Zambia's Cassava Value Chain Task Force

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for the
SIDA RRD workshop
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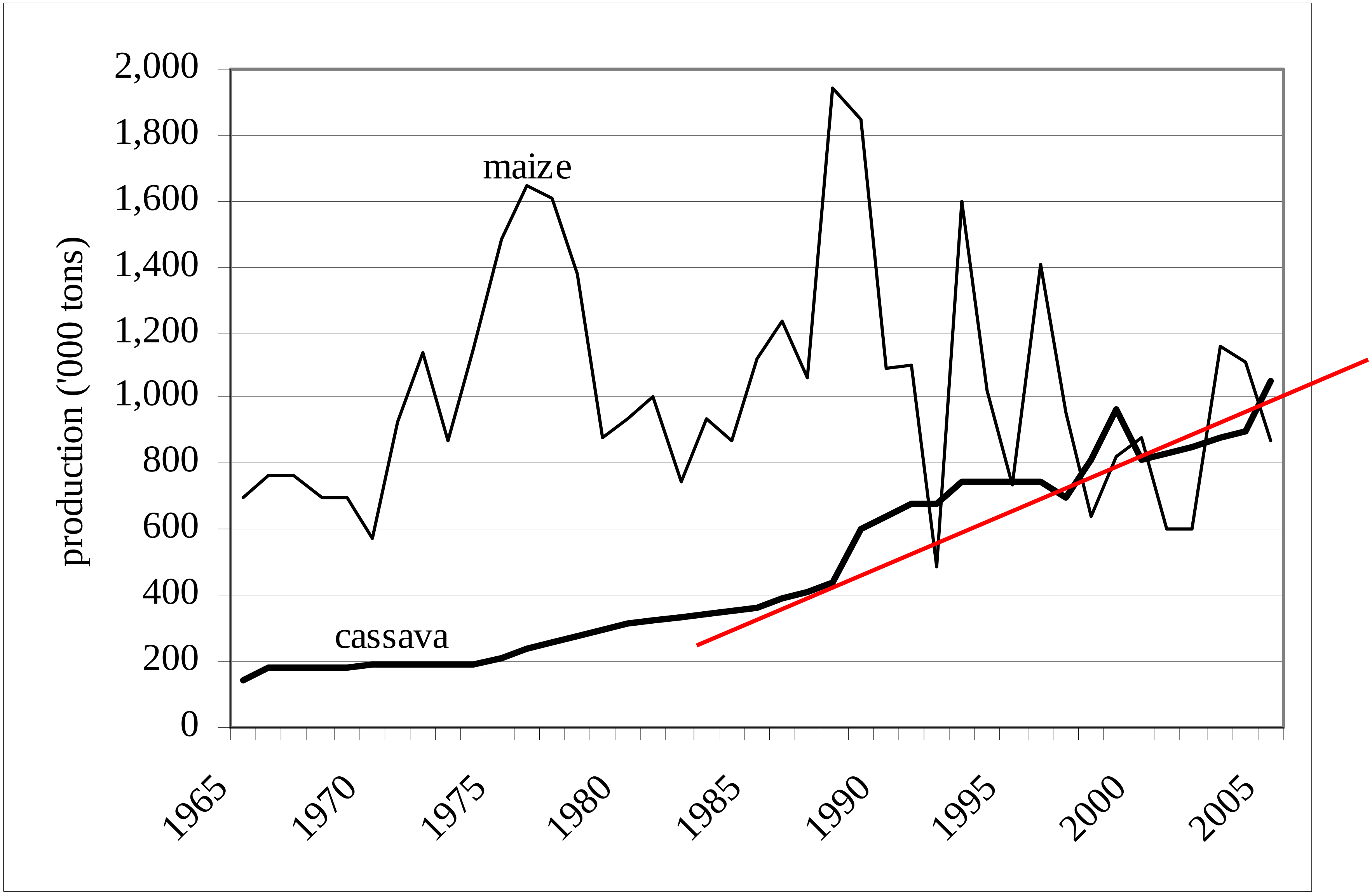
Outline

- Cassava production surge
- Cassava task force
  - Value chain diagnostics
  - Past promotional efforts
  - First-round interventions
  - Market monitoring: spatial dimensions of cassava production and trade
  - Second-round opportunities

Cassava production surge



Causes of the cassava surge

- Successful control of cassava pests
- Removal of maize subsidies
- Introduction of new cassava varieties

Cassava varieties released by RTIP

Variety	Date	Yield	Taste
1. Bangweulu	1993	31	Bitter
2. Kapumba	1993	22	Sweet
3. Nalumino	1993	29	Bitter
4. Mweru	2000	41	Sweet
5. Chila	2000	35	Bitter
6. Tanganyika	2000	36	Sweet
7. Kampolombo	2000	39	Sweet
traditional	1600	7	Bitter

