



Contrasting Experiences in Cassava Commercialization in Malawi, Mozambique and Zambia

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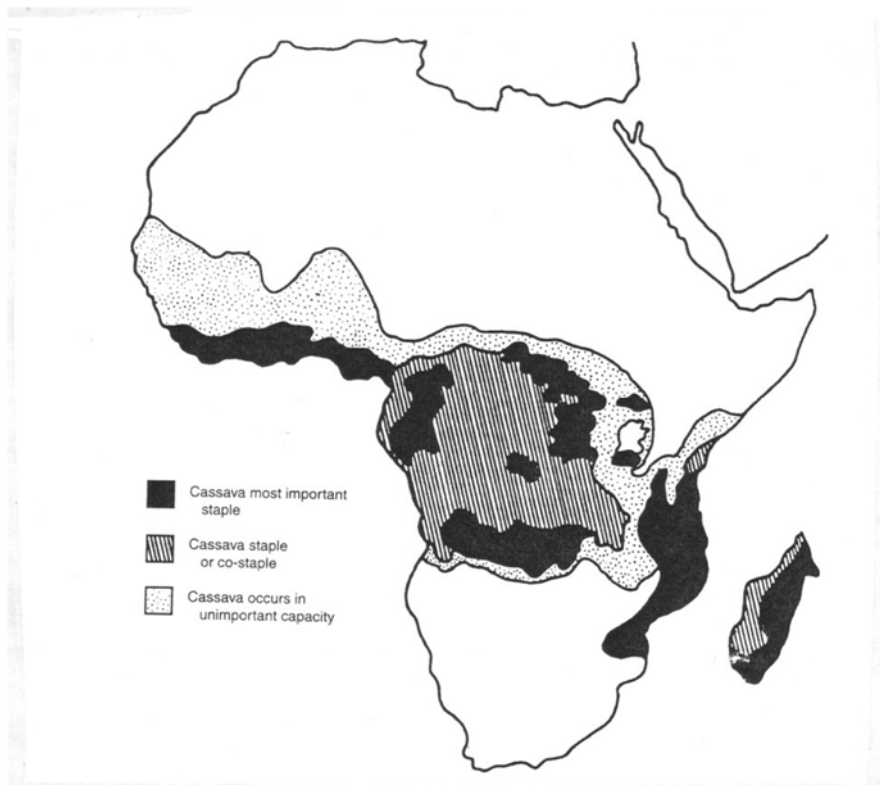
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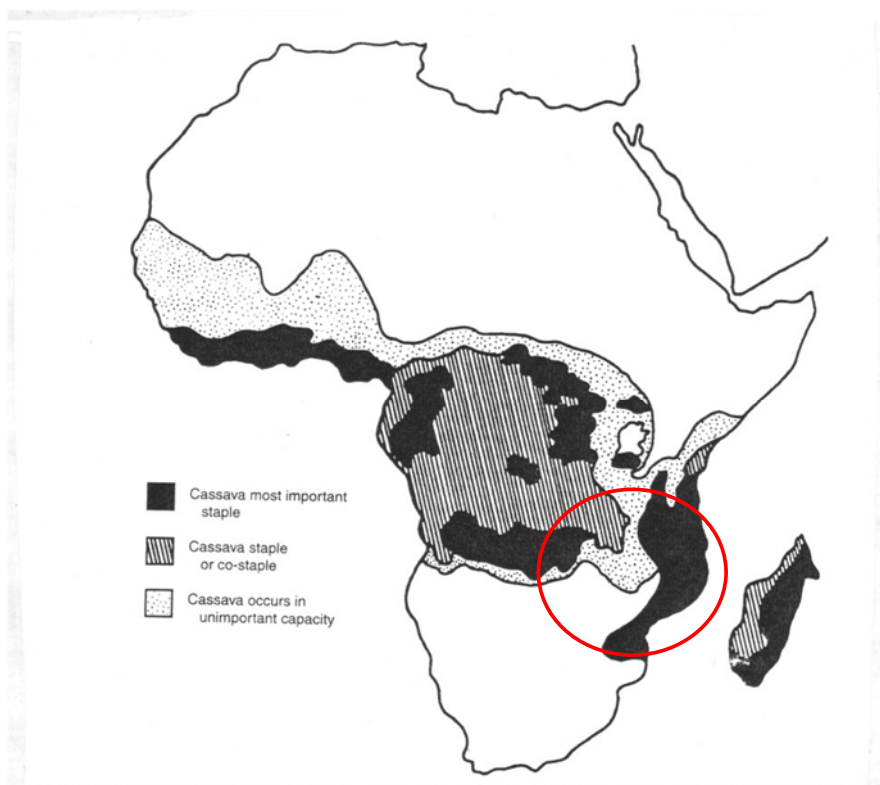
Outline

