



Marketing & Postharvest Research
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Annual Report 2001

The marketing potential of Potatoes in Uganda and market opportunities for Rwanda.

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This study was part of a regional study, to evaluate the export opportunities for Rwandan potato producers. The survey involved formal and informal interviews to a cross-section of participants in the potato sector. Production figures indicated that output of potatoes in Uganda is steadily rising but that rates of increase are flat. This suggests that more technical and farming systems investments are required to raise both production efficiency and levels of output. Potato yields in Uganda are poor due to very low rates of inputs (clean seed, fertilizers, and chemicals) utilisation. In Kabale 1% of farmers are reported to use fertilisers (Low, 2000). While Potatoes are a major food staple and cash crop in the highland areas where they are cultivated, they are considered as a cash crop in the lowland areas, where they have been promoted more recently. The high level of perishability and lack of appropriate long-term storage facilities has significantly influenced the degree of price uncertainty in the Potato market. Analysis, showed that brokers are a key link in the potato marketing chain and this group appears to charge excessive fees for their services. Within the supply chain, travelling traders attain the highest net margins and collude with brokers to reduce prices for rural producers. There is no significant cross border trade in ware potatoes between Uganda and the neighbouring countries. However, limited formal and informal trade takes place along the Uganda-Rwanda border during the months of September to November when there is a supply shortage in Uganda.

Table 1: Potato Production Calendar for Kabale District.

Area of cultivation	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec
Hill slopes	Potato Harvesting	Potato planting				Potato harvesting			Potato planting			Potato Harvesting
Swamp land					Potato planting			Harvesting				
Valley bottom	Potato planting		Potato harvesting									Potato Planting
Mean monthly Rainfall 1990-2000 (mm)	72.3	73.1	136.5	114.9	98.4	43.0	13.7	56.4	38.8	131.4	98.4	90.0

The potato production Calendar shows the windows of opportunity for Rwandan trade and from this survey it appears that September to November is the most likely time for Rwanda potatoes to sell profitably in Uganda. It should be noted however, that traders in the main markets of Kampala, Uganda, have recently tested Rwandan potatoes and found the quality was poor. Rwandans are not producing the varieties of potatoes the market requires and size of the tubers was also too small. Rwanda needs to address these market barriers first, if it is to have any potential for impacting on the Ugandan market. It was found that seed potato production and marketing in Uganda was poorly developed and the market is currently monopolised by 25 members of Uganda National Seed potato producers' Association. This association is selling 100kg bags of seed potato at 5 times the price of ware potatoes. Much of these prices are being fuelled by NGOs, who are buying most of the output from the association, to be distributed at no cost to farmers. For both the farmers and the association, this approach appears to be somewhat unsustainable. In terms of market demand, potato chips are by far the most popular potato product in urban markets as made evident by the increasing number of fast food outlets. The potential of potato crisps is encouraging but there are no processing factories in Kampala to develop this industry and all crisps on the market at present are of low quality or imported.

Evaluating the Marketing Opportunities for Shea nut products in Uganda

By R.S.B Ferris¹, C. Collinson², K. Wanda¹, J. Jagwe¹ and P. Wright³

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This study was commissioned to evaluate the economic and environmental prospects for the Shea sector of Uganda. Specifically the study aimed to evaluate the market prospects for a range of low value, traditional products and high value, export Shea products in the local, national and international markets. *Vitellara paradoxa*, the Shea butter tree, grows throughout Sahelian Africa, from Senegal to Ethiopia. The trees are truly multi-purpose and are highly valued not only for the economic and dietary value of the cooking oil, but also for the fruit pulp, bark, roots and leaves, which are used in traditional medicines and for the wood and charcoal, used for building and cooking fuel. The survey confirmed that Shea is a significant source of income for the community in the Shea producing districts of northern Uganda and that within the local market, Shea trees are valued for cooking oil and other local products including traditional medicines, charcoal, and building materials. In terms of gender, Shea is a crop which is almost exclusively the domain of women. The crop is gathered by women and children, then processed and retailed by women. Men are mainly involved in wholesaling and storage of shea nuts. Surveys found that for women involved in shea nut and oil sales, this commercial activity was likely to be the most lucrative commercial activity of the year and therefore any interventions which will increase demand for Shea, will almost certainly make a significant contribution to household financial security. In the global market, the trading links for West African Shea products are well defined and there has been a long standing export of shea nuts and butter to European and North American countries. The primary export market for West African Shea butter is as a substitute for cocoa butter in the chocolate and confectionery industries. There is also a renewed interest in Shea butter from the cosmetics industry, particularly the high value niche end of the market. It is this high value market which has been of interest to Shea groups in Uganda and recent chemical analyses of Shea butter extracts indicates that Ugandan Shea has most similarities to olive oil, which indicates two potential markets, in cosmetic and oil production. Current prospects for expansion of Shea processed products in Uganda include the local oil, improved oil and cosmetics markets. Cosmetics products would include lip balm, body lotion, hand cream, and soaps. In regard to high value cosmetics the target market would most likely be small companies and specialist cosmetic ingredient suppliers who would be willing to buy unrefined Shea butter from East Africa. In Uganda there are a number of interested agents who have expressed a desire to invest in the Shea markets and business plans for these agents have been reviewed with some preliminary forward plans outlined.