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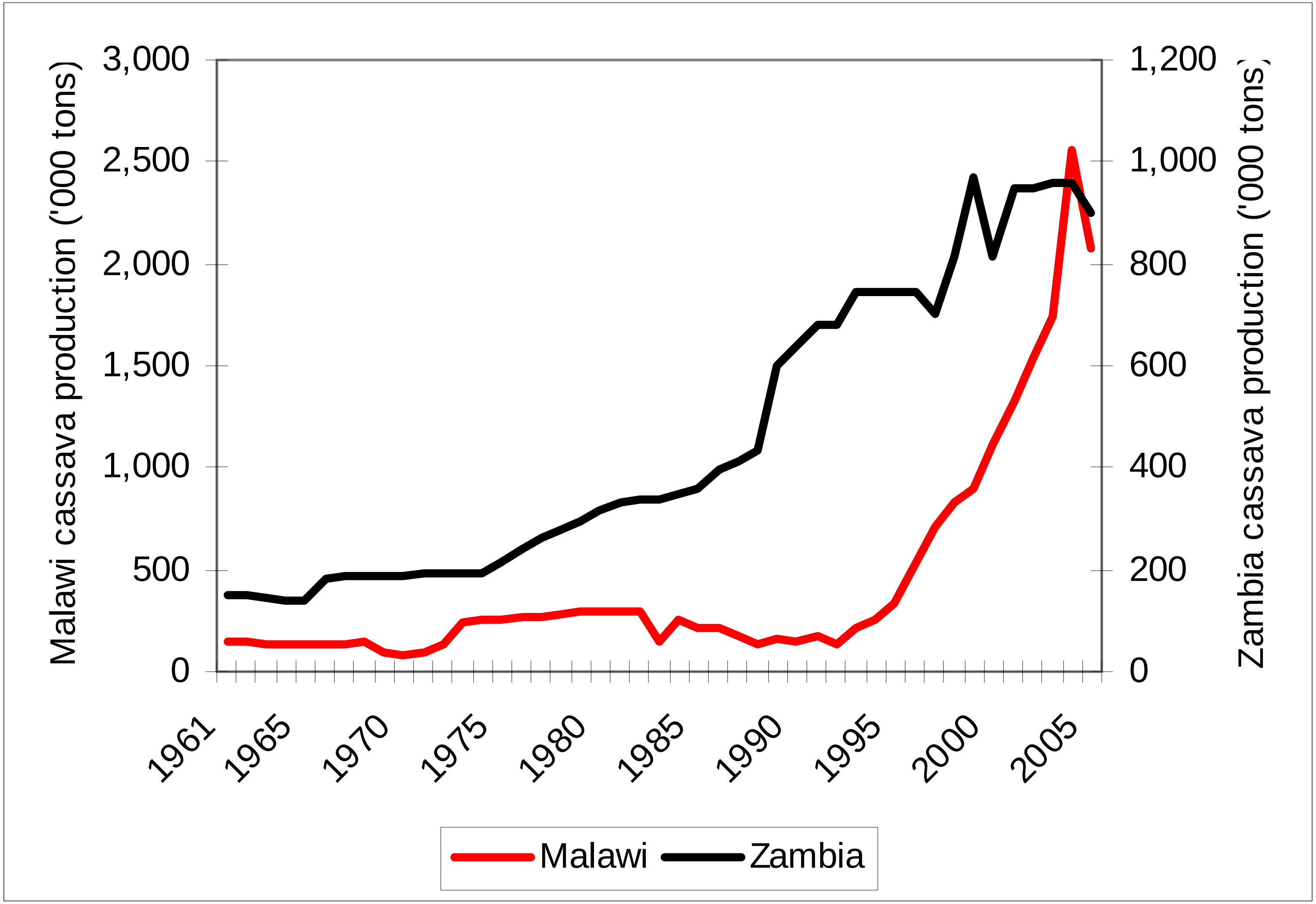
Regional cassava surge



Can production growth continue?