1. Context
2. Malawi
3. Mozambique
4. Zambia
5. Conclusions

Africa's cassava belt



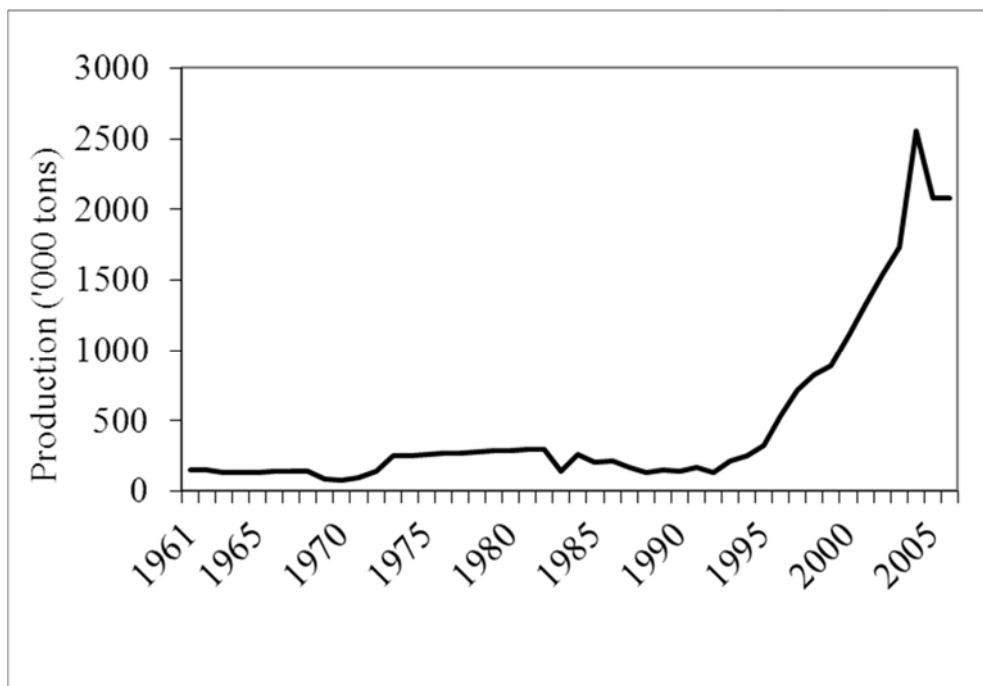
Africa's cassava belt



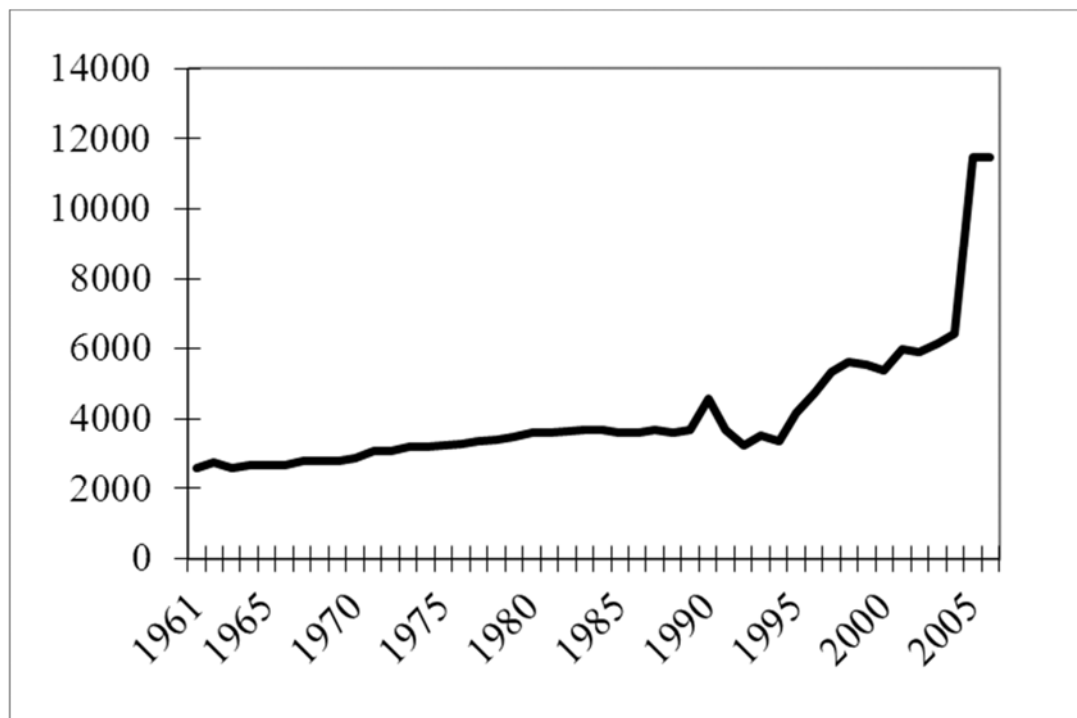
Cassava as a food security crop

- Drought tolerance
- High yield
- Farm flexibility (can harvest over many years)
- Consumer substitution among food staples
- Seasonal and spatial price stabilization