Developing systems for improving market support services Marketing Information Services in Uganda

By A. Muganga¹, G. Okoboi¹, N. Namanya¹, E. P. Robbins² and S.Ferris¹
1-IITA, 2-CMIS

The FOODNET, Market Information Service (MIS) project started in September 1999 with the aim of collecting, tabulating, analysing, interpreting and disseminating timely and accurate market data and intelligence to the farming and trading community in Uganda. The service's objective is to improve market access, transparency, market efficiency and to increase market competition in Uganda. The MIS project has two integrated components. The macro level MIS and the micro-scale MIS. The micro-MIS currently funded by the, (CTA) is a pilot project designed to test a model for the provision of market information to community based, small-scale actors in Uganda's agricultural sector. See Annex 1b.

The New Micro MIS Model

IITA with support from CTA has established three pilot projects to test the new micro-MIS model. The service is decentralised and includes the participation of farmers, traders, processors and retailers as well as local government structure, farmers unions and non-governmental organisations working in the target areas. This service is aimed to benefit the small players who comprise mostly of farmers, traders, processors, non-governmental organisations and other development agencies. The micro MIS provides localized information and utilizes the information and analytical skills at the Macro MIS. Information is collected from within the pilot sites from the markets in the major towns and agri-business development centres, regional networks and NGOs, local and national newspapers and the Macro MIS

In this model, data and market information is collected at least twice a week. Data is disseminated in the form of frequent radio broadcasts on FM radio stations, using the local language, and in local newspapers and word of mouth. This site is situated in Eastern Uganda and covers the districts of Bugiri, Iganga, Mbale, Jinja, Kamuli, Tororo, Busia and Pallisa, which, together, have a population of about **5 million people**. This area has a very high potential for exporting maize and beans and has received assistance from the Agri-business Development Centre. The problem in this area is that there is very poor organisation of farmers in the area of marketing. In addition, the producers here have no access to market information at all. In the second pilot site in Lira district, northern Uganda, many farmers have formed themselves into groups but lack the experience to collectively market their products. For this reason, the project includes provision for training farmers in these skills. It is precisely this type of activity that IITA-FOODNET is linking to other collective market support groups such as CLUSA, CEDO, ACIDI/VOCA and others. In the third pilot site, the micro MIS provides trade facilitation in the form of assistance to organised farmers and traders linking them with larger traders and new, larger markets. The project will concentrate on developing markets for beans and maize in this area. The farmers in this area are well organised and have benefited from training provided by the Irish Fund for Cooperative Development (IFCD). Information requirements in this area are somewhat different from those in the other two sites. The project aims to provide detailed information on the names, location, buying prices and trading terms offered by maize and bean traders who show an interest in buying from these farmers.

The benefits of market information.

- i) Government would benefit from a pro-active and robust policy to provide Market Information to producers and traders as a public good.
- ii) The benefits can be high. For example, in a rapid analysis conducted in 2000, in Pilot site 1 from the MICRO MIS, it was calculated, based on maize prices at that time, that with an investment of \$30,000, that these fund could generate up to 3 million dollars to the beneficiaries in the area. This is the type of re-allocation of funds / income from urban areas to rural communities, which is central to the strategy on which the PMA / NAADS approach is based, see cost:benefit overleaf.
- iii) Regionalisation:- Given that trade is both local, national and regional there should be additional analysis to evaluate and then promote the idea of regional market information to facilitate regional trade. Such a system could be implemented through intergovernmental bodies such as ASARECA, IGAD and FAO.