- Yes, farmers can increase output.
- But without growing markets, production growth will stall

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ACU Task Force

- June 2005: cassava presentation at ACF
- New ACF chairwoman
- Concensus:
  - ➢ higher productivity of new varieties → major economic opportunity
  - ➢ Continued growth of cassava production required growing markets
- ACF invites stakeholders to help constitute Cassava Utilization Task Force

Task force objectives

- realize commercial potential of cassava
- enhance its contribution to household food security

ACU Task Force members

- Private sector (feed companies, traders, processors)
- NGOs and projects (PAM, SNV, FSRP)
- Public sector (ZABS, ZARI)
- ACF

ACU Task Force principles

- Open membership
- All information → public domain
- Value chain perspective
- Facilitate private sector
- Zero budget
- evolving strategic road map

ACU first-round steps

- Value chain review
- Assessment of past promotional efforts
- Identification of first-round opportunities and constraints

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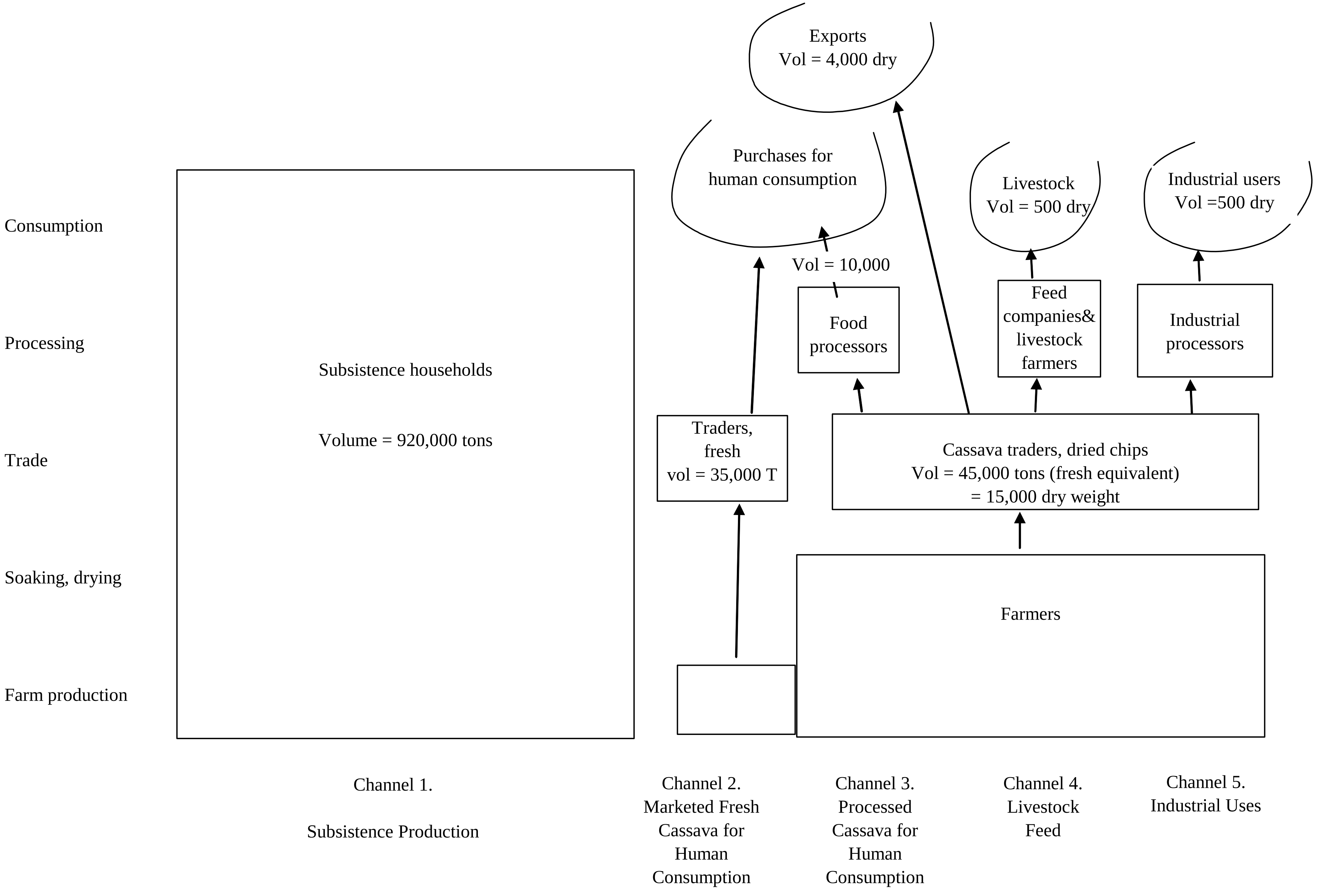
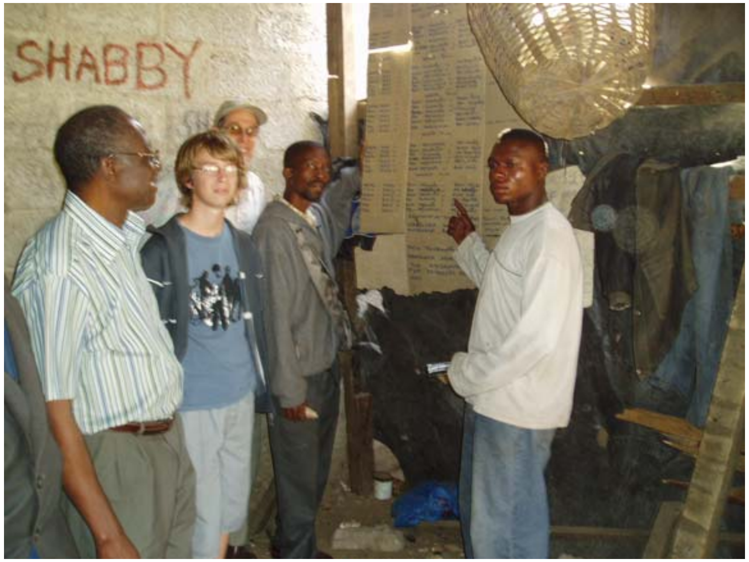
Zambia’s cassava value chain



