

Inception workshop on ‘Impact Evaluation of Feed the Future Programs in Ethiopia (2013–2017)’

IFPRI and CSA have developed an impact evaluation strategy including baseline survey design and survey instruments. The USAID mission and the study team conducted a half-day workshop on April 16, 2013 at ILRI Campus. IFPRI and CSA presented the main aspects of the FTF evaluation strategy.



In addition, a training of trainers was undertaken at the Top Ten Hotel in Addis Ababa for 10 days (April 23–May 2). A one day piloting survey and a training of field supervisors will follow.

Impact Evaluation Training

The training aimed to acquaint the participants with the state-of-the-art impact evaluation methods and techniques, and contributed toward improving the quality of impact evaluation research in Ethiopia. Participants learned methods and techniques to use immediately in their empirical research.



The training was given by Guush Berhane and Neha Kumar to 33 participants from Addis Ababa University and different regional universities. April 23–24, 2013, ILRI Campus.

More Capacity Building

Tadesse Kuma, Seneshaw Tamru, Getachew Ahmed, and Kassahun Aberra gave a week long training on “Food Price Management in Ethiopia”. March 25–29, 2013. Ghion Hotel, Addis Ababa.

A training on “Introduction to Mendeley” was given by Indra Lamoot, collaborator of ESSP, to 11 participants from EDRI, ILRI, and CIMMYT. March 27, 2013. EDRI Meeting Room.

Upcoming Events

- A half-day workshop will be organized on “Sustainable Land Management Interventions and Impact” on May 10th, in collaboration with IWMI and EDRI, at the Hilton, Addis Ababa.
- Prof. David Stifel will give a training on econometrics at the Ethiopian Economics Association (EEA) from June 17–28, 2013.

Highlights of presentations in March – April, 2013

Ethiopia's Value Chains on the Move: The Case of Tef. Bart Minten. March 19, 2013, EDRI Meeting Room; and April 30, ATA. See back page of this newsletter.

Adaptation to Land Constraints: Is Africa Different? Derek Headey. April 5 and 12, 2013. Addis Ababa University.

- History shows that rural households are generally adapting to land pressures through agricultural intensification, reducing fertility rates, and nonfarm diversification. How does Africa adapt to land constraints?
- The analysis suggests that Africa is often acting differently. For example, agricultural intensification occurs through cash crops and not through cereals; desired reductions in fertility are not met because of lack of access to contraceptives; and the nonfarm sector does not grow without engines like education, infrastructure, and agriculture.

Women's Participation in Agricultural Cooperatives in Ethiopia. Thomas Woldu. April 12, 2013. Addis Ababa University.

- Women's participation in cooperatives is limited, both as members and as leaders. However, once women are members of cooperatives, they are likely equally interested in participating in meetings.
- Different factors determine women's participation in cooperatives. Women who are members of cooperatives come from households with an educated head and higher average level of education within the household; have higher family sizes in general and more women household members; are more likely heads of their households; are relatively older; and have held relatively more some sort of official, village, or traditional position. Cooperative leaders' characteristics also play a role; cooperatives with educated or trained leaders are more likely to have more female members.

The Implementation of the Productive Safety Nets Programme (PSNP) and the Household Asset Building Programme (HABP) in the Ethiopian Highlands, 2012: Programme Performance Report. April 19–25, 2013. Guush Berhane, Samuel Gidey, Mulugeta Handino, John Hoddinott, Neha Kumar, Jeremy Lind, Biniyam Nishan, Keetie Roelen, Alemayehu Seyoum Taffesse, Mulugeta Tefera, and Yisehac Yohannes.

The report was presented in four regional workshops organized in the four big regions (Oromia, Amhara, SNNP and Tigray). The regional workshops were well attended (more than 200 regional officials from food security and other sectors participated). The report was also presented at a federal workshop for federal officials, development partners, and other stakeholders. Key findings and the final report will be shared in due time.

New ESSP Publications

The Last Mile(s) in Modern Input Distribution: Evidence from Northwestern Ethiopia. Bart Minten, Bethlehem Koro, and David Stifel. ESSP Working Paper 51 and ESSP Research Note 24.

Ethiopia's Value Chains on the Move: The Case of Tef. Bart Minten, Seneshaw Tamru, Ermias Engida, and Tadesse Kuma. ESSP Working Paper 52.

Prices and Quality in Urban Food Retail: Evidence from Addis Ababa. Thomas Woldu, Girum Abebe, Indra Lamoot, and Bart Minten. ESSP Research Note 22.

Improving Development Strategies in Pastoral Areas. Derek Headey, Alemayehu Seyoum Taffesse, and Liangzhi You. ESSP Research Note 23.



