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SOLUTIONS FOR AFRICAN FOOD ENTERPRISES (SAFE) INITIAL EVALUATION REPORT

August 2014–May 2015

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CONTENTS

Contents ii
Figures and Tables iii
Acronyms iv
Acknowledgements v
Executive Summary vi
1. Introduction 1
1.1 Program Background 1
1.2 Theory of Change 2
2. Evaluation Overview 4
2.1 Evaluation Purpose 4
2.2 Evaluation Questions 4
3. Methodology 7
3.1 Data Collection Methods 7
3.2 Limitations of the Evaluation Methodology 12
3.3 Evaluation Team 13
4. Evaluation Findings 15
Annexes 83
Annex 1: Bibliography 84
Annex 2: Assisted Processors 85
Annex 3: Key Informant Interviews (KIIs) 88
Annex 4: Household Survey Instrument 89
Annex 5: Discussion Guides 111
Annex 6: Stakeholder Surveys 119
Annex 7: In-Depth Case Study Findings, Kenya 122
Annex 8: In-Depth Case Study Findings, Zambia 158
Annex 9: In-Depth Gender FGD Findings 202
Annex 10: Terms of Reference (TOR) 208

FIGURES AND TABLES

Figure 1: SAFE Theory of Change ... vi
Figure 2: SAFE Theory of Change ... 3
Table 1: Key Informant Interviews Conducted during Initial Evaluation Round ... 8
Table 2: Focus Group Discussions Conducted during Initial Evaluation Round ... 8
Table 3: Stakeholder Surveys Conducted during Initial Evaluation Round ... 9
Table 4: Performance Improvements at Assisted Processors' as a Result of SAFE Assistance ... 15
Table 5: Performance of Assisted Processors from the SAFE Performance Monitoring System During the Period of October 1, 2013-March 30, 2015 ... 16
Table 6: Number of Jobs Created as a Result of SAFE Assistance ... 20
Table 7: Changes Made in Assisted Processors' Business as a Result of SAFE Assistance ... 21
Table 8: Performance of Assisted Processors from the SAFE Performance Monitoring System ... 21
Table 9: Trainee Survey Results, Kenya ... 26
Table10: Trainee Survey Results, Zambia ... 27
Table11: Trainer Survey, Kenya, Zambia and Malawi ... 28
Table12: Changes in Commercial Linkages at Assisted Processors' as a Result of SAFE Assistance ... 32
Table13: Linkages Made by Assisted Processors from the SAFE Performance Monitoring System ... 33
Table14: Processor Estimates of SAFE Assistance-Produced Food Reaching Food-Insecure People ... 41
Table15: Processor Survey Results ... 63
Table 16. Distribution of Household Survey Respondents in Kenya ... 122
Table 17. Distribution of Household Survey Respondents in Zambia ... 158

ACRONYMS

BAT	Business Assessment Tool
BDS	Business Development Services
BFS	Bureau of Food Security
BSD	Business Skills Development
COMACO	Community Markets for Conservation
CSB	Corn-Soy Blend
EQ	Evaluation Question
FGD	Focus Group Discussion
FTE	Full-Time Employment
FtF	Feed the Future
HACCP	Hazard Analysis and Critical Control Points
HEPS	High-Energy Protein Supplement
ISF	Initiative for Smallholder Finance
KCSE	Kenya Certificate of Secondary Education
KEBS	Kenya Bureau of Standards
KII	Key Informant Interview
KSU	Kansas State University
M&E	Monitoring and Evaluation
MOU	Memorandum of Understanding
MSI	Management Systems International
NASFAM	National Smallholder Farmers' Association of Malawi
NPD	New Product Development
PFS	Partners in Food Solutions
PLWA	People Living with AIDS
PMP	Performance Management Plan
SAFE	Solutions for African Food Enterprises
SGB	Small and Growing Business
SI	Social Impact
SWT	Sector-Wide Training
TA	Technical Assistance
ToC	Theory of Change
TNS	TechnoServe
USAID	United States Agency for International Development
WFP	World Food Programme

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The SAFE Performance Evaluation Team wishes to acknowledge the cooperation of the staff at TechnoServe and Partners in Food Solutions, who worked with us to collaboratively provide insights and access to the data required to complete this initial evaluation report. In addition, the team thanks the many food processors in Kenya, Malawi and Zambia that welcomed us into their business places and generously shared their time and experiences with us over the course of our fieldwork. Finally, we extend our thanks and gratitude to USAID for its guidance and support throughout the work thus far.

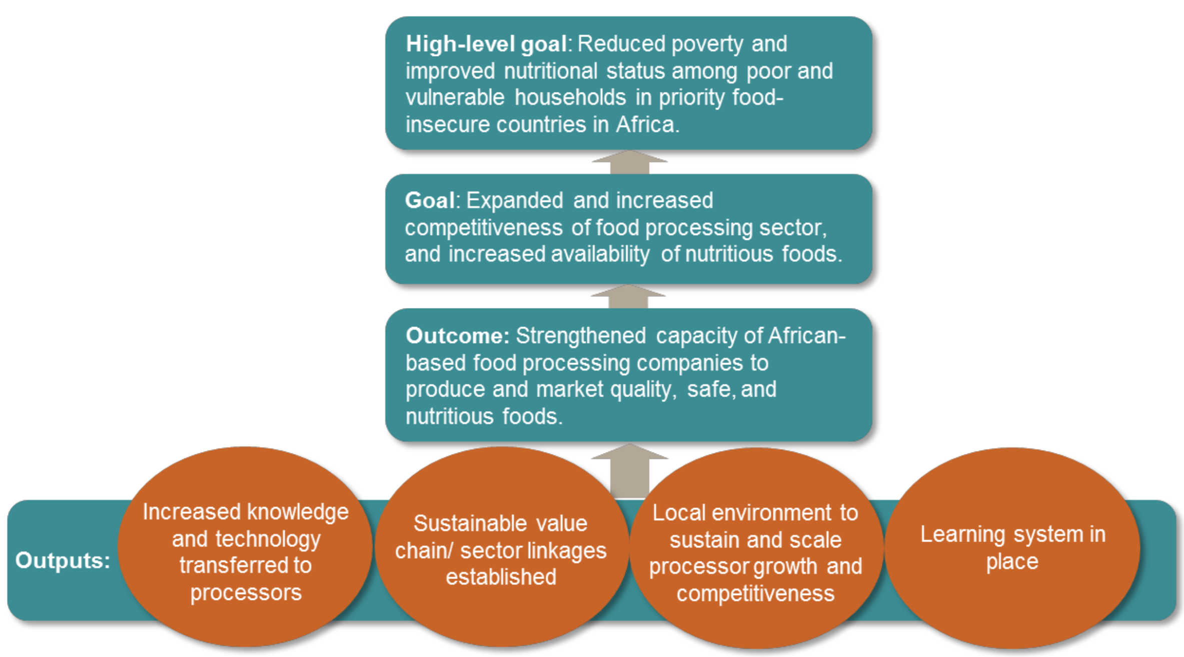
EXECUTIVE SUMMARY

This document presents the findings, conclusions and recommendations for the initial evaluation round of the Solutions for African Food Enterprises (SAFE) performance evaluation. A second evaluation round of SAFE will take place in 2016. SAFE is a five-year Feed the Future (FtF) activity funded by the United States Agency for International Development (USAID) Bureau of Food Security (BFS) and implemented by TechnoServe (TNS) and Partners in Food Solutions (PFS). The program is scheduled to run from October 2012 through September 2017. SAFE's stated goals and objectives are as follows:

- **High-level goal:** Reduced poverty and improved nutritional status among poor and vulnerable households in priority food-insecure countries in Africa.
- **Goal:** Expanded and increased competitiveness of the food-processing sector and increased availability of nutritious foods.
- **Objective:** Strengthened capacity of African-based food-processing companies to produce and market quality, safe, and nutritious foods.

The four primary programs of the SAFE Theory of Change (ToC) are expected to contribute jointly at the outcome level to strengthened capacity among assisted food processors to produce and market quality, safe, and nutritious foods. This in turn is expected to lead at the goal level to an increase in the availability of nutritious foods and a more competitive processing sector. The high-level goal, which is the theoretical culmination of SAFE outputs, outcomes, and goals, is reduced poverty and improved nutritional status among poor and vulnerable households in SAFE program countries.

Figure 1: SAFE Theory of Change



Implementation of SAFE involves technology and knowledge transfer from volunteer experts in the four PFS partner companies (General Mills, Cargill, DSM, and Bühler) delivered through the in-country facilitation and guidance of TNS food technology specialists and business advisors. Operationally, SAFE uses two primary intervention strategies: (1) customized technical assistance (TA) provided to individual food processors and (2) sector-wide trainings (SWTs) provided to food processors and other sector stakeholders on selected topics.

Under the PFS volunteer model, volunteers typically provide technical assistance (TA) from their home countries using distance communications methods such as Skype. This model may also include occasional on-site visits by PFS volunteers or other staff from the four PFS partner companies. TNS local staff plays an integral role in this process by identifying processors and helping to facilitate communications between the two parties, both in terms of arranging meetings and ensuring that the international experts and local business operators are "speaking the same language." Local TNS business advisors and food technologists themselves also provide on-site TA to assisted processors in areas falling under their relevant expertise.

Work with food processors is organized by *charters*, which are similar to memorandums of understanding (MOUs) describing the problem being addressed with a set of specific prioritized objectives and an implementation timeframe with clear milestones. Assisted processors have from one to several charters at different stages of implementation with SAFE. A particular charter may involve anywhere from a single to multiple PFS volunteers.

The SWTs are one to two day events on topics of general interest to groups of food processors, such as fortification. They are led by consultants contracted by TNS, or are conducted by TNS staff. These events attract a wide range of enterprises, ranging from small-scale companies, to farmer cooperatives, and in some cases, larger companies. As such, they provide networking opportunities to the participants, as well as opportunities for companies of various scale to learn from each other.

In selecting food processors to participate in the program, SAFE uses the following three selection criteria:

1. The food processor should source from smallholder farmers
2. The food processor should reach, or potentially reach, large numbers of consumers
3. The food processor should be producing, or plan to produce, nutritious foods.

To date, SAFE has worked with 22 food processors in Kenya, 5 food processors in Malawi, and 10 food processors in Zambia. At the end of the activity, SAFE aims to have provided intensive assistance to 56 food processors in total, including 28 in Kenya, 10 in Malawi, and 18 in Zambia.

BFS contracted Social Impact (SI) to undertake this performance evaluation of the SAFE program. The purpose of the SAFE performance evaluation is to provide BFS with empirical evidence to inform programming and investment decisions under the FtF initiative, including the following:

- How well BFS centrally funded/centrally managed programs are implemented and performing;
- How the programs are perceived by beneficiaries;
- Whether the programs are achieving targeted outcomes in support of FtF objectives; and
- What more needs to be done.

This performance evaluation examines the extent to which the SAFE program has achieved the outputs, outcomes, and goals. It bears emphasizing that this report covers the initial evaluation round of the SAFE performance evaluation.

The SAFE performance evaluation employs a mixed-methods evaluation that uses a combination of quantitative and qualitative data collection methods. It involves an initial data collection, analysis and reporting round completed during March–April 2015 and an endline data collection, analysis and reporting round scheduled for early 2016. The primary collection methods include: (1) key informant interviews (KIIs), (2) focus group discussions (FGDs), (3) stakeholder surveys, (4) household surveys, and (5) secondary data review.

The SAFE performance evaluation seeks to answer ten evaluation questions (EQs). These questions are grouped according to four categories: (1) food-processing sector, (2) markets linkages, (3) gender, and (4) implementation process.

The questions, and the conclusions reached by the evaluation team, are as follows:

***EQ1*. Does participation in SAFE improve the performance of SAFE-assisted food-processing firms in the following areas: (1) management and technical capacity, (2) volume of nutritious food products produced, (3) sales of nutritious foods, (4) employment, (5) profitability, (6) investment, and (7) marketing of nutritious foods?**

Participation in the SAFE program appears to have generated increases in volume, sales, profits and, to a lesser extent, investment. According to the perception of assisted processors, these improvements seem to have largely been associated with increased operating efficiency, including lower losses. It is also associated with improved quality, which has in some cases resulted in higher pricing. Likewise, increases in volume, sales, and profits have facilitated the hiring of additional staff. On the other hand, increased investment has proved challenging, and many of the assisted processors cite access to finance as a critical constraint to growth.

***EQ2*. Have SAFE interventions contributed directly and/or indirectly to changes in knowledge and practices of stakeholders within the food-processing sector as a result of (1) technical assistance, (2) sector-wide trainings, (3) learning activities, and (4) demonstration effects?**

SAFE assistance, both in the form of longer-term support to processors and short-term SWTs, has been moderately effective in improving the knowledge and practices among assisted processors and other sector stakeholders. This conclusion includes instances in which SAFE assistance has contributed to significant improvements in knowledge and practices, instances in which it has contributed to moderate improvements in knowledge and practices, and instances in which it has had no effect on knowledge and practices. Areas in which SAFE assistance appears to have had the greatest effect on knowledge and practices are business management practices, systems, and technical capacity and, to a lesser extent, marketing and compliance with regulatory or quality standards.

SWT participants were as likely to say that the training influenced their own or their firm's practices as assisted processors were to say that long-term TA received from SAFE influenced their practices. SWT participants also gave high to very high marks to all aspects of the SWTs. These results suggest that the SWTs are an underexploited tool and could be scaled-up, with special attention given to follow-up workshops and technical assistance support.

***EQ3*. Have SAFE interventions produced a demonstration effect as measured by the scaling-up of SAFE-supported activities among assisted processors and the replication of the SAFE model among other development organizations or in other locations and countries? What is the likelihood that these demonstration effects will be sustained?**

To date, SAFE has not produced any significant demonstration effects. To the extent it does in the future, these are more likely to come as a result of the SWTs than the long-term TA to food processors. There exist a variety of options to scale up the SWTs—for example, through collaborations with universities or training institutions; by increasing the number, scope, diversity, and outreach of SWTs; or by offering virtual SWTs using online technologies. SAFE might also follow up trainings with additional assistance to the participating stakeholders, possibly via a voucher scheme.

***EQ4*. Is participation in SAFE associated with new or strengthened market linkages between food-processing firms and (1) smallholder farmers, (2) wholesale buyers, (3) retail buyers, (4) food aid buyers, (5) lending institutions, and (6) other value chain actors?**

In terms of buyers, SAFE has been successful in strengthening market linkages but has been much less successful in assisting processors to establish new linkages. This appears to a large degree to be a result of the significant barriers to entry to sales with new buyers, i.e., cash flow stemming from payment terms with regards to distribution networks and stringent quality control requirements in the case of institutional buyers.

In terms of linkages between processors and producer-suppliers, the program has likewise been only moderately successful. The challenges presented by the operating environments, such as weak contract enforcement, have largely precluded much expansion of contract or outgrower schemes that would directly introduce new inputs or pricing to producers. However, many processors have indirectly impacted smallholder livelihoods by promoting improved agronomic practices or by disseminating grading and quality requirements through intermediaries.

Access to finance remains a significant challenge and a barrier to expansion of operations for many processors. Many processors and stakeholders continue to cite this as a critical need and the most important obstacle both to growth and to the adoption of needed technologies.

***EQ5*. Have SAFE interventions increased the availability of nutritious foods, particularly in markets characterized by higher levels of food insecurity among the consumer population?**

The evidence gathered to this point strongly indicates that, for the most part, the nutritious foods being produced by SAFE-assisted processors are not targeting and are not reaching food-insecure people. The large majority of assisted food processors are selling their products to national retail chains patronized largely by middle-class-and-above consumers. In addition to this, the foods are being sold in package sizes and at prices that make them inappropriate for low-income consumers, who tend not to buy in bulk and can afford only small amounts (in small packages) at any given time.

There is also the issue that adding fortificants to processed food increases production costs, which, if passed on to the consumer, make the food that much less affordable for the population that can potentially benefit the most from such fortified products. For this and other reasons, sector stakeholders are pessimistic that government fortification mandates will significantly increase the availability of fortified foods to food-insecure consumers.

Significantly extending the assisted processors' outreach to food-insecure consumers requires a radically different approach than selling to national retail chains, which involves changes in production, packaging, distribution, pricing, and promotional strategies. The current form of assistance being provided to processors and sector actors via individualized TA and SWTs does not currently include assistance to help the processors or sector actors expand the availability (supply) of nutritious processed foods to food-insecure populations.

***EQ6*. To what extent has any increase in the availability of nutritious foods been matched by an increase in access to (and consumption of) nutritious foods, particularly in markets characterized by higher levels of food insecurity among the consumer population?**

The increased availability (supply) of nutritious foods has not been matched by an increase in access to (and consumption of) nutritious foods among food-insecure consumers. By and large, SAFE-assisted processors are not targeting food-insecure (or generally low-income) consumers, nor are they selling/distributing their products via outlets traditionally patronized by food-insecure consumers. Food processors trying to sell to this market face a variety of obstacles that make it a much different market segment than the ones they are used to serving.

Price is by far the most important determinant in food purchasing decisions. It is not sufficient to get nutritious foods to food-insecure consumers; they must also be priced low enough to induce consumption. The general perception among consumers and other market participants is that retailers would stock nutritious foods and consumers would purchase them if they were priced appropriately, with caveats discussed below.

It cannot be assumed that the mere availability of appropriately priced nutritious foods will induce a widespread purchase response. Consumers by and large do not understand what constitutes a nutritious food, why it is nutritious, and what benefits it provides and for whom. The case studies make it clear that any attempt to market nutritious foods to food-insecure consumers will need to be accompanied by an aggressive marketing campaign to educate consumers and to promote the products and brands. This marketing campaign must include not only an appropriate pricing strategy but also an appropriate production strategy (quality, taste, and convenience also matter to food-insecure consumers), packaging strategy (food-insecure consumers can only afford to purchase in small quantities), distribution strategy (food-insecure consumers shop mostly in small, independent stores/kiosks), and promotion strategy (food-insecure consumers rely mostly on word-of-mouth but also are influenced by TV, radio, and road shows) with effective messaging (e.g., what nutrition is, why it is important, how the products are nutritious, etc.).

With that said, SAFE assistance to date appears to have been relatively weak in the area of marketing, or at least this was the case in the two case studies. In summary, brand communication strategies need to be developed that will help both Kenya and Zambian consumers incorporate new nutritious food items into their diets.

***EQ7*. Is participation in SAFE associated with increased leadership/management opportunities for women in SAFE-assisted food-processing firms?**

The evidence gathered from the nine FGDs does not support the existence of any direct link between SAFE client assistance and increased leadership opportunities and advancement for women.

Nationally mandated policies, notably maternity leave, were adopted to some degree by all nine enterprises but varied in terms of being paid or unpaid. The individual enterprise's policy on overtime (paid or unpaid) also varied.

Church membership was the primary and sometimes only venue for community participation by the FGD participants, followed by participation in women's lending groups. Both were said to be very beneficial and provided some women with leadership opportunities, trainings, or outreach to health clinics. Lack of free time and household responsibilities were given as constraints. Low literacy especially among the female part time workers was noted as a constraint to advancement by some processors.

Low literacy especially among the female part time workers was noted as a constraint to advancement by some processors.

***EQ8*. To what extent has SAFE led to increased income generation among women employees of SAFE-assisted food-processing firms?**

The assistance of SAFE did not have any discernable link to wages paid to or income earned by female workers. Interviewed processors said that SAFE assistance was responsible for creating 56 full-time jobs and 96 part time jobs for women in Kenya and Zambia.

The gender FGDs covered several dimensions around income, including the use of income, the proportion of household expenses covered by the workers' income, how gaps in income and expenses are met, and the decision-making process and control of the use of the workers' income within the context of the household.

The wages from work with the SAFE-assisted processor was essential for buying food, paying for utilities, and meeting all cash expenses of the households headed by women who were single but often supporting their extended family (mother, father, siblings) in addition to their own children. The vast majority of women had control over their wages. About half had sole decision-making power on the use of the money, and the remainder consulted with their spouse or other family member and mutually agreed on priorities and allocation of cash within the household. Most women would like to be self-employed, running their own micro-enterprise selling products or services either full- or part-time.

***EQ9*. Was the SAFE program implemented as designed?**

This section describes the impressions of various stakeholders of the SAFE program. Stakeholders offered a variety of views about SAFE (including PFS and TNS), a large number positive, but also a good number negative. When asked what they thought SAFE was, sector stakeholders described SAFE principally in terms of improving the quality, safety, and supply (availability) of food production in the country. A subset of stakeholders also noted that SAFE was specifically seeking to improve the quality, safety, and supply of nutritious foods. An even smaller number of stakeholders interviewed also identified SAFE with a broader mandate, which went beyond the mere availability of nutritious food to increasing access to nutritious food among low-income populations.

For their part, assisted processors mostly acknowledged the usefulness of SAFE assistance and their satisfaction with the quality of technical and business assistance provided by TNS staff and PFS volunteers. On the whole, assisted processors appreciated the assistance provided by PFS volunteers and local TNS staff. They largely considered the TNS staff to be available, approachable, responsive, knowledgeable, and genuinely interested in them and their business.

On the whole, assisted processors considered individual PFS volunteers to be helpful, although their views were more mixed with regard to the local TNS staff.

Interviews with assisted processors revealed a number of successful collaborations with PFS. In at least one case, an assisted processor developed a relationship with a specific PFS partner company, which proved to be more efficient than seeking assistance through PFS. Assisted processors were much less generous in their rating of the assistance received through Skype or other long-distance means. Here, processors in Kenya gave a *poor* rating, while processors in Malawi gave a *poor* to *good* rating. Only processors in Zambia said on average that the Skype or other long-distance assistance received from PFS was *good*.

The findings of this evaluation included:

- The SAFE program design is driven, for the most part, by the institutional structures and objectives of PFS, the former of which have evolved over time as PFS has incorporated experiential learning into its operational approaches.
- A critical element of the SAFE approach is that relies on 'pull' by the processor in all stages of the process, beginning with processor recruitment through the completion of project charters. If a processor is not pulling, SAFE is loath to push too much, and work on charters subsequently becomes stalled.
- TNS uses a set of selection criteria that includes both hard and soft criteria and key informants at TNS and PFS did not always agree on what these criteria are. There is confusion, or lack of agreement, among both TNS and PFS informants as to what specifically constitutes nutritious foods. Furthermore the context in which key TNS and PFS informants spoke about the nutritional impacts of the program largely focused on the assisted processors' sourcing relationship with smallholders as opposed to the increased availability of nutritious foods on the market.
- Evaluators found cases in which the assisted processors were selling the bulk of their products in foreign markets, which does not advance the program's goal of increasing the availability of nutritious foods in program countries.

The most common complaint was that SAFE assistance was too "high tech" to be practical in the African context.

Overall, sources of dissatisfaction included:

- Lack of country context among PFS volunteers
- Limited availability of local TNS staff
- Lack of intensive face-to-face assistance
- Inappropriate business or technical solutions
- Intrusive data collection
- Time lags
- Communication challenges

***EQ10*. What might SAFE have done differently to improve program implementation?**

This section summarizes the evaluation team's initial conclusions about what might have been done differently to this point to improve program implementation and results drawing on the findings and conclusions for Evaluation Questions 1 through 9. In this sense, they should also be interpreted as recommendations for what the program might do to improve implementation and results moving forward. These include:

- Refine volunteer selection and management
- Improve communications technology
- Improving processor selection
- Increase local TNS staff availability
- Reduce data collection
- Facilitate access to finance
- Increase face-to-face communications
- Conduct follow-up with SWT participants
- Increase the length of SWTs
- Increase the number of SWTs
- Enhance impact on smallholder farmers
- Improve marketing assistance
- Improve gender sensitization and training

Overall recommendations of this evaluation include:

1. Refine volunteer selection and management. There is a need to continue to refine the process, which PFS has acknowledged and to which the organization appears to have committed itself.

2. Improve communications technology. A frontier for improving communications will be developing technologies that will allow volunteers to connect with assisted processors where they are using mobile phone or other technologies.
3. Improving processor selection. A key improvement in processor selection will be for TNS and PFS to definitively agree on criteria and operate accordingly with regard to the selection process. This could be accomplished by "working backward" identify processors serving target markets/groups.
4. Increase local TNS staff availability. It may be useful to develop solutions allowing local staff to follow-up more frequently with processors who need it, while also developing a system for checking in routinely with processors.
5. Reduce data collection. Review the current level and frequency of data collection, for example, moving from quarterly to bi-annual collection. SAFE should review the feasibility of annual collection of certain PMP indicators, such as incremental profits, jobs created and investment.
6. Facilitate access to finance. As financing is a core issue that is critical to SAFE's success SAFE needs to find technical and business solutions that accommodate the processors' financial constraints, or it needs to prioritize working with processors and lending institutions to facilitate mutually beneficial commercial arrangements between them, or both.
7. Increase face-to-face communications. Processors by and large want more face-to-face interactions with PFS volunteers, whether via exchange programs where processors travel to the US or Europe (or other location) for face-to-face training or where volunteers travel to Africa to meet the processors and visit their facilities. To do so has significant budgetary implications and may or may not be feasible for PFS but should be considered.
8. Conduct follow-up with SWT participants. This includes not only the follow-up currently being planned by TNS to assess the trainings' longer-term benefits but also follow-up activities to reinforce aspects of the training and to provide additional assistance as needed particularly for strong candidates as future SAFE clients.
9. Increase the length of SWTs. Consider increasing the length of SWTs in proportion to the amount of material covered and the need to provide more practical application of the materials. Recommendation for follow up (as noted above) would also support this activity.
10. Increase the number of SWTs. SWTs are much valued by participants and appear to be the SAFE activity that has the greatest potential for creating demonstration effects. SAFE would be well advised to consider increasing the number, scope and outreach of SWTs. One approach that may that be useful is developing economies of scale in providing solutions to common problems that face multiple processors, such as packaging, trainings of staff and/or gender mainstreaming.
11. Enhance impact on smallholder farmers. It is necessary to implement specific strategies to accomplish this. For example to strategically select processors that have formal contract or outgrower arrangements with smallholders to supply raw materials. Capacity building of the numerous women smallholders through groups offers a lot of potential for broadening the gender focus and positive economic impacts from the SAFE project.

12. Improve marketing assistance. The two case studies suggest that assisted processors require greater assistance in marketing, particularly distribution and promotion (messaging).

13. Improve gender sensitization and training. Ensure follow up with the processor by TNS on the newly designed Business Assessment Tool's gender elements (that were formerly a standalone gender audit) including the findings, implications and how best to move forward. Other recommended tools are co-sponsoring on-site life skills development and learning activities for lower and mid-level workers, and facilitating gender sensitization workshops or trainings for processor staff.

1. INTRODUCTION

1.1 PROGRAM BACKGROUND

Solutions for African Food Enterprises (SAFE) is a five-year Feed the Future (FtF) activity in the East Africa region funded by the United States Agency for International Development (USAID) Bureau of Food Security (BFS) that seeks to expand the availability of affordable and nutritious foods. The program is a joint venture between USAID, TechnoServe (TNS), and Partners in Food Solutions (PFS). SAFE is scheduled to run from October 2012 through September 2017, and its stated goals and objectives are as follows:

- **High-level goal:** Reduced poverty and improved nutritional status among poor and vulnerable households in priority food-insecure countries in Africa.
- **Goal:** Expanded and increased competitiveness of the food-processing sector and increased availability of nutritious foods.
- **Objective:** Strengthened capacity of African-based food-processing companies to produce and market quality, safe, and nutritious foods.

Implementation of SAFE involves technology and knowledge transfer from volunteer experts in the four PFS partner companies (General Mills, Cargill, DSM, and Bühler) delivered through the in-country facilitation and guidance of TNS food technology specialists and business advisors. According to its website, PFS's "corporate partnerships are strategically aligned to core business capabilities. For example, Cargill takes the lead on vegetable oils, General Mills on blended flours, Royal DSM on fortification of staple foods and Bühler on process engineering."[1]TNS resources and activities are funded by USAID and include implementation for four years between September 2016 and five years for the regional support team (through September 2017).[2] It also includes a technical assistance (TA) fund to be used to catalyze program growth in other priority countries.

SAFE's focus is on increasing the *availability* of quality, safe, and nutritious foods in program countries by enabling food processors in program countries to meet local and regional food safety and quality standards and to be competitive suppliers into local and regional markets, including food aid markets. Operationally, SAFE uses two primary intervention strategies: (1) customized TA provided to individual food processors and (2) sector-wide trainings (SWTs) provided to food processors and other sector stakeholders on selected topics.

Under the PFS volunteer model, volunteers typically provide technical assistance (TA) from their home countries using distance communications methods such as Skype. This model may also include occasional

[1] PFS website: http://www.partnersinfoodsolutions.com/what-we-do

[2] SAFE activities in Malawi were originally scheduled to run only through September 2015 but have since been extended for an additional year through September 2016.

on-site visits by PFS volunteers or other staff from the four PFS partner companies. TNS local staff plays an integral role in this process by identifying processors and helping to facilitate communications between the two parties, both in terms of arranging meetings and ensuring that the international experts and local business operators are "speaking the same language." Local TNS business advisors and food technologists themselves also provide on-site TA to assisted processors in areas falling under their relevant expertise.[3]

Work with food processors is organized by *charters*, which are similar to memorandums of understanding (MOUs) describing the problem being addressed with a set of specific prioritized objectives and an implementation timeframe with clear milestones. Assisted processors have from one to several charters at different stages of implementation with SAFE. A particular charter may involve anywhere from a single to multiple PFS volunteers.

In selecting food processors to participate in the program, SAFE uses the following three selection criteria: (1) the food processor should source from smallholder farmers; (2) the food processor should reach, or potentially reach, large numbers of consumer; and (3) the food processor should be producing, or plan to produce, nutritious foods. To this point, SAFE has worked with 22 food processors in Kenya, 5 food processors in Malawi, and 10 food processors in Zambia. At the end of the activity, SAFE aims to have provided intensive assistance to 56 food processors in total, including 28 in Kenya, 10 in Malawi, and 18 in Zambia (a full list of food processors working with SAFE at the time of the evaluation is presented in Annex 2: Assisted Food Processors).

1.2 THEORY OF CHANGE

Figure 1 presents the SAFE Theory of Change (ToC), which shows the primary outputs, outcomes, and goals towards which SAFE is working. The four primary program outputs at the bottom of the ToC are expected to contribute jointly at the outcome level to strengthened capacity among assisted food processors to produce and market quality, safe, and nutritious foods. This in turn is expected to lead at the goal level to an increase in the availability of nutritious foods and a more competitive processing sector. The high-level goal, which is the theoretical culmination of SAFE outputs, outcomes, and goals, is reduced poverty and improved nutritional status among poor and vulnerable households in SAFE program countries.

Despite the fact that the stated SAFE goal is to increase the competitiveness of the processing sector, key informants at TNS dispute that this is an important goal/objective informing program activities. Rather, they assert that the program is aimed more at working with and improving the capacity of individual processors to produce and market nutritious foods, with the primary aim of increasing the availability of nutritious foods in the market.[4] In practical terms (or in terms of program operating strategy), increasing

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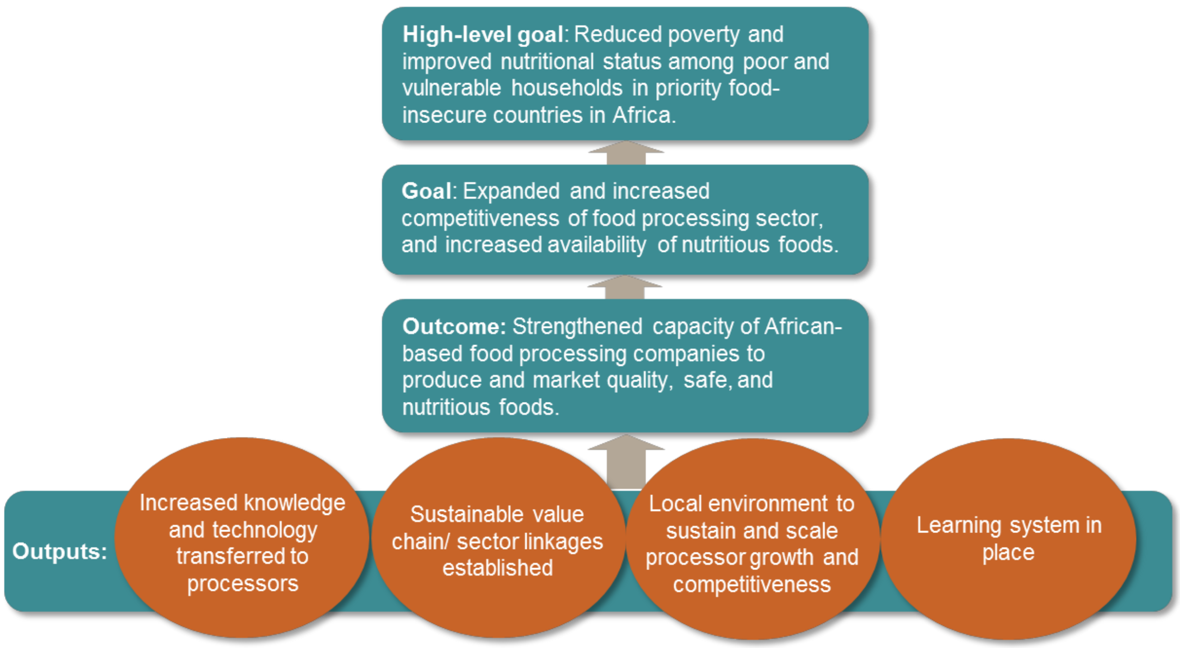
[3]Here and elsewhere, the term *assisted processors* refers to SAFE-assisted processors.

[4] Availability is one of three components of food security identified by USAID, with the other two being food *access* and food *utilization*. Availability refers to the supply of sufficient quantities of food of appropriate quality supplied through domestic production or imports (including food aid).Food access refers to access by individuals to adequate resources (entitlements) for acquiring appropriate foods for a nutritious diet. Food utilization refers to the utilization of food through

the availability of nutritious foods represents the highest-level operational goal sought by the program and the highest-level result being measured in the SAFE Performance Management Plan (PMP). While other higher-level goals are of interest to TNS staff, they do not appear to motivate program operations.

Key informants at PFS and TNS agree that facilitating linkages with smallholder farmers is a "big part" of the program. An initial motivation for SAFE was indeed to work with smallholder farmers, but there were already other programs working with them. Thus the focus turned to building the processing sector, which via its existing linkages with smallholder farmers is assumed to "turn subsistence farmers into market participants" (the validity of this assumption is discussed further below).

Figure 2: SAFE Theory of Change



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adequate diet, clean water, sanitation, and health care to reach a state of nutritional well-being where all physiological needs are met.

2. EVALUATION OVERVIEW

2.1 EVALUATION PURPOSE

BFS contracted Social Impact (SI) to undertake this performance evaluation of the SAFE program. The purpose of the SAFE performance evaluation is to provide BFS with empirical evidence to inform programming and investment decisions under the FtF initiative, including the following:

- How well BFS centrally funded/centrally managed programs are implemented and performing;
- How the programs are perceived by beneficiaries;
- Whether the program are achieving targeted outcomes in support of FtF objectives; and
- What more needs to be done.

This performance evaluation examines the extent to which the SAFE program has achieved the outputs, outcomes, and goals in its ToC. BFS will use the evidence from this evaluation, as well as other analyses, to identify critical gaps in programs in order to map out the way forward for SAFE over the remaining life of the program and to inform future FtF programming decisions in this area.

It bears emphasizing that this report covers the initial evaluation round of the SAFE performance evaluation. The purpose of this initial evaluation round is to establish the conditions at the beginning of the evaluation to serve as a benchmark to which the findings in the endline evaluation round are compared. Thus while this report sheds light on the ten evaluation questions being addressed by the evaluation (see below), it does not provide definitive answers to them. In this sense, this initial evaluation report is more descriptive than it is summative, and what conclusions it does reach are more tentative than final. Of particular interest will be whether and how results change between the initial and endline evaluation rounds, at which point the evaluation will be in better position to reach a set of final conclusions.

2.2 EVALUATION QUESTIONS

The SAFE performance evaluation seeks to answer the ten evaluation questions (EQs) listed below. Evaluation questions are grouped according to four categories: (1) food-processing sector, (2) markets linkages, (3) gender, and (4) implementation process.[5]

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[5] The order of the evaluation questions has been changed from the order presented in the evaluation design document in that evaluation questions related to the implementation process are now EQ9 and EQ10, whereas they were previously EQ1 and EQ2.The order was revised to facilitate the presentation in this report given that many of the recommendations stemming from the analysis in the initial evaluation round are presented under EQ10.

Food-Processing Sector

EQ1. Does participation in SAFE improve the performance of SAFE-assisted food-processing firms in the following areas: (1) management and technical capacity, (2) volume of nutritious food products produced, (3) sales of nutritious foods, (4) employment, (5) profitability, (6) investment, and (7) marketing of nutritious foods?

If so, how? If not, why? What could be done better to improve the program's impact on these areas of firm performance? What is the likelihood that these improvements will be sustained?

EQ2. Have SAFE interventions contributed directly and/or indirectly to changes in knowledge and practices of stakeholders within the food-processing sector as a result of (1) technical assistance, (2) sector-wide trainings, (3) learning activities, and (4) demonstration effects?

If so, how? If not, why? What worked best? What did not work well? What could be done better to facilitate changes in knowledge, attitudes, and practices among sector stakeholders? What is the likelihood that these changes will be sustained?

EQ3. Have SAFE interventions produced a demonstration effect as measured by the scaling-up of SAFE-supported activities among assisted processors and the replication of the SAFE model among other development organizations or in other locations and countries? What is the likelihood that these demonstration effects will be sustained?

Market Linkages

EQ4. Is participation in SAFE associated with new or strengthened market linkages between food-processing firms and (1) smallholder farmers, (2) wholesale buyers, (3) retail buyers, (4) food aid buyers, (5) lending institutions, and (6) other value chain actors?

If so, how? If not, why? What worked well in developing or strengthening these market linkages? What did not work well? What could be done better to develop or strengthen these market linkages?[6] Are these market linkages sustainable beyond the program?

EQ5. Have SAFE interventions increased the availability of nutritious foods, particularly in markets characterized by higher levels of food insecurity among the consumer population?

If so, how? If not, why? What could be done better to improve program impact on food availability, particularly characterized by higher levels of food insecurity among the consumer population?

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[6] Note that here and elsewhere in this document, a *market linkage* is evidenced by a successfully completed market transaction or transactions. The existence of two or more market entities that have engaged in market transactions in the past but that now are engaging in more mutually beneficial market transactions is evidence of a *strengthened* market linkage, while the existence of two entities engaging in market transactions for the first time is evidence of a *new* market linkage.