Channel 1. Subsistence

Channel 2. Fresh sales



Chanel 2 Fresh market

- important in the lean season (January – February) peak
- fresh cassava only food harvested early in lean season

Channel 3. Human foods

Channel 4. Feeds

Channel 5. Industrial processing

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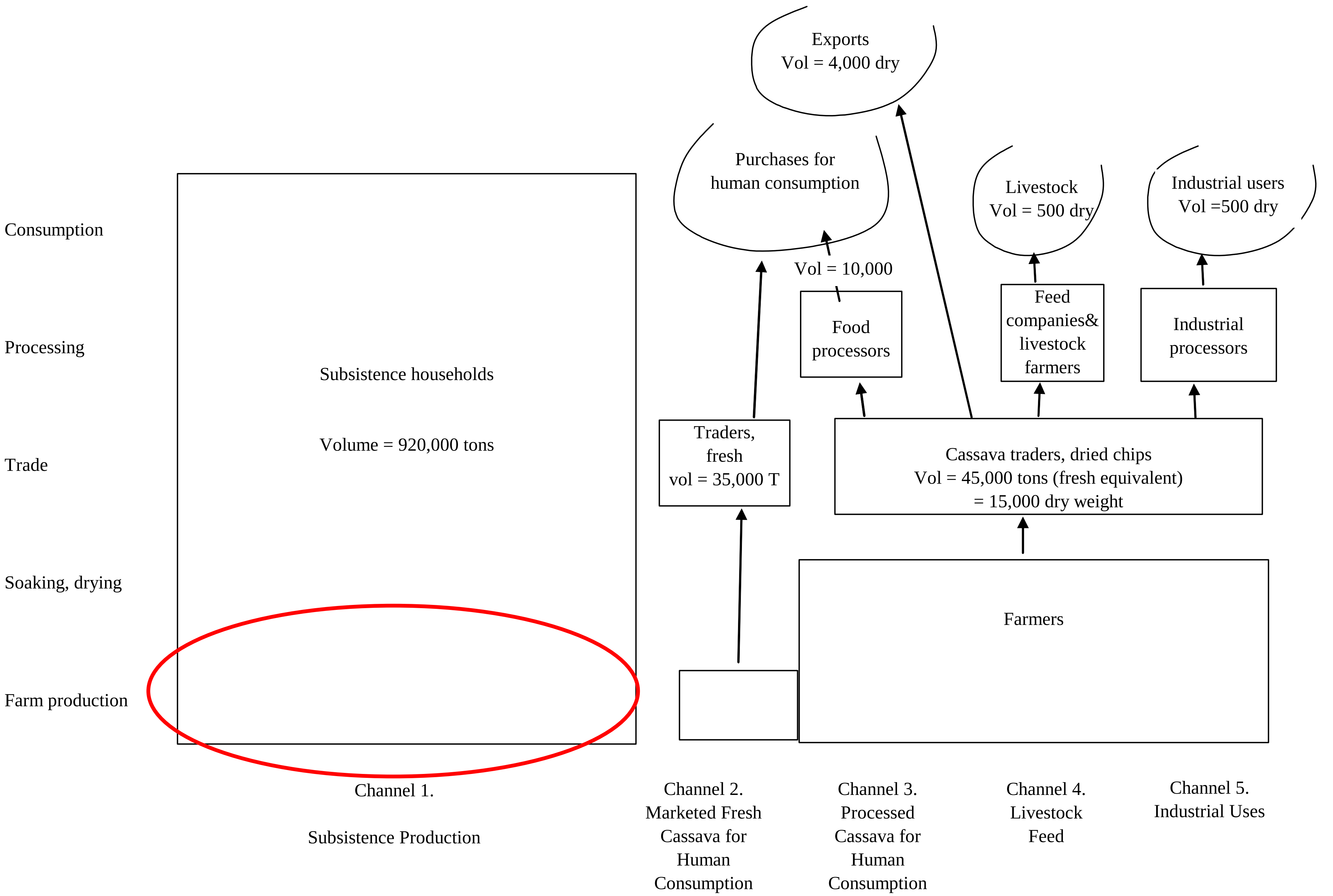
Review of past promotional efforts

