FOOD SECURITY RESEARCH PROJECT – ZAMBIA
Second Quarter Report, 2007
(April 2007 to June 2007)

A Collaborative Research, Capacity Building, and Policy Outreach Project

between

The Ministry of Agriculture and Cooperatives (MACO)
The Agricultural Consultative Forum (ACF)
The Central Statistical Office (CSO) / Ministry of Finance
Michigan State University’s Department of Agricultural Economics (MSU)
United States Agency for International Development/Zambia (USAID)
Swedish International Development Agency (SIDA)

Food Security Research Project Web Site
http://www.aec.msu.edu/fs2/zambia/index.htm
<table>
<thead>
<tr>
<th>Acronyms</th>
<th>Description</th>
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<tr>
<td>ACF</td>
<td>Agricultural Consultative Forum</td>
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<td>AFS</td>
<td>Agriculture and Food Security</td>
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<td>AIM</td>
<td>Agricultural Input Marketing</td>
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<td>AMIC</td>
<td>Agriculture Marketing Information Centre</td>
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<td>COMESA</td>
<td>Common Market Eastern and Southern Africa</td>
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<td>CSO</td>
<td>Central Statistics Office</td>
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<td>ECAPAPA</td>
<td>Eastern and Central Africa Programme for Agricultural Policy Analysis</td>
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<td>FANRPAN</td>
<td>Food Agriculture and Natural Resources Policy Analysis Network</td>
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<td>FRA</td>
<td>Food Reserve Agency</td>
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<td>FSRP</td>
<td>Food Security Research Project</td>
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<td>GART</td>
<td>Golden Valley Agricultural Research Trust</td>
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<td>INESOR</td>
<td>Institute for Social and Economic Research</td>
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<td>MACO</td>
<td>Ministry of Agricultural and Cooperatives</td>
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<td>MATEP</td>
<td>Market Access, Trade and Enabling Policies</td>
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<td>MCTI</td>
<td>Ministry of Commerce, Trade, and Industry</td>
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<td>MFND</td>
<td>Ministry of Finance and National Development</td>
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<td>MSU</td>
<td>Michigan State University</td>
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<td>NAIS</td>
<td>National Agriculture Information Service</td>
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<td>PSD</td>
<td>Private Sector Development Group</td>
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<td>SAKSS</td>
<td>Strategic Analysis and Knowledge Support System</td>
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<td>SIDA</td>
<td>Swedish International Development Agency</td>
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<td>UNDP</td>
<td>United Nation Development Programme</td>
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<td>UNZA</td>
<td>University of Zambia</td>
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<td>VAT</td>
<td>Value Added Tax</td>
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<td>ZBF</td>
<td>Zambia Business Forum</td>
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<td>ZNFU</td>
<td>Zambia National Farmers Union</td>
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1. **Brief Overview and Facts**

**Cooperating Institutions**

- Ministry of Agriculture and Cooperatives (MACO), Economics and Market Development Department: Policy and Planning Branch and Marketing Development Branch
- Ministry of Finance and National Development (MFND)
- Ministry of Commerce, Trade, and Industry (MCTI)
- Agricultural Consultative Forum (ACF)
- Central Statistical Office (CSO), Agriculture and Environment Division
- Golden Valley Agricultural Research Trust (GART)
- University of Zambia (UNZA), Institute for Social and Economic Research (INESOR)
- Food Reserve Agency (FRA)
- Agency for International Development, Zambia Mission (USAID/Zambia)
- Agency for International Development, Bureau for Economic Growth, Agriculture and Trade, Office of Agriculture and Food Security (EGAT/AFS)
- Department of Agricultural Economics, Michigan State University (MSU)

2. **Objectives**

FSRP’s mandate is to contribute to effective policy dialogue, capacity building, and ultimately an improved agricultural policy environment in Zambia, through collaboration with government and the private sector. The FSRP aims to achieve these objectives through in-service capacity building, applied analysis, and policy outreach. A hallmark of the MSU/FSRP approach is the “joint products” approach, whereby training, applied research, and outreach are undertaken collaboratively with in-country stakeholders and government counterparts. The “joint products” approach is designed to achieve these broad results:

*Capacity building* for local Zambian counterparts, including training in the design, implementation, and analysis of household-level and market-level data collection for policy analysis and priority-setting purposes. This is accomplished mainly through in-service training of public and private sector collaborators, but also through training courses and seminars targeted to specific government organizations where improved analytical capacity is most needed;