2.3 Farmer based network for local market information centre in Kiambu, Kenya

By C. Gitao+, P. Chege+, J. Mwaura*, J. Mushangi#, A. Mukhebi@ and R.S.B. Ferris

(FOODNET grant 2) +Immediate communications Ltd, *Director-SHELTER 2000 , #Market information Ministry of Agriculture(MoA), @Kenya Agriculture Commodity Exchange(KACE)

The Kiambu market information service is a new private sector initiative aimed to empower farmers through the provision of market information. At present the only prevailing market information service is through the Daily nation column provided by market information branch, Ministry of Agriculture. This method is slow and often the prices are out of date. Our niche is the rural farmers in Kiambu and the larger Central Province/Nairobi. As suggested by the Ugandan MIS, the most rapid means to provide up to date market information to farmers is via radio, which is now possible through local FM stations. The project has established partnerships with two radio stations, Coro FM and Kameme FM and this has enabled the project to cover all districts within Central province. A cost-effective method to collect information was devised to collect information from four markets including Karatina, Thika, Kutus, Kagio. This system relies on high school educated traders making a reverse charge calls. Their information is counterchecked by regular survey visits.

Many farmers have responded positively to the MIS as reflected by the following examples: Case 1: In Kawangware, some farmers after hearing the programme, relayed the information to Timboroa (In Rift Valley province). The following market day saw a large supply of potatoes from Timboroa. Case 2: In the Kiambu market, one trader who buys potatoes from Kinangop observed that the farmers were fixing the prices on the information obtained from the broadcast. Consequently, the price for a bag of potato from the farm gate increased by sh100 as they now had a bargaining position. In contrast most traders were not receptive to the service. Case 1: One trader in Kiambu felt that the market information service was creating awareness to the farmers on market trends. She felt that the prices should be looked at from the consumers side as they too bought the produce according to the prices broadcast. Case 2. A major egg supplier located in the city centre noted that farmers get a raw deal since they are mostly price takers. She observed that with introduction of the information service farmers can have more leeway in setting prices for the eggs. This, she noted, would minimize price differences in the same market, for instance, Wangige market where she obtains her supplies. Case 3 This trader from Kiambu felt the market information service was a market spoiler. She felt that with the introduction of the information service the farmers were asking for a higher price as opposed to earlier times. She would rather withhold the information from the compiler.

In conclusion, the services have been very successful according to many farmers and some traders. They have adjusted to these services and some have become daily listeners and look forward to comparing prices in the different markets.

2.4 Evaluating Commercial Channels for Delivery of Public goods Information

By G. Bell^{1/3}, P. Plovyt¹, P. Etiang¹, A. Muganga², G. Okoboi², and R.S.B. Ferris²

1- Rock Radio Board Member, 2 – IITA-Foodnet MIS, 3- Radio Works Director

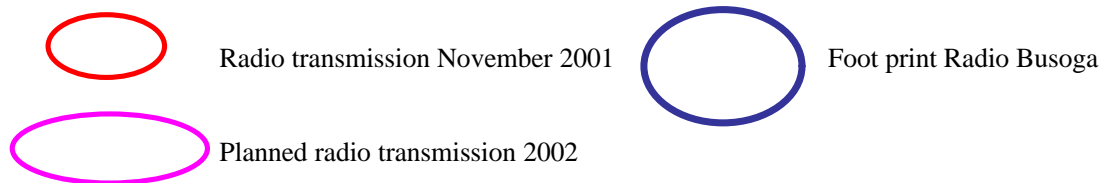
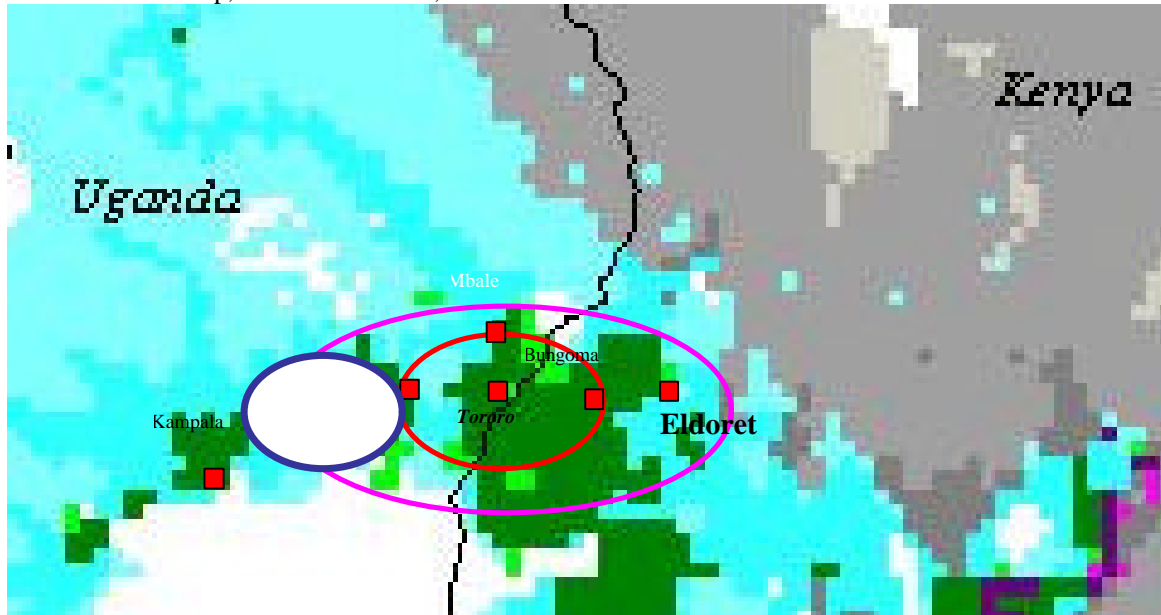
Following the successful implementation of the micro Market Information Service in Lira district, where the marketing officer is closely associated with a local radio, “Radio Lira”, the aim of this project was to test the service in an area which was not supported by a local FM station. The new project was seeking to develop a commercially sustainable means of delivering agricultural advisory information. The site for the new station was based on a market access map developed by S. Woods, 1999. The map, see below, provides a colour coded pixel map of those areas which have best market access. This analysis is based on a series of overlays including roads, population and suitability for agricultural production. The project was seeking to work with a commercial station and develop a sustainable means of providing market information service to an area which is highly productive and also has high prospects of national and cross-border trade.