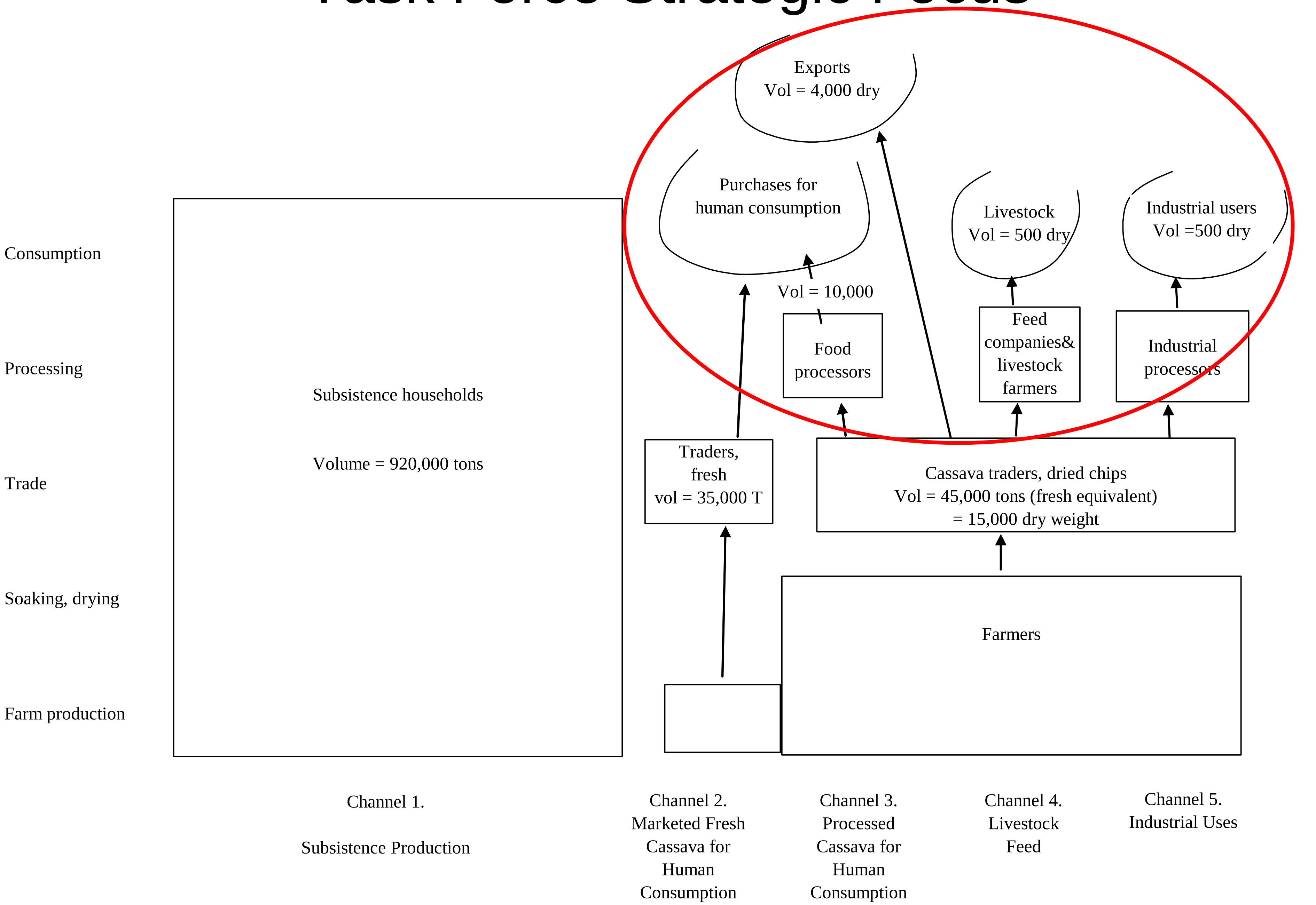
- Strategy: Deliver cuttings to vulnerable households (Channel 1)
  - Supply side focus
  - Subsistence focus

- Outcome = failure
  - only 20% plant cuttings
  - only 1% still growing cassava

Past promotional efforts



Task Force Strategic Focus



Opportunities ('000 tons fresh)

	Current size	Growth potential
Channel 1	920	2% pop growth
Channel 2	35	+ 50
Channel 3	42 (14 dry)	Wheat flour 10% +40 Maize flour 10% +200 Convenience foods +500
Channel 4	1.5 (0.5 dry)	+ 100
Channel 5	1.5 (0.5 dry)	Sweetners +40 Ethanol +100 Other ?

