

**PRESENTATION GIVEN AT THE TRANSLINKS VALUE CHAIN
WORKSHOP ENTITLED:**

**“Value Chain Cases in the Context of Conservation
Marketing and Certification”**

**JUNE 25-27, 2009
ARUSHA, TANZANIA**

HOSTED BY ENTERPRISEWORKS/VITA



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FROM THE AMERICAN PEOPLE



EnterpriseWorks/VITA

EASTERN ARC TREE CROPS PROJECT (EATC)

Optimizing agricultural production and conservation in the Eastern Arc
Montane Forest Ecosystem, Southern Tanzania



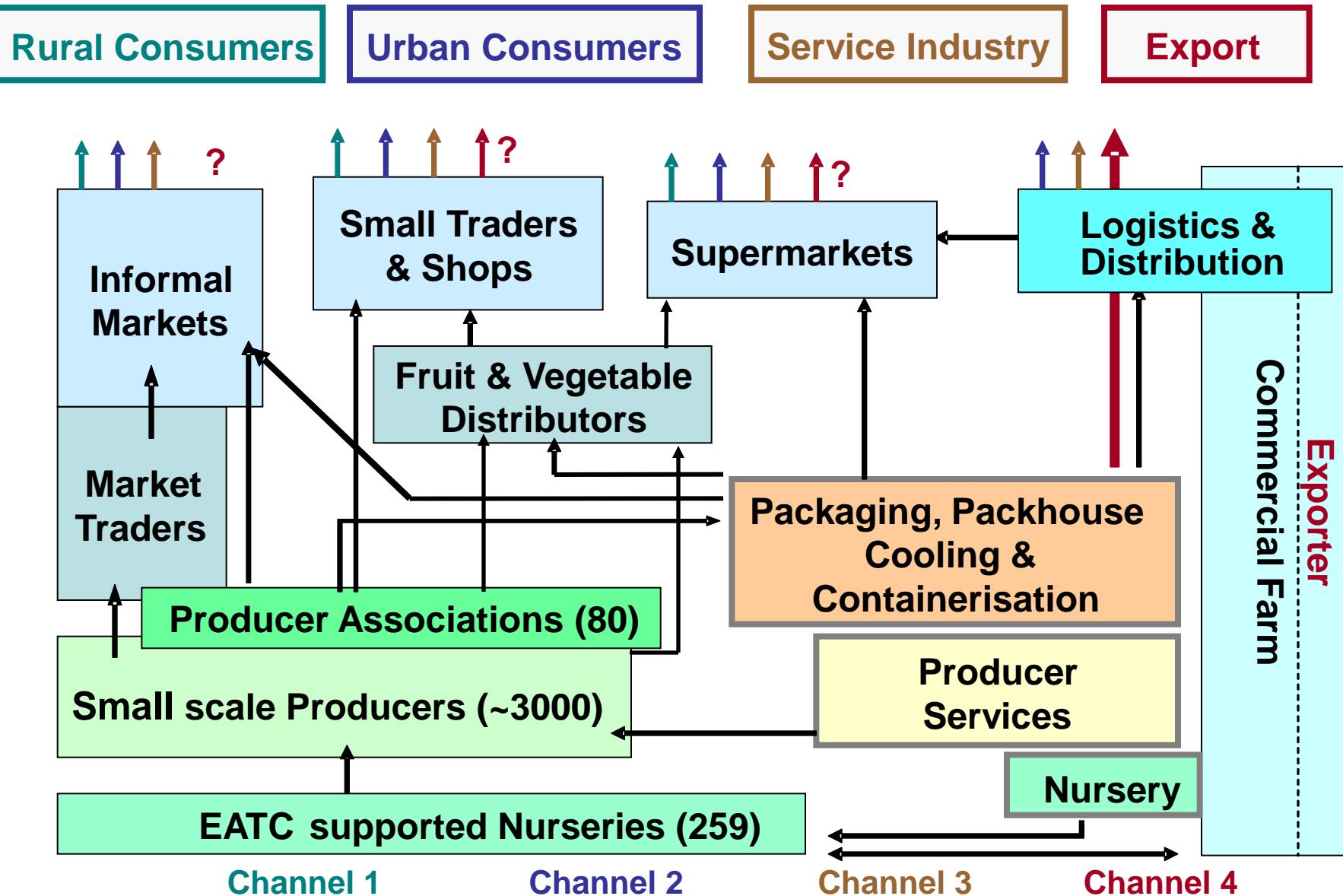
Key Objectives

- the further expansion of high value horticulture
- increased small farmer integration
- enhanced sustainable management of natural resources and the conservation of biodiversity.