EQ6. To what extent has any increase in the availability of nutritious foods been matched by an increase in access to (and consumption of) nutritious foods, particularly in markets characterized by higher levels of food insecurity among the consumer population?

If so, how? If not, why? In particular, what barriers exist to food-insecure households purchasing and consuming nutritious foods?

Gender

EQ7. Is participation in SAFE associated with increased leadership/management opportunities for women in SAFE-assisted food-processing firms?

What are the opportunities for advancement? What are the constraints? What is most needed to move women into higher-paying positions with increased income? Is training, skills development, or other capacity building accessible to the women who wish to advance?

What are the ability and willingness of the food processor enterprises assisted by SAFE to support the advancement of women in their employment?

EQ8. To what extent has SAFE led to increased income generation among women employees of SAFE-assisted food-processing firms?

If so, how? If not, why? To what extent do these women employees have control over these resources and are the decision makers in their households as to the use of the earned income?

Implementation Process

EQ9. Was the SAFE program implemented as designed?

If not, what changes were made and what factors, both internal and external to the program, explain the changes? How did these changes affect program results?

EQ10. What might SAFE have done differently to improve program implementation?

3. METHODOLOGY

3.1 DATA COLLECTION METHODS

The SAFE performance evaluation is a mixed-methods evaluation that uses a combination of quantitative and qualitative data collection methods. It involves an initial data collection round completed during March–April 2015 and an endline data collection round scheduled for early 2016. The primary collection methods include: (1) key informant interviews (KIIs), (2) focus group discussions (FGDs), (3) stakeholder surveys, (4) household surveys, and (5) secondary data review. Each of these methods is described below.

Key Informant Interviews

KIIs are in-depth and semi-structured interviews conducted with program stakeholders face-to-face, by telephone, or over Skype. KIIs use a prepared discussion guide but also allow interviewers the flexibility to investigate other lines of inquiry as appropriate. KII participants were selected purposively based on consultations with TNS and the local research partner selected by the evaluation team and on the evaluation team's familiarity local markets and stakeholders. The primary criteria for selecting participant stakeholders were their familiarity with SAFE and/or their knowledge of relevant issues.

The evaluation team conducted KIIs with representatives from the following seven stakeholder groups: PFS, TechnoServe, assisted processors, SWT trainers, institutional buyers, other sector stakeholders, and market actors. Other sector stakeholders interviewed included government officials and representatives of other development organizations. Market actors interviewed included wholesalers and retailers working in the communities covered by the in-depth case studies (see below). KIIs were recorded and the recordings transcribed whenever possible. Interviewers also took notes of each interview and prepared written summaries of their notes. Table 1 shows the distribution of KIIs across countries and stakeholders.

A complete list of KII participants, disaggregated by country and stakeholder group, is presented in Annex 3: Key Informant Interviews. Copies of the KII discussion guides for each stakeholder group can be found in Annex 5: Discussion Guides.

Table 1: Key Informant Interviews Conducted during Initial Evaluation Round

Stakeholder Group	Kenya	Zambia	Malawi	Total
PFS	N/A	N/A	N/A	**8**
TNS	6	1	2	**9**
Assisted processor	15	8	4	**27**
Trainers	2	3	3	**8**
Institutional buyers	3	4	3	**10**
Sector stakeholders	3	5	2	**10**
Market actors	10	10	1	**21**
Total	**39**	**31**	**15**	**93**

Focus Groups Discussions

FGDs are in-depth and semi-structured interviews conducted face-to-face with program stakeholders. The FGDs conducted by the SAFE evaluation team involved a small group of six to ten individuals selected based on their membership in the stakeholder group of interest. FGDs used a prepared discussion guide but also allowed interviewers the flexibility to investigate other lines of inquiry as appropriate.

The evaluation team conducted FGDs with representatives from three stakeholder groups: participants in SWT trainings, women employees at assisted food processors, and persons responsible for household food purchasing decisions living in communities served by the two case study processors. Conducting FGDs typically involved a two-person moderation team including a trained facilitator who moderated the discussion and a research assistant who took notes and assisted the facilitator. FGDs were recorded and the recordings transcribed whenever possible. Moderators also took notes of each interview and prepared written summaries of their notes.

Table 2 shows the distribution of FGDs across countries and stakeholders. Copies of the FGD discussion guides for each stakeholder group are presented in **Annex 5: Discussion Guides**, while a detailed description of the gender FGDs and their findings is presented in **Annex 9: In-Depth Gender FGD Findings**.

Table 2: Focus Group Discussions Conducted during Initial Evaluation Round

Stakeholder Group	Kenya	Zambia	Malawi	Total
SWT participants	2	1	0	**3**
Women employees	4	4	1	**9**
Consumers	4	3	0	**7**
Total	**10**	**8**	**1**	**19**

Stakeholder Surveys

The evaluation team administered short surveys to the following three groups of stakeholders: assisted processors, SWT trainers, and SWT participants (trainees). The processor and trainer surveys were administered to each assisted processor and trainer participating in the initial evaluation round at the end of each processor and trainer KII. The trainee survey was a telephone survey administered to a random sample of SWT participants in Kenya and Zambia, drawn from a comprehensive list of SWT participants in the two countries. Table 3 shows the number of stakeholders responding to each of the stakeholder surveys in each of the SAFE program countries. Copies of the processor, trainer, and trainee surveys are presented in **Annex 6: Stakeholder Surveys**.

Note that because the trainee survey was a telephone survey, responsibility for it was assigned to the local research partner Infinite Insight, which had both the expertise and resources to conduct telephone surveys and to complete them quickly. At the same time, it was decided for budgetary reasons that the SI evaluation team would conduct all fieldwork in Malawi, while Infinite Insight would carry out the bulk of the fieldwork in Kenya and Zambia.[7] While this decision allowed the baseline evaluation to be completed within the existing budget parameters, the tradeoff was that we did not do any trainee surveys in Malawi.

Table 3: Stakeholder Surveys Conducted during Initial Evaluation Round

Stakeholder Group	Kenya	Zambia	Malawi	Total
Processor survey	15	8	3	**26**
Trainer survey	2	3	2	**7**
Trainee survey	97	41	0	**138**
Total	**114**	**52**	**3**	**169**

Household Survey

The household survey is a repeated cross-sectional survey administered to a simple random sample of households located in communities characterized by relatively large numbers of food-insecure households and where the two case study processors—Classic Foods in Kenya and Community Markets for Conservation (COMACO) in Zambia—are seeking to sell the nutritious food products for which they received SAFE assistance. Households participating in the survey within each sample community were

[7] Infinite Insight had better pre-existing on-the-ground research infrastructure in Kenya and Zambia than in Malawi and could therefore conduct the planned fieldwork in those two countries at a lower per unit cost than in Malawi. At the same time, the relatively small number of assisted processors, trainers and other program stakeholders in Malawi made it possible for the SI evaluation team members to conduct all of these interviews during their time in country. Thus it made sense for budgetary reasons for the SI evaluation team to take on all the fieldwork in Malawi while making Infinite Insight responsible for the bulk of the fieldwork in Kenya and Zambia.

selected using the random walk method. Survey respondents were the persons within those households most responsible for making purchasing decisions.

Both the case study processors and communities were selected after close consultations with TNS. Initially, the evaluation team proposed conducting a longitudinal panel survey of households with the target sample size determined by the expected change in the proportion of households consuming specific nutritious foods produced by the case study processors. After further discussions with local research partner Infinite Insight, however, it was decided to conduct a repeated cross-sectional survey in which simple random samples of households are surveyed in the sample communities in each survey round. This decision hinged on two primary factors.

1. The household surveys are part of the exploratory market research being done as part of the in-depth case studies. Repeated cross-section surveys are a common market research tool and are far more commonly used for this purpose than panel surveys.
2. Low-income populations living in the sample communities are highly transient, thus requiring an adjustment for panel attrition on the order of about 50 percent, which is substantially larger than the original estimate of 20 percent panel attrition. The household survey was already subject to binding budget constraints, and increasing the estimated panel attrition rate to the number required would increase the required sample size to a level far exceeding that allowed by the existing budget.

In contrast to a panel survey, which allows for measurement of change at the household level, a repeated cross-sectional survey allows for measurement of change at the aggregate or population level. This survey design gives good estimates for the current population and the changes or movements that have occurred within the general population since the last survey.

The household survey questionnaire includes questions covering household demographics, household food consumption, attitudes toward and usage of nutritious foods, and attitudes towards and usage of the foods and brands produced by the two case study processors. The initial evaluation survey establishes the conditions for all of these questions at the beginning of the evaluation. The endline survey will allow the evaluation team to measure how these conditions have changed within the sample communities over the ensuing year concurrent with the case study processors' ongoing efforts to sell its nutritious products within those communities.

The household survey sample size in Kenya was 428 households spread across ten urban settlements in and around Nairobi. The total sample size in Zambia was 657 households spread across three rural communities in Eastern Zambia. Copies of the survey questionnaires used in Kenya and Zambia are provided in Annex 4: Household Survey Instrument, while a detailed summary of the survey findings in Kenya and Zambia (including a breakdown of the sampling distribution) are provided in Annex 7: In-Depth Case Study Findings, Kenya and Annex 8: In-Depth Case Study Findings, Zambia, respectively.

In-Depth Case Studies

As discussed above, SAFE focuses on increasing the availability of nutritious foods in the three SAFE program countries. Although improving the nutritional status of vulnerable households sits at the top of the program ToC, SAFE is not actively working toward this high-level goal. To the extent SAFE does pursue this high-level goal, it does so via *backward linkages* from its assisted processors to the smallholder farmers who are (in most cases) their primary suppliers of raw materials, rather than via forward linkages with vulnerable households as consumers of nutritious foods. Hence, there is little to no emphasis in the program on increasing the availability of nutritious foods for the vulnerable populations who stand to benefit the most from them.

With that said, there are a number of reasons why increased availability of nutritious foods may not translate into increased access and thus into improved nutritional status among vulnerable households. For example, distribution networks, prices, packaging, or local demand characteristics may all act as barriers to increasing access to these foods among vulnerable households. Therefore, this evaluation is interested in examining what these barriers are, what may be done about them, and whether it might be possible to adapt aspects of the program design or operations so as to improve its impact on nutrition outcomes without necessarily changing the fundamental nature of the program.

Note that the difficulty in translating increased food availability into increased food access and improved nutrition does not necessarily imply a flaw or incorrect assumption in the program ToC. The evaluation team sees it more in terms of a disconnect between the program's high-level goal and its design. That is, if the stated program goal is to improve the nutritional status of poor and vulnerable households, then the existing program design that focuses primarily on increasing food availability, while seeking simultaneously to improve food access primarily through facilitating indirect or second-order improvements in access via backward linkages to small-holder farmers, may not be the most effective design for achieving this high-level goal. This in turn suggests either that (1) a more direct means with clearer and stronger causal linkages for improving food access and nutritional outcomes may be appropriate or (2) the program's high-level goal may need to be restated to reflect the program's on-the-ground realities.

The challenge facing the evaluation team was to develop a method and implement this within the constraints of the evaluation budget. The solution arrived during the evaluation inception visit was to conduct "exploratory market research" in the communities served by the case study processors. The purpose of the exploratory market research was to gain an in-depth understanding of the supply and demand characteristics of nutritious foods in the case study communities and thereby enhance understanding of the process by which nutritious foods become available to and are consumed by the populations who can benefit the most from them. The exploratory market research consisted of the following three research activities: (1) consumer FGDs, (2) market actor KIIs, and (3) the household survey (see above).

The following two criteria were used to select the case study processors.

1. The processor must have received assistance from SAFE to produce and/or market nutritious food products.
2. The processor must either already be selling the nutritious food products in markets characterized by a relatively high density of vulnerable households or it must be planning to sell the nutritious food products in markets characterized by a relatively high density of vulnerable households.

Based on these two selection criteria, the evaluation team and TNS selected Classic Foods in Kenya and COMACO in Zambia as the subjects for the in-depth case studies. Classic Foods operates in relatively poor settlement areas surrounding Nairobi, e.g., Kibera, Kitengela, Juja, and Ruiru, where it sells corn-soy blend (CSB) porridge and fresh milk under its Classic brand name and fortified maize flour under its Capital brand name to retail chains and small independent retailers. COMACO operates in the Eastern Province cities and towns of Chipata, Katete, and Lundazi, where it sells two nutritious food products in retail chains and small independent retailers under the It's Wild! brand name: Yummy Soya (CSB) and Peanut Butter. None of the assisted processors in Malawi met the two selection criteria. Consequently, no in-depth case study was conducted in Malawi.

The two case study processors offer interesting contrasts in that one is selling its nutritious food products in densely populated urban and peri-urban markets surrounding the nation's capital and largest city, while the other is selling its nutritious food products in low-population-density cities and towns located in remote areas of Zambia's Eastern Province. Nonetheless, the settlement areas surrounding Nairobi and cities and towns in Zambia's Eastern Province both meet the criteria of having a relatively high share of vulnerable households, i.e., the target market for the in-depth case studies.

3.2 LIMITATIONS OF THE EVALUATION METHODOLOGY

The evaluation methodology has a number of limitations that have important implications for the types of findings and conclusions that can be drawn from the evaluation, as discussed below.

Attribution

The primarily qualitative nature of the evaluation, which in turn entails the absence of comparison measurements and (at times) small sample sizes, means that the evaluation methodology is not able to generate sufficient counterfactual evidence to attribute observed results to SAFE activities. The evaluation methodology seeks to mitigate this limitation through the triangulation of data and by drawing on multiple sources of data to reach informed findings, conclusions, and recommendations.

Sampling

Owing to time and resource constraints, the evaluation team was not able to interview all SAFE stakeholders and instead, with the exception of assisted processors and SWT trainers, was only able to interview a subset of purposively selected stakeholders. While the evaluation team worked closely with TNS to identify a reasonably representative sample set of stakeholders, these may not give a fully comprehensive picture of program impact, its activities, and its results. On top of this, 9 of 35 processors declined to participate in the evaluation. Had these processors participated in the evaluation, it may or may not have changed the findings and thus the conclusions and recommendations. However, given the consistency of certain themes that emerged during the processor interviews, the evaluation team suspects that the inclusion of these processors in the evaluation would not have significantly changed the main evaluation findings.

Case Studies

The two in-depth case studies are intended to provide insights on questions related to the availability and access of nutritious foods among food-insecure households. The two case study processors were selected after discussions with TNS as being potentially good cases from which generalizable lessons might be learned about the supply and demand characteristics for nutritious foods within markets characterized by higher numbers of food-insecure consumers. However, there are limitations to using case studies to draw generalizable lessons learned related to issues such as sample size and context limitations. It should be noted as well that the sample sizes of the household surveys within the case study communities were highly constrained by budget limitations.

Indirect Effects

The evaluation methodology and timeframe meant that evaluators were obliged to focus primarily on the program's direct beneficiaries, which are the assisted processors. At the same time, evaluators recognize that there may be direct or indirect beneficiaries of program activities, including SWT trainees and also smallholder farmers supplying the assisted processors. The original evaluation design included implementation of crop budgets surveys to assess the benefits that smallholder farmers derived from their relationships with assisted processors, but this approach was later dropped from the evaluation design due to budget limitations. In any case, the evaluation methodology did not allow the evaluation to determine what or how substantial these other direct or indirect benefits were.

Subjective Measurements

A final implication of the qualitative approach used is that the measurement of results largely consists of subjective perceptions of KII and FGD participants. Thus, the evaluation lacks specific quantitative measurements of certain key results.

3.3 EVALUATION TEAM

The SAFE evaluation team consisted of three US-based consultants including a Team Leader, an Agricultural Markets Specialist, and a Gender Specialist, in addition to a local research partner. Among the US-based consultants, the Team Leader and Gender Specialist are working under contract with SI and the Agricultural Markets Specialist is working under contract with Management Systems International (MSI).The local research partner is Infinite Insight, which is a Nairobi-based market research firm with experience working in multiple countries in East and Southern Africa.

The US-based consultants and local research partner shared data collection responsibilities during the initial evaluation round. The former conducted all KIIs with PFS and TNS staff, three processor KIIs and surveys in Kenya, three processor KIIs and surveys in Zambia, and all gender FGDs and all data collection activities in Malawi.[8] Infinite Insight conducted the remaining processor KIIs and surveys in Kenya and Zambia, all trainer KIIs and surveys in Kenya and Zambia, all trainee surveys, all KIIs with sector stakeholders and institutional investors in Kenya and Zambia, all market actor KIIs, and all consumer FGDs.

The following sections present the findings, conclusions, and recommendations from the SAFE initial evaluation round organized by the ten evaluation questions listed above. Note that the quotes presented

[8] For budgetary reasons, it was decided that the Agricultural Specialist would conduct all of the data collection activities in Malawi.

below and elsewhere to demonstrate the evaluation findings are not exhaustive of all quotes made by KII and FGD respondents but are instead intended to be reasonably representative of the statements made and the common themes that emerged during the KIIs and FGDs. For the sake of brevity, however, only a limited number of quotes is provided to demonstrate a particular point.

4. EVALUATION FINDINGS

EQ1. DOES PARTICIPATION IN SAFE IMPROVE THE PERFORMANCE OF SAFE-ASSISTED FOOD-PROCESSING FIRMS?

Assisted processors interviewed for the initial evaluation round were asked to rate on a scale of 1–3 how much their business had grown in different areas as a result of SAFE assistance. Table 4 shows their responses. With one exception, processors said that their business had shown *some increase* in terms of the number of product lines, productivity, sales, profits, and product quality. The one exception was investment, where the processors said they had experienced no to little growth.

Table 4: Performance Improvements at Assisted Processors' as a Result of SAFE Assistance

Which of the following areas of your business has grown as a result of SAFE assistance? (1=No increase; 2=Some increase; 3=Significant increase)	Kenya(*n*=15)	Zambia(*n*=9)	Malawi(*n*=3)	Total(*n*=27)
Number of product lines	1.5	2.6	2.3	**2.0**
Productivity	1.9	2.8	2.5	**2.3**
Sales	1.9	2.6	2.3	**2.2**
Profits	1.7	2.4	2.2	**2.0**
Product quality	1.9	2.9	2.6	**2.3**
Investment	1.4	1.5	1.4	**1.4**

The overall results, however, hide some variations among the three countries. Assisted processors in Kenya consistently rated their business growth to be lower in five of the six areas, whereas processors in Zambia consistently rated their business growth to be higher in all six areas, although by relatively small margins.

Table 5 presents the cumulative results from the SAFE performance monitoring system for indicators measuring the number and volume of food and nutritious food products sold by assisted processors, the number of processors earning profits and profits earned, investments made, and jobs created for Kenya and Zambia covering the time period of October 2013 through March 2015. Note that SAFE does not have monitoring data for assisted processors in Malawi over the relevant time period. The implications of the results shown in Tables 4 and 5 for answering EQ1 are included in the discussion below. Unfortunately, the PMP data SAFE provided to the evaluation team is not disaggregated by assisted processors, so it is not possible to breakdown the data by individual processors. At the same time, the number of assisted processors reporting in any reporting period was not consistent across the relevant time period, as some processors graduated from the program and others joined it, so that it is not possible either to calculate average values for the PMP data.

Table 5: Performance of Assisted Processors from the SAFE Performance Monitoring System During the Period of October 1, 2013-March 30, 2015

Indicator	Kenya	Zambia	Total
Incremental volume of processed foods sold by assisted food processors[9]	25,122	11,871	**36,993**
Number of nutritious food products sold by assisted food processors[10]	9	14	**23**
Volume of improved nutritious food products sold by assisted food processors[11]	2,341	2,998	**5,339**
Number of firms operating more profitably[12]	25	23	**48**
Value of incremental net profit by assisted food processors[13]	–-5,143,511	2,352,643	**–2,352,643**
Value of new investments by assisted processors[14]	811,097	173,181	**948,278**
Number of female FTE jobs created at assisted [15]	52	10	**62**
Number of male FTE jobs created at assisted processors	47	16	**63**

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9 The 'incremental volume of processed foods sold' is the total volume in metric tons of processed foods sold in the current reporting period minus the volume of processed foods sold in the previous reporting period. Note that this refers to all processed foods sold, including, but not limited to, nutritious food products.

10 'Nutritious food products' refer specifically to food products under production by assisted food processors that have undergone enhancement in their nutritional value, their availability of nutrition, their quality of nutrition or any improvements related to a nutritious food product due to SAFE support.

11 This is the total (not incremental) volume in metric tons of nutritious food products sold in the relevant reporting period.

12 Firms (assisted processors) are counted for this indicator for each reporting period they report higher profits than in the previous reporting period. The value for this indicator thus includes a fair, albeit unknown, amount of double counting.

13 'Incremental net profit' is the US$ net profit reported during the current reporting period minus the net profit reported during the previous reporting period. The negative value of incremental net profit thus means that the profit reported in one reporting period was less than the net profit reported in the previous reporting period.

14 'Investment' is defined as any use of resources by food processors intended to increase future production output or income, to improve the sustainable use of agriculture-related natural resources (soil, water, etc.), to improve water or land management, etc. This indicator is measured in US$.

15 Full-time employment (FTE) is calculated in the SAFE performance monitoring system based on a 40-hour workweek and a full, 230-day (11-month) work year. A part-time job would be converted into FTE terms by the following formula: FTE = (hours per week /40) x weeks/11 or (hours per week /40) x days/230.

Volume, Sales, Profits, and Investment

As seen in Table 5, assisted processors in Kenya and Zambia increased the total volume of processed foods sold by just under 40,000 metric tons from October 2013 through March 2013, and simultaneously increased the volume of nutritious food products sold by 5,339 metric tons, or 14.4% of the total volume increase in processed food sold, from 23 nutritious food products developed with SAFE assistance. Over the same period, assisted processors increased their investment by $948,278, while reporting a decline in incremental net profits totaling $2.35 million (accounted for entirely by assisted processors in Kenya), despite reporting an increase in net profits on 48 occasions over the six four month reporting periods covered in Table 5.

The decline in net profits in Kenya, however, is accounted for almost entirely by a single firm, Soy Afric, which reported a fall in net profits totaling just under $3 million in consecutive reporting periods during October-December 2014 and January-March 2015.[16] If Soy Afric is removed from the data, then Kenyan processors earned a positive $755 thousand in incremental net profits from October 2013-March 2015, and total incremental profits earned over this time period increase to $3.1 million. We do not know at this point why Soy Afric's profits fell so precipitously during these two reporting periods. This will be a matter of follow-up during the endline evaluation.

Notwithstanding their smaller numbers, assisted processors in Zambia performed comparatively well to their Kenyan counterparts in terms of the number of nutritious foods developed, volume of nutritious foods sold, and incremental profits earned. In contrast, assisted processors in Kenya performed comparatively well to their Zambian counterparts in terms of the total volume of processed foods sold, investment and jobs created.

During the processor KIIs, a number of assisted processors were able to cite specific examples in which SAFE assistance had contributed to sales and profits. Much fewer processors could cite examples of increased investment due to SAFE assistance, aside from the equipment or other physical capital acquired as part of a SAFE charter.

"*They advised us on a machine layout play, how to arrange the machines, such that we were able to minimize costs and increase efficiency*." (Assisted processor, Kenya)

"Our revenues went up by 50 percent. Profits have gone up. Due to SAFE our profits have gone up by about 30 percent because we have been able to reduce our losses. Our sales revenue went up by 100 percent."(Assisted processor, Kenya)

"It was amazing that once we got the new label our sales increased by I think 50 percent."(Assisted processor, Zambia)

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[16] The evaluation team was able to get more information on incremental profits broken down by assisted processors for the relevant reporting periods.

"In terms of income, certainly our sales are increasing year on year, which is in part because of our quality, and certainly if we can become more efficient then that's going to help us with our setting of the price." (Assisted processor, Zambia)

Increased profits were due not only to increased sales but also to increased processing efficiencies, which saved them money or improved product quality products that processors could sell at higher prices than previously.

"It has improved in a big way because the moment I scaled down on the over-purchases of raw materials, I saved on the cost of production." (Assisted processor, Kenya)

"Something we used to sell at a low price we are now selling at a higher value. That is a good response." (Assisted processor, Kenya)

"They recommended we do this and this—issues of quality control, which we have implemented and we have scaled up our quality of product." (Assisted processor, Kenya)

"The quality has improved—we used to reject around 5000 liters of milk. The farmer is not paid and the company loses, but now milk rejected is about 50 liters." (Assisted processor, Kenya)

"Our losses have really gone down by more than half. Milk going bad, yoghurt going bad, that has really gone down because we have been able to improve on our processes." (Assisted processor, Kenya)

"Quality-wise, the quality has become very good." (Assisted processor, Zambia)

"[We have achieved] improvements in efficiencies and obviously improvements in quality." (Assisted processor, Zambia)

"I will give you an example of our products: we used to market it for six months but now we do it for a year, and the reason is because we now know at what temperature we have to produce our corn-soy blend for it to last a year, so that was really great." (Assisted processor, Malawi)

Many assisted processors were also grateful to be able access the network of potential buyers offered through TechnoServe.

"It is them who brought the Edom people to buy from us; they provided the market for us." (Assisted processor, Kenya)

"TechnoServe has been able to open up their local networks to us: networks for clients and networks for individuals who are interested in these sorts of products, even networks to suppliers of equipment." (Assisted processor, Kenya)

"Most of our products, like flour, are at the registration level with Kenya Bureau of Standards [KEBS], but with some we have KEBS…. You see, when you take them to the shelves [retail], they want to see KEBS." (Assisted processor, Kenya)

For many processors, however, the lack of funding to implement the recommended changes reduced the benefit they might have otherwise received. Although (as mentioned above) the processors understood that funding was outside the mandate of SAFE, many found this frustrating:

"[Local TNS staff] advised me that I should grow, grow, grow, and the way to grow is to borrow money. They could see I had opportunity and a future in what I was doing, and they said that I need to grow. But some areas require a lot of money, and I can only borrow so much because I don't have that much collateral, and it limits me so I have to go slow and grow slowly." (Assisted processor, Kenya)

"[The PFS volunteer] wanted us to get moving, but due to the financial challenges, we could not." (Assisted processor, Kenya)

"Our main challenge is the lack of finances." (Assisted processor, Kenya)

"We will not be able to assess our performance when we have the financial constraints; it is very difficult." (Assisted processor, Zambia)

"Increase and profitability, it is extremely difficult to assess now because there are other parameters at play, which has negatively impacted on our performance because of cash constraints." (Assisted processor, Zambia)

Employment

Table 6 shows the number of new jobs that interviewed processors estimated were created as a result of SAFE assistance, divided into full-time and part-time jobs and male and female jobs. Note that these are estimates provided by the interviewed processor and could not be verified by the evaluation team.

Overall, interviewed processors said that SAFE assistance was responsible for creating 200 full-time jobs (144 male and 56 female) and 188 part-time jobs (92 male and 96 female). Kenyan processors created the most full-time and part-time jobs, followed by Zambia and Malawi. The average number of full-time jobs created per processor was highest in Malawi at 23.3, followed by Zambia at 6.8 and Kenya at 4.5. In Malawi, however, the 70 new jobs were created at a single processor, which hired the workers to run a new production line that SAFE helped it install. The average number of part-time jobs created was highest in Zambia at 8.0, followed by Kenya at 7.7 and Malawi at 0.0.Twenty-eight percent of full-time jobs and 51 percent of part-time jobs created were female jobs. The corresponding percentages were 43 percent and 38 percent in Kenya, 44 percent and 72 percent in Zambia and zero percent in both cases in Malawi. Note that these are self-reported estimates and could not be verified by the evaluation team.

There are significant differences between the numbers of jobs created for both males and females in Kenya and Zambia as reported by processors in KIIs and the data captured in the SAFE performance monitoring system. In KIIs, processors reported lower numbers. However, this is possibly due to lack of access to this data, which spans a significant timeframe.

Table 6: Number of Jobs Created as a Result of SAFE Assistance

Type of Job	Male	Female	Total
Kenya			
Full-time	39	29	**68**
Part-time	72	44	**116**
Zambia			
Full-time	35	27	**62**
Part-time	20	52	**72**
Malawi			
Full-time	70	0	**70**
Part-time	0	0	**0**
Total			
Full-time	**144**	**56**	**200**
Part-time	**92**	**96**	**188**

Sustainability

At this point, it is too early to reach informed judgments about the sustainability of the above performance improvements. The sustainability of these results will depend on a variety of factors, including the sustainability of changes in knowledge and practices at assisted processors; market trends that affect the supply, demand, price, etc. of production inputs and final products; the receipt of additional assistance from SAFE or other service providers; access to credit or other sources of capital; and the motivation and drive of the assisted processors. The endline evaluation will revisit all of these issues to determine how sustainable they have proven to be.

Conclusions

Participation in the SAFE program appears to have generated increases in volume, sales, profits and, to a lesser extent, in investment. According to the perception of assisted processors, these improvements seem to have largely been associated with increased operating efficiency, including lower losses. It is also associated with improved quality, which has in some cases resulted in higher pricing. Likewise, increases in volume, sales, and profits have facilitated the hiring of additional staff.

Recommendations

Recommendations for improving the impact of SAFE assistance on assisted processors' performance are captured under EQ10, which asks what SAFE might have done differently to improve program implementation and results.

EQ2. HAVE SAFE INTERVENTIONS CONTRIBUTED DIRECTLY AND INDIRECTLY TO CHANGES IN KNOWLEDGE AND PRACTICES OF STAKEHOLDERS WITHIN THE FOOD-PROCESSING SECTOR AS A RESULT OF TECHNICAL ASSISTANCE, SECTOR WIDE TRAININGS, LEARNING ACTIVITIES, OR DEMONSTRATION EFFECTS?

The processor survey asked assisted processors to rate the amount of change they have made in different areas as a result of SAFE assistance. The results shown in Table 7 indicate that, overall, the processors say they have made some change in production methods, product quality, management capacity, and technical capacity. Among the three countries, processors in Zambia gave higher ratings in all areas, while Kenya gave the lowest rating in all areas (and in some cases tied with Malawi processors).

The most notable differences between the three countries are in production methods, product quality, and technical capacity, in which Kenyan processors are much more pessimistic about changes made than Zambian and Malawian processors. The reasons for the finding are not evident but will be investigated further in the endline. Given frequent processor complaints about the lack of financing options, it is not surprising that processors in all three countries said that this is where they made the fewest changes.

Table 7: Changes Made in Assisted Processors' Business as a Result of SAFE Assistance

How much change have you made in your business as a result of the assistance you received? (1=No change; 2=A Little change; 3=Some change; 4=Significant change)	Kenya (*n*=15)	Zambia (*n*=9)	Malawi (*n*=3)	Total (*n*=27)
Raw materials sourcing	2.4	2.8	2.5	**2.5**
Production methods	2.5	3.6	3.2	**2.9**
Product quality	2.5	3.7	3.3	**3.0**
Management capacity	2.9	3.2	2.9	**3.0**
Technical capacity	2.5	3.5	3.2	**2.9**
Commercial relationships	2.6	2.9	2.6	**2.7**
Sources of finance	1.7	1.5	1.4	**1.6**

Table 8 presents the cumulative results from the SAFE performance monitoring system measuring the number of assisted processors applying new management practices and the number of nutritious food products developed for Kenya and Zambia covering the time period of October 2013 through March 2015.

Table 8: Performance of Assisted Processors from the SAFE Performance Monitoring System

Indicator	Kenya	Zambia	Total
Number of processors applying new management practices	18	4	**22**
Number of improved nutritious food products	9	12	**21**

Given the relatively larger number of assisted processors in Kenya, it appears that a large percentage of processors applied new management practices in both countries. A notable observation, however, is the relatively large number of improved nutritious food products that have resulted from SAFE assistance in Zambia.

Regarding the KII findings, a number of the assisted processors were able to identify one or more improvements in their knowledge and practices as a result of SAFE assistance. This was not universally true, however, as a minority of processors also claimed not to have received any, or many, tangible benefits from their collaboration with SAFE.

For those processors claiming to have benefited from SAFE assistance, several noted significant increases in their knowledge, capacity, and confidence as a result of their work with SAFE, which they intended to continue to build on so as to grow their businesses over time.

"Things are at least orderly done after them telling us to go like this, do things like this, after doing this you will get this. We are putting in practice and at least we are seeing we are going somewhere."(Assisted processor, Kenya)

"Generally speaking, standard implementation [of quality controls] across the board has quite improved; I am now talking of food where I can talk with a lot of authority. It has greatly improved."(Assisted processor, Kenya)

"From other recommendations, from the things that need to be done, and from the voluntary work that's been done from the PFS, it's become evident to us that we need to recruit someone to take that up permanently." (Assisted processor, Zambia)

Management

A number of the assisted processors interviewed believe that SAFE assistance has helped them to improve business planning as well as to make significant improvements to their internal processes and systems.

"The strategic management project has been really successful in the sense that we managed to understand each other. The objective was to have a strategic document; we have that document. We have made changes, things are happening. We have made changes executing that document." (Assisted processor, Kenya)

"They conducted an internal audit of our entire premises and our production processes. They were there throughout our entire production so they were able to pick out where the problems were, where we were going wrong, and they gave us feedback." (Assisted processor, Kenya)

Assisted processors were especially grateful for the basic technical and business knowledge received from PFS volunteers and local TNS staff. Areas in which they cited significant improvements in knowledge and practices were general business management, setting up financial systems, and compliance with regulatory standards.

"They have taken me through the simple things that a business should have, and I can say that they contributed to where I am today. They actually took me step-by-step through how to do the business. They actually told us how to get through KEBS." (Assisted processor, Kenya)

"[Local TNS staff] sent us a book on accounting, a simple accounting book to help us record so we can see the flow of cash." (Assisted processor, Kenya)

"They also give us help in the accounting system, for instance if we have a problem related to accounting, while we must control shrinkage or pilferage, we've had chats with them to say, 'Look, we are having a problem here,' and they provide a program or monitoring parameters which they design and hand over to us to use that program in order to ensure that we are accounting for every product that is produced and what is sold and what is returned; that's what they do."(Assisted processor, Zambia)

"We didn't have much recordkeeping but they did help us in putting things in place."(Assisted processor, Zambia)

"We are in discussions with ShopRite. And it's not like we went to them, they wrote us an email to see how we can work with them. They told us to prepare some documents, which we are working on right now to take back to ShopRite. We are now confident enough because we know our product is compliant with the standards. And we are able to supply to the chain of stores. So that's one of the bigger markets that we are going to enter." (Assisted processor, Zambia)

Technical Capacity

Several processors were also able to identify areas where SAFE had helped them improve their technical capacity.

"They advised us on machine layout plan, how to arrange the machines such that we are able to minimize costs and increase efficiency." (Assisted processor, Kenya)

"We were required to buy a piece of machinery that was costing quite a lot of money and through the SAFE program they got engineers to come and do drawings of equipment and we were able to fabricate it here at a fraction of the cost." (Assisted processor, Zambia)

A recurring theme in the processor interviews was the value of SAFE assistance in improving product quality and product handling and hygiene.

"We did a quality audit where we saw gaps that we have in product handling along with measures to take to ensure food does not become contaminated." (Assisted processor, Kenya)

"Hygiene was mostly to do with how our staffs operate in there. That was very helpful because they were told how to deal with the food, how to handle it." (Assisted processor, Zambia)

"The quality of our products is superb. We really have worked with PFS on quality. On the efficiency side, the program is still ongoing; you know, we've made improvements but we have still a long way to go." (Assisted processor, Zambia)

"TechnoServe trains you to ensure a safe product by training you on how you should keep the work floor clean and various stages in ensuring that you clean the factory and equipment." (Assisted processor, Zambia)

Another technical area in which SAFE demonstrated its usefulness was in product improvement. In this regard, SAFE successfully provided processors access to overseas laboratories, which provided valuable testing services.

"SAFE is taking our samples to the USA, getting them analyzed, and giving us feedback." (Assisted processor, Kenya)

"I understand that sometimes it is difficult to get to the right person… so that is why the relationship we have with General Mills was so important. We just find ourselves turning to them instead for technical assistance." (Assisted processor, Malawi)

Process flow was yet another technical area mentioned frequently by assisted processors where SAFE provided valuable assistance in improving production knowledge and practices.

"I have been able to come up with a strategy monitoring my raw materials, my products, and the end product… It assists me with stocking of raw materials so that I know how much I need this time around."(Assisted processor, Kenya)

"The internal layout—there are things we used to do that were simple but we were told to change, like the cable layout of the power, which was coming directly to the work stations. Instead of coming along the walls, they should come from up the ceiling then down to the work station, so we were able to implement the small ones, even like critical control points in the work stations."(Assisted processor, Zambia)

"They were so helpful. Even the design of the factory was also helped by them." (Assisted processor, Malawi)

Marketing

Assisted processors greatly appreciated having access to sales and marketing expertise, particularly in the areas of packaging, branding, pricing, and facilitating market linkages. In Kenya, processors frequently cited the help they received in registering their products with KEBS, which allows them to move from selling in bulk to distributers to selling in the retail market.

"We have been able to make changes in our image, our logo, our consistency, our website, and such stuff." (Assisted processor, Kenya)

"We were talking with PFS about specifications for packaging, and it helped us a lot. We sent out suggestions, they brought their suggestions, until we cleared the exercise. I think it was very useful." (Assisted processor, Kenya)

"We sent them samples of the products we have in the market, we sent them the prices that are there in the market, we sent them prices of raw materials and they were able to come up with a product whose formulation they gave to us that we'd be able to sell in the market at a cost-effective price in comparison with the products that are there in the market." (Assisted processor, Kenya)

"They have helped us with the rebranding of our box… the first box that we had was the color white and so they told us that the white box had to go. When they are being painted white it thins the board. Therefore, they are

likely to collapse. It's thinner or something like that. So they told us that we should leave it khaki. With the khaki brown, it's much stronger." (Assisted processor, Malawi)

Among the smaller food processors in Zambia, SAFE seems to have made significant inroads in the area of food safety. A number of the small and medium-sized businesses that the program has reached have transformed how they handle and process foods, including in the areas of hygiene and food storage. SAFE has also worked with the stakeholders to develop and deliver quality standards for the sector via the SWTs.

Sector-Wide Trainings

Tables 9 and 10 show the results of the trainee surveys in Kenya and Zambia. In this survey, respondents were asked to rate various aspects of the SWTs using an ascending four-point scale in which 1 represented the lowest score and 4 represented the highest score. A total of 97 participants from four SWTs in Kenya and 41 participants from two SWTS in Zambia responded to the survey. Overall, respondents were highly satisfied with the experience and found the training highly relevant to their personal needs and the needs of their organization as well as to the industry as a whole. Respondents also rated the training materials and topics to be highly relevant, while also giving high marks to the quality of instruction, the level of learning acquired, and their overall satisfaction with the training.