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First-round activities (18 months)

- Ch 4. Feeds (LDT feeding trials)
- Ch 3. Human foods (taste panels, composite flours)
- Ch 2. Industrial sweetners
- Standards (ZABS, processors, food safety labs)
- Market monitoring (prices, volumes, spatial dispersion)

First round results

- Livestock feeding trials
  - cassava rations → same growth as maize
  - viable if 60% to 70% price of maize
- Major feed company starts buying cassava
- ZABS issues standards for cassava chips and flour
- Composite wheat flour most promising in Channel 3
- Market monitoring results

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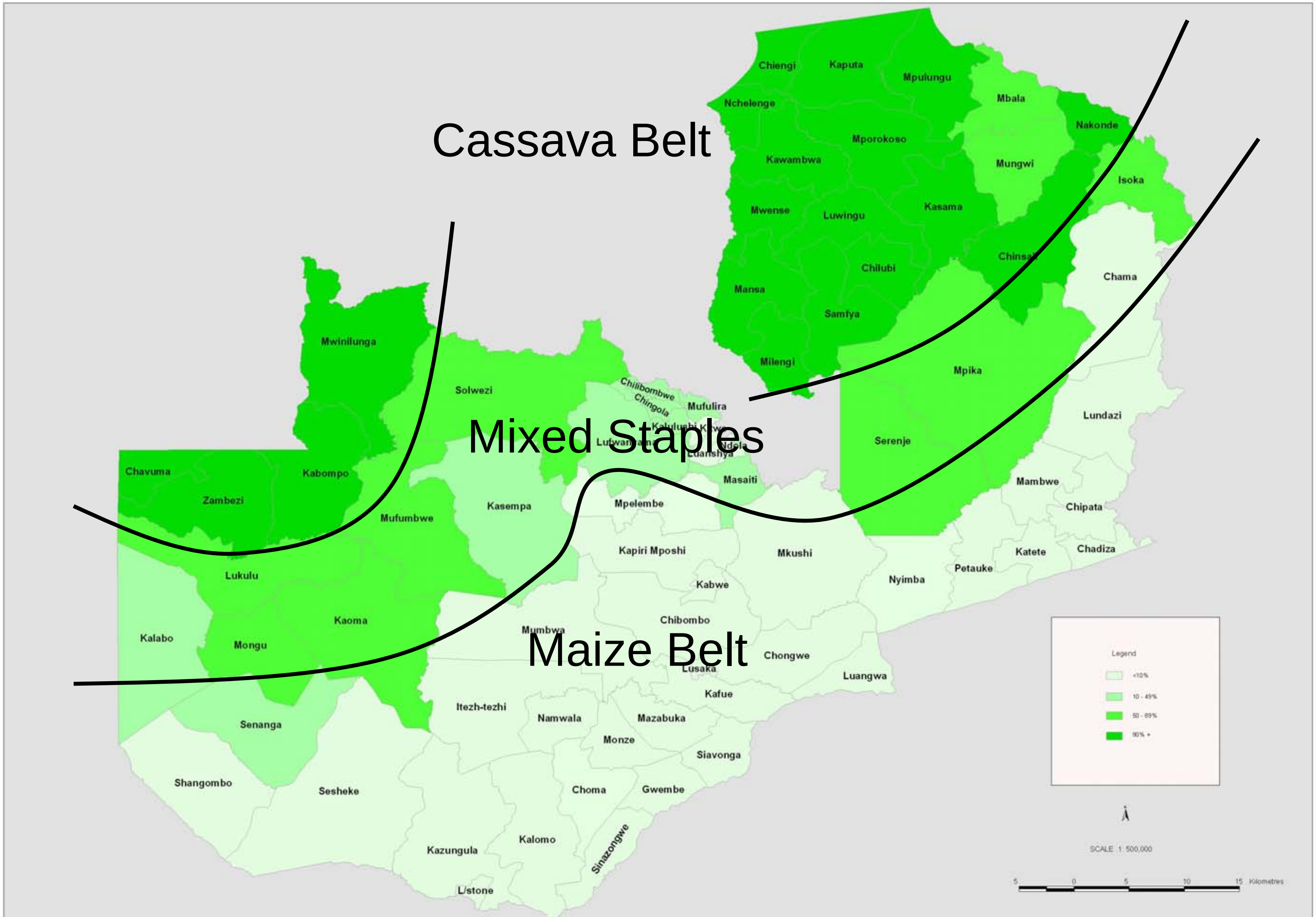
Food Staple Zones in Zambia



