FOOD SECURITY RESEARCH PROJECT – ZAMBIA
Third Quarter Report, 2007
(July 2007 to September 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
**Acronyms**

<table>
<thead>
<tr>
<th>Acronym</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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<tr>
<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>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.

4. Status of FSRP Activities in Third Quarter 2007

I. Public Investment Allocation for Promoting Agricultural Growth

1. National Agricultural Expenditure Accounts

- The paper on methodology for tracking public expenditure which was drafted in 2ndQ was reviewed by ReSAKSS and revised jointly by MACO and FSRP.
- FSRP Working Paper “Raising the Productivity of Public Investments in Zambia’s Agricultural Sector. J. Govereh, J.J. Shawa, E. Malawo, and T.S. Jayne.” was published. Numerous discussions and seminars with agricultural sector stakeholders in Zambia have been initiated based on this study. The study served as a prototype for ReSAKSS/Southern Africa to initiate similar agricultural expenditure reviews in other Southern African countries.
- Following the adoption of the comprehensive definition of public agriculture expenditure and using the Zambia Budget Estimates for 2007, a spreadsheet which contains all the various expenditure items that qualify was developed. This will contribute to forthcoming work on spatial analysis of public spending in agriculture in Zambia.
2. Returns to alternative agriculture expenditures

- Progress is slowly being made on analysis of the effects of the FSP fertilizer program on smallholder maize production, the profitability of fertilizer use, and effects on the development of the commercial retail system within a cost-benefit framework. Outreach and an initial draft report are scheduled for late 2007. This analysis will be based on the 1999/00 and 2002/03 crop seasons. The report will analyze (a) profitability of using fertilizer on maize under a range of alternative scenarios found among smallholder farmers; (b) differences in fertilizer’s contribution to maize production between households using FSP fertilizer vs. those purchasing fertilizer from commercial retailers; (c) crowding out effects; (d) targeting of FSP fertilizer; and (e) alternative strategies for improving the profitability of fertilizer use by smallholder farmers and hence raising the demand for fertilizer in Zambia. FSRP is arranging outreach activities for this study starting in late 2007. Currently preparing draft FSRP working paper and policy synthesis.

II. Productive Assets: Options for Sustainably Increasing Productivity and Incomes

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

- Additional analysis was done on the draft land paper using 99/00 as well as 02/03 PHS/SS survey data. Efforts were also made to review recent Zambian policy discussions on land access and land administration to relate these well in the policy section of the land working paper.
- Discussions were held with ZNFU, MACO, CSO and ASP project about the “commercial farm” survey and listing of all commercial farmers in Zambia. This supports FSRP workplan objectives of understanding household-level growth and poverty dynamics. Preliminary lists of all commercial farmers were obtained from various sources and are being compared to identify information consistency and gaps in knowledge.

2. Alternative strategies for maintaining soil productivity

- A revised concept note on the analysis of trends in conservation farming has been developed, and analysis will build on earlier work presented to the World Congress of Conservation Agriculture in 2005.
- A concept note and draft outline for research on animal traction has been developed, associated with the animal traction issues for conservation tillage, based on analysis of PHS and Supplemental Survey data. This research was identified in the previous quarter. A policy brief will be developed with a working paper to follow, if the datasets permit more in-depth analysis.
- FSRP staff participated in a consultative meeting at GART where research problems were highlighted by Conservation Farming Unit. This meeting was to help us to identify researchable issues and priorities. One area of possible research is the links between CF and mitigation of HIV/AIDS impacts.
3. Labor supply, HIV/AIDS and agriculture

- Research was completed on a test of the new variant famine (NVF) hypothesis using district level panel survey evidence from Zambia. Nicky Mason presented preliminary findings from this work, done in collaboration with Drs. Jayne, Chapoto and Myers, at the African Economic Research Consortium (AERC)-Cornell conference in May 2007 in Nairobi. This paper is currently being revised so that it can be used for outreach in Zambia and also be submitted along with other AERC-Cornell conference papers to the African Development Review by early next month.

- Chapoto, Jayne and Mason finished and published a working paper and policy synthesis on Security of Widows’ access to land in the Era of HIV/AIDS. To some extent, findings from this study supports the view that widows and their dependents in rural areas of Africa face greater livelihood risks of losing their land after the death of her husband. The paper highlights that efforts to safeguard widows’ rights to land by mobilizing support among traditional authorities to better understand the social and economic impacts of existing land inheritance institutions may have high economic, social, and health payoffs. Outreach events from this work will be carried out through out the 4th quarter 2007 with local communities, policy makers and interested NGOs.

- Work on Impacts of food aid on AIDS afflicted households is slowly progressing. We hope to have initial results to circulate to others and to NGOs for their comments by Q4 2007.