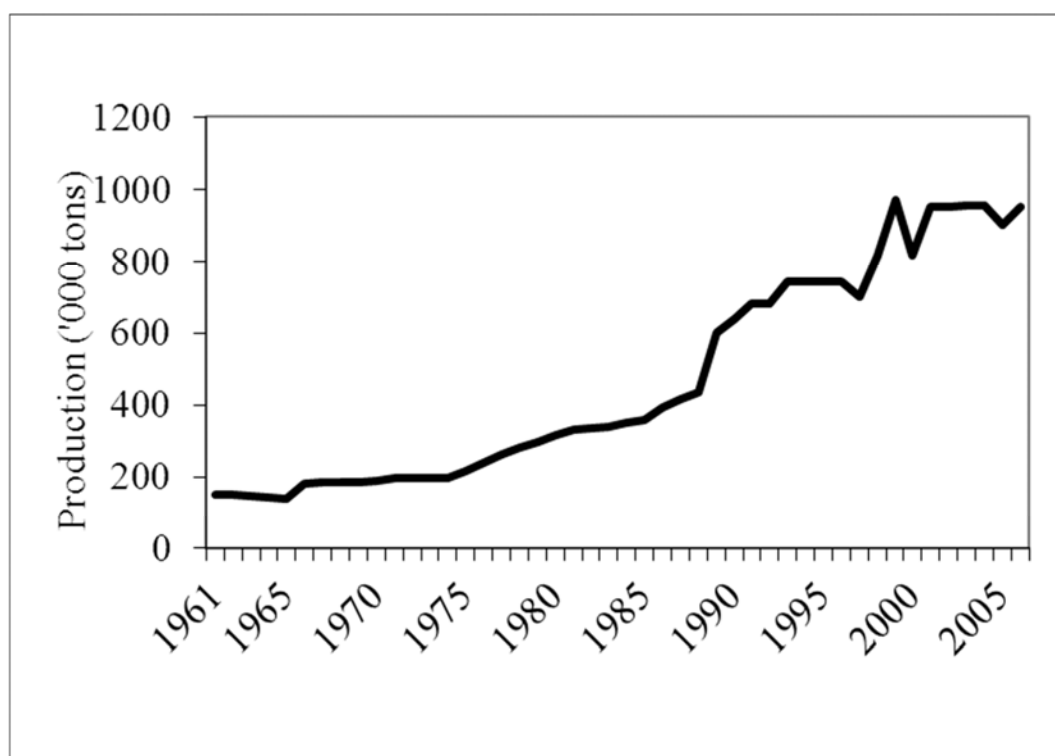
Malawi cassava production



Mozambique cassava production



Zambia cassava production



Cassava as a commercial crop



Drivers of Commercialization

- Farmers motivated to diversify due to removal of govt. production & marketing subsidies
- High cost of maize production
- Changing weather patterns: recurrent droughts
 - Food security demands
- Increased institutional support
 - Value addition
 - Product development

Relative staple food prices

	Price cassava/ price maize
Cassava belt	0.50
Dual staple zone	0.66
Maize belt	1.2

Translates into commercial opportunities



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Malawi: current commercialization