Key Activities

- Focus on high value horticultural crops for import substitution and export
- Continue support to participating farmer associations
- Assist in the development of village land-use plans and establishment community woodlots

Haas Avocado Value Chain





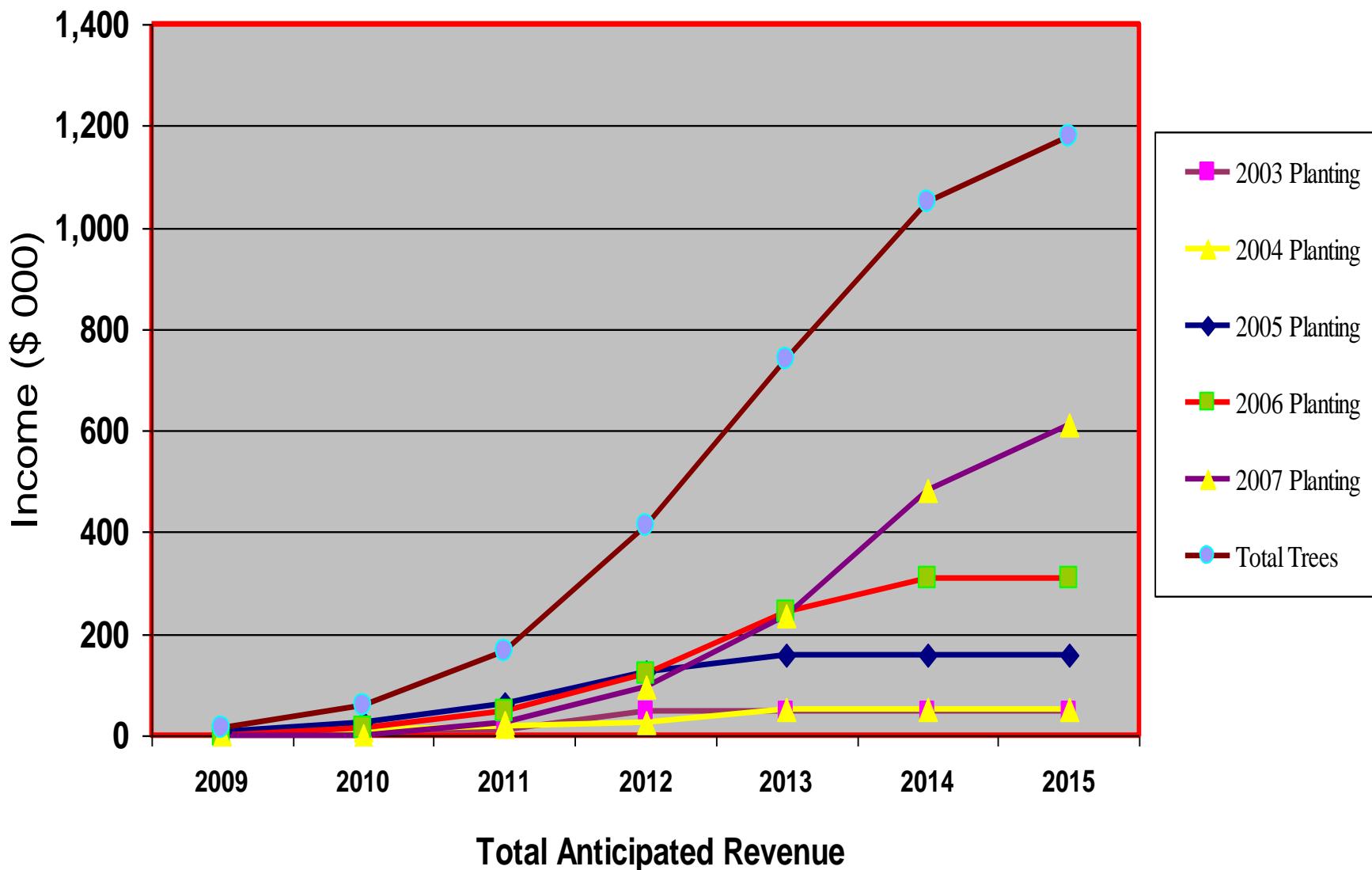
**EWV began promoting avocado production
with the USAID funded PRIME Project in 2003**