Ethiopia Strategy Support Program II

Research Initiatives 2013:

- Agricultural Productivity: Performance and Constraints
- Determination of Food Prices
- Determinants of Adoption and Impacts of Sustainable Land and Watershed Management
- Dynamic Implications of Production Shocks and Policy on Livestock Markets and Household Welfare: A Sectoral and Economywide Analysis
- Aspirations, Risk, and Household Investment Behavior
- Agricultural Growth Program (AGP) Impact Evaluation
- Accelerating Agricultural Market Transformation in Ethiopia: Processes, Potentials, and Challenges
- Tef Value Chain
- Tef Technology Study
- Understanding and Improving Agricultural Extension Service Delivery in Ethiopia
- Weather Index Insurance
- Evaluating Feed the Future (FTF) Program
- Social Cash Transfer Program (SCTP)

Capacity Building Initiatives 2013:

- **Ethiopian Development Research Institute (EDRI)**
 - Support to EDRI SAM/CGE analysis
 - Support policy analysis on agricultural productivity, markets, and economic growth
- **Central Statistical Agency (CSA)**
 - Support to GIS analysis and federal and regional GIS training
 - Support impact evaluation of FTF and PSNP
- **Ministry of Agriculture (MoA)**
 - Support analysis of impact of agricultural extension and impact of new agricultural technologies
 - Support impact evaluation of the Agricultural Growth Program (AGP)
- **Agricultural Transformation Agency (ATA)**
 - Support the establishment and scouting of the Ethiopian Soil Information System geo-database and survey through GIS analysis
 - Support the teff research
- **Ethiopian Economics Association (EEA)**
 - Technical and financial support to the Price Dynamics Hub
 - Support the annual conference

Policy Related Analysis

Ethiopia's Value Chains on the Move: The Case of Tef by Bart Minten, Seneshaw Tamru, Ermias Engida, and Tadesse Kuma. ESSP Working Paper 52.

- Based on large-scale primary surveys we document important transformations that have been happening in the last decade upstream, midstream, as well as downstream in the tef value chain in Ethiopia.
- We find significant changes in the tef value chain in the last decade:
 - 1) There is increasing adoption of modern inputs (chemical fertilizer, improved varieties, and herbicides) by farmers, especially by those living close to urban centers.
 - 2) We note large changes in the type of tef produced: we see an increasing importance of magna and white tef at the expense of the cheaper red and mixed tef. This reflects that quality demands are rising.
 - 3) We see an increasing willingness-to-pay for convenience in urban areas, as illustrated by the emergence of one-stop retail shops—that provide sales, cleaning, milling, and transport services—as well as by a sizable foodservice industry.
 - 4) The share of rural–urban marketing, urban distribution, and milling margins in final retail prices is declining, indicating improved marketing efficiency over time.

Changes in production practices and operation of retail outlets

| | Unit | 10 years prior to survey | At time of survey |
|--------------------------------------|-----------|--------------------------|-------------------|
| Production—Modern inputs | | | |
| Adoption of improved seed | share (%) | 6.5 | 35.2 |
| Use of chemical fertilizer: DAP | kg/ha | 50.6 | 87.9 |
| urea | kg/ha | 35.0 | 63.8 |
| Adoption of herbicides | share (%) | 31.0 | 62.9 |
| Adoption of pesticides | share (%) | 3.9 | 11.5 |
| Production—Type of tef | | | |
| Red tef | share (%) | 36.0 | 19.7 |
| Mixed tef | share (%) | 15.8 | 10.7 |
| White tef | share (%) | 42.6 | 54.9 |
| Magna tef | share (%) | 5.6 | 14.7 |
| Retail—Services | | | |
| Customers that get home delivery | share (%) | 59.6 | 66.9 |
| Customers that clean at home | share (%) | 29.9 | 21.2 |
| Customers that only come for milling | share (%) | 30.1 | 25.4 |
| Retail—Competition | | | |
| Number of mills in the kebele | number | 6.1 | 9.7 |
| Number of cereal shops in the kebele | number | 2.9 | 3.6 |
| Often queuing of consumers | share (%) | 30.3 | 16.7 |

Source: Authors' calculations.

- Despite the progress, there are still a number of constraints that need to be addressed to facilitate further transformation in the tef value chain in Ethiopia: the use of improved varieties and chemical fertilizers is still low and mechanization is largely completely absent; we see very little vertical integration and coordination mechanisms between tef production and marketing; and there is little evidence of up-scaling of trade, of modern retail, and of branding, which are typically seen as agricultural market development gets underway.
- We find that there are high pay-offs to public investments in improved seed varieties of tef. The improved variety *quncho* has now been adopted by more than 30% of the tef producers in major tef producing areas (the first farmers only started adopting this variety three years ago). Those tef producers that adopted *quncho* achieved yields that were, on average, 10% higher than traditional varieties. If we assume that 50% of the tef producers in Ethiopia would adopt *quncho* and that the benefits would be sustained for a 20-year period, the internal rate of return for the investment toward developing *quncho* would be as high as 160%. As tef yields are still relatively low and as there is room for significant improvements, this clearly indicates the large potential benefit and returns for public investments in improved tef seed development.

IFPRI – ETHIOPIA STRATEGY SUPPORT PROGRAM II

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