Fresh sales:
20% of total
cassava
production



Malawi: commercial growth

- Production increases
 - even in non-traditional areas
 - increasing volumes of cassava sold
- Non-food industries (starch)
- Bakeries and confectionaries substitute at least 10-20% wheat flour
- Small-scale processing (convenience foods)



commercial growth potential



Small processors produce <1% requirement



Livestock feed



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Northern Mozambique: current commercialization



Dried chips and flour



Southern Mozambique: current commercialization

Fresh cassava



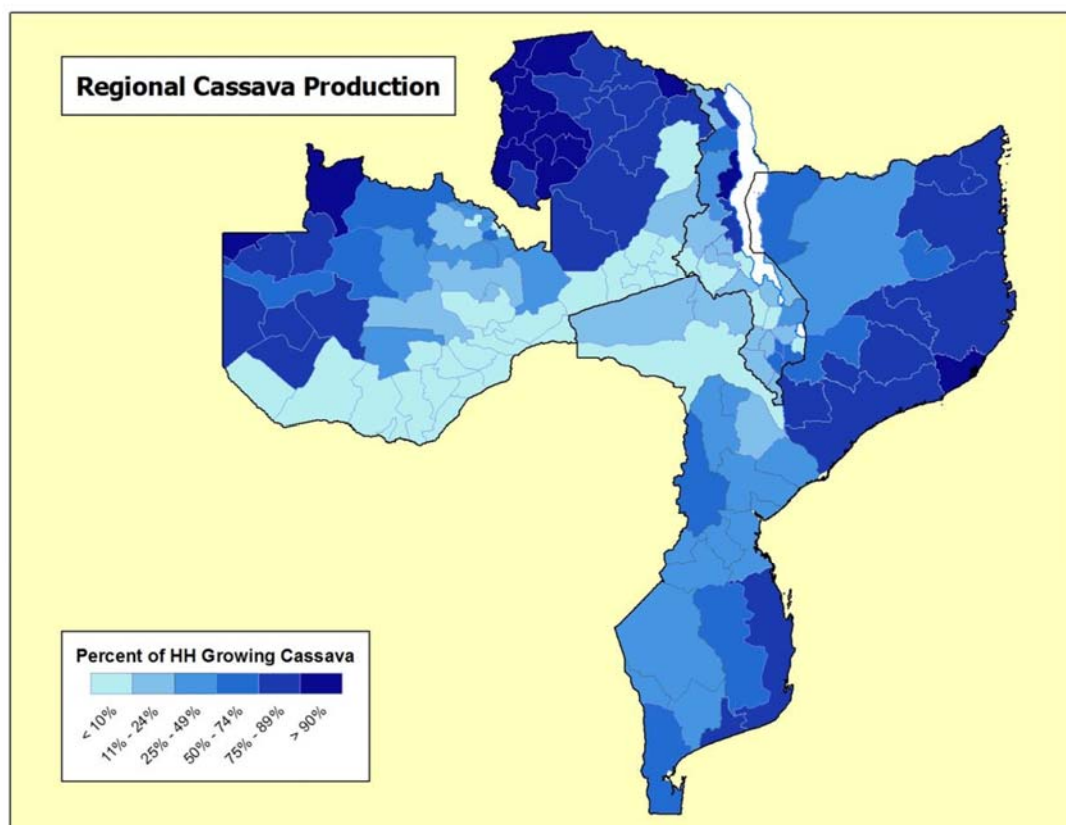
Rale (gari):