**Over 80,000 avocado trees have been planted, with
estimated production of 2,440 tons per annum**

**80 Producer organizations have been
established with over 3,000 members**

**Projected total value of sales over the next
five years is \$7 million US Dollars
(\$530 is more than twice the rural annual household income)**

Total Projected Income From Avocado



RAC

- Rungwe Avocado Company only have a 30 hectare farm
- Will depend on outgrowers to produce require volumes over time
- Smallholders will have 20% shareholding in RAC



Certification identified as a key constraint to export participation

With USAID and MACK Multiples support, certification was obtained in April 2008

Completed development of a QMS

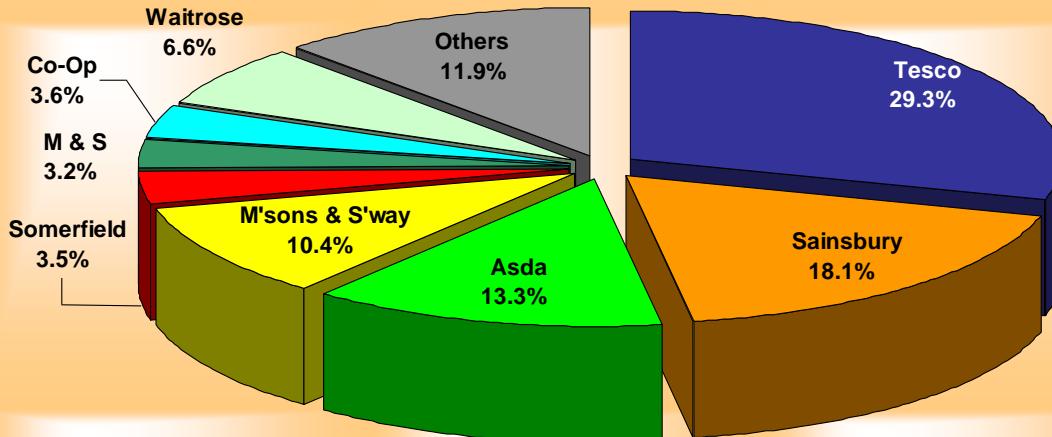


Introducing Mack Multiples

- **MACK is the largest independent supplier of fresh produce in the United Kingdom (\$500M per annum)**
- **MACK has now made 7 site visits to EWV smallholders, and has made in-kind contributions of \$70,000 to certify EATC farmers**
- **EATC has completed Globalgap, Tesco's Nature's Choice, Marks and Spencer's Field to Fork(F2F), and Linking Environment and Farming (LEAF) certifications.**
- **Trial export of 5.8 tons was made in April 2009. Product received excellent quality revues from all supermarkets**

Salad vs. Avocado Retailer Spend Share

52 week data for period ending 23rd April 2008

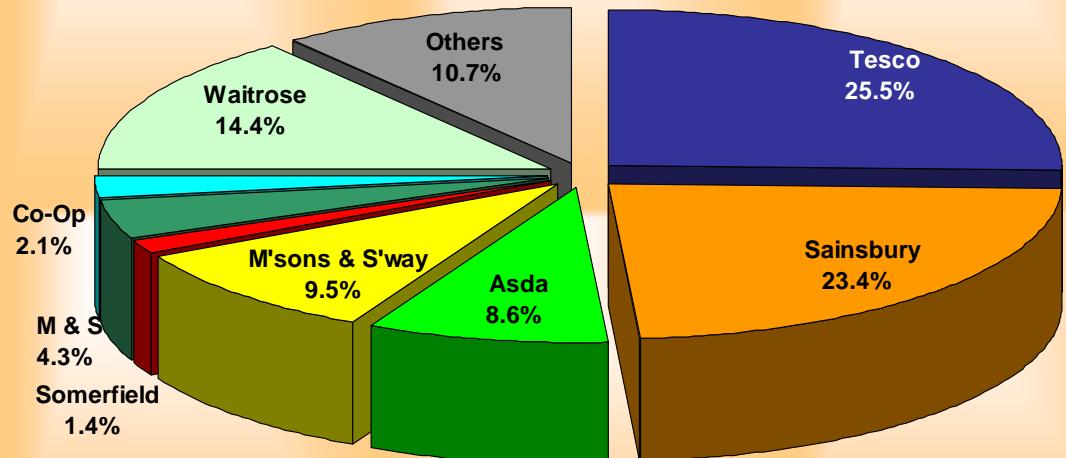


Total Salad Expenditure
est. £1.42 Billion
(+1.7% yr on yr)