Characteristics of food staple zones

	Cassava belt	Mixed staple zone	Maize belt
Percent of households growing			
Cassava	96%	65%	3%
Maize	49%	85%	95%
Cassava prodn (kg/person)			
	280	120	40
Cassava commercialization			
% hh sell	26%	30%	45%
Sales/prodn	6%	10%	25%

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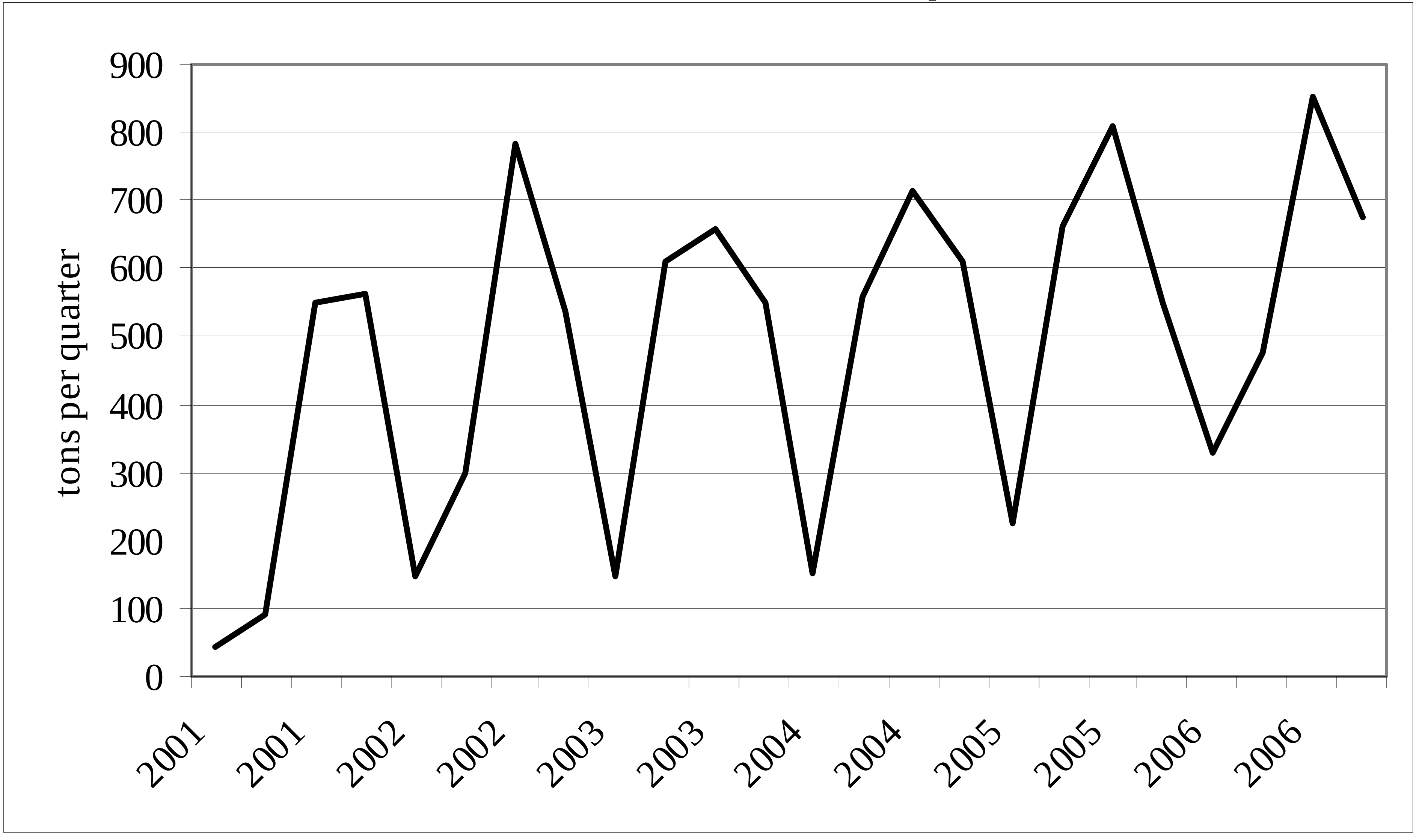
Where is the growth coming from?