*Applied research* to provide baseline information on smallholder production patterns and crop mix, input use, marketing behavior, measures of farm productivity, farm and non-farm incomes, food purchases and consumption, and other basic household-level information necessary to monitor the impacts of changes in the agricultural policy environment on selected socio-economic and regional groups in Zambia; and

*Outreach activities* to liaise with ACF, MACO, and other public and private policy making groups in Zambia on strategies for promoting smallholder agricultural productivity and income growth, and household food security in support of improved agricultural policy making in Zambia.
To carry out its research mandate, the FSRP in Zambia aims to: (a) strengthen the capacity of MACO, ACF, and other local institutions and government agencies responsible for food security in Zambia to carry out applied research and policy analysis on food security; (b) strengthen the capacity of MACO, Ministry of Finance and National Development, and Ministry of Commerce, Trade, and Industry to help coordinate research on national food security issues; (c) strengthen the Central Statistical Office (CSO) to carry out surveys, manage and process data, and perform basic analyses useful to policy makers; and (d) strengthen MACO’s management and implementation of agricultural marketing information services.

3. Implementation Approach of the Food Security Research Project

The FSRP’s main base is its field office in Lusaka. Field office research fellows and research specialists collaborate intensively with MSU campus-based staff on analysis and outreach efforts. This is complemented by frequent TDY visits of campus faculty to Zambia to work with the Lusaka-based team and officials from local collaborating organizations.

The FSRP’s substantive research and outreach activities are guided by the FSRP’s semi-annual Advisory Board consultations. From these Board meetings, an agenda for research, technical support, and outreach activities is identified and approved. Members of the Advisory Board include MACO, ACF, INESOR/UNZA, CSO, USAID, and FSRP.


I. Public Investment Allocation for Promoting Agricultural Growth

1. National Agricultural Expenditure Accounts

- A draft report on methodology for tracking public agriculture expenditure was developed. The report was submitted for review by ReSAKSS-SA.
- Another FSRP working paper “Methodological Guidelines for Data Collection on Agricultural Spending with Illustrations from Zambia” was drafted and is being reviewed. Again, Re-SAKSS/Southern Africa is using this study as a guide for replication in other countries in the region. The study was presented at a Re-SAKSS meeting in May 2007 to help monitor progress under the CAADP.

2. Returns to alternative agriculture expenditures

- FSRP team members continued to liaise with local stakeholders and donor groups informally on the desirability of GZR budget reallocations to public goods investments needed to catalyze growth and poverty reduction in Zambia’s agricultural sector.
II. Productive Assets: Options for Sustainably Increasing Productivity and Incomes

1. Land access, agricultural growth and poverty dynamics in Zambia

- Draft of FSRP working paper on land is was reviewed and updated with materials from Zambia Land Alliance and other recent events on land in Zambia.
- Draft research outputs from the World Bank funded study of tourism and game management areas in Zambia were obtained and studied.

2. Alternative strategies for maintaining soil productivity

- Review of the Post-Harvest and Supplemental Survey Instruments through time has been completed. Discussions in this quarter at GART and ZNFU indicated that including an analysis of draught animal stocks and animal traction use over time would be valuable for evaluating the recommendation domain and constraints to animal traction Conservation Farming adoption. This analysis on animal traction will be concluded in Q4/2007 with a Policy Synthesis, and with a working paper on more general CF usage over time completed in the following quarter.
- Working Paper # 23 on farm-level profitability of the ripper was completed and posted on the FSRP website. The research results were presented in seminars in the previous quarter at GART and at MACO for ZARI researchers. Their comments and ideas were included in this final working paper. The research has helped guide new investments by CFU in the animal traction CF. An extension of this research based on the current extension efforts may be developed, pending arrangements with CFU and other partners.

3. Labor supply, HIV/AIDS and agriculture

- Progress was made on the working paper on widow’s access to land in the HIV/AIDS. This paper will be finalized for publication as a FSRP working paper by September 2007. Chapoto and Jayne will carry forward outreach activities on this work in Zambia and internationally over the next few months
- A cross country analysis: characteristics of dying individuals. Work during the quarter helped bring this study to the final stages, and will be circulated for comments within the group by early September. Chapoto and Jayne will carry forward outreach activities in Zambia and internationally over the next few months. We also would like to produce a series of updated reports/policy syntheses with the new Mozambique results incorporated in.
- Community effects of HIV/AIDS. This study has been finalized and is already on the FSRP web site. We envision additional outreach activities involving this work in conjunction with other outreach activities in Zambia as indicated above.
- Work continued on analysis of the dynamics of food security vulnerability in the presence of HIV/AIDS. A draft final report has been finalized and circulated for internal comment.
• Impacts of food aid on AIDS afflicted households. Analysis continues is progressing; we hope to have initial results to circulate to others and to NGOs for their comments by Q4 2007.