The respondents gave lower ratings to how the training affected their behavior and practices and to the behavior and practices in their organization and the broader industry. With that said, it should still be noted that the average score in all these cases exceed 3, indicating that the training contributed to some change in each case.

Table 9: Trainee Survey Results, Kenya

Question	Business Strategy *n*=47	Corn-Soy Blend *n*=5	Fortification *n*=27	New Product Development *n*=18	Total *n*=97
How relevant was the SAFE training to:					
a. The needs of the food-processing sector?	3.7	4.0	3.9	3.9	**3.8**
b. The needs of your organization?	3.6	4.0	3.9	3.9	**3.8**
How relevant were the training materials?	3.6	3.8	3.5	3.8	**3.6**
How relevant were the training topics?	3.7	3.6	3.7	3.9	**3.7**
Did the training result in any meaningful changes:					
a. In terms of your own behavior and practices?	3.3	3.0	3.2	3.1	**3.2**
b. In how things are done within your organization?	3.2	3.0	3.2	3.0	**3.1**
c. In the broader food-processing industry?	3.2	3.0	3.2	3.3	**3.2**
d. In your ability to find/get information you need?	3.1	3.0	3.4	3.4	**3.3**
What was the quality of the instruction received during the training?	3.6	3.8	3.6	3.9	**3.7**
How much would you say you learned from the training?	3.6	4.0	3.4	3.6	**3.6**
Overall, how useful was the training received?	3.7	4.0	3.7	3.9	**3.7**

Table10: Trainee Survey Results, Zambia

Question	Access to Finance *n*=21	Mycotoxin Control *n*=20	Total *n*=41
How relevant was the SAFE training to:			
a. The needs of the food-processing sector?	3.8	3.8	**3.8**
b. The needs of your organization?	3.7	3.8	**3.7**
How relevant were the training materials?	3.8	3.7	**3.8**
How relevant were the training topics?	3.8	3.8	**3.8**
Did the training result in any meaningful changes:			
a. In terms of your own behavior and practices?	3.2	3.2	**3.2**
b. In how things are done within your organization?	3.4	3.2	**3.3**
c. In the broader food-processing industry?	3.3	3.4	**3.3**
d. In your ability to find/get information you need?	3.6	3.3	**3.4**
What was the quality of the instruction received during the training?	3.7	3.9	**3.8**
How much would you say you learned from the training?	3.6	3.5	**3.5**
Overall, how useful was the training received?	3.9	3.8	**3.8**

Evaluators administered a similar set of questions to the interviewed SWT trainers in Kenya, Zambia and Malawi. Table 11 shows their responses. Note that for all questions but one, the questions used a four-point ascending response scale, with 1 being the lowest and 4 being the highest. The question asking whether the right people were invited to the training uses a three-point ascending scale.

Table11: Trainer Survey, Kenya, Zambia and Malawi

Question	Kenya *n*=3	Zambia *n*=2	Malawi *n*=2	Total *n*=5
How relevant was the SAFE training to:				
a. The needs of the food-processing sector?	3.8	3.8	4.0	**3.9**
b. The needs of participants' organizations?	3.7	3.8	3.0	**3.5**
How relevant were the training materials?	3.8	3.7	3.5	**3.7**
How relevant were the training topics?	3.8	3.8	4.0	**3.9**
What is the likelihood that the training will lead to meaningful changes:				
a. In terms of participants' behavior and practices?	3.2	3.2	4.0	**3.4**
b. In how things are done within their organizations?	3.4	3.2	3.5	**3.4**
c. In the broader food-processing industry?	3.3	3.4	2.5	**3.1**
d. In the trainees' ability to find/get information they need?	3.6	3.3	3.5	**3.5**
Were the right people invited to the training?	2.7	2.9	2.5	**2.7**
How useful do you think the training was for participants?	3.6	3.5	4.0	**3.7**
Overall, how useful do you think the training was for the food-processing sector?	3.9	3.8	3.5	**3.8**

Overall, the trainers in all three countries found the training to be highly relevant to the needs of the food processing sector and the needs of the participants' organizations, while also rating the training materials and training topics to be highly relevant. The one difference of note is that trainers in Malawi found the SWT to be less relevant to the participants' organizations' than trainers in Kenya and Zambia. In Kenya, two SWTs that were consistently and favorably mentioned by processors were the trainings on business skills development (BSD) and new product development (NPD). The former covered topics such as recordkeeping, finance, strategy, product quality, process planning, and legislation compliance, while the latter taught participants to analyze the needs in the market and then use consumer information to develop and fine-tune products.

Trainers on the whole are only moderately optimistic that the SWTs will lead to meaningful changes in the behavior and practices of participants, in the participants' organizations, in the broader food processing industry or in the participants' ability to find/get information they need. Two notable exceptions are the trainers in Malawi who are both highly optimistic that the SWT will improve the participants' behavior and practices and less optimistic that the SWTs will lead to meaningful changes in the food-processing sector.

Finally, trainers from all three countries generally agree that the right people were invited to the SWTs (although slightly less so among trainers in Malawi) and believe that the SWTs were, overall, very useful for both participants and the food-processing sector. Once again, the trainers in Malawi were slight outliers in that they rated the usefulness of the SWTs to participants higher than trainers in Kenya and Zambia, while at the same time rating the usefulness of the SWTs to the food-processing sector in general lower than their counterparts in Kenya and Zambia.

"The SAFE program has enabled me to open up my eyes on the available opportunities that are there in the market, which I can easily tap because I'm currently doing products at a certain way. But if I was to add value to these products, I would be able to send out a better product to the market, which would be able to generate higher profit for us, of course with better margins. That has been done through the trainings they have been providing."(SWT participant, Kenya)

"I had faced a lot of challenges in my company, but from the moment we attended the lesson, we now have the quality assurance of the better production. The training was very effective." (SWT participant, Zambia)

The fortification trainings in all three countries were also assessed positively by trainers and participants alike, the participants were well matched to the topic and the content, and level of the course was appropriate, at least for the millers in attendance. Oil processors attended this training and found it less useful than did the millers.

"They all said they appreciated the training, apart from a few players who were not in the milling sector or who produce virgin oil, because fortification of virgin oil is not a requirement." (Fortification trainer, Kenya)

"Well, I would say it is hundred percent relevant to my organization. They are needed by the industry but how you bring them is what matters the most, and this is when now we can introduce regulations." (SWT participant, Zambia)

In the Malawi and Zambia fortification trainings, however, both trainees and other sector stakeholders were skeptical about how effective it would be in the long-term given the lack of clear direction from the government and low public demand.

"Of course SAFE works with specific companion TA that they have identified, so there's more impact in those companies and then these sector-wide trainings. I think there's more impact on these that they have identified in terms of knowledge." (SWT trainer, Malawi)

"Maybe there is a need for concerted effort. Laws are there but they need enforcement and education; you know, enforcement itself is not an end but utilization of those. If people know why those regulations are there, I think that will be the must, if we know why regulations are there it would be the best, so meaning we need concerted effort to educate the public." (Sector stakeholder, Zambia)

Two common concerns expressed by trainers and participants about the SWTs were the large amount of information and materials covered in such a short period of time and the occasional wide divergence in background and experience among SWT participants.

"The material was good and easy to follow but the duration was too limited so next time we get to have it again, I would really appreciate if the time could be extended from two days to maybe three or four days."(SWT participant, Kenya)

"It is hard to assimilate some things, it's like sending your child to school where they learn a lot of ambiguous [things], then go back home and pretend to have learnt." (SWT participant, Zambia)

"As I said, I think one of the constraints is just time, otherwise the materials were very relevant for them, but just the constraints of time…We couldn't go deeper." (SWT trainer, Zambia)

"The challenge was with some companies like [large-scale processor] who found the information really basic so with the training, the challenge is really try[ing] to balance. And also the issue of illiteracy levels: what would appear as basic to some, to others it would appear very complex." (SWT trainer, Malawi)

Sustainability

At this point, it is too early to reach informed judgments about the sustainability of the above changes in knowledge and practices. The sustainability of these results will depend on a variety of factors, including market trends that affect the supply, demand, price, etc. of production inputs and final products; the receipt of additional assistance from SAFE or other service providers; access to credit or other sources of capital; and the motivation and drive of the assisted processors. The endline evaluation will revisit all of these issues to determine how sustainable they have proven to be.

Conclusions

SAFE assistance, both in the form of longer-term support to processors and short-term SWTs, has been moderately effective in improving the knowledge and practices among assisted processors and other sector stakeholders. This conclusion includes instances in which SAFE assistance has contributed to significant improvements in knowledge and practices, instances in which it has contributed to moderate improvements in knowledge and practices, and instances in which it has had no effect on knowledge and practices. Areas in which SAFE assistance appears to have had the greatest effect on knowledge and practices are business management practices, systems, and technical capacity and, to a lesser extent, marketing and compliance with regulatory or quality standards.

Interestingly, SWT participants were as likely to say that the training influenced their own or their firm's practices as assisted processors were to say that the long-term TA received from SAFE influenced their practices. SWT participants also gave high to very high marks to all aspects of the SWTs. These results suggest that the SWTs are an underexploited tool and perhaps should be scaled-up, though with special attention given to follow-up workshops and technical assistance support.

Recommendations

Facilitating sustainable behavioral change is at the heart of most development interventions and is key here as well. It is also very hard to do and resource-intensive. It requires dedicated and competent capacity building, clear messaging, realistic objectives, and ongoing reinforcement through follow-up. In this light, recommendations for improving the impact of SAFE assistance on assisted processors' performance are captured under EQ10, which asks what SAFE might have done differently to improve program implementation and results. Among these recommendations are providing more face-to-face assistance; ensuring that both PFS volunteers and local TNS staff have the capacity and bandwidth to provide the type of intensive assistance required; increasing follow-up with both processors and SWT participants and possibly the length of the SWTs, or otherwise adjusting the materials to the length; and recruiting more homogenous cohorts of trainees into individual trainings, while perhaps matching the content of the trainings to the level of the trainees.

EQ3. HAVE SAFE INTERVENTIONS PRODUCED A DEMONSTRATION EFFECT AS MEASURED BY THE SCALING-UP OF SAFE-SUPPORTED ACTIVITIES AMONG ASSISTED PROCESSORS AND THE REPLICATION OF THE SAFE MODEL AMONG OTHER DEVELOPMENT ORGANIZATIONS OR IN OTHER LOCATIONS AND COUNTRIES? WHAT IS THE LIKELIHOOD THAT THESE DEMONSTRATION EFFECTS WILL BE SUSTAINED?

The evaluation team did not find any evidence that SAFE has produced a significant demonstration effect to this point. However, if there is an aspect of the SAFE approach that has the greatest potential for creating demonstration effects, it is the SWTs. This point was emphasized by TNS informants who argued that (in their view) the primary benefits of the SWTs are to be found in the knowledge acquired by participants that forms the basis for future action on a larger scale than possible from the one-on-one TA provided to assisted processors, particularly in terms of opening sector actors' eyes to ideas or options they would have otherwise not considered and in terms of alerting them to sources of information and other resources that they can access.

One opportunity to scale-up the SWTs is to work with local universities or other training institutions to integrate the SWT content and training materials into their own curriculum or training programs. SAFE has taken a step in this direction by partnering with the University of Nairobi to design and deliver SWTs. Much work remains to be done, however, to achieve full implementation of this strategy.

The following are illustrative approaches for scaling-up the SWTs:

- Offer more SWTs, including more SWTs on diverse topics or more SWTs on topics of particular interest or importance.
- Offer a wider variety of SWTs more finely tuned to the participants' background and level of experience. Examples include SWTs on advanced technical or business management topics for more advanced participants and SWTs on basic technical or business management topics for less experienced participants.
- Offer virtual SWTs using online technologies, to the extent possible.

It is useful to note that informants mentioned that the TA provided by SAFE is relatively unique, as opposed to traditional business development services (BDS) focusing on business-related assistance, which are more widely available. Although TA is often available to larger-scale processors through service agreements with equipment suppliers, the type of TA provided by SAFE is often not available to smaller companies that lack these relationships. In this sense, the SAFE program does appear to meet an unmet niche need.

The SWTs have also been useful in increasing awareness about SAFE among stakeholders within the processing sector. For example, the World Food Programme (WFP) in Kenya approached TNS and asked it to partner with the program in order to train small-scale millers, who were providing food to the WFP school feeding program, on the use of milling equipment. TNS adjusted its training materials for the audience and conducted a joint training with the WFP in the Kakuma settlement near Nairobi. The SWTs are also proving to be an effective recruitment tool for SAFE technical assistance, which will help SAFE both to scale-up the program and to scale it up among a more qualified pool of food processors.

Informants at PFS emphasize, moreover, that PFS has been refining its model with the express purpose of creating a replicable approach (described under EQ9) that can be scaled-up across numerous countries within a (reasonable) known period of time. For its part, TNS points out that the SAFE model can be applied to various industries within multiple contexts. However, the veracity of these claims remains to be seen.

Conclusions

To date, SAFE has not produced any significant demonstration effects. To the extent that it does in the future, they are more likely to come as a result of the SWTs than the long-term TA to food processors. There exist a variety of options to scale-up the SWTs—for example, through collaborations with universities or training institutions; by increasing the number, scope, diversity, and outreach of SWTs; or by offering virtual SWTs using online technologies. SAFE might also conduct follow up trainings with additional assistance to the participating stakeholders, possibly via a voucher scheme as described above.

Recommendations

SAFE should consider scaling-up the SWTs, possibly using one of the approaches described above or through another approach.

EQ4. IS PARTICIPATION IN SAFE ASSOCIATED WITH NEW OR STRENGTHENED MARKET LINKAGES BETWEEN FOOD-PROCESSING FIRMS AND SMALLHOLDER FARMERS, WHOLESALE BUYERS, RETAIL BUYERS, FOOD AID BUYERS, LENDING INSTITUTIONS, AND OTHER VALUE CHAIN ACTORS?

The processor survey asked the assisted processors to rate how much change in different types of commercial linkages they had experienced as a result of SAFE assistance. Processors in all three countries said that raw materials sourcing and commercial linkages have changed by somewhere between *a little change* and *some change*. In contrast, their commercial linkages with sources of financing have changed only somewhere between *no change* and *a little change*. Judging by this result, SAFE does appear to have somewhat helped the assisted processors increase/improve their commercial linkages with raw materials suppliers and other market actors, albeit at best moderately, while it does not appear to have done much to increase/improve the processors' commercial linkages with sources of financing. (See Table 12.)

Table12: Changes in Commercial Linkages at Assisted Processors' as a Result of SAFE Assistance

How much change have you made in your business as a result of the assistance you received? (1=No change; 2=A little change; 3=Some change; 4=Significant change)	Kenya (*n*=15)	Zambia (*n*=9)	Malawi (*n*=3)	Total (*n*=27)
Raw materials sourcing	2.4	2.8	2.5	**2.5**
Commercial relationships	2.6	2.9	2.6	**2.7**
Sources of finance	1.7	1.5	1.4	**1.6**

Table 13 presents the cumulative results from the SAFE performance monitoring system, measuring the number of new market linkages created at assisted processors in Kenya and Zambia and the number of assisted processors getting bank loans for the time period of October 2013 through March 2015.

Table13: Linkages Made by Assisted Processors from the SAFE Performance Monitoring System

Indicator	Kenya	Zambia	Total
Number of new market linkages created at assisted processors	30	8	**38**
Number of assisted processors that successfully accessed bank loans	9	1	**10**

Assisted processors in Kenya reported 30 new market linkages created, while their Zambian counterparts reported eight. Likewise, Kenyan processors reported successfully accessing nine bank loans, while Zambian processors reported accessing only one.

The remainder of this section summarizes the findings of the processor KIIs with regards to their relationships (linkages) with buyers, input suppliers, and lending institutions.

Buyers

Assisted processors generally sell their products to large supermarket chains or to institutional buyers. The nature and extent of these commercial linkages do not appear to have changed as a result of SAFE assistance. Rather, SAFE works closely with the assisted processors to help expand their access and sales within the processors' existing markets.

Selling to smaller outlets, where more food-insecure people are likely to shop, presents a variety of challenges that the processors would need to tackle, such as payment terms and distribution:

"All the [small] retail outlets, they want your products on credit, and that's why we prefer to sell directly. Secondly you're vulnerable to the retailers because they won't pay you on time, and you have to keep a whole team of people to chase around collecting cash, and like I said the legal system doesn't work." (Assisted processor, Zambia)

"The lack of distribution network, you have to set it up yourself, which is not viable, so it's a very difficult for the small manufacturer to break into this market and survive it." (Assisted processor, Zambia)

A number of assisted processors who are currently selling wholly or mostly to institutional buyers would like to break into retail markets. Their dependence on the institutional buyers, however, presents challenges to accomplishing this objective.

"There is a stigma attached to some of these relief program foods, which are associated with HIV. If you have HEPS,[17] nobody wants to be seen walking with it, because the public associates it with HIV/AIDS. They accept it free of charge from NGOs, but they won't buy it from us when you call it HEPS." (Assisted processor, Zambia)

For some of the smaller processors, SAFE has been instrumental in widening their reach through ensuring that they are registered with the KEBS, thus making it possible for them to enter the retail market.

SAFE had increased access to buyers in some cases by providing support in brand development (packaging, logo, etc.) and through opening up new business avenues.

"I have been thinking of exporting some of our products. That is now through TechnoServe, which is helping us to link up with some people so that our products can be sold outside." (Assisted processor, Kenya)

From the market actor interviews, it is evident that there is still a lot of room to improve the processors' relationships with retailers and wholesalers. None of the retailers or wholesalers interviewed as part of the in-depth case studies has a strong relationship with food processors; they do most of their purchasing through middlemen.

Input Suppliers

The smaller food processors simply buy directly from the marketplace based on price. The cooperatives buy from their members who are contracted through membership to deliver their products to the cooperative. Overall, the assisted processors appear to source their inputs in one or more of three primary ways: directly from farmers, directly from farmers via a contract farming/outgrower relationship, or indirectly from farmers via middlemen (agents, bulkers, etc.) Of these three sourcing methods, the second one (contract farming/outgrower) method is the least common, although it is the method most consistent with SAFE's high-level goal and stated goal to bring smallholder farmers into the market and improve their nutrition status. The third of these methods (via middlemen) is the least consistent with SAFE's high-level goal.

A number of the assisted processors (e.g., Forest Fruits, Chankwakwa, COMACO, Sylva Foods, Classic Foods) work closely with farmers to improve the quality of their crop as well as the lives of the farmers and their households. This assistance includes disseminating better farming methods as well as organizing the farmers so as to harvest and sell in a more structured way. These types of arrangements are potentially effective means for helping increase the likelihood that smallholder farmers benefit from their commercial relationships with assisted processors to the extent envisioned in the program ToC.

"Usually we convene field days through the agricultural office. Facilitators come and educate farmers in the ways of feeding and management of dairy farms; we have them at least every two months." (Assisted processor, Kenya)

[17] High-energy protein supplement (HEPS) is a therapeutic food used for treatment of people living with AIDS (PLWA).

"We have 6,000 beekeepers who are members of our producer group, and they have been mobilized, organized, and trained by us, and they produce for us under contract. These are all subsistence-level villagers." (Assisted processor, Zambia)

"We give the know-how, we train them on farming techniques, we train them on using manure and intercropping with leguminous, trees etc. We try to find sustainable solutions to agriculture." (Assisted processor, Zambia)

In other cases, however, processors have attempted to establish contract farming/outgrower schemes with smallholders, but these efforts were not successful and seem to have been disbanded.

"We were giving inputs [for potato farmers], fertilizers and fungicides. Now we are not supplying inputs at all. We lost money on that model because some farmers completely did not supply." (Assisted processor, Kenya)

"We said no more provision of inputs. What we did is bring in Equity Bank to advance farmers loans to get the inputs." (Assisted processor, Kenya)

The evaluation team also heard a great deal of skepticism from assisted processors that such contract farming/outgrower arrangements could work, primarily because of the difficulty of enforcing contracts and the tendency of smallholder to "side-sell."

"Contract farming and outgrowers won't work in Malawi; the identity cards are not there. The implementation of law is very slack but we have tried several times but it failed." (Assisted processor, Malawi)

"In the future we've thought about it, but even with NASFAM, that's what NASFAM does but sometimes they have problems with the way they will provide the seed and later on go collect the seed and find the farmers have already sold to someone else. With NASFAM they would have agreed for a lower price but then come the next year prices would have obviously gone up since prices increase every year."[18] (Assisted processor, Malawi)

Unfortunately, the scope of the evaluation did not allow the evaluation team to assess how effectively existing contract farming/outgrower arrangements are working. In addition, SAFE does not work with processors on their sourcing practices. An underlying assumption in the program ToC is that sourcing raw materials from smallholder farmers will naturally result in increased sales and income for the farmers. However, there are numerous reasons why smallholders may not benefit from such supplier-processor relationships to the extent assumed.

For example, even if processors buy directly from the smallholders while providing them embedded services, they may be offering prices no better or only slightly better than what they would get from other buyers. In addition, the embedded services may or may not be effective at boosting farmer productivity or yielding other significant benefits, for a variety of reasons. The landscape in Africa is littered with failed farming/outgrower schemes. That smallholders can sell their produce is important, but it is only part of

[18] The National Smallholder Farmers' Association of Malawi (NASFAM) is a smallholder-owned membership organization in Malawi that promotes farming as a business in order to develop the commercial capacity of its members and deliver programs that enhance productivity.

the equation, and unless they sell under conditions and at prices that allow them to capture higher returns to labor while also boosting their on-farm productivity, they are unlikely to benefit near to the extent assumed in the ToC.

As noted above, moreover, processors with these types of contract farming/outgrower arrangements are a relatively small minority. In the large majority of cases, therefore, smallholders are price takers selling at low prices that minimize their returns to labor. Thus even if they are able to sell all of their produce by selling directly to processors, they often do so at prices that keep them firmly entrenched in the cycle of vulnerability and poverty.

This is not to suggest that SAFE should change its focus and begin working directly with smallholders. In fact, the evaluation team does not recommend this, as in our experience this is a very difficult and costly undertaking that would drastically and unnecessarily alter SAFE's strategic focus. If, however, this is indeed as high a priority as indicated, there are ways to address this, which are outlined in the recommendations section.

TNS says that it does try to track the numbers of farmers supplying assisted processors, but for this it has to rely on figures from the assisted processors, which often do not have this information, and which is further complicated when the farmers sell to middlemen and not directly to the processor.

For its part, TNS states that facilitating linkages with smallholders is a "big part" of the program. There was an initial motivation for SAFE to work with smallholder farmers, but there were already other programs working with them. Thus the focus turned to building the food-processing sector, which via its existing linkages with smallholder farmers "can turn subsistence farmers into market participants."

Due to the challenges in procuring directly from smallholders, many of the processors procure their raw materials through intermediaries that aggregate and grade commodities. As such, although increased processor procurement does raise overall demand for the commodities, the structure of supply chains often precludes "new or strengthened" market linkages in terms of adding value at the producer level or diversifying market outlets.

"The supply of peanuts in Malawi is usually from different farmers and not one farming commercially. You get families farming an acre here and an acre there and usually when they bring it to the market it usually has so many things mixed in it. Sometime it's impurities and sometimes even foreign things such as stones to weigh it more. It's honestly really such a vicious cycle where commercial buyers would be adjusting their scales so they pay the farmers less. When the farmers found out, they were wetting the nuts so the nuts would weigh more. We have to get very good nuts for our products, otherwise we won't be able to sell our products. So we have a middle person who buys the nuts from the farmers. Then she grades them and dries them and then gives us only the graded ones." (Assisted processor, Malawi)

This is true as well for upstream linkages to improved inputs, such as seeds and planting materials, given the challenges of contract enforcement and the absence of forward pricing mechanisms.

Lending Institutions

The lack of funds, or access to financing, is a huge obstacle for small processors, and there is no evidence that SAFE has had any positive influence in this area. However, there is high demand among processors to facilitate linkages with financing sources.

"What we have been yearning for is financial support, although they told us very clearly that theirs is to offer technical support." (Assisted processor, Kenya)

"TechnoServe had promised to link us up with the financial institutions, but we have not succeeded so far." (Assisted processor, Kenya)

"Support is not complete until you have finance. I have not used the business plan we did because everything was based on money. I need money to implement it so it leaves it hanging, and I feel like it's not complete." (Assisted processor, Kenya)

"I think the only problem which I have seen we knew from the beginning, that's purely technical, they don't give you any money, and most of the challenges that we face these days are related to money to ensure that we enhance." (Assisted processor, Zambia)

"If they would include like a forum for financing it would help a lot where you would meet and seek financiers out there like those who may want to invest in our business or we become partners: that we would appreciate." (Assisted processor, Zambia)

There is no doubt that the effectiveness of the project could be greatly improved if SAFE could provide linkages to financial institutions that would advance the funds required to implement the strategic plans yielded from the project charters.

Although loans were the primary source of funds requested by processors, another option suggested by some was equity funding by interested volunteers. It was proposed that SAFE could act as a broker for such transactions.

"We are out shopping [for equity investors]. I think it is essentially like going out shopping for what you want. This would be somebody interested in the food market. This would probably be somebody who has got interest not necessarily to own but to co-own. We have had a bad experience previously with an investor who had wanted to own and kick us out." (Assisted processor, Kenya)

"I think in terms of equity in Malawi, like I said, to some it was very relevant and we had one or two equity firms that invest in agriculture or food processing in Malawi. There are not Malawian but they are here, maybe mostly from the UK, US, but maybe they are doing some work in Malawi, so that is to say that there are opportunities for private equity firms in Malawi because most of them are actually working in agriculture. But because of our context here, even what you call a medium or a corporation, here it is still very small, even in financing, and everything is adjusted to that level. Do not think of a private equity [firm] as a private equity [firm] in the US but it is really adjusted." (SWT trainer, Malawi)

Conclusions

In terms of buyers, SAFE has been successful in strengthening market linkages but has been much less successful in assisting processors to establish new linkages. This appears to a large degree to be a result of the significant barriers to entry to sales with new buyers, i.e., cash flow stemming from payment terms with regards to distribution networks and stringent quality control requirements in the case of institutional buyers.

In terms of linkages between processors and producer-suppliers, the program has likewise been only moderately successful. The challenges presented by the operating environments, such as weak contract enforcement, have largely precluded much expansion of contract or outgrower schemes that would directly introduce new inputs or pricing to producers. However, indirectly many processors have impacted smallholder livelihoods by promoting improved agronomic practices or disseminating grading and quality requirements through intermediaries.

Access to finance remains a significant challenge and a barrier to expansion of operations for many processors. Many processors and stakeholders continue to cite this as a critical need and the most important obstacle both to growth and to adoption of needed technologies.

Recommendations

Many programs already exist to address improved market linkages, especially in the areas of smallholder–processor linkages and access to finance, and it would likely cause SAFE to deviate from its unique mandate to over-focus on these areas. Some activities that address these challenges in ways that may specifically enhance the impact of the program include:

- Develop assistance on raw material procurement through processor relationships with intermediaries in cases where intermediaries can enhance SAFE impact. This may include training intermediaries on food safety issues or other quality issues so that they can transmit this knowledge to the producers they buy from. This may also entail supporting intermediaries to provide advice to producers on certain inputs, such as seeds and planting materials, or fertilizers, that would improve the appropriateness of their output as raw materials for assisted processors.
- Equity funding is an interesting option for the processing sector, due to the embedded TA this implies. While many of the processors that most urgently require finance are simply too small to attract the interest of existing equity funds, it may be useful to explore opportunities for equity-type funding of groups or subsectors of certain processors.

EQ5. HAVE SAFE INTERVENTIONS INCREASED THE AVAILABILITY OF NUTRITIOUS FOODS, PARTICULARLY IN MARKETS CHARACTERIZED BY HIGHER LEVELS OF FOOD INSECURITY AMONG THE CONSUMER POPULATION?

Although many processors produce food that is inherently considered nutritious (soy foods, fruit, vegetables, and dairy products), few of the assisted processors claimed to actively target their products directly to the food-insecure or are aware of whether their food products are reaching them. They are first and foremost businesses, and their focus is on the commercial production of products for a profit, which often implies focusing on higher-income urban markets. For most processors, this means specifically selling to larger retail chains that offer convenience, scale, and, importantly, more advantageous pricing.

"We're a business, not a charity. We're not social impact people, and I keep having to remind myself, as much as we're concerned about malnutrition, all we can do is provide products and provide them with good standards and ethically and morally right products. We're not a social welfare organization." (Assisted processor, Zambia)

The above is not universally true for all assisted processors. In some cases, villages and smaller communities are a secondary market, which the processors serve using their own delivery trucks or distributors covering these areas. The buyers here tend to be small independent retailers that often pay cash on delivery for their small orders.

Overall, however, the products produced by assisted processors (aside from those destined for institutional food markets) did not target food-insecure populations but instead tended to be sold via national chain outlets patronized mostly by middle-class consumers and sold at prices that were unaffordable, due to inappropriate packaging, for low-income consumers.

"Basically because our product is value-added you come out of the low end, you come to the middle and upper middle classes."(Assisted processor, Kenya)

"I am not reaching them because I am in the big supermarkets; the kind of population you are talking about usually don't shop in such shops."(Assisted processor, Kenya)

"Due to production costs our products end up being too costly, just slightly above what they can afford."(Assisted processor, Kenya)

"Our products like honey and rice are not traditionally consumed by lower-income groups, so those are thus ShopRite customers. It's probably middle- to high-income customers that would buy the honey and rice." (Assisted processor, Zambia)

Some of those few processors who did target lower-income populations were planning on moving up-market over time.

"Our products mostly target the low-income earners, but with time of course we will get a few products to target the higher-income earners, but our basic products at the moment target that group of people."(Assisted processor, Kenya)

There are exceptions, however, but they are relatively rare among the group of assisted processors interviewed.

"Most of our customers are low-income people in the outlying cities like shanties and places like that… I would say that at least 50 percent of our products reach those people." (Assisted processor, Zambia)

Sector stakeholders generally agreed that the processed foods supported by SAFE are unlikely to reach vulnerable or food-insecure consumers.

"Processors are just businesspeople, they have little interest … to deal with food insecurity." (Sector stakeholder, Kenya)

"Someone doing it as an enterprise has to attach a price to that particular product, but the vulnerable people will not be in a position to afford it." (Sector stakeholder, Kenya)

"Most of the products end up in the supermarket, but the people who can really benefit from this product, their purchasing power is very low." (Sector stakeholder, Zambia)

Sector stakeholders were also generally pessimistic that fortified foods were likely to reach those who need them most.

"I don't think we have done much in getting to those people who are food-insecure." (Sector stakeholder, Kenya)

"The people in the urban slums just buy food because they want to fill their stomachs; they don't look at the quality of the food they eat." (Sector stakeholder, Kenya)

"I don't think the food-insecure are actually accessing these foods—there is no enabler to ensure they have access to fortified foods." (Sector stakeholder, Zambia)

Furthermore, sector stakeholders are skeptical that the government fortification mandates would have much of an impact on the availability of nutritious food. The scope and extent of the mandates are not clear, and there is much misinformation, coupled with a lack of understanding, both within the food-processing industry and among the general public. In addition, many of the smaller food processors, which serve low-income rural and urban communities, are either exempted from the fortification mandates or lack the resources to implement them even if required.

"I have seen a drive by government that all processed foods should be fortified so that it adds value. The majority of processors do not have knowledge of fortification." (Sector stakeholder, Kenya)

"I came across it because my student was doing research on this, the issue of vitamin A fortification of oils and fats. I don't know whether there is a law on that, but I know some companies are trying to do that and it is a requirement that salt be iodised. I don't know if there is a requirement for Unga meal." (Sector stakeholder, Kenya)

"I am sure the Zambian people are wondering why the government has embarked so much on the fortification of foods..."(Sector stakeholder, Zambia)

Likewise, although the processors source raw materials from rural areas, most are located in industrial zones surrounding urban centers. Hence, marketing in food-insecure rural areas would of necessity entail return transport costs that place many processed products outside of the affordability of these consumers, who are simply more likely to consume the same staples as unprocessed foods.

When asked on a scale of 1 to 4 to estimate the extent to which the food they produce with SAFE assistance reaches vulnerable and food-insecure people, assisted processors gave an average score of 2.7, indicating somewhere between *not very much* and *a good amount* (Table 14). The average scores given by processors in the three countries varied from 2.5 to 3.0, indicating that, on balance, the processors are reasonably optimistic that the nutritious food they produce is reaching vulnerable and food-insecure people. Based on the evidence presented above, however, the evaluation team believes that the processors' estimates are overly optimistic.

Table14: Processor Estimates of SAFE Assistance-Produced Food Reaching Food-Insecure People

(1=Not at all, 2=Not very much; 3=A good amount; 4=A lot)	Kenya (*n*=15)	Zambia(*n*=9)	Malawi (*n*=3)	Total (*n*=27)
To what extent does the food produced with SAFE assistance reach people vulnerable to food insecurity or malnutrition?	2.5	2.9	3.0	**2.7**

Still, a few processors felt that some of what they were doing would eventually impact the low-income consumers. These efforts included supporting small farmers, providing smaller pack sizes (although these are usually more expensive on a per-volume basis), and increasing production efficiency and thus lowering costs.

"We are not in the area of providing food security, but when we buy from the farmer, he falls into that group and we help in that way [by buying from him]." (Assisted processor, Kenya)

"We have done a lot of sachets recently and the sachet market is growing… we just did the 10g product recently and people love it." (Assisted processor, Kenya)

"We are looking at small packaging and more cost-effective packaging so that it would be more affordable for low-income consumers." (Assisted processor, Zambia)

"We are in the process of looking at different packaging options to make our peanut butter more affordable to lower-income groups." (Assisted processor, Zambia)

Among those processors attending the fortification training, most had not yet implemented fortification in their organizations for a variety of reasons, although some said that they were in the process of doing so. Dealing with government authorities in complying with the fortification mandates has proven challenging in several cases.

"The micro-dosers funded by the government are not functioning today." (Assisted processor, Kenya)

"Believe me, we've had confrontations with the Nutrition Commission for fortified products… that's the mentality in these organizations, so how do you work with them?" (Assisted processor, Zambia)

Despite this, all processors, SWT participants, and stakeholders interviewed understand and appreciate the importance of fortification. Both the SAFE-supported TA to assisted processors and the SWTs have been highly effective at communicating this message.

"After processing flour a lot of nutrients are lost. If we are able to retain them then it's going to be very relevant to everybody who comes into contact with that flour because the restoration of nutrients is healthy."(Assisted processor, Kenya)

"I learned that people in less advantaged areas need this fortified food; it is going to mean everything to them and hence the need to fortify."(SWT participant, Kenya)

"With the training we got, we do not understand why the government is doing so. It's because these foods are cheap and eaten by everyone almost every day. These are the foods that should be fortified, and that's why it is not up to us to push the policymakers so that other products like mealie meal [maize meal] should be fortified." (SWT participant, Zambia)

Conclusions

The evidence gathered to this point strongly indicates that, for the most part, the nutritious foods being produced by SAFE-assisted processors are not targeting and are not reaching food-insecure people. The large majority of assisted food processors are selling their products to national retail chains patronized largely by middle-class-and-above consumers. In addition, the foods are being sold in package sizes and at prices that make them inappropriate for low-income consumers, who tend not to buy in bulk and can afford only small amounts (in small packages) at any given time.

There is also the issue that adding fortificants to processed food increases costs of production, which, if passed on to the consumer, makes the food even less affordable for the population that can potentially benefit the most from fortified products. For this and other reasons, sector stakeholders are pessimistic that government fortification mandates will significantly increase the availability of fortified foods to food-insecure consumers.

Significantly extending the assisted processors' outreach to food-insecure consumers requires a radically different approach than selling to national retail chains, which involves changes in production, packaging, distribution, pricing, and promotional strategies (see below). The current form of assistance being provided to processors and sector actors via individualized TA and SWTs does not currently include assistance to help the processors or sector actors expand the availability (supply) of nutritious processed foods to food-insecure populations.

Recommendations

The evaluation team recognizes that SAFE is primarily a food availability program. Despite the program's high-level goal to improve nutrition outcomes among vulnerable households, the program is not motivated by an explicit objective to increase the supply of nutritious foods to food-insecure (vulnerable, low-income, etc.) consumers. Moreover, the evaluation team assumes that this strategic focus is shared (or at least not opposed) by BFS. With this in mind, recommendations with regards to EQ5 are as follows:

- Decide at both the donor (BFS) and program (PFS and TNS) levels whether the program is operationally committed to its high-level goal and whether, therefore, the program should adapt its strategy and operations to work consciously toward this goal.

- If the answer to the previous question is *yes*, begin to develop internal strategies to work toward this high-level goal. Possible approaches (offered for illustrative purposes only) include the following:
  - Look for and recruit processors that are already serving food-insecure populations at scale or are looking to serve food-insecure populations at scale.
  - Related to the previous recommendation, target specific food products for assistance that are consumed at higher rates by food-insecure consumers and are presumably within an acceptable price point range.
  - In order to target the rural poor, develop a specific focus on rural businesses that serve or operate in close proximity to these areas.

SAFE should also offer TA specifically tailored to assist processors to target and reach food-insecure populations. This TA should, at a minimum, cover all four of the 4*P*s of marketing: production, pricing, promotion, and placement (distribution).This might require, in turn, PFS and TNS to identify volunteers and local staff/consultants with experience or specialization in this area, or it might require providing additional training for local staff/consultants.

EQ6. TO WHAT EXTENT HAS ANY INCREASE IN THE AVAILABILITY OF NUTRITIOUS FOODS BEEN MATCHED BY AN INCREASE IN ACCESS TO (AND CONSUMPTION OF) NUTRITIOUS FOODS, PARTICULARLY IN MARKETS CHARACTERIZED BY HIGHER LEVELS OF FOOD INSECURITY AMONG THE CONSUMER POPULATION?

The findings presented with respect to EQ6 are derived principally (although not solely) from the in-depth case studies undertaken in Kenya and Zambia. Detailed case study findings for Kenya and Zambia are found in Annexes 7 and 8.

Nutritious Foods (Kenya)

One-quarter of survey respondents lacks the resources on occasion to purchase food and is thus classified as food-insecure. All FGD participants, moreover, admitted to struggling to buy food and to having to make difficult choices between quality and quantity on a regular basis. Respondents ranked fruits, vegetables, dairy products, and fish highest in terms of nutritional value, although none of these foods are consumed on a regular basis by the food-insecure. In contrast, respondents ranked CSBs and fortified food items lowest among possible foods.

The nutritional value of food is not well understood by consumers. It is only considered to be of real importance for young children and is generally achieved by offering a variety of foods through "a balanced diet." Indeed, a balanced diet or "freshness" is widely considered synonymous with a nutritious diet. In adults, good foods are thought to be those that provide energy.