At present all MIS programming in Eastern Africa, is paid for on a fee basis for air time. This project adopted a more venture capitalist approach, by negotiating with a number of media specialists to buy sufficient air time, i.e., 3 years of air time, to encourage the private sector to make a complementary investment and establish the radio station. For the private sector, this was attractive as it provided enough capital at one time to establish the station and from the institutional perspective it enabled the MIS project to negotiate an airtime agreement that would be favourable to long term provision of market information. The commercial wing of the company is making standard sales of air time with commercial companies who wish to promote their goods and offering preferential rates to other developmental projects in key public goods areas such as agriculture, public health and community development.

In addition to being located on a major trading access, the Radio is also situated next to Tororo rock which is a natural volcanic plug, 1000 ft above the plain. The station is working in collaboration with the local mobile phone company to establish an antennae on top of the rock, which would be at 4030 ft, and will provide a considerable footprint in the on a relatively small transmitter. Having signed the agreement, the Radio started broadcasting from Tororo in June 2001, with a 300 watt transmitter. This equipment provides a footprint of approximately 50 km radius around Tororo rock, supplying information coverage to approximately 1 million people in the zone from Iganga up to Bungoma. In the future, when the radio station has achieved a stable income, the station will upgrade facilities to a 5 Kilowatt transmitter which will expand the footprint area and signal strength to provide transmission coverage to more than 5 million people in the cross border area, from Jinja to Eldoret.

Based on the success of Lira and Tororo, Radio Works has opened another station in Jinja, and fortunately, this station is located in the same town as the third micro market information officer, and therefore, the micro service has already established a link with Lusoga radio to provide localised market information, in the local language, targeting the needs of the local farming community. The combination of Lira (4 Million), Tororo (1.5 Million) and Busoga (1 Million) radios already has a combined population coverage of more than 6 million people and therefore the rate of localised coverage for the market information service has increased dramatically over the past year. There are also plans to develop two more local radio stations over the next 6 months and these will also be linked into the local MIS service when they come on air.

Market Access Map, from Woods et al, 2000.



	Low Pop Dens & Low LGP	Low Pop Dens & High LGP	High Pop Dens & Low LGP	High Pop Dens & High LGP
Low Market Integration	LLL	LLH	HLL	HLH
Medium Market Integration	LML	LMH	HML	HMH
High Market Integration	LHL	LHH	HHL	HHH

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Impact evaluation of cassava based research with a focus on small-scale processing technologies and pilot sites in Uganda and Tanzania and market information.