4. Natural Resource Management

• Studies were reviewed to obtain ideas to be include in the urban food consumption survey on charcoal consumption and cooking devices
• Background documents and contacts were developed by Dr. Richardson’s trip to assist FSRP team members to begin exploring work in the natural resource/
• Short-term visit by Dr. Richardson of MSU to make preliminary contacts with researchers and stakeholders in Zambia on natural resources and rural household participation and benefits from natural resource based tourism. This included liaisons with MATEP, ASNAPP, SNV and World Bank researchers and policy makers working on natural resource and tourism development in Zambia.
• FSRP staff participated and presented in the Global Environmental Change and Food Systems (GECAFS) Launch Workshop for the GECAFS research initiative for southern Africa (GECAFS-SAF) held in conjunction with FARNPAN and ACF. Hosted by the Agricultural Consultative Forum of Zambia, Lusaka, 26 – 27 June 2007.

III. Marketing and Trade: Policies Affecting Input and Output Markets

1. Maize Value Chain

• Presented empirical findings on Zambia maize and fertilizer marketing to DFID and EU technical and policy interest groups, including MACO leaders (the PS and the Minister).

• Developed and presented written and oral testimony to the Parliamentary Committees on Agriculture and Lands on Agricultural Marketing and Finance Systems in Zambia on May 2, 2007.


• Participated in the Re-SAKSS Southern Africa regional meeting in Lusaka on May 29-30, which was designed to track public expenditures to agriculture. In the Zambia-specific analysis under Re-SAKSS, financial costs and losses resulting from maize importing, trading and stockholding operations were found to be an important component of public expenditures to agriculture, although their contribution to smallholder productivity is controversial. Discussions concluded that the inclusion of maize imports may be somewhat inconsistent with the objective of monitoring government commitment to promoting productive investments to support smallholder agriculture as stated in the Maputo Declaration, and that further refinement of the indicators being monitored will be required to come up with meaningful indicators to track trends in public support for agriculture over time.
• Continued work on finalizing the Zambia maize value chain report, including additional analysis of smallholder maize marketing behavior, with one additional policy brief due out shortly from this work.

• Continued work on the study of maize price instability and uncertainty in Zambia. The objective of this work is to identify how FRA and discretionary trade policy decisions have affected the level and volatility of wholesale maize prices in Zambia. In the coming quarter work on identifying opportunities to improve food security and rural income growth, and urban maize consumption patterns and food security policy in Zambia will continue. Some analysis will be done, based on information from the Urban Survey, to understand whether the demand for maize may be declining in favour of wheat and cassava, and implications for policy

2. Cassava Value Chain

• Support to the ACU Task Force. FSRP has continued to work with the cassava task force on a series of activities. The draft standards for cassava chips and flour were reviewed by the technical committee and formally submitted for public review during this quarter. The team has likewise worked with task force colleagues to help launch the Northern Zambia and Southern Zambia wings of the task force. 

• Cassava market monitoring. FSRP continues to monitor weekly prices and quantities in Kitwe and Lusaka markets. In addition, the FSRP team conducted a rapid appraisal of fresh cassava markets around Lusaka, including a field visit to the prime supplying area in Rafuntsa. We are working with the Japanese cassava project to help translate the commercial leads into expanded fresh cassava marketing in central and southern Zambia.

• A Task Force Approach for Managing Value Chain Interventions. This working paper has been completed and published. It is being used for outreach in Zambia with the ACU. A reduced version of it is currently out for review with the Journal of Development Studies.

• Dynamics of Zambia's Cassava Value Chain. The team investigated fresh marketing systems in Central Zambia during the current quarter and continued statistical analysis of the 15 years of PHS production and marketing data. Next quarter, the team will make a final field trip to Northwestern and Western Zambia to complete the field work for this study.

• Economic analysis of cassava production & processing. This work will begin in the first quarter of 2008.

• Explore options on commercial cassava and other crop opportunities in Luapula. In September, FSRP will discuss with PLAARD staff in Mansa what their needs and intended outcomes are for this effort.

3. Horticulture Value Chain

• Continued the study of horticultural pricing dynamics and trade flows in Lusaka and in this respect continued the collection and analysis of market volumes and price data from Soweto Market and some selected retail markets; and analyzing the collected data with a
view to understanding the markets. A mobile phone horticultural market information system will be designed to provide information on market process.