Milk is universally believed to be the most nutritious food and is considered to provide all the nutrients required by the human body. Eggs and meat are both considered high in nutrients but are unaffordable on a regular basis. Fresh vegetables are also considered to have good nutritional value. Flour (particularly porridge flour) is also considered high in nutrients and very good for energy.

Freshness is considered the key determinant of nutritional value, which is perhaps not surprising since two of the key products purchased for their nutritional value are milk and greens (kale). However, this is transferred to other products, with the expiration date being the main determinant of freshness in packaged products and the main criteria (after price) that shoppers check when purchasing.

When shopping for young children, mothers may be concerned about nutrients; however, this is not the primary concern for the rest of the family. Both the consumers and the retailers are clear that value for money is the main determinant of purchase, and consumers are more likely to buy something for its ability to "fill the stomach" and provide energy than for its nutritional value. Price is the single greatest factor in determining whether a product is purchased on a regular basis. Even if households have extra money, they are not likely to take risks trying something new but tend to buy bigger quantities of what they usually consume. Moreover, while it may be cheaper per item purchased to buy larger quantities from the supermarket, consumers tend to buy small quantities from local kiosks due to time or money constraints.

Other factors identified as important drivers of food purchases include quality, taste, convenience, ease of preparation, and familiarity/tradition. Respondents also ranked children's preferences higher than adults' preferences as a factor influencing food-purchasing decisions. Nutritional value is not an important consideration in day-to-day food purchases for the household beyond young children.

Neither consumers nor retailers are knowledgeable about fortification, although consumers do seem to be subconsciously influenced by this in their choice of flour for babies and children. When shopping for this group, mothers are definitely more inclined to read the contents of the package or to ask the retailer for advice. *For their part, retailers felt that fortified products did not sell well because they tended to be more expensive than other products*. Thus lowering the price, or keeping it on par with competing products, would make fortified products more acceptable to consumers. Interestingly, the assisted processors in Kenya that are considering fortifying their product expect to charge higher prices for them.

At the retail level, respondents sell a wide variety of foodstuffs of what they considered the "necessities of life," which are those products purchased on a daily basis by consumers. Approximately 70 percent of the retailers' customers are women, although the share of male customers appears to have increased over the last few years.

These retailers mainly purchase their stocks from wholesalers that deliver. A few buy some products directly from distributors, but wholesalers seem to be preferred because they stock a much wider range of products and because the volume of the order that the wholesaler can deliver is bigger (more products). Few buy directly from the producer unless this is through direct door-to-door sales. This can be the case for perishable products like milk or in certain cases baked goods, which are delivered to the retailer by agents of the producer.

Loyal customers were considered crucial to the success of these retail businesses and the respondents believed that personal customer care was what set them apart from the competition. Since their customers are extremely price-sensitive, finding the right price point is essential to maintaining customer loyalty and beating the competition.

These retailers were no better informed than their customers on matters of nutrition. Their responses echoed perfectly the opinions expressed in the consumer FGDs. Nutrition to them meant a "balanced" diet, yet they were not clear on what constituted this balance. As with the consumers, retailers believe that "fresh" correlates directly with "nutritious," and therefore their suggestions on improving the nutritious content of the food that they sell mainly involve improving/shortening the supply chain. However, they did not believe that their customers currently pay much attention to the nutrition of the products that they buy. They simply select what is affordable and the only thing that they check regularly is the expiration date.

Retailers and other sector stakeholders generally agree that it would require a significant amount of education in order to get customers to purchase more nutritious products. While stakeholders saw this as the role of government or NGOs, retailers and wholesalers saw is as the role of the producer.

"We need to improve awareness… because most people are ignorant; they don't know about these products." (Sector stakeholder, Kenya)

Classic Foods Brands

Classic Porridge has yet to be launched, so the evaluation team did not find any evidence of awareness or usage for this product among case study participants. Awareness and usage of Capital Flour are both very low, with only a handful of participants having heard of the product and even fewer currently using it. Awareness of Classic Fresh Milk was much higher, and many participants had tried it but say that it is no longer available in local shops. Responses indicate that Classic Fresh Milk was more widely available for a short time but distribution is now restricted to supermarkets. Since consumers tend to buy fresh milk once or twice a day, they want to purchase it at convenient retail outlets. In contrast, supermarkets are used for bulk-buying once or twice a month.

Of those who have tried Classic brands, consumers gave it mediocre satisfaction ratings in terms of quality and product appeal and relatively few were willing to recommend them, suggesting that the brands do not represent value for money among consumers.

Classic Foods appears to face two issues with regards to selling its brands. First, it does not appear to have a firm grip on marketing basics, including brand support and distribution. Second, it also appears to have production and quality control problems. Moreover, in Kenya, milk and maize flour are highly competitive categories, with several national players already on ground. Nutritional claims by themselves will not win brand shares if they are not supported by reliable product quality, consistent distribution and relevant brand support. This is particularly the case among the poor who cannot afford to make mistakes with the little funds they have available. They need to be secure in their purchases and thus look for affordable and reliable quality.

Retailers are aware of the Classic name and were able to list a number of Classic products, including Capital (Classic) Tomato Sauce, Classic Mineral Water, Classic Yogurt, Capital Flour and Classic Milk. However, only one of the five stores claimed to currently stock any of these products, and that was Capital Tomato Sauce. Most of the suppliers had sold Classic Milk and Yogurt in the past; however, none had sold Capital Flour. They considered Classic Milk a good product and remembered it as being cheaper than competitors. None of these retailers, moreover, had any bad experiences with Classic products and all were willing to sell Classic products in the future.

Nutritious Foods (Zambia)

Thirty percent of survey respondents lack the resources on occasion to purchase food and are thus classified as food-insecure. Only about one-third of respondents had consumed meat, dairy products, or legumes the previous day, while a majority had consumed grains, cooking oils, and vegetables.

SAFE has directly impacted food security in Zambia through its work with processors that supply a number of aid organizations with food programs targeting at-risk individuals throughout the country by supplying HEPS. SAFE was instrumental in fine-tuning the formulation of this product and supports the organizational development of suppliers.

The nutritional value of food consumed is not well understood. Over one-half of respondents are not familiar with the concept of nutritious foods; the figure is nearly 60% among the food-insecure. For example, respondents rated maize as more nutritious than either CSBs or fortified foods. Characteristics associated with nutritious foods include varied diet, protein content, and vitamins and minerals, although these are understood only at a very general level. Like Kenya, freshness is considered a determinant of nutritional value with the expiration date being carefully checked by both retailers and consumers.

Food groups mentioned as nutritious in Zambia were much wider than those mentioned in Kenya. Items such as groundnuts (peanut butter), pulses, and root vegetables were added to the green vegetables mentioned in Kenya. Soya was not mentioned in Kenya but is widely used in Zambia as a meat replacement. Meat, fish, and chicken were obviously mentioned; however, milk and eggs were not. The only mention of fortification among retailers and consumers related to baby porridge. When shopping for this, mothers are likely to read the contents of the package and even to ask the retailer for advice.

Both the consumers and the retailers are clear that price, or value for money, is the key factor in food purchasing decisions and unless the product is for children, consumers are more likely to buy something for its taste than for its nutritional value. Other important factors include quality, requests by adult household members, and taste. In contrast to the results in Kenya, adult preferences matter more in food purchasing decisions than children's preference. Nutritional value is generally not an important factor in food purchasing decisions.

Consumers make purchases daily from local markets and small merchants, while making monthly or bimonthly trips to supermarkets to purchase foods not available in the local market. Purchasing food in the local markets is both more convenient and cheaper, both important considerations for low-income households.

COMACO Brands

COMACO's It's Wild! Peanut Butter has achieved reasonable market penetration in the survey locations with 46 percent awareness, 35 percent trial and 23 percent usage. In contrast, the It's Wild! Yummy Soy has achieved just 18 percent awareness, 11 percent trial and six percent usage. Among those who have used it, It's Wild! Peanut Butter is rated highly on high on both quality and nutrition, although it is also seen as a comparatively expensive product.

Correspondence analysis reveals a very clear trajectory for It's Wild! Peanut Butter, while at the awareness stage cost concerns prevail. By the time it has been tried and adopted into consumers' repertoire, quality is the main dimension. It's Wild! Yummy Soy, on the other hand, does not have a clear-cut trajectory. By the time the brand has become part of consumers' repertoire, it is not strongly characterized by any one dimension. Rather, it is perceived as a brand that is average across all dimensions.

Both COMACO brands tend to be purchased once a month, with price (and lack of funds) being the primary obstacle to more frequent purchases. Both brands are readily available; however, Yummy Soy is more easily found in the local market, while it may be necessary to go the supermarket for It's Wild! Peanut Butter. Although both brands are considered nutritious for children, all household members consume them.

Satisfaction rating for both brands both cluster around a 6 out of 7, indicating fairly high levels of product satisfaction. Consumers of both products are highly likely to recommend the product to others. Word-of-mouth is the main source of awareness for both brands followed by TV, radio, and road shows, such as that cosponsored by SAFE in 2014.

At the retail level, COMACO is one of the few processors that retailers purchase from directly. For retailers, price is a primary consideration in deciding which products to stock, and their perception is that nutritional foods cost most than other foods. Retailers insist they sell what customers buy and thus will be encouraged to stock more nutritious products once there is sufficient demand. At the same time, they believe there is a need for more communication about nutrition and nutritious products through radio, TV, and road shows. Once the pricing is right and the demand exists, the retailers will have no hesitation in stocking a wide range of nutritional foods.

COMACO does not directly target the food-insecure with its packaged products. The supermarkets and smaller retailers that they sell through are more up-market than many people can afford. According to a key informant at COMACO:

"At the moment, only our Yummy Soya is channeled to food-insecure and addressing malnutrition. We are in the process of looking at different packaging options to make our peanut butter more affordable to lower-income groups, but obviously products like honey and rice are not traditionally consumed by lower-income groups so those are the ShopRite customers."

Conclusions

The increased availability (supply) of nutritious foods has not been matched by an increase in access to (and consumption of) nutritious foods among food-insecure consumers. By and large, SAFE-assisted processors neither are targeting food-insecure (or generally low-income) consumers nor selling/distributing their products via outlets traditionally patronized by food-insecure consumers. Food processors trying to sell to this market face a variety of obstacles that make it a much different market segment than the ones they are used to serving.

Price is by far the most important determinant in food purchasing decisions. It is not sufficient to get the nutritious foods to food-insecure consumers; they must also be priced low enough to induce consumption. The general perception among consumers and other market participants is that retailers would stock nutritious foods and consumers would purchase them if they were priced appropriately, with caveats discussed below.

It cannot be assumed that if the mere availability of appropriately priced nutritious foods will induce a widespread purchase response. Consumers by and large do not understand what constitutes a nutritious food, why it is nutritious, and what benefits it provides and for whom. The case studies make it clear that any attempt to market nutritious foods to food-insecure consumers will need to be accompanied by an aggressive marketing campaign to educate consumers and promote the products and brands. This marketing campaign must include not only an appropriate pricing strategy but also an appropriate production strategy (quality, taste, and convenience also matter to food-insecure consumers), packaging strategy (food-insecure consumers can only afford to purchase in small quantities), distribution strategy (food-insecure consumers shop mostly in small, independent stores/kiosks), and promotion strategy (food-insecure consumers rely mostly on word-of-mouth but also are influenced by TV, radio, and road shows) with effective messaging (e.g., what nutrition is, why it is important, how the products are nutritious, etc.).

With that said, SAFE assistance to date appears to have been relatively weak in the area of marketing, or at least this was the case in the two case studies. While both It's Wild! Peanut Butter and It's Wild! Yummy Soy have achieved reasonable market penetration and consumer satisfaction, their performance in the market seems hampered by poor marketing and brand support as well as a higher price point. In contrast, Classic Foods has achieved only minimal market penetration and suffers from weak distribution systems and poor or lukewarm consumer perceptions.

SAFE appears to be affected by shortcomings on a couple of levels in these two cases:

- While the program focused on processors, the consumer has not been given stakeholder status. Consumer education on what constitutes nutrition and which products will ensure a nutritious diet were not communicated effectively.
- While the two processors were part of a capacity-building program, they seem to have been left to their own devices when it comes to marketing and brand support.

In summary, brand communication strategies need to be developed that will help both Kenyan and Zambian consumers incorporate new nutritious food items into their diets.

Recommendations

The recommendations for EQ6 are essentially the same as for EQ5. The relative emphasis here, however, is on providing more and improved marketing support in all of the 4 *P*s for those processors who are selling to, or seeking to sell to, food-insecure consumers, or more generally, to low-income markets.

EQ7. IS PARTICIPATION IN SAFE ASSOCIATED WITH INCREASED LEADERSHIP/MANAGEMENT OPPORTUNITIES FOR WOMEN IN SAFE-ASSISTED FOOD-PROCESSING FIRMS?

Assisted Processor KIIs

It should be acknowledged upfront that significant challenges remain in integrating women fully into the workforce in SAFE countries and providing them similar opportunities as men and that several of the assisted processors are dealing with both a broader social culture and internal work environment that are not conducive to this outcome, as the following quotes demonstrate.

"We're congested here and sexual harassment is a real problem. I've seen it happening here. I don't want to go down that road and be accused of turning a blind eye to that; I know what happens behind the scenes unless you have better facilities for women..." (Assisted processor, Zambia)

The lack of education and low job skills among many female workers severely limit their opportunities for advancement into management or leadership positions.

"The challenge we have here is the women in the community here haven't had basic education. In fact, I think we only have maybe two of them that actually write." (Assisted processor, Zambia)

In addition, some processors were afraid of harassment claims and were reluctant to mix men and women on the factory floor.

That's my worry and things can become political: the authorities are sending someone here so they are not there to encourage you, to do the inspections, etc., but they just punish you."(Assisted processor, Zambia)

Although the gender stereotypes are still firmly in place (but to a lesser degree with the Kenya small and growing businesses, or SGBs), SAFE has encouraged assisted processors to improve their administration, financial record keeping, cleanliness, and marketing. These are all jobs that are considered appropriate for women as well as men, therefore women have indirectly been provided with more opportunities. Moreover, in a limited number of cases, SAFE assistance is directly credited with creating increased opportunities for women. Unfortunately, the gender audits designed to identify and move forward women's opportunities were not undertaken in all of the SGBs (and none were in Zambia).

"Definitely. It has increased the number of women and also the opportunities for them because just as I gave examples of the works we are doing with SAFE, we were not going to have the women that we have if it weren't for SAFE coming in. This is because SAFE came at a time when we thought that probably we are not moving much, and that is the time that they surfaced and because of them coming in, we were encouraged and started moving forward." (Assisted processor, Zambia)

However, on balance there is minimal direct evidence from KIIs with management that participation in the SAFE program resulted in increased leadership/management opportunities for women. With that said, there is evidence of shifts in attitudes among several assisted processors that bode well for future gender outcomes.

"We provide an equal opportunity for both our male and female employees and whoever excels is the one who ends up in the higher position."(Assisted processor, Kenya)

"What [the] SAFE program has done for us is that it has enabled us as an organization to sit down and look at gender. Yes, we understand that in our business we need men to run the machines, and we need men to sell the milk at night but ask which other duties can be done by ladies and we employ ladies specifically for those purposes. So we have separated our tasks. Anything that has to be done by a man is done by a man, but any opening that comes up whose duties can be performed by a lady we are now employing ladies."(Assisted processor, Kenya)

"People's reaction in Africa when you are employing, it is generally, 'Oh, let's find a man or let's find a guy. 'I have to constantly be telling my managers, reminding them, 'Look, I want to get some women in here."(Assisted processor, Kenya)

"SAFE is what made me realize I need to employ more women. For gender balance, SAFE did a gender assessment and brought to our attention that the issue of gender needs to be considered."(Assisted processor, Kenya)

"Previously it was worse, but at least we are working towards creating more opportunities for women." (Assisted processor, Zambia)

"I am a very keenly aware of the advantages of hiring women, and when a recruitment comes up, I, as the managing director, first will say, 'I want you to see if there are any women available on this.'" (Assisted processor, Zambia)

One specific outcome of the SAFE program is the effort to include women in the recruitment process. A number of respondents mentioned that they now specify in their vacancy postings that women should apply.

SAFE did a gender audit with about one-quarter of the SAFE processors in Kenya and Malawi. In talking with the processors, the evaluation team learned that in most cases the processor never received the results and there was no follow-up to discuss the results and the implications.

Gender FGDs

Training and promotion. The FGDs asked a number of interrelated questions around training in current positions, promotion opportunities and procedures, and if certain jobs are restricted to men or women and why. Participants were asked if they were aware of the SAFE program or activities and if there was any direct linkage with their training or promotions.

In most cases, with a few exceptions noted here, the participants had no knowledge of the SAFE program, but in the case of COMACO, Sylva Foods, Classic and Star of the Lake, and Project Peanut Butter, some of the employees were aware of visits or trainings put on by TNS or General Mills staff. In the case of Lumuno Organics (preserved chili sauce), TNS provided a half-day workshop for the staff on sanitation and hygiene that workers said had benefited them at home, in the community, and at work. It is likely that a great deal of the training provided through/by SAFE is on new processing equipment operation and maintenance and, therefore, benefits male operators and technicians. Female and male workers in the production line at several enterprises (Project Peanut Butter, Classic, and Lumuno) received training in Hazard Analysis and Critical Control Points (HACCP) certification and in areas of quality control sponsored by SAFE.

In general, training was in-house and done by section heads or in small enterprises like Lumuno by the managing director. Classic Foods had the most extensive training period of one to three months, while others, including COMACO, had no formalized training periods if a person was hired with previous qualifications, such as in human resources. In the smaller enterprises workers were cross-trained to work in other areas as needed.

Enterprises that had direct funding from international donors, including COMACO and Project Peanut Butter, offered the most training opportunities, from external workshops to seminars. The Embassy of Norway offered a five-day gender training and sensitization workshop to COMACO staff that was highly appreciated by the FGD participants. According to the production manager at Project Peanut Butter:

"Regina and I attended the food fortification training that was organized by TechnoServe and last year also, some people also attended training about the aflatoxin [sponsored by the Trade Hub], so sometimes when chances are there, we also attend the trainings outside the company. We can say they were not sufficient because we wish that everybody was trained all together. If everybody understands why we need to wash our hands, why we need to cover our hair, why we need to cover our shoes, then we won't be having the problems of aflatoxin, and whatever problems that may arise from not following procedures."

The FGD participants said that in no case did management prohibit men or women from doing or pursuing a certain job. The common threads among the nine enterprises is that women prefer daytime jobs and shifts, as women tend to be uncomfortable around processing equipment and its operation (noise, weight) and men, not women, handle livestock operations on site, such as the "piggeries" at Gaea. Another example is that men are the cheese makers at Doinyo due to the equipment used. According to FGD respondents, women and men were paid the same amount for the same work.

According to one woman worker at Gaea who spoke about jobs more suited for her:

"I think the pigs, because I coordinate there at times, I think it's not an easy job. There is washing the pigs, all the dirt in the pen; it's not easy for a lady to work there. Others are afraid of the pigs."

Promotions are normally from within the organization and based on characteristics and skills, such as commitment to the job, trustworthiness, communication abilities, and a required level of literacy. Previous experience with the new position is not usually a prerequisite. There was no discernable direct linkage between SAFE assistance to the food processor and increased management or leadership opportunities and the FGD participants. According to one FGD participant from Gaea:

"*Maybe Irene [the co-owner] looks at her and sees she is qualified in the dealing. She has command, people can listen to her, she can get things moving in time. That's how she was picked as a leader, and then the experience, she has been here for long."*

Many of the workers had been employed for more than five years. The security of a regular wage was the primary reason given combined with the lack of employment options. Particularly in the cases of Classic, Gaea, and Project Peanut Butter, the employees felt that they were valued and respected members of a "family."

Without exception, FGD participants expressed a desire to have additional training and knowledge about their own jobs as well as the larger enterprise to boost their self-confidence and value as an employee. According to a sales and marketing representative at DoinyoLessos:

"Sometimes customers can buy ice cream and then return it and say it has rough particles or something, and you actually have no answer, because you did the same thing with the previous one. I refer the question to the supervisor, but actually, I think we need more training in that area. Especially in the sales department, out there

we meet with different people, different companies, and different products. So we are competing with those people. Some customers will prefer the longer-life ice cream over the shorter-life products. We would like to know how to tackle those people. I don't know much about the cheese, but a customer wants you to explain how the product has come, how you have produced it, yet I don't understand. So you feel you are not doing the right thing."

Conclusions

The evidence gathered from the nine FGDs does not support the existence of any direct link between SAFE client assistance and increased leadership opportunities and advancement for women.

Nationally mandated policies, notably maternity leave, were adopted to some degree by all nine enterprises but varied in terms of being paid or unpaid. The individual enterprise's policy on overtime (paid or unpaid) also varied, with COMACO, Classic Foods, Gaea, Lumuno Organics, and Project Peanut Butter providing paid overtime to its workers. The workers at firms that did not pay for overtime hours (Sylva Group, Star of the Lake, DoinyoLessos, and Chankwakwa) all noted that they would like a policy change to compensate for overtime.

Church membership was the primary and sometimes only venue for community participation by the FGD participants, followed by participation in women's lending groups. Both were said to be very beneficial and provided some women with leadership opportunities, trainings, or outreach to health clinics. Lack of free time and household responsibilities were given as constraints.

The gender FGDs did not uncover evidence of any direct linkage or positive correlation between SAFE assistance and increased opportunities and advancement for women, nor did they reveal that SAFE directly led to increased incomes for women employees. There may have been an indirect benefit to the women employees if SAFE assistance led to expansion or greater profits, which led to increases in pay and/or promotions. This indirect impact was not substantiated in the discussions with the FGD participants.

Recommendations

Increase information and sharing about SAFE, its partners, and technical information provided across a broader spectrum of workers at the SAFE-assisted food processors. This will better enable the assessment of programmatic impacts on its workers.

"I don't know much about the cheese, but a customer wants you to explain how the product has come, how you have produced it, yet I don't understand. So you feel you are not doing the right thing." (Salesperson DoinyoLessos)

SAFE could consider cosponsoring with assisted food processors on-site life skills development learning activities, such as literacy classes, effective (speech) communication, and time and money management for lower- and mid-level workers. This supports the previous recommendation.

"Yes, we could come if the classes were restarted." Sunday would be a good time and some of the husbands would be willing to come." (FGD respondent, Chankwankwa)

SAFE could encourage the food processors to provide gender-sensitization workshops and/or trainings for their staff, as the Embassy of Norway provided to COMACO in November 2014. SAFE could compile a resource list of individuals or organizations that provide affordable workshops. Subtopics could include communications, negotiating, and decision-making, all topics mentioned in the FGDs.

One of the COMACO FGD participants expressed the benefits to women farmers, some of whom are not literate, on having a say in how the money from farming is spent and said that they have a right to make decisions on the spending of the money:

"The gender workshop [sponsored by the Embassy of Norway] made me stronger in planning with my husband how the money is used."

TNS is finalizing a new Business Assessment Tool (BAT) that it will use with all of the new SGBs. The gender audit is no longer a separate, stand-alone data collection instrument. TNS said that gender-related information would be included under human resources as well as under general information. The new tool could be the mechanism to include feedback and recommendations to the assisted processors on where there are gaps or opportunities for transferring training and assistance provided by SAFE to women employees and the offering of life skills and gender sensitization/empowerment courses/workshops as suggested previously.

At the same time, if SAFE is to continue doing gender audits as part of the BAT, then it needs to follow-up in each case to share the results, discuss implications, and plot strategies. It is not reasonable to expect most processors to take the initiative to address gender issues without some level of reinforcement from the program.

Broaden women's participation of SAFE-assisted clients to include lower- and mid-level workers in the SAFE-sponsored market sector trainings.

EQ8. TO WHAT EXTENT HAS SAFE LED TO INCREASED INCOME GENERATION AMONG WOMEN EMPLOYEES OF SAFE-ASSISTED FOOD-PROCESSING FIRMS?

The gender FGDs covered several dimensions around income, including the use of income, the proportion of household expenses covered by the workers' income, how gaps in income and expenses are met, and the decision-making process and control of the use of the workers' income within the context of the household. Participants who were aware of SAFE activities were queried about the extent that SAFE contributed to increased income generation of the workers. In response to these questions, no FGD participants were able to link SAFE client support with their wages.

The wages from work with the SAFE-assisted processor was essential for buying food, paying for utilities, and meeting all cash expenses of the households headed by women who were single but often supporting their extended family (mother, father, siblings) in addition to their own children. Star of the Lake and Gaea had a high number of female single heads of households. A participant from DoinyoLessos, for example, said the following:

"I pay school fees. I have a daughter who is about to sit her KCSE this year. My salary may not be much, but I squeeze it until I am able to pay school fees for her."

In the majority of cases, the wages were not sufficient to cover all cash expenses, especially school fees of young household members. The participants asked what portion was covered and the responses ranged from 50 to 90 percent. They covered the gap with pay advances from processor and loans from women's groups. Many women expressed the desire to have a micro retail business on the side that they assumed would be profitable and help fill the gap. An administrator at COMACO said the following:

"We [my husband and I] had separate money but we would make joint decisions, and we have separate accounts. My pay cannot cover everything; it covers about three-quarters. I make up the rest with some small business."

About one-third of the FGD participants were married to a spouse who had formal employment. Some also had siblings or parents who provided income to meet cash household expenses. Some were single and the head of the household. The younger women who still lived with their parents had the most discretionary income.

The vast majority of women had control over their wages. About half had sole decision-making power on the use of the money, and the remainder consulted with their spouse or other family member and mutually agreed on priorities and allocation of cash within the household. There were fewer cases where women did not have an equal say in the use of her wages. The following quotes from participants in the Star of the Lake and Classic Foods FGDs illustrate these findings:

"It's only Maureen who is married [the others are widows or single women with children] but she makes decisions [about the use of income] on her own, since the husband is a drunkard and cannot hold any meaningful discussion."

"I have to plan with my husband. We combine our salaries and budget for the school fees, insurance, rent, and the water and electricity bills, then we cater for other small needs we have and the rest we save. In case of a problem, we have to communicate, and if I have to touch the savings we still have to communicate….Yes, we do have some differences, but we work them out; we have to come to an agreement. We know that life is very difficult; there is no way out, so we have to discuss and agree especially how we are going to offset school fees."

Conclusions

The assistance of SAFE did not have any discernable link to wages paid to or income earned by female workers. If SAFE assistance made an enterprise more competitive and profitable, the firm may have hired more workers or increased the hours or wages of existing female and male formal and casual workers, but this could not be verified by the FGD participants.

Most women would like to be self-employed, running their own micro-enterprise selling products, either full- or part-time. A few women wanted to begin new careers in health care, and one wanted to work as a vegetable food processor working with women's groups of growers or employing women directly. Another common theme was not having sufficient income to school and feed their children and extended families.

Recommendations

The recommendations for improving advancement opportunities of women (EQ7) also apply here. Of particular relevance to income generation is the desire of the women to have more knowledge and skills in household budgeting and money management. To this end, SAFE could consider cosponsoring with assisted food processors on-site life skills development learning activities, such as literacy classes and money management for lower- and mid-level workers.

A respondent in the Chankwakwa FGD had this to say regarding restarting a literacy course that had been previously offered by a local church:

"Yes, we could come if the classes were restarted. Sunday would be a good time and some of the husbands would be willing to come."

One of the COMACO FGD participants expressed the benefits to women farmers, some of whom are not literate, on having a say in how the money from farming is spent and said that they have a right to make decisions on the spending of the money:

"The gender workshop [sponsored by the Embassy of Norway] made me stronger in planning with my husband how the money is used."

EQ9. WAS THE SAFE PROGRAM IMPLEMENTED AS DESIGNED?

This section describes different aspects of program design and implementation; processor and stakeholder perceptions of the program, including both local TNS staff and PFS volunteers; and perceived problems with program implementation. Recommendations related to program design and implementation are presented in the following section EQ10: What might SAFE have done differently to improve program implementation?

Program Design and Implementation

Program structure. The SAFE program design is driven, for the most part, by the institutional structures and objectives of PFS, the former of which have evolved over time as PFS has incorporated experiential learning into its operational approaches. In its current form, PFS has built in several layers of administrative and operational responsibilities to its approach. These include (1) a headquarters staff that is expanding and gradually transitioning from volunteer staff to full-time or part-time salaried staff; (2) country coordinators, who are responsible for overseeing all PFS volunteer activities within a particular country and working with TNS to establish the country strategy; (3) country volunteer coordinators, who are responsible for managing the volunteer recruitment process within a particular country; (4) SGB leads,[19] who are responsible for managing all projects involving a particular food processor; and (5) project leads, who are responsible for managing the team of volunteers working on a particular project with a particular food processor.

Likewise, TNS has established its own administrative and operational structure, which includes (1) Chief of Party, who is responsible primarily for overall program oversight and engagement with external stakeholders; (2) Deputy Chief of Party, who is responsible for on-the-ground program operations and for coordinating strategy and activities with PFS; (3) program managers, who are responsible for managing the activities of the TNS technical teams in each country as well as for working directly with assisted food

[19] PFS and TNS refer to assisted processors as small and growing businesses (SGBs.)

processors; and (4) food technologists and business advisors, who make up the technical teams in each country responsible for working directly with assisted food processors.

The TNS food technologists have backgrounds in production technology and specialize in working with assisted processors on technological issues, while the business advisors have backgrounds in business management and specialize in working with assisted processors on business management issues, e.g., business planning, finance, marketing, etc. Program managers are also either food technologists or business advisors, and in this capacity are referred to as *senior* food technologists or *senior* business advisors. PFS brings all TNS food technologists to the US for two to eight weeks of training at PFS headquarters within the facilities of its partner companies.

Division of labor. The SAFE approach assigns a reasonably clear division of labor between TNS and PFS. TNS is responsible for recruiting and selecting food processors and making sure that they commit to the process, diagnosing technological or business gaps at assisted processors, negotiating project charters, acting as an intermediary between processors and PFS volunteers to facilitate communication and to help translate volunteer recommendations into practical solutions, managing the relationship between processors and PFS volunteers, and providing technological or business solutions to processors on issues not addressed by PFS volunteers. Importantly, this last responsibility of TNS is evolving, and TNS food technologists and business advisors will be playing a larger role in the future in providing technological and business solutions to selected processors as part of SAFE's emerging "quick win" strategy. (The quick win strategy is discussed at greater length below.)

PFS is in turn responsible for recruiting volunteers from its four partner companies and matching them to the project charters negotiated by TNS, providing distance-based technical and business solutions and managing its teams of volunteers in SAFE program countries.(While PFS assistance is typically provided using distance-based methods, volunteers will on rare occasions visit the country to provide face-to-face assistance.) At the moment, PFS is managing a volunteer network of over 700 volunteers spread across its four partner companies.

Among the PFS partners, there is a rough division of labor by core corporate capacity, although the actual selection of volunteers does not always break down as such. General Mills has comparative expertise in cereals and milling and transforming ingredients into final products; Cargill in transforming raw materials into ingredients; Bühler in process engineering and fabricating food-processing equipment; and DSM in micronutrients, fortification, and corn-soy blend (CSB) improvement. PFS recently added a fifth partner, Ecolab, which is a food safety and sanitation firm based in St. Paul, Minnesota, and it is currently in discussions to add a telecommunications firm as a sixth partner. Over the medium- to long-term, PFS seeks to grow to approximately six to eight international firms, while maintaining its focus on working in the processing sector.[20]

To aid it in this process, PFS has developed an internal cloud-based resource called PFS Connect. PFS Connect is a technology platform that serves as a "knowledge repository" and is specifically designed to

[20] PFS is also working with TNS in Tanzania and Ethiopia under different funding mechanisms.

manage volunteer collaboration and communications with the assisted processors in program countries. PFS volunteers use this resource to maintain records of progress on SAFE charters.

The above structure and division of labor work well as an operational approach, although with some notable qualifications, which are discussed below. Each participant in this process understands his or her role and generally implements this role as intended with high levels of professional responsibility and competence. Moreover, both TNS and PFS are highly complimentary of the other, insisting in all cases that the relationship is a collaborative and productive one.

"From the get-go, we have been tremendously impressed with TechnoServe's on-the-ground sense and presence and professionalism. The quality of TNS personnel has been outstanding down the line."(Key informant, PFS)

"The relationship with TechnoServe is absolutely amazing, the third leg of the stool. It may appear to be an expensive model, but when you are creating and building, you need to pay the price to get it right on the ground. In this sense, TNS is critical."(Key informant, PFS)

"The way PFS is organized is excellent, it allows us to access the full range of their technical skills really efficiently… The process is really streamlined, thanks to the way they are organized." (TNS staff, Malawi)

Processor selection. To select the right processor, TNS uses a set of selection criteria that includes both hard and soft criteria. Notably key informants at TNS and PFS did not always agree on what these criteria are. The three most commonly mentioned criteria by key informants at TNS and PFS were: (1) the processor is producing (or is looking to produce) nutritious foods, (2) the process has significant customer outreach and (3) the processor sources raw materials from smallholder farmers. Other selection criteria mentioned by key informants are that the processor should be producing a staple food product and that the product should have potential for creating a large nutrition impact. Selection of a woman-owned or managed company is not a hard and fast criteria but all else equal, so that a processing enterprise would be given preference over a male-owned or managed processor.

With regard to first selection criterion, the evaluation team found some confusion, or lack of agreement, among both TNS and PFS informants as to what specifically constitutes nutritious foods. SAFE works with processors producing a wide range of foods that includes staples, such as maize, soybean, and groundnuts, but also works with processors that process 'niche' products with specialized demand, such as honey, fruit drinks, jams, edible oils, vegetable oils and aquaculture feed.

With regards to the third selection criterion, key informants at TNS and, particularly, PFS stressed the importance of sourcing from smallholders as a means to achieve the program's higher-level goal related to improving the poverty and nutritional status of vulnerable households. Interestingly, moreover, the context in which key TNS and PFS informants spoke about the nutritional impacts of the program largely focused on the assisted processors' sourcing relationship with smallholders as opposed to the increased availability of nutritious foods on the market.

In terms of the soft selection criteria, the consensus among TNS and PFS informants was that the ideal processor candidates has leadership characterized by a 'strong entrepreneurial spirit,' a clear vision as to what he/she wants to accomplish and a commitment to working with their local communities. Informants at TNS concede that in the past it has not always emphasized these criteria in its selection process, perhaps at times focusing more on achieving outreach targets than on selecting ideal processors, although all key informants at PFS and TNS also conclude that, on balance, TNS has done a good job selecting the right processors. The evaluation team generally concurs with this conclusion.

Other issues that arose during the interviews with regards to processor selection are (1) the range of value chains in which processors operate and the markets in which they sell their products and (2) the size of food processors targeted for SAFE assistance. As mentioned earlier, SAFE-assisted processors operate in at least ten different value chains including both staple and small cash crops. According to TNS informants, the program has expanded organically to this point by pursuing opportunities as they arise, which helps explain the wide dispersion of value chains covered. There are reasons, however, why a more concentrated value chain focus might make sense, for example to achieve greater nutritional impact or to leverage government fortification policies. For example, in Ethiopia PFS is focusing heavily on the wheat sector so as to leverage the government's wheat fortification policy.

Evaluators also found cases in which the assisted processors were selling the bulk of their products in foreign markets, which does not advance the program's goal of increasing the availability of nutritious foods in program countries. It should be noted, however, that in at least two of these cases, the processor was working directly with smallholder farmers via contract or outgrower farming arrangements, which does advance the program's goal of improving the livelihoods of smallholder farmers by increasing demand and in some cases disseminating quality and standards.

Consistent with the SGB terminology, SAFE draws its client processors overwhelmingly from the population of small and medium-sized enterprises (SMEs) operating in the three program countries. Despite this, key informants at TNS and PFS are hesitant to limit SAFE's focus to small and medium-size processors. If, for example, an opportunity arose to work with a large processor that fit within the scope of the program and which advanced its objectives, SAFE would not rule out working with this processor.

Sector-wide trainings. SWT trainers are selected through an open process, while participants are recruited using mass media (e.g., newspapers) and via SAFE's network of sector stakeholders. SWT topics, in turn, are selected based on such things as stakeholder requests and TNS/PFS knowledge, experience and observations of industry trends.

"The consultancy was advertised in the newspaper, I think and we were short listed and we were asked to present a proposal and our proposal won the tender and that's how we ended up being recruited to advance the training of entrepreneurship to the entrepreneurs." (SWT trainer, Malawi)

SWT trainers used a variety of training methods, including presentations of theory, practical exercises, demonstrations and case studies, with the latter methods intending to encourage interaction and involvement from the participants. Guest presenters were also invited to deliver different topics. Training materials included PowerPoint presentations supported by handbooks.

"In delivering our training, we used very practical training methodologies. The lectures were just used at the beginning of each session just to introduce a topic, state the objectives, then we would go into group work, put them in groups, give them a task, they go and do that task come back and present. We also had role-plays, we also had them facilitating, coming in front and giving examples. We also had facilitated discussions where you just give a particular situation and ask participants to comment on it, debate and in the process they would learn. We

would also invite some guest speakers to come and talk to them to enrich the learning process. And then of course there were questions and answers where you allowed the participants to ask questions." (SWT trainer, Zambia)

SWT participants found both the practical and theoretical aspects of the trainings useful, but were also appreciative of the opportunity to interact with specialists and network with their peers. Most participants specifically mentioned that they appreciated that the trainings provided a platform for them to meet new people (other processors in different areas) thus enabling them to network and create new business links.

"The networking helps so much, because I wanted to venture into peanut butter manufacturing so through TechnoServe I met a guy who helped me and I started doing peanut butter." (SWT participant, Kenya)

"They were very useful especially in networking. Getting to be known in your own field as well." (SWT participant, Malawi)

Training materials included PowerPoint presentations supported by handbooks. The participants were particularly happy with the handbooks, and several continue to use these back at work as reference materials and also to teach their colleagues.

"I used it [handbook] to sit down and learn so that when I go out to teach others, I understand what I am telling those guys." (SWT participant, Kenya)

Individual trainings could bring in a wide diversity of stakeholder into a single group of trainees.

"What I remember is that it was a variety of participants. People engaged in food processing such as you know processing of pork products from pork, we had people that were dealing in peanut butter manufacturing, we had people that were dealing in production of sauces, tomato sauces, tomato ketchup, and others were into chilli production and so on. It was a variety, a very good variety I must say." (SWT participant, Kenya)

This level of diversity, however, presented certain challenges. One in particular that emerged from the interviews, according to both trainers and trainees, was the challenge of training such a diverse group of people with different educational backgrounds and from different types of organizations operating with different levels of technical sophistication.