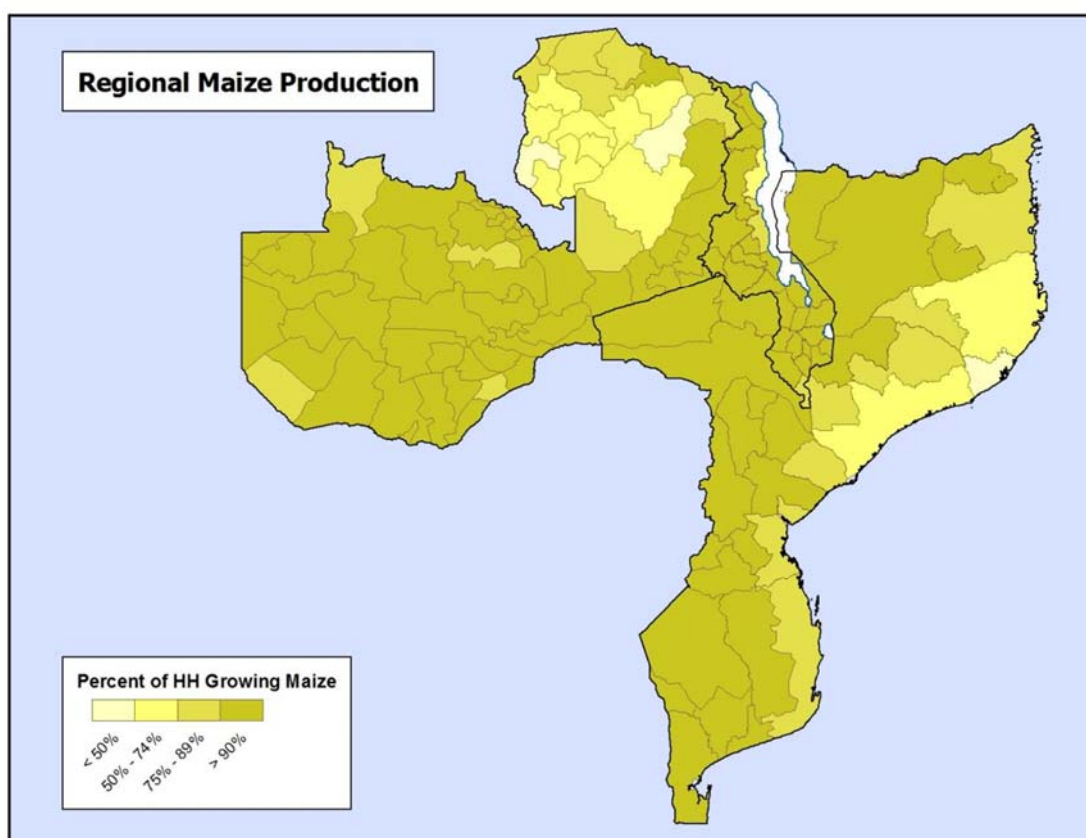
Comercialization Trends

- Marketing linked to maize crop
 - More cassava marketed when maize crop was not good