- Focus group discussions were held at Soweto Market in early June with some first sellers (30 participants) of tomato, rape and onion to familiarise them with the ZNFU SMS market information system and review the information we have been capturing from the markets and how it would be built into the horticultural market information system. The first sellers were greatly interested in having access to such an information system. The designed system will be shared with stakeholders once finalized within the next quarter during which it will be implemented on a pilot basis.

- Continued working on the report on wholesale-retail market linkages in Lusaka’s horticultural markets based on data generated and processed from the snap-shot survey of retail traders in main markets around Lusaka conducted earlier in the year. The report will be finalized in the coming quarter and results will be shared with sector stakeholders including SHEMP, ZNFU, UMDP, Marketeer Cooperatives, MACO and the Ministry Local Government and Housing.

- Continued preparations for the Urban Consumption Survey. The Sample Design and the Household Listing instrument have been completed. The questionnaire is almost ready for pre-testing. In the coming quarter, will work on household re-listing, pre-testing of the questionnaire and the training of enumerators and undertake actual data collection in August 2007. Will also work at finalizing the design and implementation of the pilot fresh produce price/market information system, and the report on “Wholesale-Retail Market Linkages in Lusaka’s Horticultural Markets”. Work on “Price Dynamics in Lusaka Horticultural Trade” will continue.

4. Cotton Value Chain

- Continued work on finalising the draft report of the “Multi-Country Review of the Impact of Cotton Sector Reform in sub-Saharan Africa – Zambian Country Study”. An outreach event based on the study is being arranged for October.

- Presented a new Cotton Policy Brief at an informal meeting of the Cotton Working Group, highlighting the success story and challenges of the sector and why the sector needs an effective and workable Cotton Act. Revised the brief on the Cotton Act incorporating comments from stakeholders, and presented the revised brief at formal meeting of the Working Group and the Minister of Agriculture and Cooperatives. The Minister promised to push for the enactment of the revised Cotton Act and MATEP/FSRP will continue to push for the enactment of the Act. The Cotton Working Group will be working with the office of the Minister to make consultation with the Ministry of Justice over the Cotton Act. An outreach event will be organized in late July/early August where a Multi Country Review report would be presented. The Multi Country Review report will be finalized and follow up research on cotton will be initiated.
5. Fertilizer Value Chain

- Continued benefit/cost analysis of the Fertilizer Support Program and has been aiming to conduct further outreach on this topic, including to the Ministry of Finance and National Planning. This subcomponent deals with the issue of subsidy distribution by the state vs. development of a sustainable private sector distribution system within the context of the Agricultural Input Marketing Plan (AIMDP). FSRP’s objective in this work is to ultimately identify politically feasible options for improving small farmers’ access to fertilizer and using it in cost-effective and profitable ways, so as to promote sustainable rural productivity growth.
- Participated in the Re-SAKSS Southern Africa regional meeting in Lusaka on May 29-30 which was designed to track public expenditures to agriculture. In the Zambia-specific analysis under Re-SAKSS includes fertilizer subsidies, and some discussion on this was held during the meeting. FSRP/MATEP is leading a regional analysis of fertilizer promotion programs in Zambia, Malawi, and Kenya to provide insights in Zambia on how its program is measuring up (in terms of benefits and costs, effects on overall agricultural production, and on the development of the private fertilizer industry) compared to fertilizer promotion efforts in other countries in the region.
- Made a presentation to Farmer Organization Support Programme (FOSUP). Lusaka, Zambia. June 1, 2007. In the coming quarter undertake follow up research on the analysis of fertilizer profitability as well as interactions with stakeholders on the AIMDP will continue during the quarter.

6. Regional Trade Perspectives on Food Staples and Input Markets


7. Alternative Instruments for Stabilizing National Food Availability and Prices

- Progress was made in this quarter on an FSRP working paper “Alternative Instruments for Stabilizing National Food Supplies and Prices” by S. Haggblade in collaboration with Simon Dradri and Paul Dorish. Expect to publish in the next quarter.
- XX

IV. Consumption Behavior of Urban and Rural Households

- Urban food consumption survey instrument finalized and pretested.
- Listing undertaken with CSO for urban sample selection
- Training undertaken jointly with CSO staff completed for survey enumerators.
V. Household Impacts and Behavior

- Smallholder income and growth dynamics: This work is proceeding, albeit slowly due to the need to focus on the urban household survey. We hope to make more progress on this study in the fourth quarter of 2007.