"There were old people, young people, educated people, not very educated." (SWT participant, Kenya)

"Participants were mixed, those who had knowledge of fortification and those who were hearing about fortification for the first time." (SWT participant, Kenya)

This particular challenge, however, did not exist in all SWTs, nor did it necessarily prevent participants from benefitting from the trainings.

"When they came in there appeared like they didn't know what was happening, confused and so on. But at the end, one could tell these fellows have gained something because they were discussing amongst themselves, asked questions, and were very interested in the next level of training." (SWT trainer, Kenya)

"I think the strength is after the training I observed people interact, networking and exchanging contacts. A major strength is seeing these people come together, formal or informal, at least they are coming together and at the same time there are issues that they have in common and those issues have to be addressed." (SWT trainer, Malawi)

Overall, the trainers were pleased with the level of interest and responsiveness demonstrated by SWT participants.

"They didn't send just employees -most of the people there were owner managers." (SWT trainer, Kenya)

"I think the training was very effective because I have had follow-up calls to find out what I said about something or to elaborate." (SWT trainer, Zambia)

"Cooperatives are like village level, so English was a challenge. So what we had to do is deliver a training in both in English and Chichewa. The first day, they were a bit intimidated but at the end of the day they would really speak their mind and their experiences, which means they also benefitted." (SWT trainer, Malawi)

Performance monitoring. By way of context, the SAFE performance monitoring system collects indicators on a quarterly basis from its assisted processors. The quarterly data collection is a requirement of USAID, which according to TNS, is necessary to account for seasonal variations in food processing. SAFE has a minimal monitoring and evaluation (M&E) staff in Kenya and no M&E staff in Zambia or Malawi, so that food technologists and business advisors are responsible for quarterly data collection and for following-up with processors to secure late or missing data. The local TNS staff either sends a request along with a standardized reporting template by email for data or requests it in person if the processor does not have email or lack Internet access. The same staff member follows up via email, phone or in-person as appropriate with processors who fail to submit data or who submit incomplete or questionable data.

All monitoring data coming from assisted processors is self-reported. As a quality control mechanism, TNS randomly selects 30 percent of the assisted processors each quarter for a follow-up visit, which serves the dual purpose of checking in on the progress of the processors and verifying reported M&E data.

Getting data from every processor each quarter, however, is a challenge. This challenge is magnified once a processor graduates from the program and no longer has an incentive to report the data (or alternatively, TNS no longer has the leverage to request the data), yet this information remains important so that TNS can track the trajectory of assisted processor performance over time. A further challenge (common to programs of this kind) is the issue of attribution. The SAFE M&E system lacks a comparison group or other benchmark for comparison that might allow it to tease out the program's role in the observed changes among assisted processors. At present, there is no system in place by which TNS can credibly report on its contribution to observed improvements in assisted processor performance.

Beyond USAID reporting requirements, there has been little to no attempt that the evaluation team saw on the part of TNS and PFS to coordinate or integrate their information performance monitoring systems. For its part, PFS finds the TNS performance monitoring system and indicators of little practical use, and it is currently considering its own options for developing a performance monitoring system.

Stakeholder Perceptions of SAFE

Stakeholders offered a variety of views about SAFE (including PFS and TNS), a large number positive, but also a good number negative. The information presented in the next several sections summarizes the positive views followed by a several sections that discuss the less positive views.

When asked what they thought SAFE was, sector stakeholders described SAFE principally in terms of improving the quality, safety and supply (availability) of food production in the country.

"SAFE is about producing products that meet quality standards and are safe to consumers, that will not bring any health hazards." (Sector Stakeholder, Kenya)

"That word means Solutions for African Enterprises…let me say it is a program which was introduced to us early 2014. The main aim is to support processors so that they can have quality product."(Sector Stakeholder, Zambia)

A subset of stakeholders also noted that SAFE was specifically seeking to improve the quality, safety and supply of nutritious foods.

"The main objective of SAFE program is to empower food processors to be able to produce nutritious food."(Sector Stakeholder, Kenya)

"Well according to the way it was introduced to me and the people that were doing the training, I think it's a very good program, but I wouldn't say how much it's been implemented in Malawi, but I think if it was implemented well, it would change or promote nutrition issues." (Sector stakeholder, Malawi)

An even smaller number of stakeholders interviewed also identified SAFE with a broader mandate, which went beyond mere availability of nutritious food, to increase the access to nutritious food among low-income populations.

"It's how to produce foods to benefit low-income earners and produce quality foods and at low cost…." (Sector stakeholder, Kenya)

Finally, a small number of processors expressed an impression of the program unrelated to its objectives.

"I am thinking SAFE is a project that is looking at farmers in Malawi who are producing." (Assisted processor, Malawi)

Processor Perceptions of SAFE

Processor perceptions of SAFE assistance. For their part, assisted processors mostly acknowledged the usefulness of SAFE assistance and their satisfaction with quality of technical and business assistance provided by TNS staff and PFS volunteers. The following quotes are illustrative of the general perceptions expressed by processors Interviewed.

"*So SAFE comes as a partner you can bounce off your ideas on, and they help you refine and crystallize them for implementation. In my case, they helped me improve the quality of my products and also enlightened me on the different areas in the business world."* (Assisted processor, Kenya)

"We are a growing business and we don't intend to remain small forever. We are a growing business, and some of the charters that we were engaging with them would not have been possible without them advising us when we don't have the muscle starting from the first to the end."(Assisted processor, Zambia)

Processor perceptions of TNS staff. In general, assisted processors also appreciated the assistance provided by the local TNS staff. They largely considered the TNS staff to be available, approachable, responsive, knowledgeable and genuinely interested in them and their business.

"We talk to them regularly, we know their people and have a one on one relationship with them."(Assisted processor, Kenya)

"They have taken me through the simple things that a business should have, and I can say they have contributed to where I am today."(Assisted processor, Kenya)

"TechnoServe has played a bigger role on our business processes. Pointing out areas that we need to improve on our efficiencies. Pointing out where we need to engage, systems. Generally let's put it down at systems."(Assisted processor, Kenya)

"[Local TNS staff] is an excellent man to work with; he is knowledgeable, he's got an open mind . . . it's a learning experience for both of us, and you don't expect much more in this country." (Assisted processor, Zambia)

"From the ground work, which they have availed to us, you could see that they know what they are talking about."(Assisted processor, Zambia)

"Very useful because they have… I don't know where we would be without PFS" (Assisted processor, Malawi)

A particular benefit cited by the assisted processors was TechnoServe's access to technical expertise.

"We discussed some prospects with them, we thought that their volunteers are competent, we thought they have a wide network that can be useful to us."(Assisted processor, Kenya)

"If we have a problem, then TechnoServe puts it out and they try and find expertise in that area that they can help. So it's quite difficult to say what are the areas would we need assistance in because, as I said, their assistance is not limited to a specific box of items."(Assisted processor, Zambia)

Processor perceptions of PFS volunteers. Assisted processors considered individual PFS volunteers to be on the whole helpful. Interviews with assisted processors revealed a number of successful collaborations with PFS.

"Through the SAFE program and a team sitting in General Mills, we were able to send our products over to General Mills. They did an analysis and found a problem with the lumpiness and actually adjusted it in our processing line." (Assisted processor, Kenya)

"I remember one of them, although he didn't come here, we used to meet on Skype when we were coming up with my first business plan…. The guy took me through it until the end." (Assisted processor, Kenya)

"It provided us an opportunity to learn and get best practices in place in our company. We were taught how to make the products safe for consumers." (Assisted processor, Kenya)

"They have considerable knowledge and expertise on feed manufacturing, that's what we are asking PFS now. TechnoServe helped me get the feed formulation programs from Cargill, and so what we need is their people, who are extremely knowledgeable people and we borrow experience from them." (Assisted processor, Zambia)

"In our case, they have attached a specialist in the States, when we have problems or complaints they forward it to the specialist in States, who then together with them, they discuss and then they evolve a solution." (Assisted processor, Zambia)

"One time we had these belts and every month we had to change them and they were not cheap either; they were very expensive. However; they made these other belts for us that last longer and can work for up to eight months before any need to have them changed." (Assisted processor, Malawi)

"They have helped us procure cheaper milk as well as a cheaper ingredient that we used to hold products together. It was Alphodine T180… a product we use; we call it a 'musifier.' They have helped us work with the product, testing it to see how good it is, the amount to put in etc." (Assisted processor, Malawi)

In at least one case, an assisted processor developed a relationship with a specific PFS partner company, which proved to be more efficient than seeking assistance through PFS.

"PFS I understand that sometimes it is difficult to get to the right person because they sometimes put you on hold for a long time and so that is why with the relationship we have with General Mills, we just find ourselves turning to them instead for technical assistance." (Assisted processor, Malawi)

Table 15, which shows the results of the processor surveys, confirms the processors' general satisfaction with SAFE assistance. Overall, assisted processors interviewed for this evaluation rate the knowledge and helpfulness of local TNS staff and PFS volunteers as 'good,' although in only one case (Malawi processor rating of PFS volunteers' knowledge) did processors give a 'very good' rating. The absence of 'very good' ratings in Table 15 is perhaps a cause for concern. On the flip side, Malawi processors gave TNS staff a 'poor' rating with regards to their level of helpfulness. All other responses ranged from 2.9 (slightly less than 'good') to 3.5 (midway between 'good' and 'very good').

Table15: Processor Survey Results

Please rate the following aspects of the SAFE program (1=Very poor, 2=Poor; 3=Good; 4=Very good)	Kenya (*n*=15)	Zambia (*n*=9)	Malawi (*n*=3)	Total (*n*=27)
Knowledge of local TechnoServe staff	3.3	3.2	3.0	**3.2**
Helpfulness of local TechnoServe staff	3.5	2.9	2.0	**3.1**
Knowledge of PFS volunteers	3.1	3.1	4.0	**3.2**
Helpfulness of PFS volunteers	2.9	2.9	3.3	**2.9**
Assistance through Skype or other long-distance means	2.3	3.3	2.7	**2.7**

Assisted processors were much less generous in their rating of the assistance received through Skype or other long-distance means. Here, processors in Kenya gave a 'poor' rating, while processors in Malawi gave a 'poor' to 'good' rating. Only processors in Zambia said on average that the Skype or other distance received from PFS was 'good.'

Perceived Problems with Program Implementation

Assisted processors were by no means uniformly satisfied with all aspects of TNS and PFS assistance. In particular, the volunteer-based distance method for providing TA did not appear to have fully met the expectations of assisted food processors with regards to sharing of information or knowledge building. The sources of their dissatisfaction are described below.

Lack of country context among PFS volunteers. Many processors noted that volunteers were not particularly knowledgeable about the local environment, which could cause frustrations for processor and volunteer alike.

"Their volunteers are very competent, but the point is they are in Europe or America, and we are in Africa. Their volume requirements are so big, they are very different from us so matching is a problem."(Assisted processor, Kenya)

"Well I would say they better get out here and they got to be more practical, just do not propose to me an American solution, propose to me an African solution… if you are in business in Africa, you got to be focused on Africa and nowhere else. To propose to me to buy something in California is just not a solution for me." (Assisted processor, Malawi)

"The Americans yes, they expect that their standards should simply be accepted because there isn't a standard under their horn. So if you talk to them, and you have to work with them, they are rather impatient."(Assisted processor, Zambia)

Inappropriate business or technical solutions. A number of processors expressed dissatisfaction with the business or technical solutions proposed by PFS volunteers, or the lack of a solution. The most common complaint was that SAFE assistance was too "high tech" to be practical in the African context. Along these lines, cost-efficiency often requires processors to make do with locally available equipment and supplies, even if these are not optimal, with a possible exception of equipment and supplies available from South Africa. In most of these cases, the processors either blamed the volunteer's lack of familiarity with the country or local context or their inability to implement a proposed solution due to a lack of funding. Presumably, a role for the local TNS staff would be to help ensure that proposed solutions are contextually appropriate, but this did not always occur.

While processors were generally aware that helping them to access credit was not within the scope of the program, many stated that their ability to implement the proposed technical or business solutions was limited or non-existent because they lacked the financial resource to do so, a problem which might be solved by linking them with credit or other types of funding agencies.

"*Our volunteers have high expertise; they have to have it to do their jobs. We get requests from clients that have a foundational nature, such as developing the means of doing scheduling for the plant that is demand driven. At*

General Mills, for example, demand driven planning is very sophisticated—e.g. reading bar codes to drive scheduling—but this is not very relevant to Africa, which has very basic needs. This presents challenges to volunteers who are used to much more sophisticated technologies to find simpler solutions. We try to be very realistic about this when recruiting."(Key informant, PFS)

"For marketing someone from Switzerland will have poor knowledge about local markets. We got very obvious kind of advice. I don't blame them, they are not fluent in what will make consumers shift form Brand A to Brand B in this market. We ended up hiring a local agency from Africa that knows this market better." (Assisted processor, Kenya)

"We wanted lab equipment, but it did not work out. The volunteer did not understand that we can't buy such expensive equipment. He recommended a fabricator for a CSB grinding solution, but this fabricator had never sold to Africa. For CSB snacks, we wanted low tech machinery, but the volunteer was not familiar with that." (Assisted processor, Zambia)

"They recommended software for us, but I think the possibility of us getting access with Microsoft or any American company to install the system here… well it did not seem it could work. I think we lost out understanding between us and PFS."(Assisted processor, Zambia)

"I would say they better get out here and they got to be more practical, just do not propose to me an American solution, propose to me an African solution and speaking from the chest, if you were business Africa, you got to be focused on Africa and nowhere else. To propose to me to buy something in California is just not a solution for me." (Assisted processor, Malawi)

"I also had a feeling that the team was too high tech, they came back to me with packaging proposal saying you can bag a paper bag from so and so and they have an outlet in this country, well before I go to this country then I better go to Johannesburg because it is closer and cheaper, that was just not adequate, it would have been better if we had a TechnoServe out of Johannesburg." (Assisted processor, Malawi)

In addition to contextually inappropriate technical or business solutions, some assisted processors complained that the process dragged on but produced no real solution, whether because the solution was 'common sense' or the process simply lost momentum and dragged to a halt.

"The advice the volunteer gave was common sense stuff that was not very helpful. He gave two recommendations: buy maize during harvest and store, but we're already doing that, and look for cheaper sources of financing, but we're already doing that too and haven't had success." (Assisted processor, Kenya)

"At the beginning, it was very good, but later it fell apart." (Assisted processor, Malawi)

"It has just been talking. We kind of got frustrated, then I told them I didn't want to talk anymore." (Assisted processor, Malawi)

Limited availability of local TNS staff. Another source of dissatisfaction was the at times limited availability of local TNS staff, particularly their availability to provide the pro-active type of intensive on-the-ground TA that many of the processors require, given the number of other processors they are working with and the limited time they have to do so.

"TechnoServe is getting more and more clients so that is going to eventually prove a problem if they don't scale up their current staffing capacity."(Assisted processor, Zambia)

"I think the only expert in TechnoServe is [local TNS staff]. He has both work experience and a PhD in food processing and food technology. That is incredibly useful. I haven't actually met him, but he has significant expertise beyond us. The result is he is obviously overworked."(Assisted processor, Zambia)

"TechnoServe does not practice knowing about clients. It should get to know the business, but this never happens. The [local TNS staff] catches up every few months and is more of a manager than a problem solver. There is a difference between responding to requests and knowing the business so TechnoServe can be proactive and find ways to help the business."(Assisted processor, Kenya)

"TechnoServe staff, the ones who are capable, are overworked and don't have time to interact with clients adequately, so they are responsive, yeah, they have an approach and it's really not a criticism, they are response based. They need to interact and anticipate more." (Assisted processor, Zambia)

"We have plenty (of needs for technical assistance) but the problem is after some time it became few phone calls just here and there, it also became more time consuming so we almost started feeling like it was a useless exercise." (Assisted processor, Zambia)

"They were calling but the problem was the follow up was not there. So we felt like there was nothing happening. It is mixed, I feel that if they organize better and do some follow ups then they would be great." (Assisted processor, Zambia)

"Dissatisfied (overall), because of lack of follow up." (Assisted processor, Malawi)

"I feel that if they organize better and do some follow ups then they would be great." (Assisted processor, Malawi)

Lack of face-to-face assistance. Some processors feel that they are not receiving the type of intensive face-to-face assistance and follow-up they need to implement the recommendations made by the local TNS staff and PFS volunteers.

"One of the things I find hard is implementation. We can do it ourselves, but I would also prefer that in future …sometimes they come and spend a couple of days, you know the way operations go sometimes you need a bit long implementations."(Assisted processor, Zambia)

"I would like in future if they have a guy who is good at what we are doing or what we are supposed to achieve to attach him to us maybe even for a month. He is attached to us as a way of helping to see how he observes things as part of the implementation."(Assisted processor, Zambia)

"The distance assistance I think I would… I don't know how I would put it, but it was not very useful as they say. Because it is more of where you have a phone discussion or so and there is no follow up, when you end it you just say let's conclude and then there is no follow up from there. So it's like there are left things hanging, and there is nothing conclusive to it."(Assisted processor, Zambia)

Intrusive data collection. Another common theme uncovered by the processor interviews was an objection to what many see as the overly intrusive information requests made by TNS, both respect to the level of detail requested and the frequency of collection. TNS collects performance monitoring information quarterly. Providing this information is a challenge for many of these processors.

"We cannot generate the data they want, the information they want is too huge which is very difficult for us to give. It is a real issue; we are not in a position to feed them with data every month. It takes a lot of our time, and we are busier than them"(Assisted processor, Kenya)

"There was a time when I felt they only came to me when they needed records. I actually told them off, that you either assist me or you don't come for records at the end of the month."(Assisted processor, Kenya)

"We do not know how to package the information for them, so when we send the information to them maybe we do not have everything, and they ask for more and we do not have it. We do not understand how they want it. So then it takes them a long time to get their information and longer time for us to discuss it and it takes more time to understand their recommendations."(Assisted processor, Kenya)

"We were supposed to submit quarterly reports, and it was a template that they would send to us. We fill in our numbers and the template had some macros to make it easier, but it never worked very well despite our representation where this template was never really repaired." (Assisted processor, Zambia)

"There was never really any evidence to us of TechnoServe's interaction with these numbers. All they were doing was just collecting numbers; you wonder why bother, even though they said we did it for our numbers, you would expect some measure of interaction. I felt that the level of knowledge and expertise at that stage, the people collecting the data, you know they function as clerks more than anything and I was trying and they were always asking me to get them in, and I was always late by about 3 months. But there was no real motivation, there was no interaction to make it meaningful for us either, so it was a real pain."(Assisted processor, Zambia)

"*I wonder who designs these questions and whether they know they arise from a hole in the ground. SMEs have very limited capability to generate this type of information*." (Assisted processor, Zambia)

"A guy from TNS comes in every quarter to ask for sales information, but I stopped giving him information, because 'who are you?" (Assisted processor, Malawi)

The primary cause of processors' dissatisfaction, however, largely stems from three sources, each of which is inherent in the PFS model of delivering distance based TA delivered by volunteers at partner companies: time lags, communication challenges and inappropriate business or technical solutions. Each of these is addressed further below.

Time lags. Time lags occur for three primary reasons. The first cause is the time lag involved in selecting and 'onboarding' PFS volunteers. Initially SAFE thought that this process might take an average of about one month, but in practice, it often drags on much longer than this and can take as long as three months. According an informant at TNS, "*The model is on the whole very successful. It is not innately flawed, but we had underestimated the time factor. Once we identify gaps and write charters, it takes time to match the volunteer to the project. It is taking longer than expected; we first thought it would take one month, but it is taking longer*."

This lag time has several adverse implications. To begin with, once the project charters are agreed-on, the processors are motivated and ready to get moving, but instead of moving forward, they often have to wait. This wait can stall whatever momentum has been achieved and can cause disillusionment among processors.

The second cause of time lags is the delays inherent in the distance-based methods of TA. The time differences and communications challenges make it difficult at times to provide timely assistance.

"*PFS uses a distance model using volunteers to work on customized projects. So it is very challenging to provide rapid responses. We need to scope projects, and then staff them with volunteers, then work at great distances. Our main challenge is speed, how to respond quickly, while developing ways of engaging with clients in Africa and new ways to find and deliver while building custom teams*." (Key informant, PFS)

"The time difference killed the SAFE collaboration. We tried to set conference calls. General Mills came here then wanted to do market research, but it just died. We sent documents back and got nothing. TNS was swamped and couldn't give it time. Everything was channeled through TNS, but it didn't have the bandwidth. The volunteers at General Mills had good intentions. They talked the talk, but they don't really understand what's needed. Nothing really moved forward. Volunteers had other priorities, the time difference was a challenge, and the TNS person had his hands full with other clients."(Assisted processor, Kenya)

"So it was like this is what you are doing and based on that they would now give you a feedback, but not immediately. No that's why I used to suspect that maybe when they get the information they would discuss and communicate through TechnoServe that I don't know."(Assisted processor, Zambia)

"I mean we had lengths of discussions on Skype on what the story is, I had to give all the corner data, how much volume is, how the processor is and we also sent our flow charts and I cannot remember what else. Our biggest issue was how to deal with the quality control… Accidently my wife is a laboratory technician by training and by experience so we looked into it together then dag up a supplier of laboratory equipment in south Africa… we bought it and did the test ourselves and then three months later TechnoServe came back to us saying " this is it" looking at the label sent to me and I said the is the label we just bought three months ago. That was it, end of the story. I was just faster though because I cannot wait." (Assisted processor, Malawi)

The third cause of time lags is the use of volunteers as the primary means of delivering TA. Volunteers have full-time jobs at their respective partner companies, which means that they can only spend a few hours per week on average on SAFE work. When conflicts between their full-time job and volunteer work occur, they almost inevitably prioritize their full-time job. Moreover, demands on the volunteers' professional and personal lives pull them away from their volunteer work with SAFE, whether over the short-term, longer-term or permanently. On top of this, events at the partner firms, such as Buhler's recent downsizing and Cargill's recent organizational changes, can also affect the availability of volunteers and the amount of time they can spend on the project, again contributing to disruptions and delays in the process.

"[Local TNS staff] had mentioned once that there was an expert who needed to speak to us, but it never took off – he wanted it done when the Director was here, but when he was finally available, at that point in time the Director was travelling, and it never took off." (Assisted processor, Kenya)

"At the end of the day, things move a bit slowly. In a competitive environment when something takes nine months to a year to do, it can be overtaken by events."(Assisted processor, Kenya)

"In some cases some people, like many people volunteering, put their name on the roster, but when an opportunity does arise, they were like, in some cases they were just too busy."(Assisted processor, Zambia)

"It has its limits. Some people volunteering were just too busy. And in a couple of cases we recognized that and we discretely bowed out and we found another way."(Assisted processor, Zambia)

Communication challenges. Communications challenges occur both because of the distances and time differences involved (most PFS volunteers are based in the US, although some are based in Europe or other locations closer to the SAFE countries) and because of deficiencies in communication technology, mostly due to problems with the communication infrastructure (e.g., low bandwidth) in SAFE countries. Deficiencies in communication technologies mean that establishing communication be challenging and also that virtual meetings are not as productive as might be owing to dropped calls, line static, poor internet connectivity and so forth. Such communication challenges are particularly acute in Malawi.

"The main challenge is you cannot understand what some of them are saying."(Assisted processor, Kenya)

"At times it seems like you are speaking the same language, but we have to translate because we cannot quite capture the information."(Assisted processor, Kenya)

"Over the phone, we called into a conference. It felt a little bit removed in the sense that sometimes what you are describing and what you are saying may not be what is perceived. There is a communication lapse."(Assisted processor, Kenya)

"The challenge is of course communications. Internet is not always good, I mean the commitment from the volunteers is strong and the support is good, it's just that communications sometimes can be a challenge."(Assisted processor, Zambia)

"Well the PFS that we had here is mainly that our … you know network here is so bad so towards the end of it, as it became so important, we wouldn't understand each other in the teleconferences and we would actually had to drive into town… to get better Wi-Fi network. That was the biggest challenge we had."(Assisted processor, Zambia)

To be fair, not all interviewed processors found communication issues to be significant and some asserted that there were clear advantages to working with international experts via Skype or other distance means.

"It has been very useful because I am able to articulate myself very clearly to the team there. If you only talk through email you may not get your message across. Skype shortens the turnaround time."(Assisted processor, Kenya)

"It is useful because it is cost effective and time saving."(Assisted processor, Kenya)

Several processors felt that while Skype communication has its place, there was a real need for more 'on-the-ground' communication with PFS volunteers. They believed that some of the miscommunication and misunderstandings would not arise if the volunteers were able to visit and see for themselves the situation on the ground.

"The volunteers will only give you help by distance education. Distance education on the floor doesn't work. What we need is if there is a processing plant in Europe I want my person to go and get trained there rather than this guy telling me to do this and that. I want my person to go and work under him for three months and he trains him."(Assisted processor, Kenya)

"Get some experts from outside and put them in our factories and they stay for eight days, see the processes, see how we can do technical advancement."(Assisted processor, Kenya)

Caveat. As seen from the above quotes, the evaluation team encountered a number of assisted processors that did not meet the objectives in some or all of their project charters and/or who expressed dissatisfaction with certain aspects of SAFE assistance. In most cases, the processors attributed the lack of success or dissatisfaction to either TNS or SAFE (usually a lack of timely responsiveness, time constraints of SAFE staff or inappropriate technical or business solutions). Such claims, however, must be viewed with a certain degree of caution. In speaking with TNS staff, it became clear that in some of the cases, much of the blame also lies with the processors themselves, often due to the processor's lack of engagement with the program or lack of initiative in following through with the terms of the project charters.[21] Inability to access credit at an affordable interest rate and cash flow issues of the processor were also common constraints among the assisted processors.

A critical element of the SAFE approach, moreover, is that relies on 'pull' by the processor in all stages of the process, beginning with processor recruitment through the completion of project charters. 'Pull' in this case refers to proactive efforts by the processor to demonstrate a demand for SAFE assistance in specific areas, identify a strategic vision and articulate objectives, and demonstrate initiative working toward charter objectives. Thus if a processor is not pulling, SAFE is loath to push too much, and work on charters might subsequently become stalled.

In the end, it was not possible within the scope and constraints of the evaluation to investigate processors' numerous complaints and what their causes were. While it is clear that the cause of the complaints were

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[21] In one notable example that demonstrates this point, the CEO of an assisted processor in Malawi complained at length about delays and the lack of TNS and PFS responsiveness and that after couple of years of working with SAFE, nothing had been accomplished under any of its charters. TNS, for its part, blamed the lack of progress on a host of factors related to the processor and the CEO, including the CEO's frequent trips out of the country and otherwise limited availability, a problem compounded by the fact that he did not delegate responsibility for the charters to anyone else in the organization, and the fact that the processor's largest plant burned down temporarily halting work on the charters. Unfortunately, constraints involved in the fieldwork did not allow the evaluation team to sort out these types of conflicting claims meaning that all such claims must be taken with a degree of caution.

often due to the weaknesses in the SAFE model or in program implementation, it is also probable that some processors contributed to the problems as well.

Following from this last point, as important as selecting the 'right volunteer' is, selecting the 'right processor' appears to be equally as important, as discussed above.

Changes Made, In Process, or Under Consideration

Both PFS and TNS and well aware of the issues raised above, as noted by the following quotes.

"*The ability of volunteers to engage is more limited than hoped for in these very technical issues*." (PFS informant)

"*Businesses in Africa move fast and projects don't move fast enough. There's not a lot of accountability for meeting deadlines and keeping projects on track*." (PFS informant)

"*While we have a great history of picking good ones, we can, however, improve. It would be real easy to work with large and growing businesses, but I'm not sure that would have the impact we want to have. We want to make sure SGBs have great leaders who can communicate needs and vision. This starts with SGB selection. Then we want to reduce the cycle time from selection to charter to engage volunteers and finally to solve problems in the charter*." (PFS informant)

"*Connectivity in the developing world is a major challenge. It is very difficult to establish solid and reliable lines of communication, so we do a lot of email; use Salesforce platform, Facebook, and GotoMeeting. These, however, all require connectivity. Malawi in particular has a bad communications infrastructure so there we communicate a lot with mobile phones*." (TNS informant)

Both PFS and TNS are consequently working toward developing solutions to address these issues. These are discussed below.

Quick wins. The solution mentioned most prominently by PFS and TNS informants is to identify two types of charters: the 'quick win' charter and the standard charter. The quick win charter is designed to address the lag time during the first 90 days after a charter has been signed and before the onboarding of the PFS volunteer.

Under this scenario, as part of the gap analysis that TNS conducts with every assisted processor immediately on enrollment into the program, local TNS staff will work with the processor to identify technical or business gaps that fall under the experience/knowledge of the local TNS staff and that lend themselves to relatively quick resolution. In SAFE's experience, there are certain issues that come up repeatedly in working with small and medium-sized food processors for which the local TNS staff have built up institutional knowledge over time that do not require international experts and which can be addressed relatively quickly.

"*We are focusing on the early management of each client relationship. We found over time that the majority of SGBs have some similar needs that fall into two categories: technical—including quality control food safety, product shelf life and compliance with regulations—and business. There are multiple opportunities to help with quality, and almost everyone has the opportunity to help with access to finance, developing financial tracking systems,* *doing strategic business plans, etc. We are going to take a more template approach vs. an a la carte approach. So, while we are working on quick wins, we will also charter customized projects so that we can value while building the customized project*." (PFS informant)

"*In the beginning, we felt like most problems could be turned into charters, but we found early on that what SGBs need is answers to specific questions. We want to provide value early on to build credibility and meet SGB needs. So, if TNS can address a problem, then it should do so. If it can't, then bring on PFS. We believe that there will be many projects that are too complex for a quick win, but not every project needs to be chartered. We want to find different ways to deliver expertise as soon as we can and with high quality*." (PFS informant)

Thus while PFS works to identify and onboard the volunteers to work with the processor on standard charters, the local TNS staff will work with the processor to deliver quick win solutions. TNS estimates that in the future quick wins will make up about 30 percent of the total SAFE portfolio.

"*We want to deliver rapid value and buy time to get to know the customer better so we can do better customized projects. TNS will be responsible for quick wins. TNS owns the first 90 days, with PFS helping and training TNS staff to build expertise to take a template approach. Then after the first 90 days, TNS will revert to its role as communication interface, while PFS is responsible for building customized projects*." (PFS informant)

Communications. SAFE has used, or experimented with, multiple methods of communication to connect assisted processors with the SAFE volunteers in the United States or Europe. These methods include email, telephone (landline and mobile), Skype, Microsoft Lync, GotoMeeting, Facebook, PFS Connect, Blue Jeans, and Salesforce1. PFS plans to continue working on refining its communication strategy and methods, as indicated in the following quote:

"*The technology piece can always be improved. Right now it is computer based or mobile. We need to make sure that it is 100 percent mobile. From an efficiency standpoint and making ease of engagement optimum, we need to remove communication barriers. This involves reaching them where they are using mobile devices. There is an application called Salesforce1 that we are using now, but it has not been customized or exploited; this is part of next year's strategy, getting our arms around this technology better to ease its use for volunteers and field teams*." (PFS informant)

One communications problem that also arises with some frequency is that the volunteer teams are located in different countries and thus different time zones. PFS has discovered that the majority of its US-based volunteers have time available in the mornings (predominantly Central time), which is the middle of the afternoon for volunteers in Europe making it harder for volunteer teams to schedule meetings, both among themselves and with the assisted processors. In response to this, PFS is considering the idea of forming volunteer teams that are located in common time zones. No action has been taken on this so far, however.

Volunteer selection. There are less ready solutions for time lags and work disruptions caused by the volunteer distance model. It is probably unreasonable to expect volunteers to prioritize their volunteer work with SAFE at the expense of their full-time jobs or relative to other professional or personal priorities. Both PFS and TNS acknowledge that such things are inevitable to a certain degree and recognize that it is an inherent weakness (although not flaw) in the SAFE model.

One obvious method for addressing this weakness is refining the volunteer selection process so as to identify those volunteers most committed to seeing the process through in a timely manner. When asked to describe the characteristics of a good volunteer, informants at PFS used the following types of adjectives: talented, high expertise, patient, big heart, passion, and enthusiastic. Admittedly, however, correctly identifying these characteristics is more art than science, and even if such persons can be identified, this is no guarantee that other priorities will not emerge over time or that changes in the volunteers' job status will not adversely affect their ability to commit the needed time and effort to their volunteer work.

To address this issue, PFS takes, at least, three approaches. The first approach is the layered volunteer management process (described above), which includes country leads, country recruitment coordinators, SGB leads and project team leader, in addition to the full-time and part-time support staff located at PFS headquarters. The latter include a Training Manager and a Volunteer Manager.

The second approach is to practice full disclosure to potential volunteers with regard to the challenges they will face in the volunteer role.

"*When soliciting and running volunteer campaigns, we try to be very realistic about expectations so that they understand the challenges, as well as the opportunities to make a difference. There can be frustrations, because things don't always move fast, and there are communications challenges. So we need to understand this part of the experience and to give volunteers realistic expectations and be upfront about what's needed*." (PFS informant)

The third approach is trying to learn from experience, so as to identify possible 'tweaks', or more significant changes, that can be made to improve the volunteer recruitment and management process. At the end of the year, for example, PFS runs a volunteer survey, partner survey and SGB survey with scaled questions and conducts a detailed debrief of every project once it is completed.

Processor selection. SAFE is currently instituting changes in the processor selection process. In the past, TNS selected processors one at a time, relying primarily on mass media to identify and recruit processors into the program. Once a processor expresses interest in the program, TNS requests the submission of a concept note, after which TNS visits the processor to inspect the plant and interview the owner and then, if all goes well, signs an agreement with the processor. After signing the agreement, the local TNS staff next conducts a gap analysis after which the processor and TNS select projects and the processor signs the charter(s).

TNS acknowledges that the above selection process was not always effective at differentiating the processors opportunistically taking advantage of a subsidized TA program and the processors with the right 'entrepreneurial spirit', community involvement and strategic vision. Consequently, TNS now proposes to implement the following changes in the selection process:

1. Recruit processors in cohorts (as opposed to one at a time). Recruiting in cohorts has the advantage of allowing TNS to compare processors to each other and to rank them.
2. Place a greater emphasis on recruiting processors through established networks that include participants in the SWTs, business associations and other market actors (e.g., GAIN and USAID), as opposed to relying so heavily on mass media recruitment methods. TNS has also

proposed proactively identifying and reaching out to promising women-owned or managed SGBs.

3. Conduct a site visit to applicant processors to identify and shortlist stronger candidates and weed out weaker candidates.
4. Ask the shortlisted candidates to submit a concept note.
5. Select finalist candidates and conduct a final interview with owners so they can explain more about themselves in order to allow TNS to gauge better their motives and assesses their entrepreneurial spirit, community and strategic vision.
6. Select the winning candidates.
7. Before or immediately upon selecting the winning candidates, PFS will identify the relevant SGB lead and hold a 'foundational meeting' to establish objectives and agree on the methods of communication to be used.
8. Hold a workshop with processors selected in a particular cohort so as to further familiarize them with the program and allow them to interact with and learn from past or present SAFE client firms and from each other.

Sector-wide trainings. Up to this point, TNS has not done any post-training follow-up with training participants. According to TNS informants, however, it is now in the process of implementing plans to do routine follow-up with SWT participants by surveying random samples of participants six months after the conclusion of each training to ask them about their experience and the effect the training has had on them both personally and on their company.

SAFE is also looking at formalizing its relationships with universities in the program countries for the purpose of integrating the training curriculum and resources into university courses, perhaps also creating certification courses in certain areas. Toward this end, PFS has recently signed an MOU with Kansas State University (KSU) that includes professor and student exchanges with universities in program countries.

Monitoring and evaluation. TNS is attempting to develop a process for assessing program contribution to the changes in processor performance being reported through its performance monitoring system. This process remains in its early conceptual phase and entails linking program assistance to observed changes in processors production or other practices and then linking those observed changes to estimates of their likely impact on processor performance. For example, if TNS can verify that SAFE assistance contributed significantly to a processor's adoption of an improved production line, can this in turn be linked either empirically or subjectively (via an informed estimate) in some way to improvements in processor performance? In any case, TNS has a long way to go to flesh out and operationalize this process.

With regards to the challenges of collecting data from graduated processors, TNS is planning to set up an 'Ask the Expert' facility under which graduated processors can return to TNS to ask additional questions or seek additional support. TNS hopes that by providing this type of post-charter assistance, it can exert further leverage on processors to continue submitting performance data.

EQ10. WHAT MIGHT SAFE HAVE DONE DIFFERENTLY TO IMPROVE PROGRAM IMPLEMENTATION?

This section draws on the findings and conclusions from above to reach conclusions, along with a corresponding set of recommendations, about what SAFE might have been done differently to this point, and what it might do moving forward, to improve program implementation and results.

Volunteer Selection

PFS has taken a number of actions already to improve the volunteer selection and management process. These include, but are not limited to, bringing additional partner firms (and areas of expertise) under the PFS umbrella, continuing to develop and adding new features to PFS Connect, creating a hierarchical volunteer management structure with clear divisions of labor, and bringing on additional paid staff to manage the volunteer network and train volunteers with more focus on understanding and working within the African context.

Recommendations:

- SAFE should continue to refine the volunteer selection and management process, as it has been doing to this point. There remains significant potential to improve this process even further.

Processor Selection

TNS is aware of the need to improve processor selection and is in the process of revising its selection process so as to identify those processors that have the greatest potential for success with strong innate entrepreneurial traits especially in women-owned or managed enterprises, and those enterprises with a community vision or focus as emerging in importance.

Recommendations:

- Continue to increase the program's reliance on referrals and work-of-mouth over mass recruitment methods so as to improve the pool of candidates from which assisted processors are chosen.

- A key improvement in processor selection will be to agree definitively on criteria and operate accordingly with regards to the selection process, i.e. selecting processors that advance the stated program objectives. This could be accomplished by "working backward" to identify processors serving target markets/groups. Examples might include working with national farmer associations such as the National Association of Smallholder Famers (NASFAM) in Malawi to identify processors that have direct commercial links with smallholders, including those with contract or outgrower type arrangements, working with the intermediaries that procure raw materials to disseminate market and safety standards to the producers they procure from; processors that are selling, surveying markets and outlets where food-insecure people shop to determine which companies are supplying them; or soliciting processors actively seeking to comply with government mandates by fortifying their products with micro-nutrients.

- Consider limiting the range of assisted processors to a smaller number of sectors so as to take advantage of potential economies of scale, focus on products that offer a bigger nutritional bang for the buck, have potential to reach the greatest number of vulnerable households, etc.

Implementing the above recommendations may lead to the wider inclusion of larger processors. While larger processors may require more specialized technical or business assistance as the smaller processors, they typically have much greater outreach and thus greater potential to advance the program's goal of increasing the availability of nutritious foods with program assistance. Hence, this is an area in which PFS capacity may be best utilized. Also, with lower costs by virtue of greater economies of scale, they may be in a position to increase market penetration into markets and outlets where food-insecure people shop. The challenge here is ensuring that SAFE assistance adds true value to what the processor is doing and does not just replace other options available to the processors through commercially available sources TA.