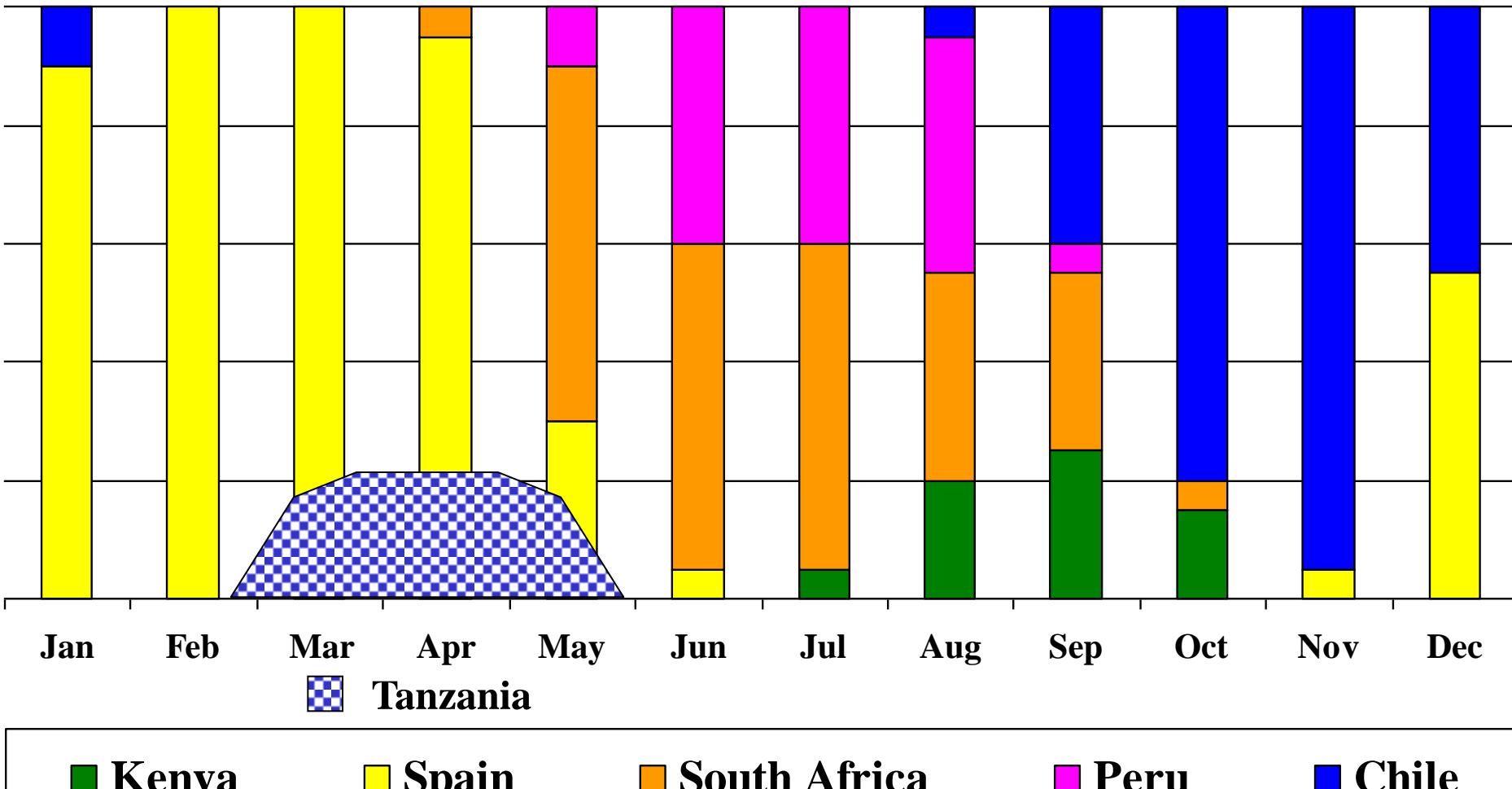
Prev. 52 wks = +7.7% yr on yr

Total Avocado Expenditure
est. £49.4 Million
(-2.4% yr on yr)

Prev. 52 wks = +5.4% yr on yr



Haas Avocado sourcing





Kenya



KENYA





‘Ripe and Ready’

- Ripening has made avocados a convenience product
- Had a huge impact on the market and demand
- Greater scrutiny on quality from the growers







The Future

- Estimated consumers are only 5-10% of the UK population
- Growth of the industry increasing on average 7% per annum
- Excellent opportunities for growth of the sector



Thank You!