- Trends in Zambia Smallholder Agriculture. This work has been delayed due to methodological problems found in recent PHS surveys. We are working with CSO to explain how these problems affect the integrity of their national PHS production estimates, and to identify possible ways to correct for these problems. Dealing with these problems is time consuming and requires intensive interactions with CSO management. This study, which relies on computing trends in crop production based on annual PHS surveys, cannot proceed until CSO modifies its past PHS production estimates and resolves to redress these problems in future PHS surveys.

- Trends in Food Security Vulnerability: A draft report from this study has been produced. The report has been circulated internally for comments, and will be finalized in the third quarter of 2007.

- Finished report on local procurement of food aid in Zambia; report awaiting publication as FSRP working paper.

- Finished report on Africa-wide experience with local and regional procurement of food aid; Zambia had a prominent role in this report. Outreach was conducted in Washington with FFP leadership, and also through the Partnership to Cut Hunger and Poverty in Africa, which organized a special session with industry, NGO, and government representatives.

- Finalized agreement with Africa Bureau in Washington to finance the development of GIS-based decision tools for assisting in the decision between food- and cash-based responses to food emergencies and on-going social protection mechanisms. Given CSO’s excellent data resources for this work and their regular reliance on food aid, we propose to first develop the tools in Zambia.

VI. General Policy Research and Outreach Support, Including Zambian Collaborator In-Service Strengthening

- Margaret Beaver worked with GART and ZARI staff to evaluate their current database methods in order to assist in the design of systems for socioeconomic analysis. This work is a precursor for further training in the analysis of agricultural technologies.

- A regional workshop was organized by FSRP on behalf of ReSAKSS – SA to debate data and procedure issues in the draft and develop terms of reference for tracking public agricultural expenditures in Malawi and Mozambique. Permanent Secretary for Agriculture gave a keynote address.

- A letter of agreement between ReSAKSS – SA and MSU/FSRP was finalized and put into the signature process. The public expenditure work is only part of the activities to be conducted under this $125,000 agreement.

- Have engaged JCTR in discussions for possible collaboration in both research and outreach. JCTR’s social conditions research could benefit from research FSRP is doing.
• Engaged MACO leadership – Permanent Secretary and Minister of Agriculture and Cooperatives. The two leaders missed out on a dialogue meeting in Nov 2006. Gave the Ps and Minister first hand access to the discussions in Nov.
• Summoned by parliamentary committee on Lands and Agriculture to appear before it on 2nd May, 2007 as witnesses and present evidence on agricultural marketing and finance in Zambia.
• Project exhibited at the 2007 Agricultural Show jointly with ACF. Our recent products were circulated.
• Attended ACF strategic planning workshop and retreat to discuss ways of collaboration on ACF’s new core function of policy research.

VII. Staff changes

• None this quarter.

VIII. Project Visitors

• ReSAKSS-SA, AU, HSRC – SA, IFPRI and participants from Malawi and Mozambique visited Zambia to attend an FSRP organized workshop in May on Methods of Tracking Public Agricultural Expenditure.
• PLARD (FINIDA project) represented by Mr Mpiya and Ms Gun Mickels visited FSRP to seek collaboration in research to inform their development work in Luapula province.
• Thom Jayne, Jim Shaffer, Cynthia Donovan, Steve Haggblade and Dave Tshirely visited in this quarter to assist FSRP staff in various activities related to the work plan
Most Recent Research and Outreach Publications Added to Web Site- 2nd Quarter - 2007

Policy Syntheses


Research Reports


Policy Presentations


  - Written Submission
  - Oral Presentation


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<th>FSRP Work Plan Focus Areas and Sub Areas</th>
<th>PMI USAID Zambia Indicators</th>
<th>FSRP WP/PS # s</th>
<th>1.1. Trade and Investment Enabling Environment</th>
<th>1.2. Trade &amp; Investm. Capacity</th>
<th>3.4 Agriculture Enabling</th>
<th>3.5 Agriculture Productivity</th>
<th>4.6 Private Sector Competitiveness</th>
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<td>(USAID Indicator Targets for FY 07)</td>
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<td>1.1 National Agricultural Expenditure Accounts</td>
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<td>1.2 Returns to alternative agriculture expenditures</td>
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<td>2.2. Alternative strategies for maintaining soil productivity</td>
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<td>2.4 Natural resource management</td>
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<td>3. Marketing and Trade: Policies Affecting Input and Output markets</td>
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<td>3.1 Maize value chain</td>
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<td>3.5 Fertilizer value chain</td>
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<td>3.7. Alternative instruments for stabilizing national food availability and prices</td>
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<td>4. Consumption Behavior of Urban and Rural Households</td>
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<td>4.1. Trends in rural and/or urban consumption</td>
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<td>5.3. Improved emergency response</td>
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