	Cassava belt	Mixed staple zone	Maize belt
Production growth (early 1990's to early 2000's)			
% hh growing	+4%	+30%	+47%
Qty harvested	+17%	+50%	+17%
Marketing growth (increase in quantities sold)			
	+110%	+200%	+222%

Dried cassava transiting the Chembe border post



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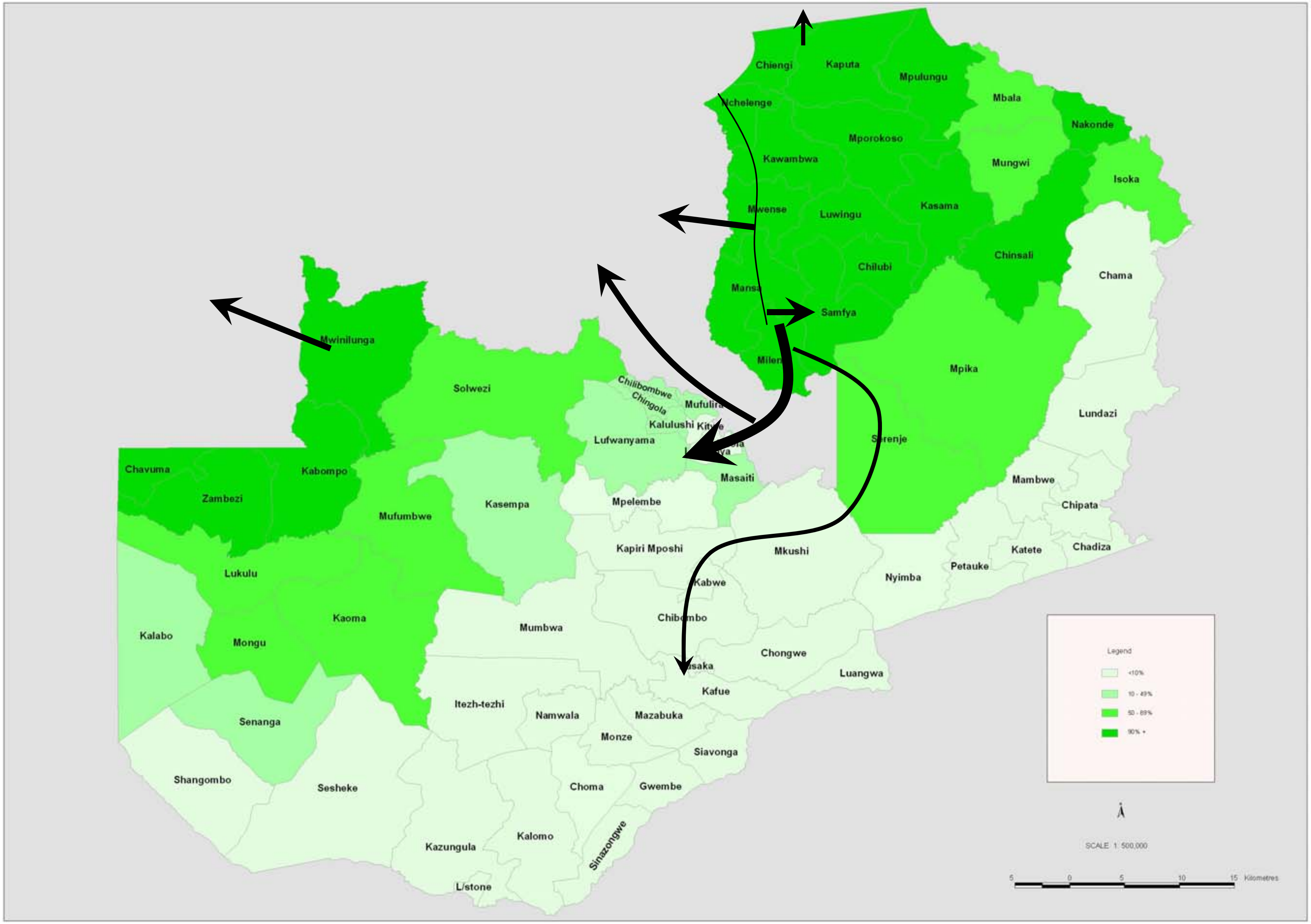
Dried Cassava Trade Flows



Cassava price

	Price cassava/ price maize
Cassava belt	0.5
Mixed staple zone	.066
Maize belt	1.2

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Key market opportunities

- Cassava belt:
  - Export of dried chips
  - Cassava-based convenience foods
  - Large-scale industrial processing (ethanol, sweeteners, starch)
- Maize belt:
  - Fresh sales during lean season
  - Feeds (if cassava price falls < maize)
  - Composite flours (if cassava price < maize)

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Task Force 2nd round

- Regional sub-committees (cassava belt and maize belt)
- Cross-country learning
  - food products
  - industrial products
  - technologies