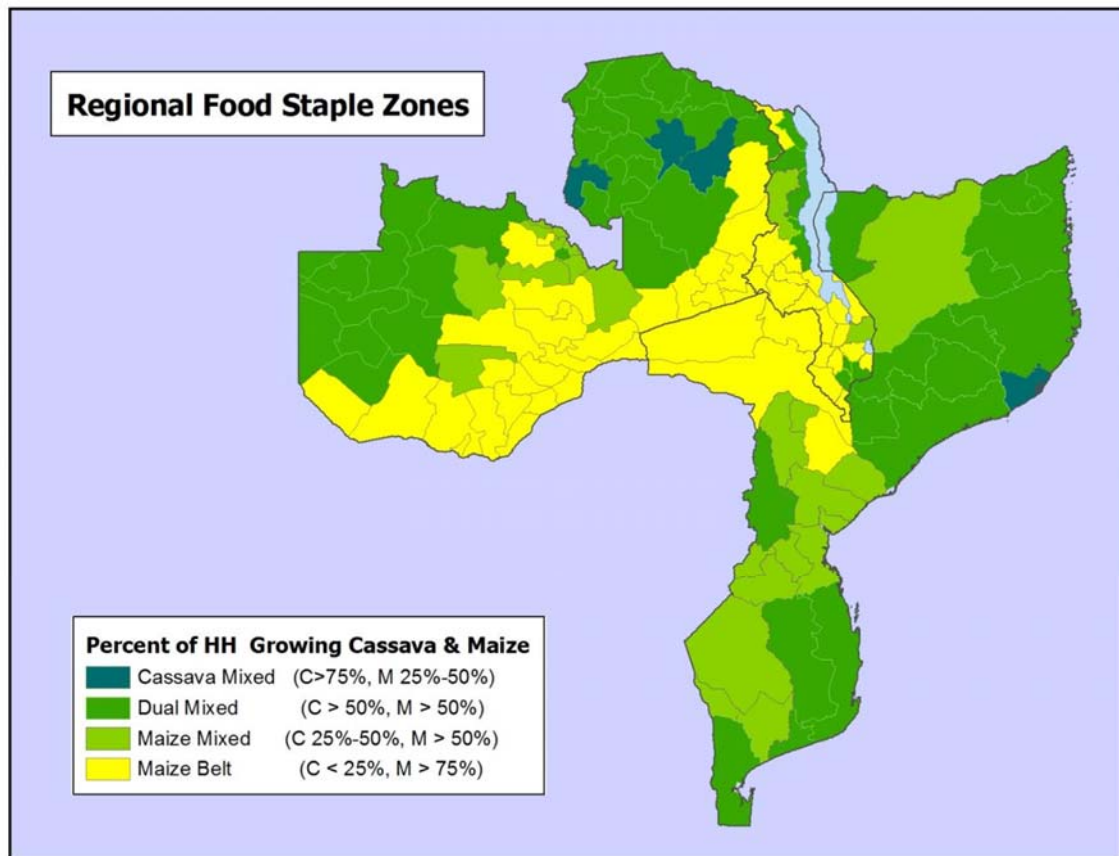
Cassava production



Maize production



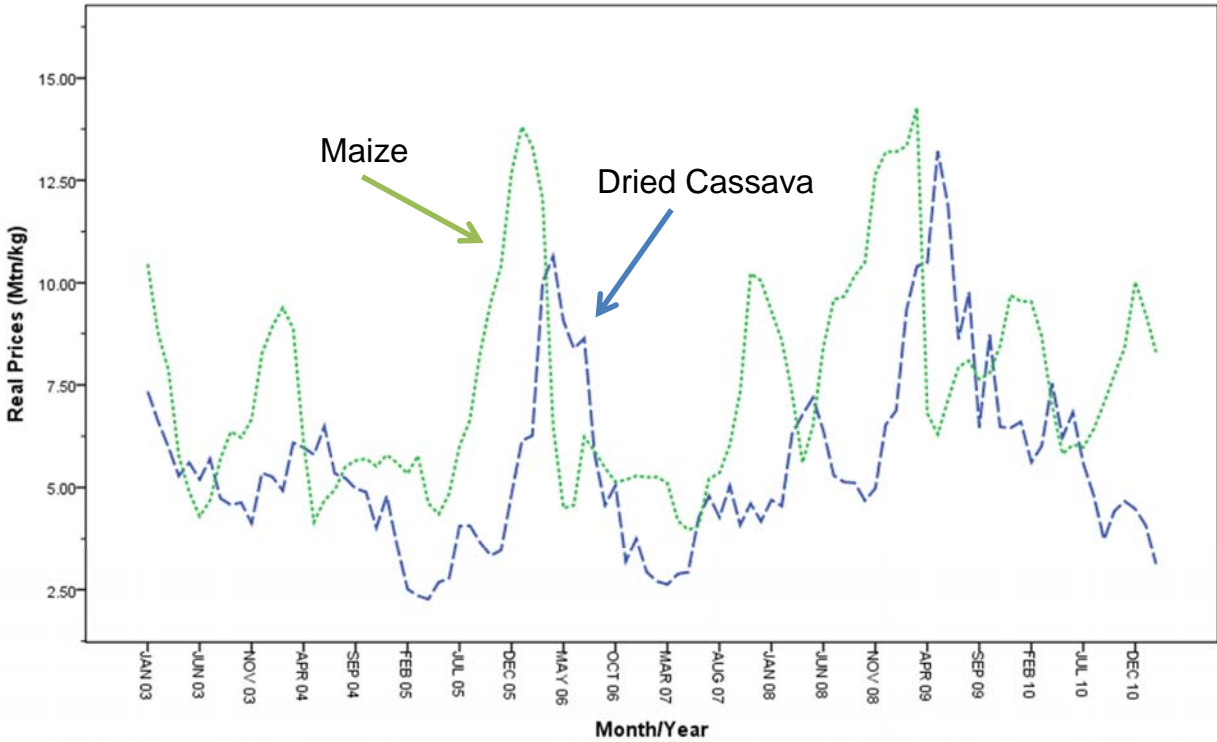
Dual staple zones



Cassava and maize sell side-by-side



Maize and Dried Cassava Real Prices, Wholesale in Nampula (Mtn/kg, base Dec 2010)



Source: SIMA/MINAG 2011.

Commercial investors: large and small



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Zambia: current commercialization



↑
Fresh cassava
for human
consumption

→
Flour for food and
non food industry



↑
Dried chips
for feed,
human
consumption

Commercial Trends Among Cassava-Growing Farm Households

Cassava production		1990s	2000s	Differenc e	Change
		%	%	%	%
Households growing cassava %					
	Cassava belt (3b)	92	96	4	4
	Mixed staple zone (3a)	46	54	8	17
	Mixed staple zone (2b)	48	68	20	42
	Maize belt (1 and 2a)	3	4	1	47
	All Zambia	38	44	6	16
Quantity harvested kg/hh					
	Cassava belt (3b)	1 035	1 216	181	17
	Mixed staple zone (3a)	821	1 266	445	54
	Mixed staple zone (2b)	396	583	187	47
	Maize belt (1 and 2a)	600	700	100	17
	All Zambia	906	1 155	249	27