- Chapoto and Weber participated in SIDA sponsored workshop in Lusaka on HIV/AIDS and Food Security work being done by various SIDA supported project. Distributed and discussed informally the recent work on security of widow’s access to land in the era of HIV/AIDS.

- Chapoto and Weber also established contacts with the HIV/AIDS outreach program of PANOS Southern Africa (office in Lusaka) to initiate collaborative work PANOS/FSRP on community-level outreach and feedback from the FSRP work on widow’s access to land.

4. Natural Resource Management

- Additional literature searches were conducted on selected natural resource issues in the news in Zambia, including information on the investment potential of Jatropha curcas, (biodiesel tree,) for energy production and other uses in Zambia.

- Insights from the review of charcoal studies were used to design and finalize the coverage of charcoal use and other heating devices in urban food consumption survey. Charcoal was also included as one of the products covered in the price surveys done to complement the urban consumer surveys done.

- FSRP staff in Lusaka cooperated with Dr. Richardson to outline a short paper to be written on the analysis of charcoal/fuelwood production in rural Zambia with policy implications for poverty reduction. This work would be circulated in Zambia and also presented at a regional science association international (RSAI) meeting in Savannah, GA, November 7-10, 2007

- FSRP participated and presented at the RIHN’s (Vulnerability and Resilience of Social-Ecological Systems) - First Lusaka Workshop, Sept 3, 2007. The RIHN work is being done in cooperation with ZARI. FSRP presented information on perspectives from studies underway in Zambia of urban/rural food marketing systems. Prepared by M.T. Weber and the MACO/ACF/FSRP/MATEP Research/Outreach Team.
FSRP staff also searched the Zambia and international literature, as well as making contacts with Zambian organizations working on climate change rural growth and development issues.

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

1. Maize Value Chain

- Worked on the urban survey preparations, including extensive revisions to the sections of the survey instrument to assess consumer attitudes about alternative maize meals and purchase preferences and options.
- 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 preliminary report in the form of a working paper and policy synthesis will be circulated by the end of 4th Quarter. Chapoto, Jayne and other FSRP outreach team will carry out outreach activities on this work during the 1st and 2nd quarter 2008.
- Continued work on the study examining maize price instability in countries with maize without borders policy versus countries restricting regional trade such as Zambia and Malawi. This work will feed into the work on Zambia’s study on price instability to inform the debate on the role of government in the maize market. 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

- Continued in this quarter efforts of market monitoring of prices, volumes, sources of cassava continued in Lusaka and Copperbelt, since these are the big markets for cassava. The market monitoring has provided vital information on the trends in prices and volumes in these major markets. The goal is to identify carefully the major sources of both the fresh and dried cassava for these markets.
- FSRP staff continues efforts in the role of the Vice-chair of the cassava task force (ACU). These contributions to ACU are aimed at strengthening private sector commercialization of cassava and gaining broad-based input into the value chain by various stakeholders. Many meetings have been held with various stake holders to brainstorm different ways and stages of the cassava commercialization. So far three main types (human consumption, stock feed processing and industrial usage ie starch and glucose) of commercialization have been unveiled. In this quarter two background meetings with the ACU were conducted, and FSRP staff also participated in a formal ACU stakeholder meeting on Sept 27.
- Background research on product formation and informal experiments were conducted to see if it is possible to produce in Zambia a non-glutinous snack bread product from cassava starch combine with cheese. Outreach efforts have resulted in two private individuals with interest in experimenting further with this product if sufficient cassava starch can be obtained. Work is underway to obtain this raw material.
• Informal discussions continued in this quarter to coordinate with on-going cassava projects being implemented by JICA, FAO and SHEMP.

• Work continued on drafting a working paper on the dynamics of Zambia’s cassava value chain.

3. Horticulture Value Chain

• Continued the write up 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. Insights obtained from this will be incorporated into issues for stakeholder outreach activities and dialogue.

• Continued study of horticultural pricing dynamics and trade flows in Lusaka: supervising the collection and processing of market volumes and price data from Soweto Market and some selected retail markets; and analyzing collected data with a view to understand the markets and design a mobile phone horticultural market information system. Preliminary results from this work have shown that market prices are highly variable from day-to-day, and that this variability is driven primarily by high variability in quantities entering the market, not by inelastic demand. The policy implication from this finding is that any initiative that can stabilize flows into the market over time could substantially reduce price variability, to the benefit of farmers and consumers. The team is currently assessing options for pursuing this goal, including implications for the design of the SMS-based market information system.