Communications

PFS has experimented with a number of technologies for improving communications between volunteers and assisted processors, and it continues to work on improving this process. Improving the communications process will also go a long way to addressing other processor concerns related to the timeliness of PFS assistance.

Recommendations:

- A frontier for improving communications will be to develop technologies that will allow volunteers to connect with assisted processors where they are at the time using mobile phone or other technologies. Connecting with processors where they are, whether in the field, in their plants or in other areas away from an Internet connection, will potentially allow PFS to improve the quality of technical assistance transfer.

Availability of TNS Staff

The evaluation team heard several stories of intermittent contact or communication with local TNS staff. The evidence thus suggests that the local TNS staff is at times stretched to the point where they cannot provide the type of intensive attention and follow-up that many processors may require. It is not a good sign when processors complain that the only time they see the local TNS staff is when they come every three months to request performance information for the SAFE PMP.

Recommendations:

- An obvious solution is to hire more local staff, although that may not be feasible within the budget or timeframe remaining in the program. In any case, it will be useful to develop solutions allowing local TNS staff to follow-up more frequently with processors who need it, while also developing internal processes for checking in routinely with processors.

Face-to-Face Assistance

Several assisted processors mentioned that the quality and effectiveness of program TA could be improved and through more face-to-face interactions with PSF volunteers. When PFS volunteers were able to visit processors, assisted processors found the TA to be more useful.

"The theory part was great and also quite impressed when they visited our plant. They gave us very good tips, which we started using and following and that has made a big impact on our production." (Assisted processor, Malawi)

Recommendations:

- Assisted processors cited specifically their interest in exchange programs in which processors travel to the US or Europe (or other location) for face-to-face training or in which volunteers travel to Africa to meet the processors and visit their facilities.

- Another possibility mentioned by assisted processors was to organize exchange visits among assisted processors that would enable them to learn from each other, although as the following quote acknowledges, this last suggestion might be difficult given the competitive nature of the food-processing sector.

"*When we started the program, we said that maybe we would organize trips to other local processors, although I know that would be difficult because of the competition aspect.*" (Assisted processor, Kenya)

"The problem you would have here in Malawi, nobody would allow me to walk in to their office because here I am the competition, maybe if it was in a different country." (Assisted processor, Malawi)

Note that the suggestions to involve more face-to-face interactions with PFS volunteers may or may not be feasible, and it would represent a fundamental change in the PFS model, although with that said the evaluation team did encounter a substantial number of processors who claimed to have met with someone in person from one of the PFS partner companies.

Performance Monitoring

Following from the previous point, quarterly data collection of processor performance is excessive. The evaluation team uncovered substantial resentment among assisted processors about the burdens of complying with the program's data collection requirements.

Recommendations:

- Bi-annual data collection is more than sufficient for most outcome indicators (those collected from assisted processors), and SAFE should even consider annual collection of certain PMP indicators, such as incremental profits, jobs created and investment.

Sector-Wide Trainings

Both SWT trainers and trainees observed that the effectiveness of the SWTs could be substantially improved by following-up with trainees afterwards to reinforce the lessons from the trainings and to assist trainees in implementing them. The following quote was typical:

"In terms of weaknesses, I think it's the continuity. Like I said and I think we really need to follow up. I feel we lost an opportunity to hear from people that did the training before, they might have made some improvements but we missed the opportunity to follow up on that. I also think they should be a way for people to follow up through vouchers." (Assisted processor, Malawi)

Recommendations:

- SAFE should consider conducting routine follow-ups with SWT participants, especially those who appear to be good candidates for working directly under SAFE. This includes not only the follow-up currently being planned by TNS to assess the trainings' longer-term benefits but also follow-up activities to reinforce aspects of the training and to provide additional assistance as needed. This might take the form of follow-up phone calls, workshops, visits to production facilities, linkage meetings (such as was done in Zambia with lending institutions), participation in Ask an Expert, and so forth. SAFE may also consider implementing a voucher scheme for follow-up, whereby SWT attendees can redeem vouchers for TA from pre-identified trainers at a later date.

Another common concern expressed by SWT trainers and trainees alike was the short duration of the SWTs in relation to the amount of material covered.

Recommendations:

- It may be worthwhile to consider increasing the length of SWTs in proportion to the amount of material covered and the need to provide more practical application of the materials.

- Increasing the length of SWTs might also involve providing post-training follow up in person or virtually, one-on-one or in groups (small or large).

Inappropriate Business or Technical Solutions/Limited Local Environmental Knowledge

A number of assisted processors expressed dissatisfaction with the business or technical solutions proposed by PFS volunteers with much of the dissatisfaction stemming from the volunteers' limited understanding of the local environment.

Recommendations:

- PFS may consider providing volunteers with more intensive training including greater focus on sensitizing volunteers to the country and local environments in which they will be working. Another possible approach may be to require some type of more formal vetting from the Country Leads or other local context experts (including local TNS staff) before proposing formal solutions to assisted processors. In any case, the frequency with which assisted processors cited contextually inappropriate business or technical solutions suggests that PFS needs to investigate methods to improve volunteers' contextual knowledge.

Scaling-Up Program Impacts

SWTs appear to have been fairly effective in facilitating learning among participants, in addition to practice improvements among participants and their organizations, or at least more effective than assumed by key informants at TNS. On top of this, the SWTs are highly valued by participants and appear to be the SAFE activity that has the greatest potential for achieving truly 'significant' scale within the program countries. These all suggest that SWTs are an under-exploited tool. There also appear opportunities to scale-up program impacts by providing more 'standardized' solutions to common problems that face multiple processors.

Recommendations:

- SAFE should consider increasing the number, scope and outreach of SWTs.

- Develop sets of relatively standardized solutions to common problems that face multiple processors, such as packaging. Once identified, these technologies could be widely disseminated to multiple processors through both in-person TA and SWTs. Note that this type of "economies of scale" approach to a common challenge was successfully implemented in the SWT on fortification, though as noted elsewhere, more post-training follow-up would enhance impact.

Smallholder Farmers

If it is indeed an important program objective to upgrade the production and livelihoods of smallholders, then it is necessary to implement specific strategies to accomplish this, as it is unlikely to happen organically as assumed.

Recommendations:

- Opportunities to improve the capacity of smallholders to supply markets may exist through working with market intermediaries to train farmers on quality and safety issues. For example, one processor in Malawi described working with a market intermediary to purchase peanuts that are free from aflatoxin. Another assisted processor described learning how to determine visually if soya was appropriate as a raw material.

"First of all the first thing is the grading and the drying; so making sure that this middle woman who gets them will not just buy any groundnuts but select the ones that are looking good and those are the only ones that she will buy. Then she dries them as soon as she gets them and sorts them." (Assisted processor, Malawi)

"What they have trained us is how we should source our products, I mean our raw materials, what good soya looks like" (Assisted processor, Malawi)

- Another possibility is to select processors that have formal contract or outgrower arrangements with smallholders to supply raw materials (see above) or to include assistance to processors to create such arrangements as part of the services delivered by the local TNS staff, or perhaps by bringing in outside experts to collaborate with TNS to deliver this service.

- A further possibility is to collaborate with USAID or other donor programs working with smallholder farmers producing products commonly sourced by assisted processors. Note that capacity building of the numerous women smallholders offers a lot of potential for broadening the gender focus and positive economic impacts from the SAFE project.

At the same time, SAFE should remain cognizant of the challenges of taking such an approach Upgrading smallholder production and livelihoods is difficult and resource intensive, and the challenges it creates for SAFE may not be worth the resources and strategic attention that it requires, although SAFE's ability to link producers with real market demand represented by the processors means that they are starting from an advantageous position.

Marketing Assistance

The two in-depth case studies suggest that assisted processors require greater assistance in marketing. While many processors are receiving useful assistance in certain marketing areas, such as production and packaging, their capacity in other marketing areas, particularly distribution and promotion (messaging), remains lacking.

Recommendations:

- Increase the program emphasis on providing training in marketing strategy and methods to assisted processors. Given the program's emphasis on 'pull,' this might require in turn using the pre-charter GAP analysis to highlight gaps in the processors' marketing strategy and methods, which the processors might not otherwise be aware of (thus reducing their demand for marketing assistance). Particular emphasis might be given to processors selling or seeking to sell their products in markets accessed by lower-income or vulnerable households, or who produce products that are particularly appropriate for the needs of these households (e.g., CSBs).

Gender Sensitization and Training

While the evaluation team did find instances in which SAFE assistance had improved assisted processors' gender awareness and/or practices, these were more the exception than the rule. This and the finding that SAFE has not shared the results of its gender audits with many of the assisted processors indicate that there is ample room for SAFE to improve program implementation with regards to gender sensitization and training.

Recommendations:

- Potential program improvements to improve gender sensitization and training include co-sponsoring on-site life skills development and other learning activities for lower and mid-level workers, facilitating gender sensitization workshops or trainings for processor staff, integrating the gender audit into the BAT and following-up with all processors with whom it has done gender audits to share the results, discussion the implications and plot the way forward.

Access to Finance

Assisted processors identified two other areas in which they believe SAFE could significantly improve the quality and effectiveness of program services: access to finance and more face-to-face contact. Assisted processor consistently cited the lack of financing to be a persistent constraint that stymied their best efforts to implement the recommendations made by PFS volunteers and local TNS staff. In fact, when asked specifically which was more challenging, access to technical assistance, or access or finance, assisted processors overwhelmingly cited access to finance.

That said, linking some, or most, of these processors to lending institutions and helping them secure credit may be easier said than done, as noted by this SWT participant in Zambia who participated in the post-training follow-up arranged by the SWT trainer mentioned above),

"A workshop about access to finance where TechnoServe had invited some commercial banks besides giving us tips on how we should prepare things like record keeping and stuff like that. So basically it was just a few of the things they wanted, the major was collateral. They said there is no way they can be spending sleepless nights over our investment when you are having sweet dreams with nothing to worry about. And they said basically the commercial banks are not for the small SMEs." (Assisted processor, Zambia)

Recommendations:

- Processors suggested that SAFE could play a role in helping to link them to funding agencies, financial institutions or to sources of equity financing. This might presumably also include one-on-one work with processors to help them qualify and apply for financing from targeted financial institutions or group training sessions on such things as preparing loan applications.

Note that TNS is well aware of the financing constraints facing its assisted processors, and it is working on solutions to it. Specifically, PFS, TNS and Root Capital, with support from the Initiative for Smallholder Finance (ISF) and funding from the Small Foundation, have been developing a lending facility to address the need for asset financing for equipment and working capital in the $10,000 to $50,000 loan range. The development process was initiated in June 2014 with a meeting of all the partners in Boston to frame the opportunity and principles for working together. In July and August, PFS assessed the current process flow between the entities and conducting an initial effort to vet potential lending opportunities. The initial analysis identified a preliminary need and demand in the market for commercial (non-subsidized) loans give high interest rates, long turnaround times for review and approval, excessive collateral requirements, requirements for specific suppliers, and inflexible terms, especially short payment periods.

In September and October, the effort shifted to the supply side, with Root leading an effort to develop an appropriate lending product and process, and removing steps and requirements from its standard lending process. In the process, the division of responsibility for the loan product was clarified. TNS would introduce Root Capital as a potential lender and help prepare loan applications, but not represent the lending side (so as to avoid conflicts of interest), while Root Capital would conduct the independent loan review and underwriting. To date, TNS has piloted three loans in Tanzania (through SAFE's sister program *Tuboreshe Chakula* and one loan in Kenya under SAFE). The following is taken from a review memo:

It is bears emphasizing that access to finance is not a secondary issue contributing to the success of SAFE assistance but instead appears to be a core issue that is critical to SAFE's success. Either SAFE needs to find technical and business solutions that accommodate the processors' financial constraints, or it needs to prioritize working with processors and lending institutions to facilitate mutually beneficial commercial arrangements between them, or both.

ANNEXES

ANNEX 1: BIBLIOGRAPHY

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Place, Frank, JemimahNjuki, Festus Murithi, and FridahMugo. (2009). "Agricultural Enterprise and Land Management in the Highlands of Kenya." International Food Policy research Institute.

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Kenya Demographic and Health Survey 2008-09

Malawi Demographic and Health Survey 2010

Zambia Demographic and Health Survey 2007

ANNEX 2: ASSISTED PROCESSORS

Kenya Processors

FOOD PROCESSORS — COMPLETED BY II

	Client	Contact person	Contact Details		INT STATUS	COMMENTS	Gender
1	Soy Afric	David Muriuki	+254 0723306321	dmuriuki@soyafric	19-Mar	Uploaded	M
2	Mwailu Enterprises	Johnson Gachuhi	+254 726673348	gachuhi.johnson@	25-Mar	Uploaded	M
3	Nyala	Mutwiri	+254 721245037	taratisiom@yahoo	19-Mar	Uploaded	M
4	Deepa	Gillian	+254 721846247	qam@tropicalheat	31-Mar	Uploaded	F
5	Meditech Pharma	John Gachuhi	+254 725499990	meditecpharma@	18-Mar	Uploaded	M
6	Nioro Canning	S.D Vaidya	+254732618010	sudhir.vaidya@njo	19-Mar	Uploaded	M
7	Doinyo Lessos Creameries	Brian Cuthbert	+254 722839722	bcuthbert@doinyo	20-Mar	Uploaded	M
8	Borabu Union	Amos Ombaso	+254728 572 026	amosayieko@gmai	18-Mar	Completed	M
9	Marenyo Multipurpose	Aura Omamo	+254 725735208	omamo.aurah@ya	19-Mar	Uploaded	M
10	Kakamega Dairy	Buluku Benjamin Mshepa	+254 728368414	benjaminbuluku@	18-Mar	Uploaded	M
11	Tanga-kona	Catherine Amusugut Otaga	+254 729949824	tangakonacommer	18-Mar	Uploaded	F
12	Cherubet Company	Mary Maritime	+254 722410680	md@cherubetcom	17-Mar	Uploaded	F
	INTERVIEWS NOT CONDUCTED						
13	Sunripe	Hasib Shah (Tiku)	+254 722742244	shamit@sunripe.co.ke		Project no longer going on & contact person not familiar/ past people involved no longer working there	
14	Osho Grain Millers	Alpesh Shah	+254 728601111	alpesh@oshomillers.com		Mr Alpesh declined to give an appointment and said he HAS NO INTEREST. To follow-up with Technoserve	
15	Edom Nutritional Solutions	Winston Odhiambo	+254 724222356	winstone@nutrition-solutions.org		Project did not commence due to internal director issues	
16	MACE Foods	Margaret	+254 720391290	macefoods@gmail.com		Reply from Margaret Komen/ person left no one else familiar	
17	Bomet Millers	Paul Ngerich	+254 720 557 989	ngerechipaul@gmail.com		Project initiated but funding not successful therefore no work started	
18	Stawi Foods	Eric Muthomi	+254 720466910	eric5kenneth@gmail.com	23-Mar	Travelled & was unavailable after return	
	INTERVIEWS CONDUCTED BY SI						
19	Classic Foods	Stella Kimani	+254 722990100	info@classicfoods.	Completed - SI	Uploaded	F
20	Gaea Foods	Wanjiku Mwangi	+254 737739283	info.gaeafoods@gr	Completed - SI	Uploaded	F
21	Star of the Lake	Florence Musumba	+254 721732712	starofthe_lake@ya	Completed - SI	Uploaded	F

INSTITUTIONAL BUYERS — COMPLETED BY II

	Client	Contact person			Int Status	FP	Gender
1	Corner Brooke School	Mr. Kameri - Former principal / cur	Tel: 0711798618		26-Mar	Classic foods	M
2	Goodrich school	Mr. Mureithi, - Principal	Tel: 0710578478		30-Mar	Classic foods	M
3	Amref	Joan Birir - Admin Procurement Officer		Joan.Birir@Amref.org		Soy Afric	F
4	Kenya Wildlife Service	Joseph Serem - Head of Logistics (Food & uniforms)	Tel: 0723 135 790	Serem@kws.go.ke	26-Mar	Doinyo Lessos	M
	INTERVIEWS NOT CONDUCTED						
5	Kenya Co-operative Creameries (KCC)	Paul K Chumba, Relationships Officer				Doinyo Lessos	
6	AghaKan primary	0736 340 101				Borabu Dairy	

STAKEHOLDERS — COMPLETED BY II

	Client	Contact person			INT STATUS	COMMENTS	Gender
1	Kenya Bureau of Standards	Peter Mutua - Principal Standards (	Cell: +2547228364	mutuap@kebs.org		Uploaded	M
2	University of Nairobi	Prof SK Mbugua - Prof of Industrial	Cell: +2547227265	smmbugwa@yahoo.com		Uploaded	M
3	Kenya Institute of Manageme	Peter Njuguna - Technical Officer	+254 020 2445600	pnjuguna@kim.ac.ke		Uploaded	M
4	GAIN	Felistus Mutambi - Food Fortification Mgt	Cell: 0725 559412	fmutambi@gainhe	26-Mar	Uploaded	F
5	WFP-Kenya	Zippy Mbati - Program Officer	Cell: +2547077224	zippy.mbati@wfp.org		Uploaded	F
	INTERVIEWS NOT CONDUCTED						
2	Ministry of Health	Gladys Mugambi	Cell: +2547207910	gladysmugambi@yahoo.com		Travelled & person recommended (Francis) provided no feedback	

TRAINERS — COMPLETED BY II

	Client	Contact person			INT STATUS	COMMENTS	Gender
1	Industrial & Scientific support Services / Gain	Contact: FELISTUS MUTAMBI	Tel:020553964	info@sheqsystems.com	26-Mar	Uploaded	F
2	The Kenya Institute of Management	Prof. Kibas	tel: +254 020 2445600 / 0712			Uploaded	M
3	Department of Food Science, Nutrition & Technology	Contact: Prof. S.K Mbugua	Tel: 254-722-726547	smmbugwa@yahoo.com	25-Mar	Uploaded	M

TRAINEES — COMPLETED BY II

	Client	Contact person			INT STATUS	COMMENTS	Gender
1	2 Trainee FGDs - NPD/ Fortification	N/A			Completed	Uploaded	3 Males/ 3 Females

MARKET ACTORS — COMPLETED BY II

	Client	Contact person			INT STATUS	COMMENTS	Gender
1	10 Market Actors - Kibera/ Kayole	N/A			Completed	Uploaded	2 Females/ 8 Males

CONSUMER FGDS — COMPLETED BY II

	Client	Contact person			INT STATUS	COMMENTS	Gender
1	4 Consumer FGDs - Kayole	N/A			Completed	Uploaded	F

HH SURVEY QUANT — COMPLETED BY II

	Client	Contact person			INT STATUS	COMMENTS	Gender
1	400 Interviews conducted	N/A			Completed	Uploaded	Mix of both genders

Zambia Processors

FOOD PROCESSORS		**COMPLETED BY II**					
	Client	***Person Interviewed***	***Contact Details***		INT STATUS	COMMENTS	Gender
1	**Hipro**	Salim Dawoodge (MD)	Cell: +260-0977789389/0955789	hipro@iconnect.zm	19-Mar	uploaded	M
2	Forest Fruits	Daniel Ball	Cell:+260	dball@zambezigold.co	31-Mar	"	M
3	Savanna Stream	Salim Dawoodge	Cell: +260-	savannastreams@ico	19-Mar	"	M
4	Zelo Food	David Chisulo	Cell: +260979840734	zelofoods@yahoo.co	19-Mar	"	M
5	**Kankoyo Bakewell Bakeries**	Jackson Kapobe	Cell: 260974770248	jackson.kapobe@gma	19-Mar	"	M
6	**COMACO**	John Powers (CEO)	Landline: +260-211-	jpower@itswild.com	25-Mar	"	M
	INTERVIEWS NOT CONDUCTED						
7	**Southern BioPower**	Martina Bergschneider (MD)	Cell: +260977861959	southernbiopower@gmail.com		Wrong person provided for interview & unable to reach MD for Skype Interview	
	INTERVIEWS CONDUCTED BY SI						
8	Sylva Food Solutions	Sylvia Banda (MD)	Landline: +260211257209, Cell: +260979707944	sylviabanda@sylvagroupafrica.com, lanku2001@yahoo.com	Completed by David	Uploaded	F
9	Lumono	Khama Mbewe (MD)	Cell: +2600969531453, 0966745716	lumunoorganics@gmail.com	"	"	M
10	Chankwankwa	Dorothy Eriksson (MD)	Cell: +260 (0) 979 530919 Landline: +260 215	chankwa@zamtel.zm	"	"	F

INSTITUTIONAL BUYERS		**COMPLETED BY II**					
	Client	***Contact person***			INT STATUS	***COMMENTS***	Gender
1	Thrive Project	Rick Henning. /Chief of Party.	Tele: +260965872578.	rhenning@path.org	24-Mar	Uploaded	M
2	Marys Meals	Panji Kajani Head of Programs	Tele: +260972015407,	headofprog@marysmeals.mw	25-Mar	Uploaded	M
3	Project Concern International	Beatrice Masala - Program Officer	TBA			Uploaded	F
	INTERVIEWS NOT CONDUCTED						
4	Community Schools	Get contact info from HIPRO				FP declined to provide details	

STAKEHOLDERS		**COMPLETED BY II**					
	Client	***Contact person***			INT STATUS	***COMMENTS***	Gender
1	Zambia Development Agency, SME Development	Mukula Makasa/Director SME Division	Tel: +260-211-222358 | +260-211-220177	Email:Mukula.Makasa@zda.org.zm		Uploaded	M
2	Zambia Bureau of Standards	Mr Anthony Munyenyembe (ccd)	Tel+260965408737	amunyenyembe@zabs.org.zm	25-Mar	Uploaded	M
3	University of Zambia	Dr John Shindano/ Head of Department	Tel : +260-211-295141/ Mobile:+260-955-753612	Jshindano@unza.zm/ Email: wcmatoka@yahoo.com		Uploaded	M

TRAINERS		**COMPLETED BY II**					
	Client	***Contact person***			INT STATUS	***COMMENTS***	Gender
1	3C – Development and Entreprenuership Experts	Contact: Abraham Makano	Tel: +260 955041576	Email: Abraham.makano@gmail.com	25-Mar	Uploaded	M
2	Wadada Consultants	Contact: Windu Matoka	Tel: +260977889717	Email: wcmatoka@yahoo.com		Uploaded	M
	INTERVIEWS NOT CONDUCTED						
3	Stem Education Center	Contact: Mwananyanda Lewanika	Tel: +260 966 735360	Email: mwananyanda_lewanika@stem.co.zm		TBA	

TRAINEES		**COMPLETED BY II**					
	Client	***Contact person***			INT STATUS	***COMMENTS***	Gender
1	1 Trainee FGD - NPD	N/A			Completed	Still to upload	4 Male / 1 Female

MARKET ACTORS		**COMPLETED BY II**					
	Client	***Contact person***			INT STATUS	***COMMENTS***	Gender
1	10 Market Actors - Chipata	N/A			Completed	Still to upload	M

CONSUMER FGDS		**COMPLETED BY II**					
	Client	***Contact person***			INT STATUS	***COMMENTS***	Gender
1	3 Consumer FGDs - Chipata	N/A			Completed	Still to upload	15 Females/ 5 Males

HH SURVEY QUANT		**COMPLETED BY II**					
	Client	***Contact person***			INT STATUS	***COMMENTS***	Gender
1	600 Interviews conducted	N/A			Completed	Uploaded	Mix of both genders

Malawi Processors

MALAWI				
Company/Institution	**Name**	**Position**	**Email**	**Telephone**
Processors				
Project Peanut Butter	AlimaAmini	Executive Director	projectpeanutbutter@gmail.com	+265 991 890-028
Rab Processors	ChandrinDissanaike	General Manager	gmp@rabmw.com	+265 888 864-147
Tafika Milling	Rhoda Gadama-Misomali	Managing Director	rhodagadama@yahoo.com	+265 884 195-872
Treecrops	Chris Dohse	Managing Director	chris.dohse@silvaterra.net	+265 999 960-662
Institutional Buyers				
Mary's Meals	Chris Maclullich	Country Director	chris.maclullich@marysmeals.org	+265 993 759-591
UNICEF/CHAI	ChifundoSeunda	Supply Officer	cseunda@unicef.org	+265 888 869-360
World Food Programme	Phillip Hovmand	Procurement Officer	phillip.hovmand@wfp.org	+265 999 972-426
World Food Programme	Peter Otto	Head of Sub-Office	peter.otto@wfp.org	*+265 999 984-100*
World Vision	Weston Kasinje	PM Procurement	weston_kasinje@wvi.org	+265 888 839-616
Sector Stakeholders				
Malawi Bureau of Standards	Daniel Mwalwayo	Division Chief	d.mwalwayo@gmail.com	+265 999 944-5159
National Fortification Alliance	Maurice Monjerezi	Professor	mmonjerezi@cc.ac.mw	+265 991 865-585
USAID/Malawi	John Edgar	FtF Div. Chief	jedgar@usaid.gov	*+265 999 960-036*
Trainers				
Life Sciences Consulting	Phillip Makhumula	Managing Director	lifecon.malawi@gmail.com	+265 991 573-805
UMODZI Consulting	DumisaniMatundu	Consultant	dumisani.matundu@umodziconsulting.com	+265 994 175-673
TechnoServe				
TechnoServe	DagrousMsika	Program Manager	dmsiska@tns.org	+265 882 077-824
TechnoServe	Lawrence Muhamba	Assistant Program Manager	lmuhamba@tns.org	*+265 993 720-023*

ANNEX 3: KEY INFORMANT INTERVIEWS (KIIS)

TNS and PFS KIIs

Name ***(Last, First)***	**Organization**	**Title in Organization**	**Notes (e.g., contact info)**
Technoserve			
Brent Wibberley	Technoserve	Regional Program Director SAFE	bwibberley@tns.org +254 20 3743389/92 (Office) +254 722 207635 (Mobile)
Zambia			
ChitunduKasase	Technoserve	Program Manager/ Senior Food Technology Specialist	ckasase@tns.org +26 096 785 1167 (Mobile)
Blantyre, Malawi			
DagrousMsiska	Technoserve	Program Manager/Malawi	dmsiska@tns.org +265 882 077 824
Nairobi, Kenya			
Johnson Kiragu	Technoserve	Program Manager/Kenya	kiragu@tns.org +254 714 635-248
Jonathan Thomas	Technoserve	COP SAFE	Thomasj@tns.org +254 20 3743389/92 (Office) +254 715 740 089 (Mobile)
Esther Kamau	Technoserve	Regional Deputy Program Director/DCOP SAFE	ekamau@tns.org +254 20-3743389/90 (Office) +254 722 718 300 (Mobile)
David Galaty	Technoserve	Regional M&E Manager	dgalaty@tns.org +254 716 928-040
FlorahMukabana	Technoserve	M&E Specialist	fmukabana@tns.org
PFS			
Jeff Dykstra	Partners in Food Solutions	CEO	Jeff@partnersinfoodsolutions.com 952-221-8730 (Mobile)
Scott Meyers	General Mills	Country Volunteer Coordinator, Zambia	scott.myers@genmills.com +1 763 293-1497
Stacie Seibold	Nestle	SGB Lead, Kenya	Staci.Seibold@rd.nestle.com
John Mendesh	General Mills	SGB Lead, Zambia	john.mendesh@genmills.com
David Cummings	PFS	Director of Volunteer Operations	david@partnersinfoodsolutions.com
Susan Langer	PFS	Vice President Marketing & Development	susan@partnersinfoodsolutions.com
Amanda Donohue-Hansen	Cargill	SGB Lead, Kenya	amanda_Donohue-Hansen@cargill.com

ANNEX 4: HOUSEHOLD SURVEY INSTRUMENT

CASE STUDY QUESTIONNAIRE - ZAMBIA

Serial Number:____________

Latitude:____________
Longitude:____________

Respondent Name:________________________	Phone Number: ____________________
Respondent Address:______________________	
Interviewer:________________________	
Province: Eastern Province	Interviewer ID:______________________
Town/Village: Chipata 1	Supervisor:_________________________
Katete 2	Supervisor ID:_______________________
Lundazi 3	
Date of Interview:_________________________	**Household Type:**
Sample Point Number:_____________________	- Male and Female adult: 1
	- Female only: 2
	- Male only: 3

INTERVIEWER: ASK TO SPEAK WITH THE PERSON RESPONSIBE FOR MAKING FOOD PURCHASE DECISIONS

Hello, my name is .... from Infinite Insight, a market research agency based in Nairobi. We are conducting a survey in your area about food purchasing decisions and nutritious foods. The survey will take no more than 30 minutes.

QF1 Please describe the foods (meals and snacks) that members of your household consumed yesterday during the day and night, not including foods purchased and eaten outside the home.

INTERVIEWER: READ OUT FOOD GROUPS AND EXAMPLES

#	Food Group	Examples	Yes	No
A	Cereals	Bread, noodles, nshima, chapattis, biscuits, cookies or any other foods made from millet, sorghum, maize, rice, wheat	1	2
B	Vitamin A rich vegetables and tubers	Pumpkin, carrots, squash or sweet potatoes that are orange inside; capsicums	1	2
C	White tubers and roots	White potatoes, cassava, white sweet potatoes	1	2
D	Dark green leafy vegetables	Dark green leafy vegetables, including wild ones: kale, pumpkin leaves, cassava leaves, spinach,	1	2
E	Other vegetables	Other vegetables (e.g., tomato, onion, eggplant), including wild vegetables	1	2
F	Vitamin A rich fruits	Ripe mangoes, + other locally available vitamin-A rich fruits	1	2
G	Other fruits	Other fruits, including wild fruits	1	2
H	Organ meat (iron rich)	Liver, kidney, heart or other organ meats or blood-based foods	1	2
I	Flesh meats	Beef, pork, lamb, goat, rabbit, bush meat, chicken, duck or other birds	1	2
J	Eggs		1	2
K	Fish	Fresh or dried fish or shellfish	1	2
L	Legumes, nuts and seeds	Beans, peas, lentils, nuts, seeds or foods made from these	1	2
M	Insects	Insect larvae, lake fly, ants, caterpillars	1	2
N	Milk and milk products	Milk, cheese, yogurt or other milk products	1	2
O	Oils and fats	Oils, fats or butter added to food or used for cooking	1	2
P	Sweets	Sugar, honey, sweetened soda or sugary foods, such as chocolates, sweets or candies	1	2
Q	Spices, condiments, beverages	Spices (black pepper, salt), condiments (soy sauce, hot sauce), coffee, tea, alcoholic beverages OR local examples: Munkoyo	1	2

QF2 Now I would like to ask a few questions on the difficulties some families experience when providing food for their families. Please tell me whether you have experienced the following problems.

#		Response Options	Code
A	In the past [4 weeks/30 days], was there ever no food to eat of any kind in your house because of lack of resources to get food?	Yes – 1 No – 2 **(SKIP TO QF2C)**	
B	How often did this happen in the past [4 weeks/30 days]?	Rarely (1-2 times) 1 Sometimes (3-10 times) 2 Often (more than 10 times) 3	
C	In the past [4 weeks/30 days], did you or any household member go to sleep at night hungry because there was not enough food?	Yes – 1 No – 2 **(SKIP TO QF2E)**	
D	How often did this happen in the past [4 weeks/30 days]?	Rarely (1-2 times) 1 Sometimes (3-10 times) 2 Often (more than 10 times) 3	
E	In the past [4 weeks/30 days], did you or any household member go a whole day and night without	Yes – 1 No – 2 **(SKIP TO QF3)**	

	eating anything at all because there was not enough food?		
F	How often did this happen in the past [4 weeks/30 days]?	Rarely (1-2 times) 1 Sometimes (3-10 times) 2 Often (more than 10 times) 3	

QF3 How familiar are you with nutritious foods? By nutritious foods we mean foods that provide essential nutrients and energy to sustain growth, health and life while satiating hunger.

Not at all familiar	1
Not very familiar	2
Pretty familiar	3
Very familiar	4
D/K	9

QF4 Now I would like to talk to you about nutrition. In your own opinion, what are the characteristics that make a food item nutritious? Using a scale from 1 to 7, where 1 means that you do not agree at all and 7 means that you agree completely, please rate the following characteristics.

#	Questions	Ratings						
A	The food fills you up and you don't feel hungry anymore	1	2	3	4	5	6	7
B	The food contains vitamins and minerals	1	2	3	4	5	6	7
C	The food is rich in protein	1	2	3	4	5	6	7
D	The food has a pleasant taste	1	2	3	4	5	6	7
E	Meat-based foods are more nutritious than plant-based foods	1	2	3	4	5	6	7
F	Foreign foods are generally more nutritious than our local foods	1	2	3	4	5	6	7
G	Our traditional foods are just fine; there is no need to change our diets	1	2	3	4	5	6	7
H	All food items are nutritious	1	2	3	4	5	6	7
I	Having a good variety in your food ensures you get the nutrition you need	1	2	3	4	5	6	7
j	I always prepare nutritious food for my family	1	2	3	4	5	6	7

QF5 I will now read a list with different food items. Please rate each item on the degree that it is nutritious. Please use the same scale from 1 to 7, where 1 means that the food is not nutritious at all and 7 means that it is very nutritious.

#	Questions	Ratings							D/K
A	Fruits	1	2	3	4	5	6	7	9
B	Vegetables	1	2	3	4	5	6	7	9
C	Cooking bananas (matoke, plantain)	1	2	3	4	5	6	7	9
D	Beans	1	2	3	4	5	6	7	9
E	Soya Beans	1	2	3	4	5	6	7	9
F	Meat	1	2	3	4	5	6	7	9
G	Fish	1	2	3	4	5	6	7	9
H	Chicken	1	2	3	4	5	6	7	9
I	Milk and other dairy products	1	2	3	4	5	6	7	9
j	Eggs	1	2	3	4	5	6	7	9
K	Potatoes	1	2	3	4	5	6	7	9
L	White sweet potatoes	1	2	3	4	5	6	7	9
M	Orange sweet potatoes	1	2	3	4	5	6	7	9
N	Cassava, arrow root,	1	2	3	4	5	6	7	9
O	Rice	1	2	3	4	5	6	7	9
P	Maize	1	2	3	4	5	6	7	9
Q	Breads made from wheat	1	2	3	4	5	6	7	9
R	Flat breads (chapattis, roti)	1	2	3	4	5	6	7	9
S	Ground nuts	1	2	3	4	5	6	7	9
T	Peanut butter	1	2	3	4	5	6	7	9
U	Fortified foods	1	2	3	4	5	6	7	9
V	Corn soy blends	1	2	3	4	5	6	7	9
W	Cooking oils	1	2	3	4	5	6	7	9
X	Margarine	1	2	3	4	5	6	7	9

QF6 Now I would like to talk to you how youabout make food-purchasing decisions. Please rate each item on how important it is to you when making food-purchasing decisions. Please use the same scale from 1 to 7, where 1 means that the item is not important at all and 7 means that it very important.

#	Questions	Ratings							D/K
A	Cost	1	2	3	4	5	6	7	9
B	Quality	1	2	3	4	5	6	7	9
C	Taste	1	2	3	4	5	6	7	9
D	Ease of preparation	1	2	3	4	5	6	7	9
E	Availability (ease of finding)	1	2	3	4	5	6	7	9
F	Packaging	1	2	3	4	5	6	7	9
G	Brand name	1	2	3	4	5	6	7	9

H	Nutrition value	1	2	3	4	5	6	7	9
I	Familiarity / tradition	1	2	3	4	5	6	7	9
j	Requested by spouse or adult family members	1	2	3	4	5	6	7	9
K	Requested by children	1	2	3	4	5	6	7	9
L	Other (specify)	1	2	3	4	5	6	7	9

INTERVIEWER: HAND BRAND LIST TO RESPONDENT

QB1 Which of these brands have you seen or heard about?
FOR BRANDS MENTIONED IN QB1, ASK

QB2 Which of these brands have you ever tried?
FOR BRANDS MENTIONED IN QB2, ASK

QB3 Which of these brands are you using nowadays, even if only infrequently?
FOR BRANDS MENTIONED IN QB3, ASK QB4, QB5, AND QB6

QB4 On average, how often do you buy .... (INSERT BRANDS FROM QB3)
INSERT CODE IN GRID BELOW

Every day	1
Several times a week	2
Once a week	3
Several times a month	4
Once a month	5
Less often	6
Don't know	9

QB5 Using a scale from 1 to 7, where 1 means completely dissatisfied and 7 means completely satisfied, how satisfied are you with....
INSERT RATING IN GRID BELOW

QB6 And where did you learn about Brand....
INSERT CODES IN GRID BELOW; MULTIPLE CODES

TV	1
Radio	2
Magazine	3
Newspaper	4
Internet	5
Sign/poster/billboard	6
Friend/relative/associate	7
Road show	8
Other (specify)__________________	99

	It's Wild: Yummy Soy	**It's Wild: Peanut Butter**	Seba Foods: Corn-Soy Blend	Chankwakwa Corn-Soy Blend	Freshpikt Peanut Butter	Jungle Beats Peanut Butter	None of these
QB1 (Awareness)	1	2	3	4	5	6	9 → GO TO DEMOGRAPHICS
QB2 (Trial)	1	2	3	4	5	6	9 → GO TO DEMOGRAPHICS
QB3 (Repertoire)	1	2	3	4	5	6	9 → GO TO DEMOGRAPHICS
QB4 (Frequency)							
QB5 (Satisfaction)							
QB6 (Source of awareness)							

INTERVIEWER: THE FOLLOWING QUESTIONS ARE ASKED ONLY FOR **It's Wild: Yummy Soy** AND/OR **It's Wild: Peanut Butter**

IF RESPONDENT IS UNAWARE OF BOTH BRANDS, **GO TO DEMOGRAPHICS**

CHECK QB4 – IF ONCE A MONTH OR LESS OFTEN (CODE 5 OR 6), ASK

QN1 Why do you not buy ... or buy it more often? DO NOT READ; MULTIPLE CODES

	It's Wild: Yummy Soy	It's Wild: Peanut Butter
Too expensive	1	1
Not sold in market	2	2
Too hard to find	3	3
Do not like taste	4	4
Not part of traditional diet	5	5
Too hard to prepare	6	6
Not packaged appropriately (e.g. packs are too big and we don't need that much or cost too much)	7	7
Not appropriate food for people like us (e.g., for sick or old people)	8	8
Other adults in the family do not like it or do not want me to buy it	9	9
Children in the family do not like it or do not want me to buy it	10	10
It's not a food for people like me	11	11
Other (specify)	98	98

ASK ALL AWARE OF BRAND 1 AND/OR BRAND 2 IN QB1

QN2 How do you rate the quality of....