By S. Wood\$, L. You, B. Douthwaite+, J. Whyte+, A. Muganga and R.S.B.Ferris+

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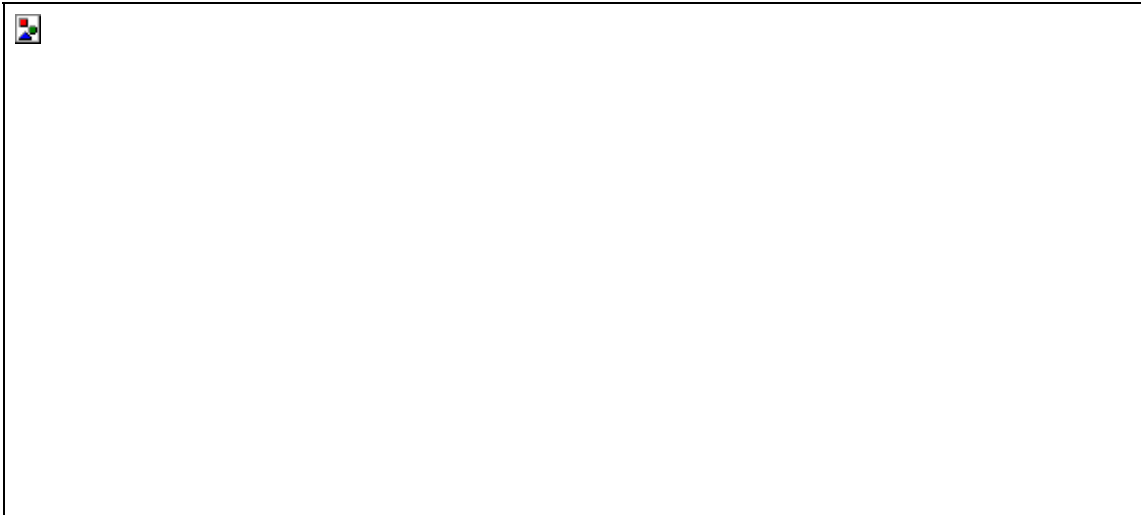
The DREAM impact model was used to test the benefits derived from the Uganda PL-480 cassava project in six districts of Uganda. This analysis shows that for an investment of 0.8 million US dollars to the IITA Uganda rehabilitation project, the total benefit over the past 4 years (1998-2001) is approximately US\$36 million.

Region	Producer Benefit	Consumer Benefit	Government Revenue (1000US\$)	Total Benefit	Cost	Benefit - Cost	Benefit /Cost	IRR (%)
Iganga	6,538	7,631	0	14,169	0	14,169	--	--
Kamulli	413	4,162	0	4,575	129	4,446	35.33	--
Luwero	1,561	710	0	2,271	129	2,141	17.53	--
Masindi	-841	1,159	0	319	129	189	2.46	105.50%
Mpigi	2,918	2,803	0	5,722	129	5,592	44.19	--
Mukono	5,775	3,129	0	8,904	129	8,775	68.77	--
Sum	16,365	19,594	0	35,959	647	35,312		

Development of the FOODNET website

By M. Namanya, K. Muganga, G. Okoboi and R.S.B. Ferris, J. Atalobhor and P. Philpot

The FOODNET website has undergone a series of changes since being established and in this year, the design of the site has changed to provide a better understanding of the FOODNET price information system. The website is therefore developing greater capacity for provision of information as well as being used as a management tool. In 2002, the website will be more fully integrated with the FAO InPhO Website, the PhAction site will be created as part of the ongoing development of the PhAction consortium and data links will be further developed to integrate more applications for GIS linked price management and market information services.



Statistics		
Hits	Entire Site (Successful)	516,639
	Average Per Day	756
	Home Page	12,848
Page Views	Page Views (Impressions)	49,229
	Average Per Day	72
	Document Views	48,961
Visitor Sessions	Visitor Sessions	20,962
	Average Per Day	30
	Average Visitor Session Length	00:09:06
	International Visitor Sessions	13.56%
	Visitor Sessions of Unknown Origin	47.95%
	Visitor Sessions from United States	38.47%
Visitors	Unique Visitors	3,107
	Visitors Who Visited Once	5,214
	Visitors Who Visited More Than Once	1,893

5.0 Training

5.1 Group training in Agro-enterprise development 1-12 May 2001

The Foodnet / CIAT / SARRNET agro-enterprise course was held in Entebbe, Uganda from 2 to 11 May 2001, with 27 participants from East and Southern African countries.

The course was made up of 5 modules:

Module 1: Setting the scene: Agro-enterprises and development. This module included sessions on a) Presentation of participants and review of expectations, b) Course objectives and content, c) Agro-enterprises within the newly liberalised economies, and d) The enterprise spirit.