• Conducted the first of the 2-round data collection for the Urban Food Consumption Survey covering the urban centers of Lusaka, Kitwe, Kasama and Mansa. The primary objective of this survey is to develop a detailed understanding of the food and other consumption and expenditure behavior of households in key urban areas of Zambia. Key aspects of this behavior are consumer budget shares across different food groups and specific food items, and the market share of different types of retail outlets such as open air markets, street vendors, shops, supermarkets, and others. The survey will address four objectives and related sets of questions:

  i. Understand urban consumption patterns and how these vary by income level and across key cities and regions of the country. For fresh produce, for example, what is the share of fresh produce in consumer budgets, and how does this vary by income level? What are the individual shares of the top 5-6 items? What are the total volumes purchased by urban consumers? Answer to these questions are fundamental to designing investment programs that improve marketing capacity in urban areas and better link these urban areas with key rural production zones.

  ii. Quantify the importance of various retail channels in satisfying the food purchases of urban consumers and qualitatively assess how the importance of different channels has changed over time. Examples of key questions that will be addressed include: What is the share of the “traditional” marketing sector (open air markets, street vendors, shops) for different food groups and income levels, and how does this compare to the “modern sector” (independent and chain supermarkets)? Answers to this question are fundamental to understanding the rate and direction of change in Zambia’s food system; such understanding is a pre-requisite to designing policies and
investment programs to ensure smallholder access to dynamic markets and a steady supply of quality food at affordable prices to consumers.

iii. Quantify the importance of urban agriculture in the four selected urban centers, both in aggregate, for different income levels of households, and for different food groups. Urban agriculture is especially potentially important for fresh produce, but could be also for staples in some urban areas. As in items 1 and 2 above, quantifying urban production and marketing of food is relevant to the design of policies and programs to improve the urban food marketing system and its links to rural areas.

iv. Understand the rural-urban flow of goods and cash among extended households. Such information will provide insights into, for example, the proper design of emergency response activities for rural areas during droughts.

4. Cotton Value Chain

- Due to the importance of the Cotton Act, MATEP/FSRP activities in the cotton sector have been heavily oriented towards supporting a collaborative process of revision. The Act has been revised by consensus of various stakeholders. The revisions to the New Cotton Act have been finalized and submitted to the Minister of Agriculture and Cooperatives. The Minister has indicated that he will soon present the Act to Cabinet before having it tabled in Parliament for enactment.

- FSRP/MATEP presented at an informal meeting of the Cotton Working Group a new Cotton Policy Brief highlighting the success story and challenges of the sector and why the sector needs an effective and workable Cotton Act. Feedback from stakeholders was incorporated and the revised brief together with revisions to the Cotton Act was later presented to a formal meeting of the Working Group and the Minister of Agriculture and Cooperatives (Title of presentation: An Effective Public-Private Coordinator in Zambia’s Cotton Sector: Deliberation on the Cotton Act) The Minister promised to push for the enactment of the revised Cotton Act.

- As part of the review of cotton sector reform experience in nine countries of SSA, FSRP/MATEP collected basic information on the behavior and performance of the cotton sector over the past three years and assessed the status of key public policy initiatives and private sector programs. Selected farmers were interviewed and data was used to generate crop budgets for different types of farmers which helped better understand the factors that assist some farmers to earn good returns from cotton on a regular basis, while others achieve limited or inconsistent profits. This information has been used to update and enhance FSRP Working Paper #10, and has now been published as FSRP Working Paper #26.

- The country level information also contributed to the cross-country comparative report under this effort. A draft version of this comparative report is now available for download on the FSRP web site, with a final version expected during fourth quarter, 2007. An outreach event based on the Zambia and cross-country studies is being arranged during the last quarter of 2007, and a Southern Africa regional outreach event is likely to occur during 1st quarter 2008.
5. Fertilizer Value Chain

- Continued benefit/cost analysis of the Fertiliser Support Program and has been aiming to conduct further outreach on this topic, including to the Ministry of Finance and National Planning.

- Prepared for seminar to MACO staff on impacts of Fertilizer Support Programme on smallholder farmer fertilizer use and development of commercial fertilizer delivery system.

- Made an outreach presentation to the Gates Foundation WorldAgInfo Project Design Team on Under-appreciated Aspects of Smallholder Agriculture: Possible Implications for Information System Design by Thom Jayne and Colleagues, Food Security Research Project – Zambia at the Agricultural Consultative Forum, Lusaka, Zambia on August 13, 2007. One of the messages the Design Team carried away from Africa is about the importance of utilizing rural radio to reach out to smallholders. Some of the team’s interesting reports on this from both Mali and Zambia in the Design Team's blog:
  
  - Radio is the unused cutting edge of technology
  - Women's Radio Forum: Dancing to another tune
  - Formative Evaluation
  - Here comes the sun and your education
  - The Power Of Evaluation
  - An Internet center's troubles
  - Women balance a great deal
  - Counting as a means to a better market place
  - Food Security Commission

- Trials of spatial mapping of indicators of fertilizer profitability were done with selected districts but full-scale mapping awaits receipt of soil shapefiles from ZARI.