	It's Wild: Yummy Soy	It's Wild: Peanut Butter
Poor	1	1
Fair	2	2
Good	3	3
Very good	4	4

QN3 And how would you rate the cost of ...

	It's Wild: Yummy Soy	It's Wild: Peanut Butter
Inexpensive	1	1
Not very expensive	2	2
Expensive	3	3
Very expensive	4	4

FOR BRAND(S) USED IN QB3, ASK QN4 AND QN5

QN4 What pack size to you usually buy?
QN5 And how much do you pay for this pack size?

	It's Wild: Yummy Soy		It's Wild: Peanut Butter	
QN4 PACK SIZE				
	1 kg	1	Specify:	98
	2 kg	2		
	Other (specify)	3		
QN5 PRICE				
		.......ZMK		.......ZMK

ASK ALL WHO HAVE TRIED BRAND 1 AND/OR BRAND 2 IN QB2

QN6 How would you rate the nutritional value of....?

	It's Wild: Yummy Soy	It's Wild: Peanut Butter
Not nutritious	1	1
Not very nutritious	2	2
Moderately nutritious	3	3
Very nutritious	4	4

QN7 And how would you rate the taste of...?

	It's Wild: Yummy Soy	It's Wild: Peanut Butter
Not at all tasty	1	1
Not very tasty	2	2
Moderately tasty	3	3
Very tasty	4	4

QN8 a On a scale from 1 to 7, where 1 means dislike very much and 7 means like very much, how much do adults in your household like ....?
QN8b And how much do children in your household like....?

	It's Wild: Yummy Soy	It's Wild: Peanut Butter
QN8a (Adults)		
QN8b (Children)		

QN9 Would you recommend ... to your friends or associates?

	It's Wild: Yummy Soy	It's Wild: Peanut Butter
Definitely not	1	1
Probably not	2	2
Not sure	3	3
Probably	4	4
Definitely	5	5

QN10 How likely are you to buy ... in the future?

	It's Wild: Yummy Soy	It's Wild: Peanut Butter
Very unlikely	1	1
Not very likely	2	2
Not sure	3	3
Somewhat likely	4	4
Very likely	5	5

IF CODE 1 OR 2 in QN10, ASK

QN11 Why would you not buy... in the future? SPONTANEOUS; MULTIPLE CODES

	It's Wild: Yummy Soy	It's Wild: Peanut Butter
Too expensive	1	1
Not sold in market	2	2
Too hard to find	3	3
Do not like taste	4	4
Not part of traditional diet	5	5
Too hard to prepare	6	6
Not packaged appropriately (e.g. packs are too big and we don't need that much or cost too much)	7	7
Not appropriate food for people like us (e.g., for sick or old people)	8	8
Other adults in the family do not like it or do not want me to buy it	9	9
Children in the family do not like it or do not want me to buy it	10	10
Other people will consider you a failure, if you are seen eating this product	11	11
Other (specify)	98	98

DEMOGRAPHICS

Respondent sex	Male……..1 Female…..2
Household head sex	Male……..1 Female…..2
Respondent age	
Respondent marital status	Currently married-monogamous…….1 Currently married-polygamous……...2 Widowed…………………………….3 Divorced……………………………..4 Single……………………..………..5 Separated…………………………….6
Household head can read and write	Yes……..1 No….…..2
Respondent can read and write	Yes……..1 No….…..2
Level of education of household head	Standard 1-4……….1 Standard 5-8……….2 Formal 1-2…………3 Formal 3-4…………4 Post secondary……..5 Adult literacy………6 None……………….7
Level of education of respondent	Standard 1-4……….1 Standard 5-8……….2 Formal 1-2…………3 Formal 3-4…………4 Post secondary……..5 Adult literacy………6 None……………….7
Total number of household members	
Total number of people above 65 years	
Total number of people 15-64 years	
Total number of children 5-14 years	
Total number of children under 5 years	

	Response	Response Codes
ENUMERATOR OBSERVE (DO NOT ASK) Roof top material (outer covering)		Tile. . 1 Wood. . 2 Corrugated metal. . 3 Plastic sheeting. . 4 Thatched/vegetable matter/sticks. . 5 Mud/cow dung. . 6 Other. . 7
ENUMERATOR OBSERVE (DO NOT ASK) Floor material		Earth/mud. . 1 Concrete/flag stone/cement. . 2 Tile/bricks. . 3 Wood. . 4 Other. . 5
ENUMERATOR OBSERVE (DO NOT ASK) Exterior walls		Earth/mud. . 1 Concrete/flag stone/cement. . 2 Tile/bricks. . 3 Wood. . 4 Other. . 5
What is the main type of toilets your household uses?		Flush, shared. . 1 Flush, private. . 2 Ventilated improved pit latrine. . 3 Pit latrine. . 4 Community toilet. . 5 Pan/bucket. . 6 No toilet. . 7 Other. . 8
What is the main source of drinking water for your household?		Piped into dwelling. . 1 Piped into plot/yard. . 2 Public tap (someone else's private tap). 3 Tubewell/borehole. . 4 Protected dug well. . 5 Protected spring. . 6 Rain water collection. . 7 Unprotected dug well/springs. . 8 River/ponds/streams. . 9 Tankers-truck/vendor. . 10 Bottled water. . 11 Other (specify). . 12
Does this house have electricity?		Yes = 1 No = 2
What is the main source of cooking fuel for your household?		Electricity. . 1 Piped or liquid propane gas (biogas). . 2 Kerosene. . 3 Charcoal. . 4 Firewood. . 5 Animal dung. . 6 Agricultural crop residue. . 7 Other. . 8

CASE STUDY QUESTIONNAIRE - KENYA

Serial Number:____________

Latitude: ____________
Longitude: ____________

Respondent Name:________________________ Phone Number: ____________________

Respondent Address:______________________
Interviewer:________________________

Province:_________________________________ Interviewer ID:______________________

County:_________________________________
Supervisor:________________________

Town/Village: Supervisor ID:_______________________

Juja	1
Thika	2
Ruiru	3
Kibera	4
Kayole	5
Kitengela	6
Tassia	7
Mwiki	8
Huruma	9
Athi River	10

Date of Interview:_________________________

Sample Point Number:_____________________

Household Type:

- Male and Female adult: 1
- Female only: 2
- Male only: 3

INTERVIEWER: ASK TO SPEAK WITH THE PERSON RESPONSIBE FOR MAKING FOOD PURCHASE DECISIONS

Hello, my name is .... from Infinite Insight, a market research agency based in Nairobi. We are conducting a survey in your area about food purchasing decisions and nutritious foods. The survey will take no more than 30 minutes.

QF1 Please describe the foods (meals and snacks) that members of your household consumed yesterday during the day and night, not including foods purchased and eaten outside the home.

INTERVIEWER: READ OUT FOOD GROUPS AND EXAMPLES

#	Food Group	Examples	Yes	No
A	Cereals	Bread, noodles, ugali, chapattis, biscuits, cookies or any other foods made from millet, sorghum, maize, rice, wheat	1	2
B	Vitamin A rich vegetables and tubers	Pumpkin, carrots, squash or sweet potatoes that are orange inside; capsicums	1	2
C	White tubers and roots	White potatoes, white yams, cassava, white sweet potatoes	1	2
D	Dark green leafy vegetables	Dark green leafy vegetables, including wild ones: kale/sukuma, cassava leaves, spinach,	1	2
E	Other vegetables	Other vegetables (e.g., tomato, onion, eggplant), including wild vegetables	1	2
F	Vitamin A rich fruits	Ripe mangoes, + other locally available vitamin-A rich fruits	1	2
G	Other fruits	Other fruits, including wild fruits	1	2
H	Organ meat (iron rich)	Liver, kidney, heart or other organ meats or blood-based foods	1	2
I	Flesh meats	Beef, pork, lamb, goat, rabbit, bush meat, chicken, duck or other birds	1	2
J	Eggs		1	2
K	Fish	Fresh or dried fish or shellfish	1	2
L	Legumes, nuts and seeds	Beans, peas, lentils, nuts, seeds or foods made from these	1	2
M	Insects	Insect larvae, lake fly, ants	1	2
N	Milk and milk products	Milk, cheese, yogurt or other milk products	1	2
O	Oils and fats	Oils, fats or butter added to food or used for cooking	1	2
P	Sweets	Sugar, honey, sweetened soda or sugary foods, such as chocolates, sweets or candies	1	2
Q	Spices, condiments, beverages	Spices (black pepper, salt), condiments (soy sauce, hot sauce), coffee, tea, alcoholic beverages OR local examples	1	2

QF2 Now I would like to ask a few questions on the difficulties some families experience when providing food for their families. Please tell me whether you have experienced the following problems.

#		Response Options	Code
A	In the past [4 weeks/30 days], was there ever no food to eat of any kind in your house because of lack of resources to get food?	Yes – 1 No – 2 **(SKIP TO QF2C)**	
B	How often did this happen in the past [4 weeks/30 days]?	Rarely (1-2 times) 1 Sometimes (3-10 times) 2 Often (more than 10 times) 3	
C	In the past [4 weeks/30 days], did you or any household member go to sleep at night hungry because there was not enough food?	Yes – 1 No – 2 **(SKIP TO QF2E)**	
D	How often did this happen in the past [4 weeks/30 days]?	Rarely (1-2 times) 1 Sometimes (3-10 times) 2	

		Often (more than 10 times) 3	
E	In the past [4 weeks/30 days], did you or any household member go a whole day and night without eating anything at all because there was not enough food?	Yes – 1 No – 2 **(SKIP TO QF3)**	
F	How often did this happen in the past [4 weeks/30 days]?	Rarely (1-2 times) 1 Sometimes (3-10 times) 2 Often (more than 10 times) 3	

QF3 How familiar are you with nutritious foods? By nutritious foods we mean foods that provide essential nutrients and energy to sustain growth, health and life while satiating hunger.

Not at all familiar	1
Not very familiar	2
Pretty familiar	3
Very familiar	4
D/K	9

QF4 Now I would like to talk to you about nutrition. In your own opinion, what are the characteristics that make a food item nutritious? Using a scale from 1 to 7, where 1 means that you do not agree at all and 7 means that you agree completely, please rate the following characteristics.

#	Questions	Ratings						
A	The food fills you up and you don't feel hungry anymore	1	2	3	4	5	6	7
B	The food contains vitamins and minerals	1	2	3	4	5	6	7
C	The food is rich in protein	1	2	3	4	5	6	7
D	The food has a pleasant taste	1	2	3	4	5	6	7
E	Meat-based foods are more nutritious than plant-based foods	1	2	3	4	5	6	7
F	Foreign foods are generally more nutritious than our local foods	1	2	3	4	5	6	7
G	Our traditional foods are just fine; there is no need to change our diets	1	2	3	4	5	6	7
H	All food items are nutritious	1	2	3	4	5	6	7
I	Having a good variety in your food ensures you get the nutrition you need	1	2	3	4	5	6	7
j	I always prepare nutritious food for my family	1	2	3	4	5	6	7

QF5 I will now read a list with different food items. Please rate each item on the degree that it is nutritious. Please use the same scale from 1 to 7, where 1 means that the food is not nutritious at all and 7 means that it is very nutritious.

#	Questions	Ratings							D/K
A	Fruits	1	2	3	4	5	6	7	9
B	Vegetables	1	2	3	4	5	6	7	9
C	Cooking bananas (matoke, plantain)	1	2	3	4	5	6	7	9
D	Beans	1	2	3	4	5	6	7	9
E	Soya Beans	1	2	3	4	5	6	7	9
F	Meat	1	2	3	4	5	6	7	9
G	Fish	1	2	3	4	5	6	7	9
H	Chicken	1	2	3	4	5	6	7	9
I	Milk and other dairy products	1	2	3	4	5	6	7	9
j	Eggs	1	2	3	4	5	6	7	9
K	Potatoes	1	2	3	4	5	6	7	9
L	White sweet potatoes	1	2	3	4	5	6	7	9
M	Orange sweet potatoes	1	2	3	4	5	6	7	9
N	Cassava, arrow root, yams	1	2	3	4	5	6	7	9
O	Rice	1	2	3	4	5	6	7	9
P	Maize	1	2	3	4	5	6	7	9
Q	Breads made from wheat	1	2	3	4	5	6	7	9
R	Flat breads (chapattis, roti)	1	2	3	4	5	6	7	9
S	Ground nuts	1	2	3	4	5	6	7	9
T	Peanut butter	1	2	3	4	5	6	7	9
U	Fortified foods	1	2	3	4	5	6	7	9
V	Corn soy blends	1	2	3	4	5	6	7	9
W	Cooking oils	1	2	3	4	5	6	7	9
X	Margarine	1	2	3	4	5	6	7	9

QF6 Now I would like to talk to you how you make food-purchasing decisions. Please rate each item on how important it is to you when making food-purchasing decisions. Please use the same scale from 1 to 7, where 1 means that the item is not important at all and 7 means that it very important.

#	Questions	Ratings							D/K
A	Cost	1	2	3	4	5	6	7	9
B	Quality	1	2	3	4	5	6	7	9
C	Taste	1	2	3	4	5	6	7	9
D	Ease of preparation	1	2	3	4	5	6	7	9
E	Availability (ease of finding)	1	2	3	4	5	6	7	9
F	Packaging	1	2	3	4	5	6	7	9
G	Brand name	1	2	3	4	5	6	7	9
H	Nutrition value	1	2	3	4	5	6	7	9
I	Familiarity / tradition	1	2	3	4	5	6	7	9
j	Requested by spouse or adult family members	1	2	3	4	5	6	7	9
K	Requested by children	1	2	3	4	5	6	7	9
L	Other (specify)	1	2	3	4	5	6	7	9

INTERVIEWER: HAND BRAND LIST TO RESPONDENT

QB1 Which of these brands have you seen or heard about?

FOR BRANDS MENTIONED IN QB1, ASK

QB2 Which of these brands have you ever tried?

FOR BRANDS MENTIONED IN QB2, ASK

QB3 Which of these brands are you using nowadays, even if only infrequently?

FOR BRANDS MENTIONED IN QB3, ASK QB4, QB5, AND QB6

QB4 On average, how often do you buy .... (INSERT BRANDS FROM QB3)

INSERT CODE IN GRID BELOW

Every day	1
Several times a week	2
Once a week	3
Several times a month	4
Once a month	5
Less often	6
Don't know	9

QB5 Using a scale from 1 to 7, where 1 means completely dissatisfied and 7 means completely satisfied, how satisfied are you with....

INSERT RATING IN GRID BELOW

QB6 And where did you learn about Brand....

INSERT CODES IN GRID BELOW; MULTIPLE CODES

TV	1
Radio	2
Magazine	3
Newspaper	4
Internet	5
Sign/poster/billboard	6
Friend/relative/associate	7
Road show	8
Other (specify)___________________	99

	Classic Porridge	**Capital Flour**	**Classic Fresh Milk**	Daima Milk	KCC My Choice	Wimbi	SokoUji	None of these	
QB1 (Awareness)	1	2	3	4	5	6	7	9 →	GO TO DEMOGRAPHICS
QB2 (Trial)	1	2	3	4	5	6	7	9 →	GO TO DEMOGRAPHICS
QB3 (Repertoire)	1	2	3	4	5	6	7	9 →	GO TO DEMOGRAPHICS
QB4 (Frequency)									
QB5 (Satisfaction)									

QB6 (Source of awareness)								

INTERVIEWER: THE FOLLOWING QUESTIONS ARE ASKED ONLY FOR **Classic Porridge**, **Capital Flour** AND/OR **Classic Fresh Milk**

IF RESPONDENT IS UNAWARE OF BOTH BRANDS, **GO TO DEMOGRAPHICS**

CHECK QB4 – IF ONCE A MONTH OR LESS OFTEN (CODE 5 OR 6), ASK

QN1 Why do you not buy … or buy it more often? DO NOT READ; MULTIPLE CODES

	Classic Porridge	Capital Flour	Classic Fresh Milk
Too expensive	1	1	1
Not sold in market	2	2	2
Too hard to find	3	3	3
Do not like taste	4	4	4
Not part of traditional diet	5	5	5
Too hard to prepare	6	6	6
Not packaged appropriately (e.g. packs are too big and we don't need that much or cost too much)	7	7	7
Not appropriate food for people like us (e.g., for sick or old people)	8	8	8
Other adults in the family do not like it or do not want me to buy it	9	9	9
Children in the family do not like it or do not want me to buy it	10	10	10
It's not a food for people like me	11	11	11
Other (specify)	98	98	98

ASK ALL AWARE OF BRAND 1, Brand 2 AND/OR BRAND 3 IN QB1

QN2 How do you rate the quality of….

	Classic Porridge	Capital Flour	Classic Fresh Milk
Poor	1	1	1
Fair	2	2	2
Good	3	3	3
Very good	4	4	4

QN3 And how would you rate the cost of …

	Classic Porridge	Capital Flour	Classic Fresh Milk
Inexpensive	1	1	1
Not very expensive	2	2	2
Expensive	3	3	3
Very expensive	4	4	4

FOR BRAND(S) USED IN QB3, ASK QN4 AND QN5

QN4 What pack size to you usually buy?

QN5 And how much do you pay for this pack size?

	Classic Porridge		Capital Flour		Classic Fresh Milk	
QN4 PACK SIZE						
	1kg	1	1kg	1	500ml	1
	2kg	2	2kg	2	1 litre	2
	Other (specify)	3	Other (specify)	3	2 litres	3
					3 litres	4
QN5 PRICE		.......KES		.......KES		.......KES

ASK ALL WHO HAVE TRIED BRAND 1, BRAND 2 AND/OR BRAND 3 IN QB2

QN6 How would you rate the nutritional value of....?

	Classic Porridge	Capital Flour	Classic Fresh Milk
Not nutritious	1	1	1
Not very nutritious	2	2	2
Moderately nutritious	3	3	3
Very nutritious	4	4	4

QN7 And how would you rate the taste of...?

	Classic Porridge	Capital Flour	Classic Fresh Milk
Not at all tasty	1	1	1
Not very tasty	2	2	2
Moderately tasty	3	3	3
Very tasty	4	4	4

QN8 a On a scale from 1 to 7, where 1 means dislike very much and 7 means like very much, how much do adults in your household like ....?

QN8b And how much do children in your household like....?

	Classic Porridge	Capital Flour	Classic Fresh Milk
QN8a (Adults)			
QN8b (Children)			

QN9 Would you recommend ... to your friends or associates?

	Classic Porridge	Capital Flour	Classic Fresh Milk
Definitely not	1	1	1
Probably not	2	2	2
Not sure	3	3	3
Probably	4	4	4
Definitely	5	5	5

QN10 How likely are you to buy ... in the future?

	Classic Porridge	Capital Flour	Classic Fresh Milk
Very unlikely	1	1	1
Not very likely	2	2	2
Not sure	3	3	3
Somewhat likely	4	4	4
Very likely	5	5	5

IF CODE 1 OR 2 in QN10, ASK

QN11 Why would you not buy... in the future? SPONTANEOUS; MULTIPLE CODES

	Classic Porridge	Capital Flour	Classic Fresh Milk
Too expensive	1	1	1
Not sold in market	2	2	2
Too hard to find	3	3	3
Do not like taste	4	4	4
Not part of traditional diet	5	5	5
Too hard to prepare	6	6	6
Not packaged appropriately (e.g. packs are too big and we don't need that much or cost too much)	7	7	7
Not appropriate food for people like us (e.g., for sick or old people)	8	8	8
Other adults in the family do not like it or do not want me to buy it	9	9	9
Children in the family do not like it or do not want me to buy it	10	10	10
Other people will consider you a failure, if you are seen eating this product	11	11	11
Other (specify)	98	98	98

DEMOGRAPHICS

Respondent sex	Male……..1 Female…..2

Household head sex	Male……..1 Female…..2
Respondent age	
Respondent marital status	Currently married-monogamous…….1 Currently married-polygamous……...2 Widowed…………………………….3 Divorced……………………………..4 Single…………………….………..5 Separated…………………………….6
Household head can read and write	Yes……..1 No….…..2
Respondent can read and write	Yes……..1 No….…..2
Level of education of household head	Standard 1-4……….1 Standard 5-8……….2 Formal 1-2…………3 Formal 3-4…………4 Post secondary……..5 Adult literacy………6 None……………….7
Level of education respondent	Standard 1-4……….1 Standard 5-8……….2 Formal 1-2…………3 Formal 3-4…………4 Post secondary……..5 Adult literacy………6 None……………….7
Total number of household members	
Total number of people above 65 years	
Total number of people 15-64 years	
Total number of children 5-14 years	
Total number of children under 5 years	

	Response	Response Codes
ENUMERATOR OBSERVE (DO NOT ASK) Roof top material (outer covering)		Tile. . 1 Wood. . 2 Corrugated metal. . 3 Plastic sheeting. . 4 Thatched/vegetable matter/sticks. . 5 Mud/cow dung. . 6 Other. . 7
ENUMERATOR OBSERVE (DO NOT ASK) Floor material		Earth/mud. . 1 Concrete/flag stone/cement. . 2 Tile/bricks. . 3 Wood. . 4 Other. . 5
ENUMERATOR OBSERVE (DO NOT ASK) Exterior walls		Earth/mud. . 1 Concrete/flag stone/cement. . 2 Tile/bricks. . 3 Wood. . 4 Other. . 5
What is the main type of toilets your household uses?		Flush, shared. . 1 Flush, private. . 2 Ventilated improved pit latrine. . 3 Pit latrine. . 4 Community toilet. . 5 Pan/bucket. . 6 No toilet. . 7 Other. . 8
What is the main source of drinking water for your household?		Piped into dwelling. . 1 Piped into plot/yard. . 2 Public tap (someone else's private tap). 3 Tubewell/borehole. . 4 Protected dug well. . 5 Protected spring. . 6 Rain water collection. . 7 Unprotected dug well/springs. . 8 River/ponds/streams. . 9 Tankers-truck/vendor. . 10 Bottled water. . 11 Other (specify). . 12
Does this house have electricity?		Yes = 1 No = 2
What is the main source of cooking fuel for your household?		Electricity. . 1 Piped or liquid propane gas (biogas). . 2 Kerosene. . 3 Charcoal. . 4 Firewood. . 5 Animal dung. . 6 Agricultural crop residue. . 7 Other. . 8

ANNEX 5: DISCUSSION GUIDES

Institutional Buyer KII Guide

	DISCUSSION GUIDE
Introduction	• Introduce self, the purpose of the study and the equipment • Reassure respondent of confidentiality • Ask respondent for their business card • **IMPORTANT: The institutional food buyer interviewed should be purchasing food from a SAFE-assisted processor. Make sure that the interviewer knows ahead of time which food processor this is.**
Institution Background	• **Please tell me your name and position within….** STATE THE NAME OF THE ORGANISATION YOU ARE INTERVIEWING • How long have you worked here in this role? Please tell us about your organization, including its purpose and activities What type of food do you purchase? From whom do you purchase food? (Ask if he/she is willing and able to list the food processors from whom they purchase food. If he/she does not mention the relevant SAFE-assisted processor, ask specifically about this processor. (If the interviewee does not know about this processor, then terminate the interview.) To whom and how do you distribute the food? What partners, if any, do you work with in purchasing and distributing food and what roles do they play? What criteria do you use to select food suppliers? How are they identified and selected? Have ever terminated a relationship with a food processor? Why? Please give example. What payment terms do you provide to food suppliers? What is the current relationship between supply and demand for food aid: ○ In your organization? ○ Overall?
SAFE Processor	NOW WE WOULD LIKE TO TALK ABOUT YOUR EXPERIENCE WITH [NAME THE RELEVANT SAFE-ASSISTED PROCESSOR] What do you buy from this processor? How much do you buy from this processor? What has been your experience working with this processor? What are its strengths and weaknesses? How satisfied are you with this processor? Why? What changes have you observed at this processor over the time you have been purchasing from them? To what do you attribute these changes? What does this processor still need do to improve? Do you plan to continue purchasing and/or increase your purchases from this processor in the future? Why or why not?
Impact assessment	What impact is food aid having overall? What impact is your organization specifically having? What evidence exists of this impact? What contribution is the [SAFE-ASSISTED PROCESSOR] making to this impact?
SAFE awareness and knowledge	Are you aware of the SAFE program? How did you hear about SAFE? What do you know about SAFE? Have you been involved with SAFE? How? What is your impression of SAFE? To the best of your knowledge, what impact is SAFE having on the food-processing sector in in this country? Why?

Wind up and close	•	ASK RESPONDENT IF THEY HAVE ANYTHING FURTHER THEY WOULD LIKE TO SAY THEN THANK RESPONDENT

Market Actor KII Guide

	DISCUSSION GUIDE
Screening question	For duka or small shop owners, screen to make sure you are talking to the owner.
Introduction	Introduce self, the purpose of the study and the equipment Reassure respondent of confidentiality **Please tell me your name and position within….** STATE THE NAME OF THE BUSINESS YOU ARE INTERVIEWING (NOTE: SOME REPSPONDENTS MAY BE SELF-EMPLOYED AND NOT HAVE A FORMAL BUSINESS NAME) What is your position in the business? How long have you been here in this role?
Market information and background	What types of foods you sell/distribute? From whom do you buy these foods? Who are your customers? FOR RETAILERS GET A PROFILE OF CUSTOMERS. FOR WHOLESALERS GET DETAILS OF TYPE OF CUSTOMERS. Who are your competitors? GET DESCRIPTION OF KEY COMPETITORS Why do you sell/distribute these foods?
Nutrition awareness and knowledge	When someone says 'nutritious food,' what do you think of? How do you know how nutritious a particular type of food is? What nutritious foods do you sell/distribute? Why these foods? OR Why do you not sell nutritious foods? From whom do you buy these nutritious foods? To whom do you sell these nutritious foods? How much of these nutritious foods do you sell? To what extent do you care about the nutrition content of food? To what extent do your customers and final consumers (if respondent is not a retailer) care about the nutrition content of foods? What are the challenges you or others face selling nutritious foods? Who are the main market players with regards to nutritious foods? (Ask the respondent to think in terms of producers, distributors/agents, wholesalers, retailers, etc.) What needs to happen for more nutritious foods to be bought and sold in the local markets? Do you plan to sell nutritious foods in the future? Why or why not? If so, which ones?
SAFE PROCESSORS knowledge and awareness	**Show participants the panel with pictures of the foods being produced and sold by the case study processor.** Have you heard of these foods? How did you hear of these foods? Do you sell these foods? From whom do you buy these foods? What is your impression of these foods in terms of, for example, taste, quality, price, convenience, ease of preparation, etc.? Where can these foods be purchased in the local market? Do you plan to sell these foods in the future? Why or why not? IF NOT ASK What would have to happen for you to sell these foods in the future? What needs to happen for more of these foods to be bought and sold in the local markets?

Wind up and close	Who else do you know that is a good source of information about the topics we have discussed today? ASK RESPONDENT IF THEY HAVE ANYTHING FURTHER THEY WOULD LIKE TO SAY THEN THANK RESPONDENT

Food Processor KII Guide

	DISCUSSION GUIDE

Introduction	• Introduce self, the purpose of the study and the equipment
	• Reassure respondent of confidentiality
	• Ask respondent for their business card (AND LATER ATTACH TO THEIR SELF-COMPLETE)
	
	• **Please tell me your name and position within….** STATE THE NAME OF THE COMPANY YOU ARE INTERVIEWING
	• How long have you worked here in this role?
	
	• **Please tell us about your firm, including:**
	    o Products produced and associated brand names
	    o Where your products are sold, including location and types of retail outlets
	    o Number of employees, including number of female employees and where these female employees work (e.g., shop floor, administration, sales, etc.)

SAFE partnership	• **Please tell us the food products for which you received assistance from SAFE** • From where do you source your raw materials for these products? • What is the method you use to purchase/source your raw materials from these suppliers? • Please describe your relationship with these raw material suppliers? (For example, contract farming arrangement, provide training, provide inputs, payment terms, etc.) • Please describe to whom you sell these food products and the distribution system you use to get the products there. o As best you can tell, to what extent these products are reaching lower income populations more vulnerable to food insecurity or malnutrition? Why?
Technoserve/PFS	• **When I use the word SAFE, what comes to mind? (Make sure the processor understands that SAFE here refers to the SAFE project or to Technoserve and PFS.)** • Now thinking specifically of the SAFE project, what does SAFE stand for in this instance? • How did you become acquainted with SAFE and why did you decide to participate? • What projects/charters (or activities) have you worked on with SAFE? What were you trying to accomplish with each one? • What is the current status for each of these projects/charters (or activities)?

SAFE Assessment	• **Please tell us about the assistance you received from SAFE, including:**
	    o Knowledge of local Technoserve staff
	    o Usefulness of assistance received from local Technoserve staff

	o Knowledge of PFS volunteers o Usefulness of distance-based assistance from PFS volunteers • What specific problems or challenges have arisen in your work with the local TechnoServe staff and PFS volunteers? How did you deal with these problems or challenges? • What recommendations did the TechnoServe local staff or PFS volunteers make? Did you implement those recommendations? Why or why not? What was the result of implementing those recommendations? • **What changes have your company has made as a result of assistance received from SAFE?** These include, for example, changes in such things as raw materials sourcing, product lines, packaging, production methods and technologies, management practices, marketing strategy and so forth. • How have these changes affected your business' performance in areas such as production costs, productivity, quality, sales, income, or employment? • In addition to the assistance you already received from SAFE, are there other types of assistance you would like to receive from Technoserve or the PFS volunteers?
SAFE and gender	• Please describe the opportunities in your business for women in terms of work, personal advancement, professional advancement and management opportunities. • How has SAFE assistance affected the opportunities in your business for women in terms of work, personal advancement, professional advancement and management opportunities?
Overall satisfaction	• Overall, how satisfied are you with the assistance you received from SAFE? Why? • What recommendations do you have for improving the assistance provided by SAFE?
Wind up and close	• ASK RESPONDENT IF THEY HAVE ANYTHING FURTHER THEY WOULD LIKE TO SAY ON THE SAFE PROGRAM THEN HAVE THEM COMPLETE THE SELF-COMPLETE QUESTIONNAIRE AND STAPLE THE RESPONDENT'S BUSINESS CARD TO THE QUESTIONNAIRE • THANK RESPONDENTS

Sector Stakeholder KII Guide

	DISCUSSION GUIDE
Introduction	Introduce self, the purpose of the study and the equipment Reassure respondent of confidentiality Ask respondent for their business card **Please tell me your name and position within….** STATE THE NAME OF THE ORGANISATION YOU ARE INTERVIEWING How long have you worked here in this role?
Institution Background	• Please tell us about your organization, including its purpose and activities. • What is your organization's role within the food-processing sector?
SAFE awareness and knowledge	• Are you aware of the SAFE program? • Where did you hear about SAFE? • What, if anything, has been your involvement with SAFE? • What are your impressions of SAFE?
Food processing sector	• How would you describe the food-processing sector in this country? In answering this question, please think about such things as the number, size,

	geographic distribution and technological capacity of processors in addition to the overall competitiveness of the sector. • Who are the primary market actors in the food-processing sector in this country? What roles do they play? • How has the food-processing sector changed over the last few years? To what do you attribute these changes? • How do you expect the food-processing sector to change over the coming years? Why? • What is the status of the food-processing sector in this country with regards to the production of nutritious foods? Nutritious foods include, for example, fortified staple foods, other fortified foods, high energy protein supplements, corn soy blends, or other processed nutrition dense foods, such as soy beans, orange flesh sweet potato, ground nuts, or peanut butter. • Aside from food aid, to what extent are processed nutritious foods reaching people vulnerable to food insecurity or malnutrition? What factors contribute to this outcome? • Aside from food aid, what can be done to increase the access to nutritious foods both overall and among vulnerable populations? • Aside from food aid, what examples are there of organizations or initiatives, private or public, that have successfully: o Increased the supply of nutritious foods? o Increased the access to nutritious foods by vulnerable populations? o Why were these initiatives or organizations successful? • What is needed to improve the food-processing sector in this country? • To you knowledge, to what extent is SAFE contributing to the improvement of the food-processing sector in this country?
Fortification laws	• FOR THESE QUESTIONS ASK WHETHER RESPONDENT IS AWARE OF THE COUNTRY'S FORTIFICATION LAWS. IF THEY ARE NOT AWARE OF THEM, THEN DO NOT ASK • What are these laws trying to accomplish? • What, if anything, is your role in these laws? • How are these laws being implemented? • What impact have these laws had so far? Why? • What impact do you expect these laws to over the long-term? Why? • What needs to happen for these laws to have an impact?
Lending institutions only	• FOR THESE QUESTIONS ASK ABOUT FOOD PROCESSORS GENERALLY AND SMALL AND MEDIUM SIZED FOOR PROCESSORS IN PARTICULAR • To what extent do food processors have access to credit? • What obstacles exist for food processors to access credit? • What do food processors need to enable them to access credit? • What are you doing to help food processors access credit?
Wind up and close	ASK RESPONDENT IF THEY HAVE ANYTHING FURTHER THEY WOULD LIKE TO SAY ON THE FOOD PROCESSING SECTOR OR THE SAFE PROGRAM THEN THANK RESPONDENT

Trainee KII Guide

	DISCUSSION GUIDE
Introduction	Introduce self, the purpose of the study and the equipment Reassure respondents of confidentiality and explain how group works (speak one at a time, loud enough to be heard, agree/disagree, etc) Explain there are no right or wrong answers
Background	Explain that participants in the focus group discussion were selected because each participated in a short-term training offered by the SAFE program. Ascertain whether they understand what SAFE is.

Training content and impact **Wind up and close**	**Please introduce yourself one at a time**. Please tell us your name and a little bit about the organization you represent, what your job within the organization is and how you came to participate in the training? Please tell me what word comes to mind when I say SAFE What were the topics covered at the training you attended? How were you recruited to participate in the training? How relevant were the topics covered during the training to you, your organization and to the food processing sector in general? How useful were the instructional materials and content? How well were the instructional materials and content matched to your level of knowledge and experience and that of other training participants? How effective was the training in terms of increasing your technical knowledge How effective was the training in terms of increasing your knowledge of other issues, such as general knowledge of the food processing sector, sources of information, different types of products or markets, opportunities for you or your organization, and so forth. What type of guidance or assistance did the training provide you on how to implement the things discussed during the training? What changes have you or your organization made, or what actions have you or your organization taken, as a result of the training? What impacts have these changes or actions had on you personally and on your organization? Overall, what are the primary benefits that you or your organization has received as a result of the training? Overall, how satisfied were you with the training? Why? What are the strengths and weaknesses of these types of trainings? How can these trainings be improved? What additional topics do you think these types of trainings should cover? Why? What evidence do you see that these SAFE trainings are having an impact more generally on the food-processing sector? What is causing this? ASK RESPONDENT IF THEY HAVE ANYTHING FURTHER THEY WOULD LIKE TO SAY ON THE SAFE PROGRAM THEN THANK RESPONDENT

Trainer KII Guide

	DISCUSSION GUIDE
Introduction	Introduce self, the purpose of the study and the equipment Reassure respondent of confidentiality Ask respondent for their business card
Background	**Please tell us about your background, including your relevant experience and expertise related to the training you conducted.** Please describe the short-term training that you delivered for SAFE (ascertain how many trainings the interviewee delivered for SAFE): o What topics did the training or trainings cover? o How many people attended the training course or courses?

	◦ What organizations did the training participants represent? How were you recruited to provide short-term training or trainings for SAFE? What role did you play in designing the training course or courses and in preparing the training materials?
Training content and impact	**What instructional methods did you use during the training**? (For example, lecture, power point, role-playing, group discussion, practical experience, and so forth.) How relevant were the topics covered during the training, both overall and to the persons/organizations attending the training? How useful were the instructional materials and content? How well were the instructional materials and content matched to the level of knowledge and experience among training participants? Were these the 'right' participants? Why or why not? How interested and engaged were the training participants? How effective was the training in terms of: ◦ Increasing the technical knowledge of participants? ◦ Increasing the overall knowledge of participants in areas such as general knowledge of the food processing sector, sources of information, different types of products or markets, opportunities for you or your organization, and so forth. ◦ Influencing the behaviours or practices of participants? What type of guidance or assistance did the training provide on how to implement the things discussed during the training? What type of follow-up was done with training participants after the training? What are the strengths and weaknesses of such short-term trainings?
Wind up and close	What are your overall impressions of your experience with this training? How can these short-term trainings be improved? What additional topics do you think these types of trainings should cover? Why? What evidence do you see that these SAFE trainings are having an impact more generally on the food-processing sector? What is causing this? ASK RESPONDENT IF THEY HAVE ANYTHING FURTHER THEY WOULD LIKE TO SAY ON THE SAFE PROGRAM THEN THANK RESPONDENT

Consumer FGDs Guide

	DISCUSSION GUIDE
Screening Criteria	• FGD participants should be the person primarily responsible for food purchasing decisions within the household. • FGD participants should be aware of the products produced and sold by the case study processor. To determine this, show potential participants a panel with the pictures of the relevant products and ask if they are aware of them.
Introduction	Introduce self, the purpose of the study and the equipment Reassure respondents of confidentiality and explain how group works (speak one at a time, loud enough to be heard, agree/disagree, etc) Explain there are no right or wrong answers **Please introduce yourself one at a time**. Please tell us your name, your family details and the work that you do?
Food purchases	• Where do people in your area shop for food? • When someone says 'nutritious food,' what do you think of? • How do you know how nutritious a particular type of food is?

	• Do you try to find out the nutrition value of foods before buying them? Why or why not?
	• How important is the nutritional content of food to you when you make food-purchasing decisions? Why?
	• If price were not an issue, how important would the nutritional content of food be to you when you make food-purchasing decisions? Why?
	• How easy is it to find nutritious foods in the markets?
	• If you wanted to purchase nutritious food, where would you go to purchase it?
	• What nutritious foods do you purchase?
	  o Why do you purchase them?
	  o Where do you purchase them?
	  o How often do you purchase them?

SAFE processors	• **Show participants the panel with pictures of the foods being produced and sold by the case study processor.**
	• How did you hear of these foods?
	• Where can these foods be purchased in the local markets?
	• How easy are these foods to find in the local markets?
	• Which of these foods do you purchase?
	  o Why do you purchase them? AND why do you not purchase them?
	  o Where do you purchase them?
	  o How often do you purchase them?
	• Who within your household eats these foods?
	• What do you think about these foods in terms of (Ask this of all participants even those who do not eat them. Try to differentiate responses by those who have eaten them and those who have not):
	  o Taste
	  o Cost
	  o Convenience
	  o Quality
	  o Ease of preparation
	• How likely are you to buy these foods in the future? Why?

