

Coffee Value Chain Survey 2014

The Ethiopia Strategy Support Program (ESSP) gave training for 70 enumerators on a Coffee Value Chain Survey. The actual survey was conducted in February 2014.



The Coffee Value Chain study aims to unravel some tangible facts about the entire value chain to improve understanding of the sector. This will help in possible further policy discussions.

AGP 2nd Round Survey

AGP is a unique program to focus on 'non-drought-prone' zones of the country. It aims primarily to trigger fast agricultural growth, and consequently meet domestic demand for food, industrial inputs and exports.

In 2011, the AGP baseline survey report was presented on highly potential areas in the four main regions of Ethiopia.

In collaboration with CSA, ESSP undertook the second round impact evaluation survey using CAPI in 2013. Using Households, Woreda level and Community level information, the AGP implementation was assessed. The key findings were presented to respective donors on February 05, 2014 at Beshale Hotel. Currently, the AGP team is preparing a draft report on the impact evaluation.

New ESSP Publications

- Determinants and Impact of Sustainable Land and Watershed Management Investments: A Systems Evaluation in the Blue Nile Basin, Ethiopia. Emily Schmidt, Paul Chinowsky, Sherman Robinson and Ken Strzepek. 2014. *ESSP Working Paper 62*.
- Hydrological modeling of sustainable land management interventions in the Mizewa watershed of the Blue Nile Basin. Emily Schmidt and Birhanu Zemadim. 2014. *ESSP Working Paper 61*.
- Cows, missing milk markets and nutrition in rural Ethiopia. John Hoddinott, Derek Headey, and Mekdim Dereje. 2014. *ESSP Working Paper 63*

Upcoming Events:

- IFPRI 2020 Conference on "Building Resilience for Food and Nutrition Security". May 15-17, 2014. Addis Ababa, Ethiopia.
- Workshop on "Agricultural price policy in the context of rapid growth in Ethiopia". June 17, 2014. In collaboration with JMA/AMD and EDRI.

Highlights of presentations in January – March 2014

The Impacts of Rural Land Certification in Ethiopia: Empirical evidences from the Northern Highlands of Ethiopia. ESSP Working Paper 59

Hosaena Ghebru Hagos and Stein Holden. November 20, 2013.

Paper presented at Seminar on "Rural Land Certification in Ethiopia" organized by DFID-Ethiopia

- Land certification activity in the land rental market has had a positive effect, such that potential landlords have become more willing to rent out their land, especially female-headed households. Female-headed households with land certificates rented out significantly more land.
- Food availability has been enhanced through increased access to land through the land rental market for tenant households. This has important implications.
- Ethiopian land reform has improved land security, despite there being no full private property rights to land, no open sales markets for land, no open mortgaging of land.

The Impacts of Rural Land Certification in Ethiopia: Evidence on the Impact of Investments and Policies

Hosaena Ghebru. December 13, 2013. Hilton Hotel.

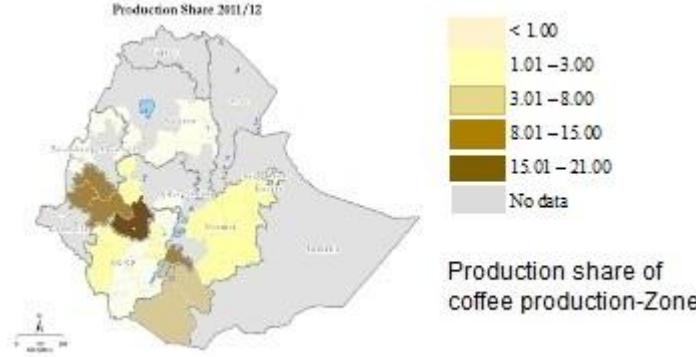
- Land certification has contributed to increased investment in trees, better management of soil conservation structures and higher land productivity.
- Land certification has enhanced land productivity, reduce land conflicts, reduced poverty especially of female headed households and land rental market participation.

Structure and performance of Ethiopia's coffee sector

Bart Minten, Seneshaw Tamru and Tadesse Kuma. 18-Mar-14.

EDRI Meeting Room and 19-Mar-14, Ministry of Agriculture.

- There are strong price differences between destination markets; partly explained by differences in quality demands
- Low coffee yields in Ethiopia; potential for growth with increasing support; better assessment at farm level needed in order to better understand constraints
- Two-thirds of Ethiopian coffee could be qualified as speciality coffee.