- The report on “Trends in agricultural and rural development indicators” initially done for ReSAKSS now appears as FSRP working paper No. 24

6. Regional Trade Perspectives on Food Staples and Input Markets

- The FSRP team has compared domestic maize prices with border (import parity prices) since 1994 in order to assess the potential for using regional trade to buffer domestic price volatility. Then, using a multi-market model of Zambia’s maize and cassava markets, the team has estimated the likely price impact of bumper harvest and droughts in the presence of alternate policy responses, under both closed borders and free trade. This work contributed to discussions about the maize export ban of 2006 through presentation at the ACF (July 2006), one policy brief and publication of the simulation results in the Zambian Farmer magazine (July 2006).

7. Alternative Instruments for Stabilizing National Food Availability and Prices

- Progress was made on an FSRP working paper “Alternative Instruments for Stabilizing National Food Supplies and Prices” by S. Haggblade in collaboration with Simon Dradri and Paul Dorosh. Expect to publish in early 2008.

IV. Consumption Behavior of Urban and Rural Households

- Conducted the first of the 2-round data collection for the Urban Food Consumption Survey covering the urban centers of Lusaka, Kitwe, Kasama and Mansa. The primary objective of this survey is to develop a detailed understanding of the food and other consumption and expenditure behavior of households in key urban areas of Zambia. Key aspects of this behavior are consumer budget shares across different food groups and specific food items, and the market share of different types of retail outlets such as open air markets, street vendors, shops, supermarkets, and others. The survey will address four objectives and related sets of questions:

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4. Understand the rural-urban flow of goods and cash among extended households. Such information will provide insights into, for example, the proper design of emergency response activities for rural areas during droughts.
The consumer data had been entered and verified by the 3rd week of September, and the cleaning process started. In addition to consumption data, price information was collected on selected food and non food items to establish variations in price levels across the urban centers and across outlet types location within these centers. Entering of this data will commence in October.

V. Household Impacts and Behavior

- A working session was held at FSRP offices with a WB consultant working on a modeling component of the project “Participative Value Chain Management for Poverty Reduction in Zambia”. This is a follow up to a meeting with the same consultant that visited FSRP office in the 2nd Quarter seeking data and advice on the model formulation.
- The report on “Trends in agricultural and rural development indicators” initially done for ReSAKSS was published as a FSRP working paper (No. 24.)

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

- FSRP staff conducted an introductory training module based on assessing agronomic trials with partial budgeting techniques. The training was done in July 2007, with 11 participants from GART and ZARI. Trainees expressed satisfaction with the training.
- The next training module for GART and ZARI will cover the design and statistical analysis of on-station and on-farm trials. FSRP has contracted a bio-statistician from UNZA to develop and implement the training module, in coordination with FSRP, GART, and ZARI staff. The module will be conducted later in 2007.
- To work on resolving the issue of more adequate coverage for large scale farmer surveys, lists of large scale farmers used by CSO, members of ZNFU in Mkushi and Mazabuka and in central province as listed by MACO field officers were obtained. Preliminary review suggests that the list by MACO is the best frame that exist in Zambia at the moment.
- On efforts to support ReSAKSS-SA's regional agenda. FSRP has added Tadeyo Lungu as a staff members and he will focus on ReSAKSS work plan 50% of his time.
- Work towards setting up an “Inter-Ministerial Policy and Technical Advisory Group” was started. FSRP staff have engaged MACO, ACF, MFNP, MCTI in preliminary discussions. The challenge is to have buy-in by MACO who is the primary user of technical advice. The permanent secretaries in agriculture are being approached to seek endorsement of the strategy. It is envisaged that this technical group will take the role of organizing the annual national policy dialogue event. The Director, Agribusiness & Marketing and Director Policy and Planning have accepted responsibility to steer this process from within MACO.
VII. Staff changes

- Tadeyo Lungu joins the FSRP team as a researcher at the beginning of the urban survey implementation.
- Kasweka Chinyama also joined the FSRP team as a researcher, participating in the training and implementation of the urban consumer and price surveys.

VIII. Project Visitors

- Margaret Beaver for urban consumption survey
- David Tschirley for urban consumption survey
- Thomas Jayne for work on maize and general project backstop
- Nicole Mason and Hunter Neilson for assistance with urban food consumption survey
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Policy Syntheses Top


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<td>5.2 Smallholder income and growth dynamics</td>
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<td>5.3 Improved emergency response</td>
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