Peeling Unit

Wet Processing Unit

Kanakantapa Cassava Processing Centre, Chongwe

Milling, store and office Units

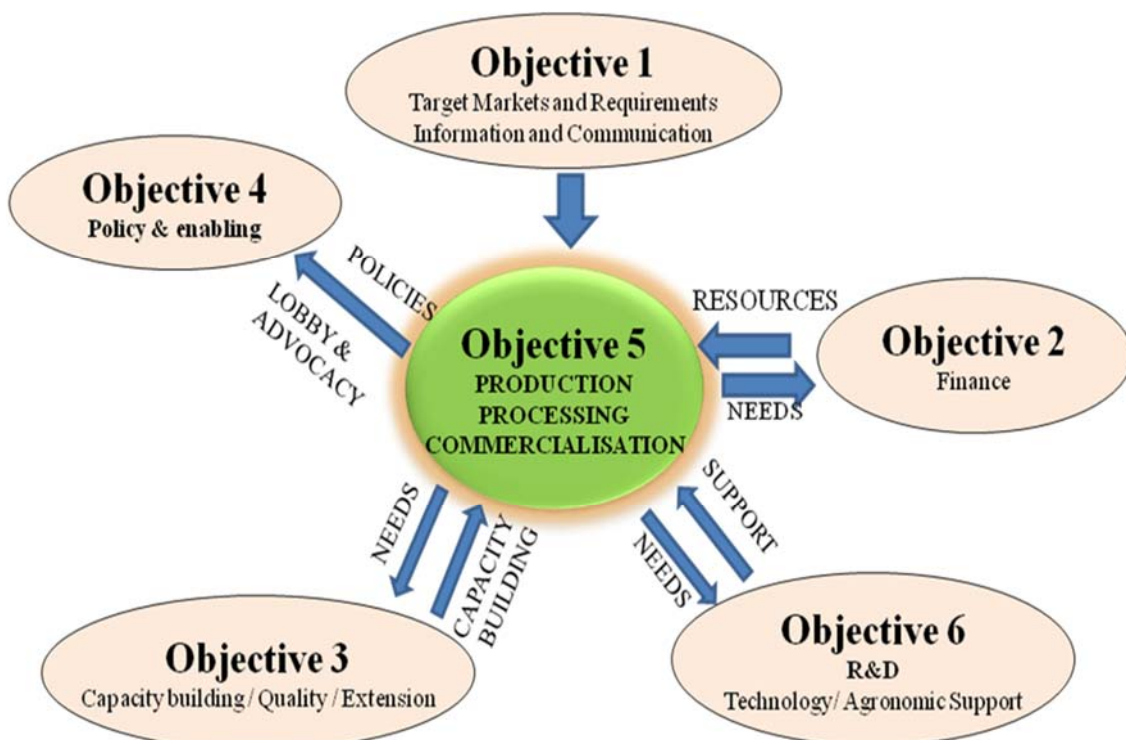


Raised drying racks

Secondary food products



Next Steps: Zambia's Cassava Strategy in Brief



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Differing cassava value chain structures

Channel	Malawi	Moz.	Zambia	Nigeria
1. Subsistence	73%	96%	90%	20%
2. Fresh sales	20%	2%	3%	20%
3. Dried foods	5%	2%	5%	45%
4. Feed	1%	< 1%	1%	10%
5. Industrial products	1%	< 1%	1%	5%
Total	100%	100%	100%	100%

Opportunities

- Starch/Glue products
- Feed
- Composite flours (maize, wheat blending)
- Beer/wine
- Prepared foods (rale (gari), ateke, maheu, cheese bread, biscuits, fritters)
- Cassava leaves

Bottlenecks

- Policy bias against drought-tolerant cassava
- Limited scaling up processing technology in industries
- Quality (consistency, standards)
- On-farm handling and postharvest processing technologies
- Inadequate knowledge on right varieties for industrial needs
- Achieving critical mass of marketed volumes
- Price
- Market information and coordination
- Poor roads in production zones
- Pests and plant diseases
- Weak seed systems for improved varieties

Next steps

- Eliminate policy bias against cassava
- Product and processing technology development
 - Roots, leaves
- Food safety (harmonize to facilitate trade)
- Strengthen research
 - Disease tolerance
 - Early bulking; long-term in-ground storage
 - Starch/flour characteristics for processing industries
 - Nutrient composition of cassava leaf products
- Improve research, extension and private sector linkages
- Road investments

Thank you!



Zikomo, Obrigado!