to coax the process forward toward signing a contract and eventually delivering shea kernels.

This coaxing role meant finding a balance between too much and too little involvement in the process. For example, the project team learned that the buyer and exporters were seeking signals from each other that would reassure and demonstrate their commitment to working together. If the project team played too large a role in facilitating communication, it would effectively quash the e-mail and phone calls each sought. As a result, the project team instead pushed the parties to correspond and the team would follow up to determine if and how messages were received. In this manner, the project team fostered connections and managed expectations, which seemed a more suitable role.

Other project activities were for shorter, more intense periods. Also, their timing was dictated as much by the traditional rhythm of the shea season and the commercialization campaign as by their logical progression. For example, building the quality management capacity of the exporters occurred just before suppliers started processing shea kernels and when buyer networks started to gear up for the coming campaign.

Conclusion

Should facilitation activities continue next season, the project team anticipates that a similar cycle of activities will be repeated. Activities will likely be of shorter duration, more frequent, and more intense. For example, the project's role will involve less nurturing of buyer-exporter relations and more focused interventions to build capacity.

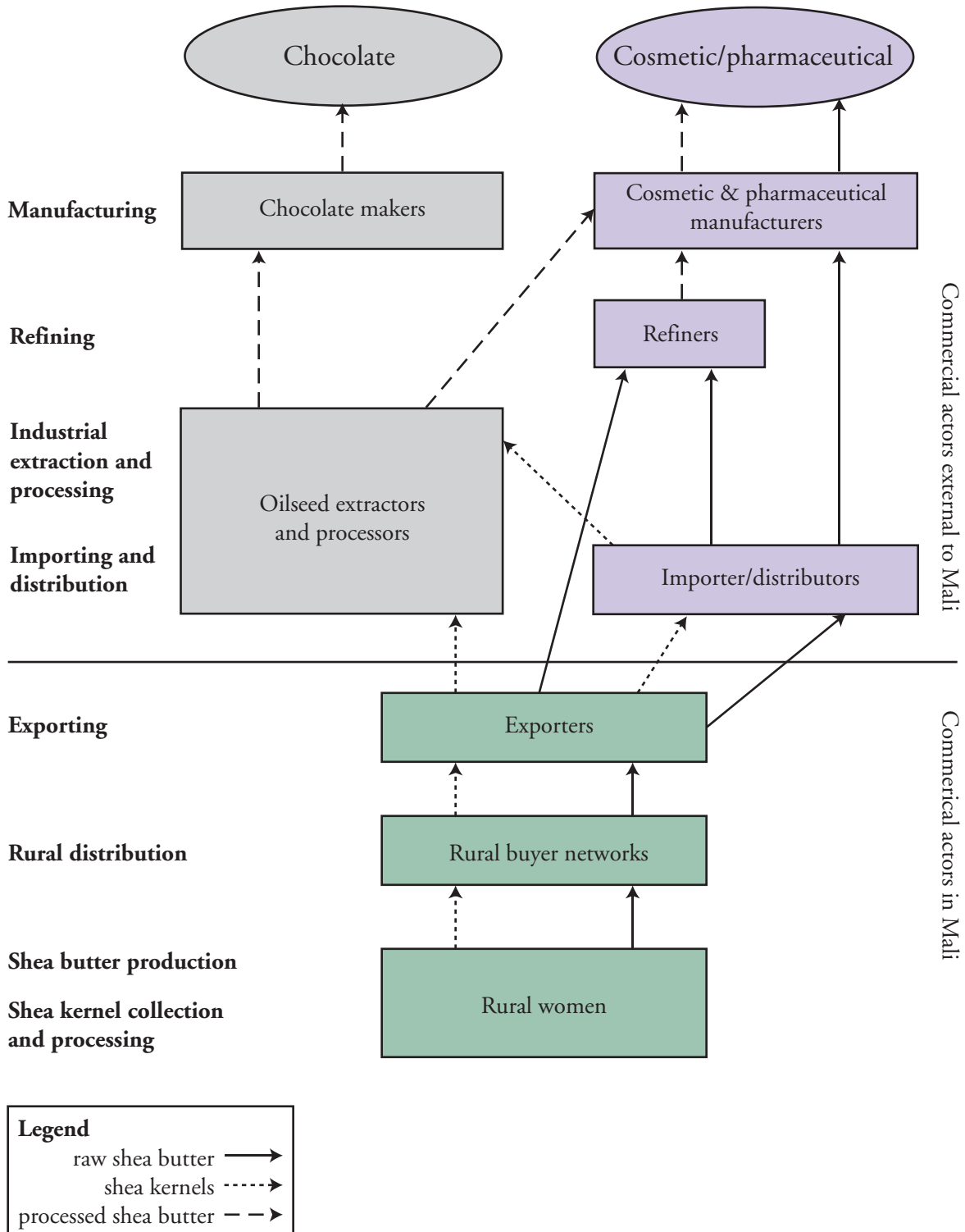
New activities and changes in the role of the project team are also likely. More emphasis will be put on linkages between exporters and producers. For example, the project

could intervene to develop greater demand for and awareness of the services offered by exporters. In addition, the lessons learned from the first shea season will likely indicate additional activities or adjustments to the current strategy.

The question of shea butter remains. Stronger exporter-producer linkages and the availability of better-quality kernels will perhaps increase Mali's competitiveness on this market. The project will explore this issue further before the end of its term.

Annex 1:

An Abridged Flowchart of Global Shea Production and Use



Annex 2: Progression, Duration and Intensity of Facilitation Activities

	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Shea season calendar				shea fruit ripens and processing begins							
							contract negotiations		commercialization campaign		
Facilitation Activities											
1. Promote market opportunity											
2. Identify & assess supply zones											
3. Facilitate buyer-exporter relations											
4. Build exporter capacity to provide quality management services											
5. Strengthen exporter operations											
6. Track market prices											
7. Assess operations and monitor impact											

Legend: Intensity of project activity