Module 2: Managing and organising agro-enterprises. This module was made up of seven sub-modules. 2.1 Markets and marketing, 2.2 Business and market plans, 2.3 Strategies for enterprise development, 2.4 Technology: approaches and tools (including Internet), 2.5 Business development services, 2.6 Product development, 2.7 Profitability analysis.

Module 3: Exchanging information and learning from our experiences. In this module, whose objective was to share experiences among the participants, each participant made a 15 minute presentation on his or her work related to agro-enterprise development, highlighting successes, limitations and lessons learnt.

Module 4: Improving market chain efficiency. In this module, a presentation was made on Integrated Agro-enterprise Projects, which provided elements for the analysis, through a field visit, of specific agro-enterprise chains (cassava, maize, coffee, spices and dried fruit). These cases were presented by the participants in plenary.

Module 5: Action planning and course evaluation. In the concluding module, participants prepared brief action plans on the proposed use of the knowledge gained during the course. In addition the course was evaluated (a) based on the uptake of concepts on the part of the participants, and (b) on the level of fulfilment of the participants expectations.

Evaluation

Course participants provided feedback on the relevance of the course and the level to which the content had met their expectations, information that will be used to develop future courses. The very homogeneous nature of the activities of and institutions from which participants were drawn meant that not all expectations were fully met. If the interaction of researchers and development personnel is one of the principal objectives of this type of course, its design and content will need to be adjusted accordingly, making sure that the prospective participants are fully aware of the scope of the course that is being offered.

Future activities

In general the agro-enterprise course was very well received by the participants and there has been much interest generated from this work. Based on the findings of this course, it was decided to proceed, based on two requests for similar training from NARO, Uganda and from mainstream NGOs such as Catholic Relief Services and CARE.

The main consideration from our perspective is to change course format from a two week basic training to a more long term learning process, in which training models are shorter, ie in 1 week sessions, but that each session tackles a part of the agro-enterprise training and then the participants take this information and apply this in the field. This approach to learning will take on the question of both sustainability and also knowledge capturing which is a perennial problem, particularly with Government staff who are not well paid compared with other private sector or NGO agencies. Typically, well trained personnel will leave the department in which the training was given or training is provided to people who are unable to capitalize on the skills taught.

This learning process, is therefore a more robust partnership with the client organization and there will be a cost element to this process such that both sides are making not only a skills transfer commitment but also that there is a financial tie.

The first of these new sessions is planned for January 2002, with NARO-Uganda and from this first session on market analysis, the participants will test the ideas and in the subsequent sessions, participants will come armed with relevant experiences which will be used as part of the forward planning in the process of developing agro-enterprises. This approach is therefore a much more dynamic process and will work with participants who are designated to perform market linkage tasks.

Table 2. Evaluation by the participants of the Agroenterprise Development Course. Entebbe 2-11 May 2001. Scale: 0 – 10.

Module	Av, Score
Module 1.Setting the scene	7.50
Module 2. Managing and organising agroenterprises	
Module 2.1 Markets and marketing	7.48
Module 2.2 Business and market plans	7.88
Module 2.3 Model approaches and strategies	8.00
Module 2.4 Technology: approaches and tools	7.88
Module 2.5 Business development services	8.33
Module 2.6 Product development	8.15
Module 2.7 Profitability analysis	8.48
Module 3 Exchanging information and learning from our experiences	n.a
Module 4 Improving market chain efficiency	8.30
Technical organisation and educational methods	7.00
Logistics and administration	7.67

n.a not available

Table 2. shows the participants' evaluation of the course on a scale of 0 (negative evaluation) to 10 (positive evaluation). All technical modules were evaluated well, in the range 7.50 to 8.48. The 'technical organisation and educational methods', which includes aspects such as the division of time between theoretical and practical sessions, field work, sequence of topics etc. and the educational approaches and techniques used, was evaluated at 7.00, and this aspect could probably be improved in future courses.

5.2 Group training in website development 15-26 Sept 2001

By J. Atalobhor, J. Nyagahima, A. Muganga, S. Ferris

This course was developed in collaboration with IITA-Foodnet and Africa-link to assist the national programmes in the ASARECA region to have a better understanding of using the internet and to enable each national programme to set up the framework for their own website. The course set out to provide the participants with a clear understanding of how to maintain and update a website. The sites will be the diary, directory, strategy point and monitoring and evaluation information source for the national programmes.

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