Production share of coffee production-Zone

Capacity Building

- EGTE Staff Training. Helina Tilahun and Mekdim Dereje. EGTE meeting room. November 14, 2013
- Intermediate GIS Course. Emily Schmidt, Helina Tilahun, Hailu Shiferaw and Mekamu Kedir. EDRI Meeting Room. December 10-12, 2014
- Training Course on the Design and Implementation of Social Protection Programmes in Ethiopia. 23-28, 2013. Eshetu Chole Building.
- Introduction to Geographic Information Systems. Sisay Guta, Atreshiwal Girma, Abiy Wogderes and Helina Tilahun. March 3-8, 2014.
- A training course on "CGE Modeling" has been given for 43 students at Addis Ababa University from March 24-28, 2014 by Prof. Sherman Robinson, Dr. Mateusz Filipski and Dr. Arthur Gueneau.

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Ethiopia Strategy Support Program II

Research Initiatives 2014:

- Productivity, technology adoption, and agricultural transformation
- Agricultural markets, value chains, and agro-industry
- Food and agricultural prices
- Risk, insurance, and investment
- Land and water management
- Poverty, nutrition, and safety nets
- Productive Safety Net Program (PSNP) Impact Evaluation
- Agricultural Growth Program (AGP) Impact Evaluation
- Feed the Future (FTF) Program Impact Evaluation
- Social Cash Transfer Program (SCTP)

Capacity Building Initiatives 2014:

- **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

Cows, missing milk markets and nutrition in rural Ethiopia

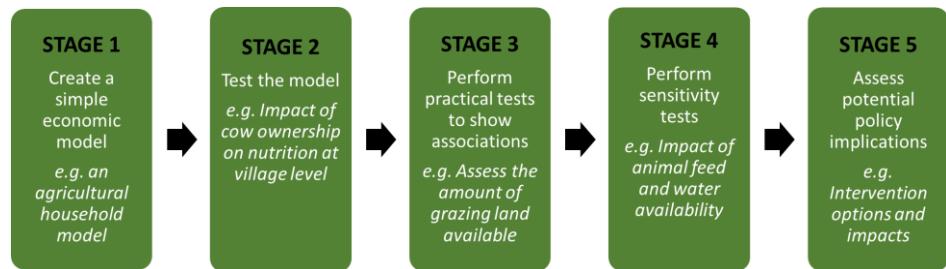
John Hoddinott, Derek Headey and Mekdim Dereje - ESSP Working Paper 63

Overview

Household cow ownership in rural Ethiopia is critical for income and nutritional purposes, especially amongst young children. However, cow ownership alone does not solely have dietary impacts. By investigating access to local markets as potential substitutes to cow ownership, we discover some important results pertaining to these perishable milk products.

Study Set-Up

In rural communities, cattle signify wealth and insurance, as well as a dominant source of dairy products and meat. The nutritional value of milk cannot be understated, yet within Ethiopia, the milk sector yields a fraction of its potential. To establish understanding of the complex relationship between cows and malnutrition, we drew data from Ethiopia's Agricultural Growth Program (AGP) from the four regions in the Ethiopian Highlands. The number of households sampled was 7,930. We took a **5-staged approach**:



Key Findings

- Cow ownership increases milk consumption and linear growth of young children well beyond estimated impacts
- Large reductions (6-10%) in the probability of stunted growth in children
- Village cow ownership positively affects milk consumption and linear growth, even if the household ownership is marginal
- Market access, whether formal or informal, helps develop markets to support children's milk consumption and growth trajectories

Policy Implications

Chronically undernourished children are less likely to perform well in school and likely to be less economically productive as adults. Therefore reducing chronic under-nutrition has high economic returns. Given the results of this study, we identify 3 possible classes of increasing intervention:

Cow Ownership Dairy Productivity Dairy Market Development

Each has varying degrees of sustainability with regard to their benefit in the resource-constrained Ethiopian highlands. Nevertheless, by improved productivity and marketing in the dairy sector and scaling up the livestock budget, these are likely to yield sustainable benefits both economically for farmers and nutritionally for children. At the same time though, attention should focus on technologies for reducing perishability and health risks of milk products in order to transform this essential source of child nutrition.