Wind up and close	ASK RESPONDENT IF THEY HAVE ANYTHING FURTHER THEY WOULD LIKE TO SAY THANK RESPONDENTS AND PROVIDE INCENTIVES

ANNEX 6: STAKEHOLDER SURVEYS

Processor Survey

PROCESSOR SELF-COMPLETE

PROCESSOR NAME | INTERVIEW DATE

1.	Please rate the following aspects of the SAFE program	Very poor	Poor	Good	Very good	n/a
a	Knowledge of local Technoserve staff					
b	Helpfulness of local Technoserve staff					
c	Knowledge of PFS volunteers					
d	Helpfulness of PFS volunteers					
e	Provision of assistance through Skype or other long distance means					

2.	How much change have you made in your business as a result of the assistance you received:	No change	A little change	Some change	Significant change	n/a
a	Raw materials sourcing					
b	Production methods					
c	Product quality					
d	Management capacity					
e	Technical capacity					
f	Commercial relationships					
g	Sources of finance					

3.	Which of the following areas of your business has grown as a result of this assistance:	No increase	Some increase	Significant increase	n/a
a	Number of product lines				
b	Productivity				
c	Sales				
d	Profits				
e	Product quality				
f	Investment				

4	How many new jobs have you created as a result of the SAFE program	overall	Male	Female
a	Full time jobs			
b	Part time jobs			

5	Overall how useful was the assistance you received through the program	Not at all useful	Not very useful	Somewhat useful	Very useful	n/a

6	As best you can tell, to what extent does the food you produce for which you receive SAFE assistance reach people vulnerable to food insecurity or malnutrition?	Not at all	Not very much	A good amount	A lot	n/a

PLEASE TICK APPROPRIATE RESPONSE FOR EACH QUESTION

Trainee Survey

TRAINEE SELF-COMPLETE

TRAINEE NAME INTERVIEW DATE

TRAINEE ORGANISATION

1.	How relevant was the SAFE training	Not at all relevant	Not very relevant	Somewhat relevant	Very relevant	n/a
a	To the needs of the food processing sector					
b	To the needs of your organisation					

2.	How relevant were the SAFE training	Not at all relevant	Not very relevant	Somewhat relevant	Very relevant	n/a
a	Materials					
b	Topics					

3	Did the training result in any meaningful changes	None	A few	Some	Many	n/a
a	In terms of your own behaviour and practices					
b	In how things are done within your organisation					
c	In the broader food processing industry					
d	In your ability to find/get information you need					

4	What was the quality of instruction during the training	Not at all good	Not very good	Somewhat good	Very good	n/a

5	How much would you say you learnt from the training	Nothing	A little	A good amount	A lot	n/a

6	Overall how useful was the training you received	Not at all useful	Not very useful	Somewhat useful	Very useful	n/a

7	Please indicate how you think the training could be improved

PLEASE TICK APPROPRIATE RESPONSE FOR EACH QUESTION

Trainer Survey

TRAINER SELF-COMPLETE

TRAINER NAME INTERVIEW DATE

TRAINER ORGANISATION

1.	How relevant was (were) the SAFE trainings	Not at all relevant	Not very relevant	Somewhat relevant	Very relevant	n/a
a	To the needs of the food processing sector					
b	To the needs of participant's organisation					
c	Materials					
d	Topics					

2.	What is the likelihood that the training will lead to meaningful changes	Very low	Low	Medium	High	n/a
a	In terms of participant's own behaviour and practices					
b	In how things are done within their organisation					
c	In the broader food processing industry					
d	In trainee's ability to find/get information they need					

3	Were the right people invited to the training	no	for the most part	yes

4	How useful do you think the training was for participants	Not at all useful	Not very useful	Somewhat useful	Very useful	n/a

5	Overall, how useful do you think the training was for the food processing sector	Not at all useful	Not very useful	Somewhat useful	Very useful	n/a

6	Please indicate how you think the training could be improved

PLEASE TICK APPROPRIATE RESPONSE FOR EACH QUESTION

ANNEX 7: IN-DEPTH CASE STUDY FINDINGS, KENYA

Introduction

The evaluation team conducted an in-depth case study of Classic Foods in Kenya. Classic Foods produces three nutritious food products that it sells in, among other outlets, lower-end retail chains and independent shops in a variety of settlement areas in and around Nairobi. The three Classic Foods products and brands covered by the case study include Classic Porridge, Capital Flour (sifted maize meal) and Classic Fresh Milk.

For the case study, the evaluation team conducted the following research activities: (1) four consumer FGDs in Kayole (an area selected because of its proximity to Classic Foods) with lower-income persons responsible for household food purchases, (2) five KIIs in Kayole with retail shop/store owners ranging from small general stores to supermarkets and including one wholesaler/retailer of dry goods, and (3) 428 household surveys with randomly selected households in 10 communities served by Classic Foods. Respondents to the household survey included the person in the household responsible for making food-purchasing decisions. The 10 communities included: Juja, Thika, Kibera, Tassia, Hurum, Kitengela, Ruiru, Kayole and Mwiki. Table 16 shows the distribution of survey respondents across the 10 communities. Fieldwork for the in-depth case study commenced on 24th March and ended on 27th March 2015

Table 16. Distribution of Household Survey Respondents in Kenya

Location	Sample Points		Dates Covered		Achievement	Back-Checks	
	Number	Name	Start March	End March		Accompanied	Telephonic Verification
1 Juja	101	Juja	25	26	21	2	2
	102	Kalimoni	25	26	20	2	2
2 Thika	201	Makongeni	25	26	15	2	2
	202	Kianduli	25	27	14	2	2
	203	Waitethia	25	27	14	2	2
3 Ruiru	301	Kwa Kairu	24	27	14	3	3
	302	Kimbo	24	27	13	2	2
	303	Toll	24	27	15	2	2
4 Kibera	401	Katwekera	27	27	8	1	1
	402	Lain Saba	25	27	6	1	1
	403	No. 8	24	27	9	1	1
	404	Oympic	25	27	11	1	1
	405	Karanja	25	25	8	1	1
5 Kayole	501	Kwa Chief	26	27	12	2	2
	502	Matopeni,	26	26	11	2	2
	503	Soweto,	26	26	10	1	1
	504	Nyando	27	27	14	2	2
6 Kitengela	900	Kitengela	25	25	40	2	2
7 Tassia	601	Pipeline	25	25	22	2	2
	602	Juakali	25	27	22	2	2
8 Mwiki	701	Quarry Slums(Squarters)	24	27	16	2	2
	702	Phase III	25	25	14	2	2
	703	Gituamba	26	26	15	2	2
9 Huruma	801	Jonsaga	26	26	15	2	2
	802	Kwa Chief	26	26	14	1	1
	803	Kiamaiko	25	27	12	3	3
10 Athi River	1000	Athi River	24	27	43	3	3
TOTAL					428	50	50

Findings-Household Survey

Food Security

- Close to a quarter (24%) of survey respondents across the ten study locations on occasion lack the resources to buy food.
- About 17% of survey respondents have gone to bed hungry during the past one month, and 9% had to go through a whole 24-hour period without food.
- Consequently, 24% were classified as "food insecure" throughout this report
- During the consumer FGDs, all participants admitted to struggling to buy food and to having to make difficult choices between quality and quantity on a regular basis.

Types of Food Consumed

- Cereals, oils and fats, vegetables (both green leafy and other) and dairy products make up the bulk of consumers' diet. Sweets are also mentioned at similar levels in the quantitative study, although they are not mentioned at all during the FGDs.
- Although consumers like to eat meat, it was consumed on the previous day by just 28% of respondents.
- Food insecure consumers show higher consumption of dairy products, while food secure respondents showed greater variety in their consumption, including legumes, eggs, meats and tubers.

Familiarity with Nutritious Foods

- Sixty-two percent of respondents claimed to be familiar with the concept of nutritious foods, with 39% being somewhat familiar and 23% being very familiar.
- The highest degrees of familiarity are registered in Thika (95%), Mwiki (87%) and Huruma (80%); also women (66%) claim higher familiarity than men (55%).
- More than half (53%) of food insecure consumers, however, are not familiar with the concept of nutritious food. In the FGDs, while they claimed to be aware of nutritious food, they equated it with fresh food.

Nutrition Ranking of Diets

- Foods that are high in protein, contain vitamins and minerals and taste pleasant are ranked highest by consumers. Traditional diets are said to be nutritious, while a wide variety of food items are seen as important. *In qualitative this was expressed as a "balanced diet".*
- These attributes are not only ranked highest, they also have the greatest impact on what respondents claim to serve their families; i.e. they are motivators

- Segmented by attitudinal factors, 49.5% of consumers are motivated by hedonism (good taste, traditional, familiar diets are fine, all foods provide nutrients); 43% emphasise the functional aspects (protein, vitamins and minerals, good variety).

- *In the qualitative research, it is clear that the nutritional value of the food takes second place to price. The most important factor is having enough to eat.*

Nutrition Ranking of Food Items

- Fruits, dairy products, vegetables and fish are the food items that were most highly ranked. However, as seen in the qualitative research, with the exception of vegetables, these are not foods that are consumed on a regular basis by the food insecure.

- On the other hand, wheat bread and maize were ranked higher than corn soy blends and fortified food items, which were ranked at the bottom of the list of various foodstuffs. In the qualitative research, the normal daily diet was given as maize meal and vegetables. Milk is a luxury for adults but a necessity for young children.

Factors in the Purchase Decision Making Process

- Cost is the most important consideration, scoring a mean rating of 6.1 on a 7-point scale. It was also clearly evident as the most important factor in the qualitative findings.

- Quality, taste, nutrition value, ease of preparation and familiarity/tradition also were ranked highly.

- Requests made by children are given slightly higher priority than requests made by adult household members. In the FGDs, mothers claimed to be willing to forego their own needs in order to ensure their children receive adequate nutrition, usually in the form of extra milk.

Brand Performance

- In Kenya, the selected processor was Classic Foods along with the following three brands: Classic Fresh Milk, Capital Flour (sifted maize meal) and Classic Porridge

- Classic Porridge has not yet been launched, accounting for its minimal levels of awareness. There was no awareness of Classic Porridge among the qualitative respondents.

- Readings for Capital Flour were obtained in four out of ten locations, which had been provided by Technoserve; however, just two survey respondents were found using the product. In the Kayole qualitative research, none of the respondents used this product.

- Respondents in nine out of ten locations were aware of Classic Fresh Milk; however, just nine respondents were currently using the brand. Respondents in the FGDs were nearly all aware of the product and had tried it; however, it was no longer readily available in the local shops.

- In contrast, 67% of respondents are users of Daima Milk, a value for money brand, 25% are using Wimbi, a porridge made from millet, and 19% are using SokoUji, which is a maize flour.

- Not only are awareness levels of Classic Food brands low, the experience using the brands does not seem to be entirely satisfactory. Classic Fresh Milk has a rating of only 3.9 out of a possible 7.

Brand Usage (Classic Fresh Milk)

- Eight out of nine respondents that buy Classic Fresh Milk buy it several times a week.

- The preferred pack size seems to be the 500ml pack (7 out of 9 respondents).

- The RSP for the 500ml pack is 85 KES and between 110 and 115 KES for the 1 litre pack.

- For a product that is not rated highly on quality or taste, the high RSP disqualifies Classic Fresh Milk as a value for money brand.

- It also does not speak in the brand's favour that it is not particularly liked by those who use it, as seen by its rating of 4 out of possible 7.

- Respondents' willingness to recommend the product is lukewarm.

- Although a number of communication channels are mentioned as source of product and brand awareness, five out of nine respondents mentioned word of mouth as the most prominent communication method.

- In contrast to the survey results, the consumer groups in Kayole for the most part found Classic Fresh Milk to be a good value. The selling price was considered cheaper than other brands and the taste and consistency acceptable. However, the brand was no longer readily available and could now only be found in supermarkets.

- Classic Food's issues are two-fold. Not only does it not appear to have a firm grip on marketing basics—brand support and distribution—it also seems to have production issues and quality control problems.

- Dairy products (mainly milk) and maize flour are popular products with high levels of usage. Consumers also credit them with being nutritious.

- Competitor products are doing well, especially the value for money brand Daima milk.

- For Classic Fresh Milk, however, satisfaction ratings and product appeal are mediocre, while quality and taste ratings are equally underwhelming.

- Classic Fresh Milk seems to be perceived as expensive when put into context of product delivery—the quality does not justify the price. It is also difficult to find it in local shops.

- Within the framework of SAFE, technical assistance in the area of nutrition should have been preceded by an assessment of production and quality control practices.

- In Kenya, milk and maize flour are highly competitive categories, with several national players already on ground. Nutritional claims by themselves will not win brand shares if they are not supported by reliable product quality, consistent distribution and relevant brand support. This is particularly the case among the poor who cannot afford to make mistakes with the little funds they have available. They need to be secure in their purchases and thus look for affordable and reliable quality.

Findings-FGDs

FGD respondents generally purchase fresh food (vegetables, fruits and eggs) from the local market, fish from independent fish vendors, meat from local butchers and processed food (sugar, flour and bread) where possible from the supermarket. When needed urgently or unexpectedly, they purchase from a local shop or kiosk. Cereals are often purchased from specialist stores and taken to the mill for grinding.

Convenience was a big factor in purchasing behaviors, as was the availability of funds. While it may be cheaper to buy larger quantities from the market or supermarket, it is often necessary to buy small quantities from local kiosks due to time or money constraints. This was also true for perishables. Nutrition was not a big consideration in the purchase of day-to-day foodstuffs.

"I will not think about it [nutrition] when I don't have money but sometimes when I have money I will think about it."

FGD respondents generally understood the term nutritious food to refer to a balanced diet, where a balanced diet is one that provides strength and energy to the body.

"I think we are just talking about food that is beneficial to the body, that protects you from diseases."

What constituted nutritious food under this definition, however, was vague. Most agreed that fresh vegetables, milk, eggs greens, and beans were good sources of nutrients, but there was much less agreement on what were other goods sources of nutrients.

"I would say energy giving food, let's say flour. When you have flour, you can cook porridge or ugali and it will give your body energy."

"I would say food that is strong, not things like snacks."

Respondents also associated 'freshness' with nutrition, not just for vegetables but also for milk, bread and meat, as well as price and brand, in that they believed the nutritional value of a food to be directly correlated with price and more expensive brands to be more nutritious.

"When things are fresh, they are more nutritious."

"You tend to believe that products from famous companies are better quality."

While respondents recognized that some processed/packaged foods display nutritional information on the packaging, most agreed that it was unlikely they would read or pay attention to such information. Rather the primary factors that they considered in purchasing food were price and quantity.

"We don't read all that, we just read the brand name."

"To be sincere, we look at the prices, which is cheaper - we look for the one we can afford."

"Most people just read the price tag."

Mothers were more likely to look for nutritional information on food for their young children. Most of this information came as word-of-mouth but some was gleaned from food producers during the introduction of new products.

"I think when you are buying milk you have to consider nutrition, especially if you have a young child since you will have to use three packets a day. You look for milk that is nutritious for the baby."

"Not unless a product is new to the market and you want to know what the contents are, but if you are used to it you just buy it."

Price was clearly the most important factor in food choice, but respondents also tend to buy what they are used to. Even if they have extra money, they are not likely to take risks trying something new but will tend to buy bigger quantities of what they currently buy or will add treats like eggs and meat to the diet.

"There is the one you have grown up using so you know it. You used it growing up so you go on using it."

What respondents considered to be nutritious foods (meat, fish, milk, eggs, vegetables, fruit, margarine, bread and flour) were all readily available at local markets and shops. Respondents, however, had limited and sporadic access to these due to lack of funds.

"You can easily get them so long as you have money"

"They are everywhere but they are expensive."

"It depends upon your financial status… when you have less money there are some foods you cannot afford"

"The issue of money can affect nutrition"

Respondents purchased 'nutritious' food whenever possible but in much smaller quantities than would be ideal for health purposes. Purchasing in very small quantities was seen as a way to get some luxury /taste into the diet rather than nutrition.

"A person selling from the kiosk will have groundnuts, millet, sorghum, so you can buy for a price you can afford – for example in 10/- portions."

"You can buy flour even in small quantities."

"Beans are nutritious and they are cheap – for 30/- you can feed a family of 6."

Many mothers struggle to provide enough food for their children and have no choice but to sacrifice quality for quantity. It is not uncommon for mothers to go without themselves in order to give their children the nutrition they consider necessary. This, however, is usually in the form of milk.

"Its about the quantity, we are trying to balance the diet for kids though they don't get enough because of the finances in this economy. So if money was not a problem, we would up the quantity so they are healthy and strong."

"I would not run for quality so that my children would not have enough… I would go for quantity."

"You just sacrifice yourself and say let my baby have porridge with milk and I will have to eat without milk."

After the general discussion, the respondents were specifically asked about Classic Foods with focus on their main products - Classic Milk and Capital Flour.

Most respondents were aware of the Classic milk but few had seen or heard of Capital flour. None mentioned Classic Porridge. Some were aware of Classic yoghurt. Although many had seen the milk brand in the supermarket, most claimed it was not readily available in the local shops:

"I have even used it and it is good. The problem is how to get it in the local shops. I have to go to the supermarket for it and you know you can't walk into the supermarket just to buy milk – you have to be going there for a lot of things"

"Milk went out of stock, I looked for it but don't find it. You can only get it in two or three shops, its rare."

When the milk is available, respondents consider it to be of good quality at a good price.

"I would buy 3 or 5 and put them in the fridge because they were cheap but nowadays its not there."

"The first time I used it I found it was very nice. I used to buy for the baby in the morning and evening – it's a good milk that you can actually give to a young baby."

"I decided to buy it because it was cheaper than the other milk (43/- compared to 47/-) and I did not regret."

"I used it for like a month, then my local shop stopped selling it"

A few, however, found the quality of the milk to be less desirable.

"I tried it once on Sunday when other shops were closed and the shopkeeper had only Classic. It did not feel fine to me, it was lumpy. But I have not seen it since."

"I bought it once or twice, then I realised it was very dilute so I stopped buying it."

From the responses it would seem the brand was more widely available for a short time but distribution is now restricted to supermarkets. Milk, however, as a perishable, is a product respondents tend to buy as required (once or twice a day). Thus they want to purchase it at convenient retail outlets. In contrast, supermarkets are used for bulk buying once or twice a month.

If the brand was regularly available in the local shops, respondents are likely to choose it rather than their current brand (mainly Daima) because it is cheaper.

There was almost no awareness of Capital Flour. Flour brands mentioned were Soko, Jogoo and Hostess. Respondents believed that flour should be easier to market than milk or milk products because it has no shelf life issues and respondents are less concerned about quality. They were, therefore, surprised that is was not available. They recommended that Classic Foods get their flour brand into the shops and promote it.

Findings-KIIs

Key informant interview respondents sell a wide range of foodstuffs. They sold what they considered the necessities of life – those products used on a daily basis by consumers. They took pride in having such a wide range of products and most mentioned that they sell both packaged foods and loose cereals and grains.

"I deal in basic food items like cereals, flour, milk and snacks for kids. I sell every type of cereal."

"We sell unpackaged porridge flour that we weigh ourselves and the ones in packets."

"We've got grains, we've got flour and we've got soft drinks, milk, fruits, let's say everything."

For the most part, the respondents' customers were women; however, they observed that increasingly over the past few years, men have been seen shopping for basic foodstuff more frequently than before. Despite this, they still think that women account for more than 70% of their customers. If these women were employed, they were likely to be self employed or part-time/casual employees. Most of them, however, were probably housewives.

"In this area most of the men are employed, some in jua kali… women have been left funds by their husbands so they can come to the shops."

"Most are females between the ages of 18-54, they are self employed mostly. Males are few."

"Let's say 10 years ago it was mostly women who came to shop for foodstuffs, but gradually it has been changing whereby you find men coming for basics and they don't take their time in the supermarket."

These retailers mainly purchase their stocks from wholesalers who deliver. A few buy some products direct from distributors, but the wholesaler seems to be preferred because they stock a much wider range of products and because the volume of the order is bigger (more products) the wholesaler can deliver. Few buy directly from the producer unless this is through direct 'door to door' sales. This can be the case for perishable products like milk, which is delivered to the retailer by agents of the producer.

"Wholesalers have everything, like cooking fat, they've got sugar, and they've got flour."

"For the size of our business we cannot afford to go to the producers themselves because they'll tell us to open an account. That account might need you to deposit a lot of money"

The willingness of suppliers to take orders and deliver is of particular importance to the smaller retailers who would otherwise need to close their store to go buy stock.

"If they are in Nairobi and you don't have anyone to leave running the shop you have to close in order for you to go for these items. During that period you may lose customers."

Loyal customers were considered crucial to the success of these retail businesses and the respondents believed that personal customer care was what set them aside from the competition.

"There are those with bigger shops but what it depends on the most is how you treat your customers."

"There are wholesalers who do both retailing and wholesaling an they are around here. There are even some who sell cheaper products but how you treat your customers make them still come to your shop."

To encourage customer loyalty these retailers will often offer short-term (informal) credit facilities.

"I sometimes give goods on credit to some of my customers because I try to understand that sometimes they don't have the money so I try to help them."

"Sometimes they might come without money, you loan them the first time only then when they come back next they repay the debt first before you loan again."

Since their customers are extremely price sensitive, finding the right price point is key to retaining customers and winning out over the competition.

"You can't sell at a higher price because you'll lose customers to those who are selling their products cheaper."

These retailers were no better informed than their customers on matters of nutrition. They echoed perfectly the opinions expressed in the consumer FGDs. Nutrition to them meant a 'balanced' diet, and yet they were not clear on what constituted this balance.

"I think all the ones I'm selling are nutritious, it now depends on how you'll prepare it."

"Mostly flour, milk, if you read biology you'll see it's a balanced diet. The moment someone drinks milk you know even if they don't eat anything else the following day their life will continue."

As with the consumers, retailers believe that fresh correlates directly with nutrition and therefore their suggestions on improving the nutritious content of the food they sell mainly involves improving/shortening the supply chain. However, they did not believe that their customers currently pay much attention to the nutrition of the products they buy. They simply select what is affordable and the only thing they check regularly is the expiry date.

"They have never asked me but the minerals are written on them - they mostly just check the expiry date and don't bother with anything else."

"Most just eat it to get satisfied, they don't care. Most people look at quantity and not quality. I've told you price matters."

These retailers were well aware of the Classic name and were able to list a number of Classic products, including Capital (Classic) Tomato Sauce, Classic Mineral Water, Classic Yogurt, Capital Flour and Classic Milk. However, only one of the five stores claimed to currently stock any of these products, and that was Capital Tomato Sauce. Most of the suppliers had sold Classic milk and yoghurt in the past; however, none had sold Capital flour. They considered Classic milk a good product and remembered it as being cheaper then competitors. None of these retailers, moreover, had any bad experiences with Classic products and all were willing to sell Classic products in the future.

"They should just be on the ground, they should go shop to shop, door to door, then people will start … because you know somebody buys what is available. You can see something on posters but on the shelves if it is not there so it is disappointing also to the customer"

"I'd like them to make an effort to make the products readily available in the market."

"I say they should bring these products to us; we'll sell them."

Some of the suppliers had sold Classic milk and yoghurt in the past while others had sold Capital flour. Both were considered good products however (as with Kayole) the supply chain appears to have broken down.

"The supplier is the one who came with it in the market and told us it is very good milk… with some samples of the new product. By so doing we started selling the Classic milk. Then it came a point where the supplier was nowhere to be seen."

"The flour is good in terms of its quality for example the 90 Kg bag. The price is also good. It is affordable here but the challenge is its supply. So there is demand but no supply."

While there were a few quality issues mentioned for the milk, the only issue mentioned for the flour concerned price increases.

"The flour was of good quality I can say but where they went wrong is on the price. It was the fastest moving flour here especially the packaged flour. When they increased its price, it meant it was competing with other flour like Pembe and at that time the Capital flour was not well known by the people."

"The quality is not that bad but there's something which needs to be done with it. The customers would complain it's too watery. It also has a short shelf life compared to the other milk."

Household Survey Detailed Results

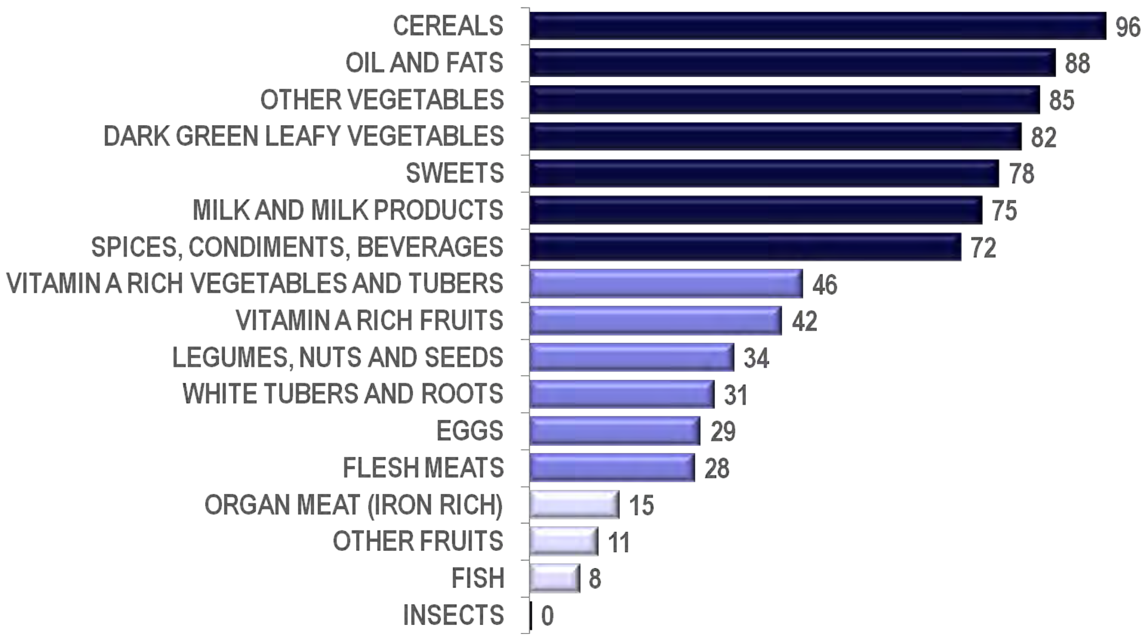
Food Security Status

	Total	Male	Female
Base:	*428*	*151*	*277*
	%	%	%
LACK OF RESOURCES TO GET FOOD	**24**	19	27
Base:	**102**	28	74
RARELY (1-2 TIMES)	**46**	57	42
SOMETIMES (3-10 TIMES)	**52**	43	55
OFTEN (MORE THAN 10 TIMES)	**2**	0	3
DID YOU GO TO SLEEP AT NIGHT HUNGRY BECAUSE OF LACK OF FOOD?	**17**	14	19
Base:	**74**	21	53
RARELY (1-2 TIMES)	**57**	57	57
SOMETIMES (3-10 TIMES)	**42**	38	43
OFTEN (MORE THAN 10 TIMES)	**1**	5	0
DID YOU GO A WHOLE DAY AND NIGHT WITHOUT FOOD?	**9**	7	10
Base:	**40**	11	29
RARELY (1-2 TIMES)	**63**	73	59
SOMETIMES (3-10 TIMES)	**38**	27	41
OFTEN (MORE THAN 10 TIMES)	**0**	0	0

Respondents are classified as food insecure is they experience at least one of the following three episodes:

1. Worry that the household would not have enough food (24%)
2. Household member goes to sleep at night hungry because there was not enough food (17%)
3. Household member goes a whole day and night without eating anything at all because there was not enough food 9%)

Foods Consumed Yesterday

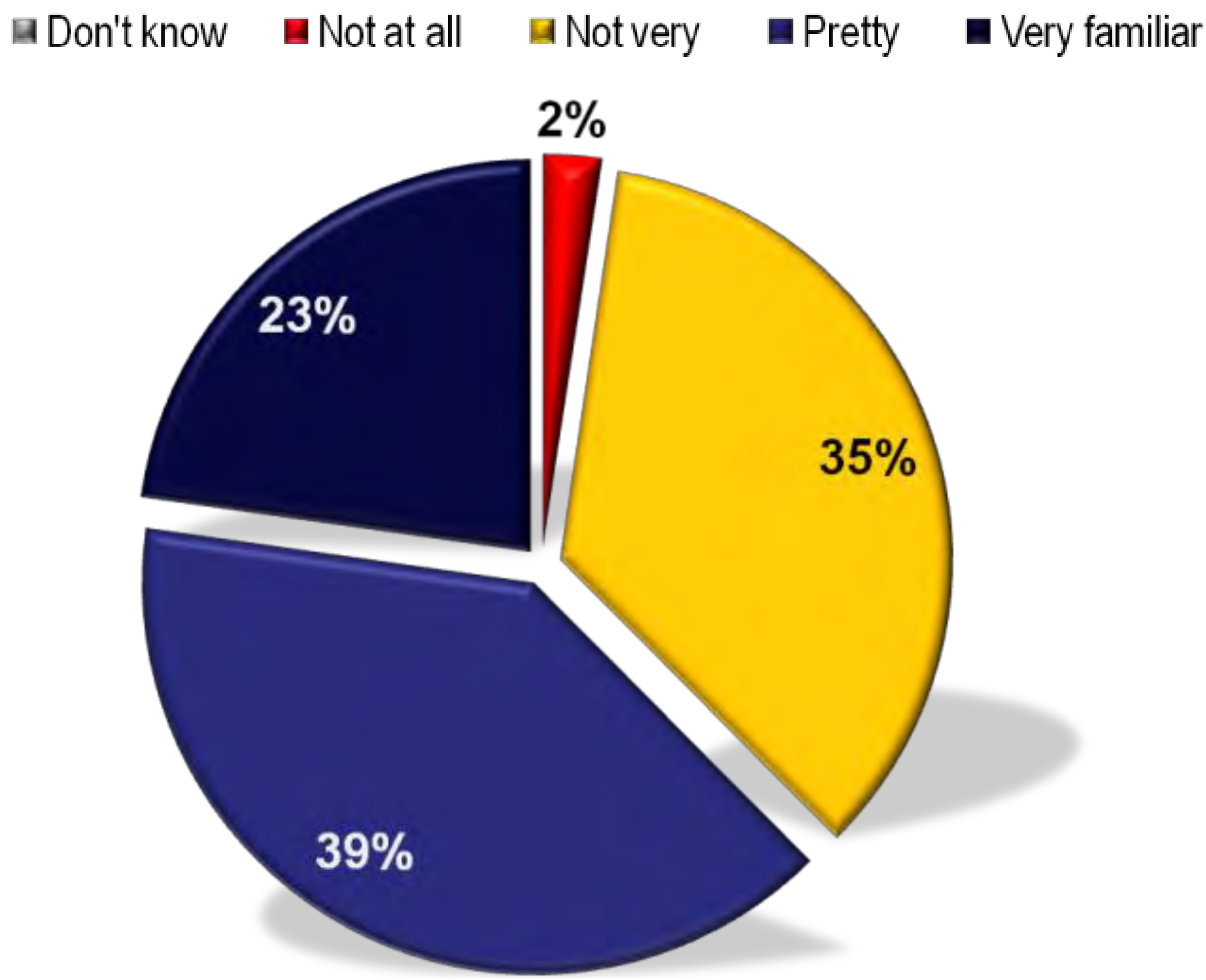


Foods Consumed Yesterday (by Gender and Food Security Status)

	Total	Male	Female	Food Insecure	Food Secure
Base:	*428*	*151*	*277*	*102*	*326*
	%	%	%	%	%
CEREALS	**96**	97	96	93	97
OIL AND FATS	**88**	89	87	82	89
OTHER VEGETABLES	**85**	83	86	75	88
DARK GREEN LEAFY VEGETABLES	**82**	84	81	80	83
SWEETS	**78**	80	77	69	**81**
MILK AND MILK PRODUCTS	**75**	74	77	**82**	73
SPICES, CONDIMENTS, BEVERAGES	**72**	77	69	52	**78**
VITAMIN A RICH VEGETABLES AND TUBERS	**46**	51	43	31	**50**
VITAMIN A RICH FRUITS	**42**	**47**	39	28	**46**
LEGUMES, NUTS AND SEEDS	**34**	37	32	18	**39**
WHITE TUBERS AND ROOTS	**31**	28	**32**	18	**35**
EGGS	**29**	27	29	24	**30**
FLESH MEATS	**28**	**33**	25	21	**30**
ORGAN MEAT (IRON RICH)	**15**	**21**	12	10	**17**
OTHER FRUITS	**11**	11	12	10	12
FISH	**8**	10	8	9	8
INSECTS	**0**	0	1	**2**	0

- Men tend to eat more meat and Vitamin A rich fruit than women do.
- Food insecure consumers consume more dairy products, while the food secure are more likely to consume a whole range of food items from sweets to meats.
- The basic diet includes cereals and fats as well as vegetables. This cuts across demographic categories.

Familiarity with Nutritious Foods



- The majority (62%) of consumers across the study locations claimed to be familiar or very familiar with nutritious foods.
- 35% are not too familiar with nutritious foods.
- Just 2% are completely unfamiliar with nutritious foods.

Familiarity with Nutritious Foods (by Gender and Food Security Status)

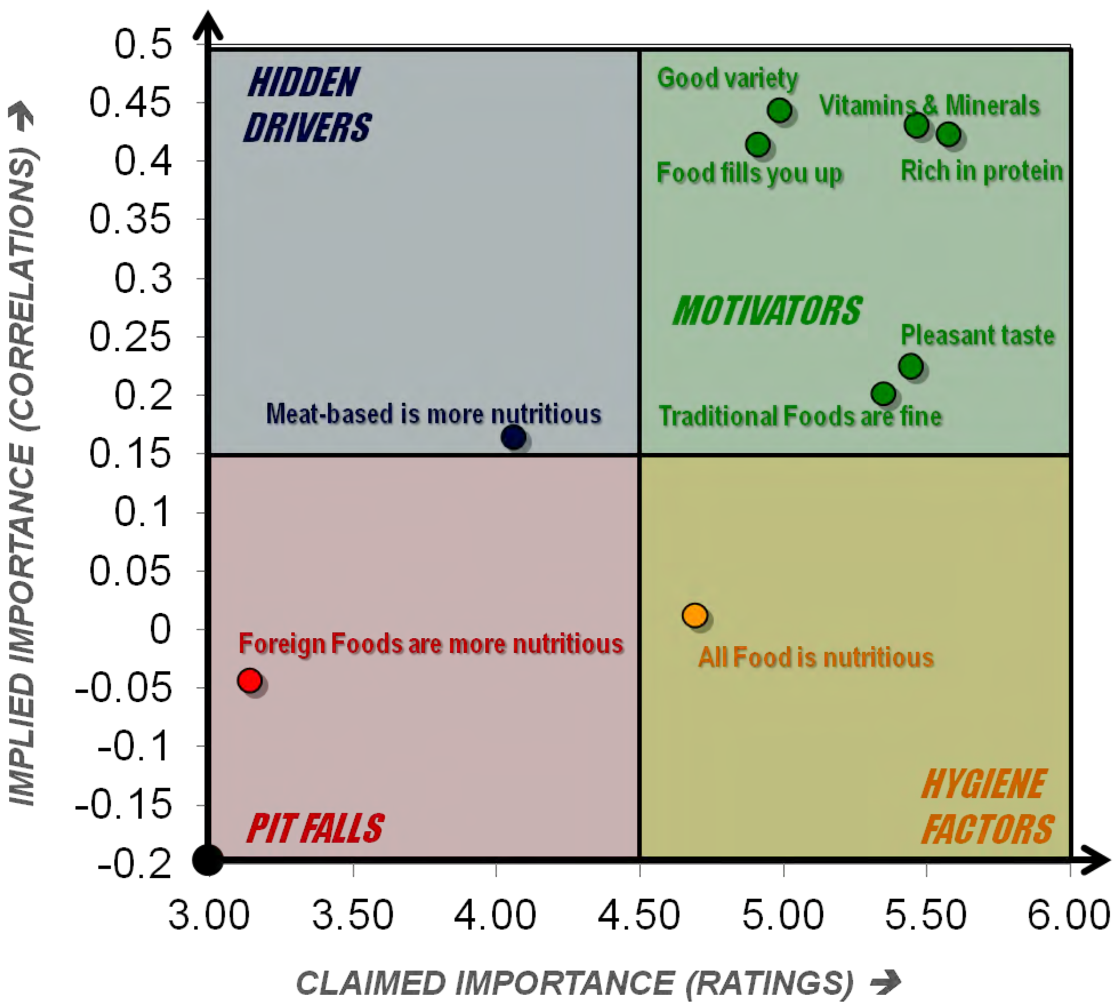
	Total	**Male**	**Female**	**Food Insecure**	**Food Secure**
Base:	*428*	*151*	*277*	*102*	*326*
	%	%	%	%	%
VERY FAMILIAR	**23**	13	28	15	25
PRETTY FAMILIAR	**39**	**42**	38	32	42
NOT VERY FAMILIAR	**35**	42	31	**50**	30
NOT AT ALL FAMILIAR	**2**	1	3	3	2
DO NOT KNOW	**0**	1	0	0	1

- Among Kenyan consumers, the food secure are more familiar with nutritious food than the food insecure.
- Respondents in Thika, Mwiki and Huruma claim higher levels of familiarity than respondents in other study locations.

Assessment of Properties of Nutritious Foods (by Gender and Food Security Status)

	Total	Male	Female	Food Insecure	Food Secure
Base:	*428*	*151*	*277*	*102*	*326*
FOOD IS RICH IN PROTEIN	**5.58**	5.36	5.69	5.98	5.45
FOOD CONTAINS VITAMINS AND MINERALS	**5.46**	5.15	5.64	5.78	5.37
FOOD HAS PLEASANT TASTE	**5.44**	5.24	5.56	5.75	5.35
OUR TRADITIONAL FOODS ARE JUST FINE:	**5.35**	5.32	5.37	6.16	5.10
HAVING A GOOD VARIETY IN YOUR FOOD ENSURES YOU GET THE NUTRITION YOU NEED	**4.99**	4.73	5.13	4.83	5.04
FOOD FILLS YOU UP	**4.91**	4.70	5.03	4.09	5.17
ALL FOOD ITEMS ARE NUTRITIOUS	**4.69**	4.62	4.73	5.12	4.56
MEAT BASED FOODS ARE MORE NUTRITIOUS THAN PLANT BASED FOODS	**4.06**	4.17	4.00	3.30	4.30
FOREIGN FOODS ARE GENERALLY MORE NUTRITIOUS THAN OUR LOCAL FOODS	**3.14**	3.35	3.03	2.48	3.35
I ALWAYS PREPARE NUTRITIOUS FOOD FOR MY FAMILY	**5.09**	5.23	5.01	5.10	5.08

Implied vs. Claimed Importance (Dependent Variable: I always prepare nutritious food for my family)



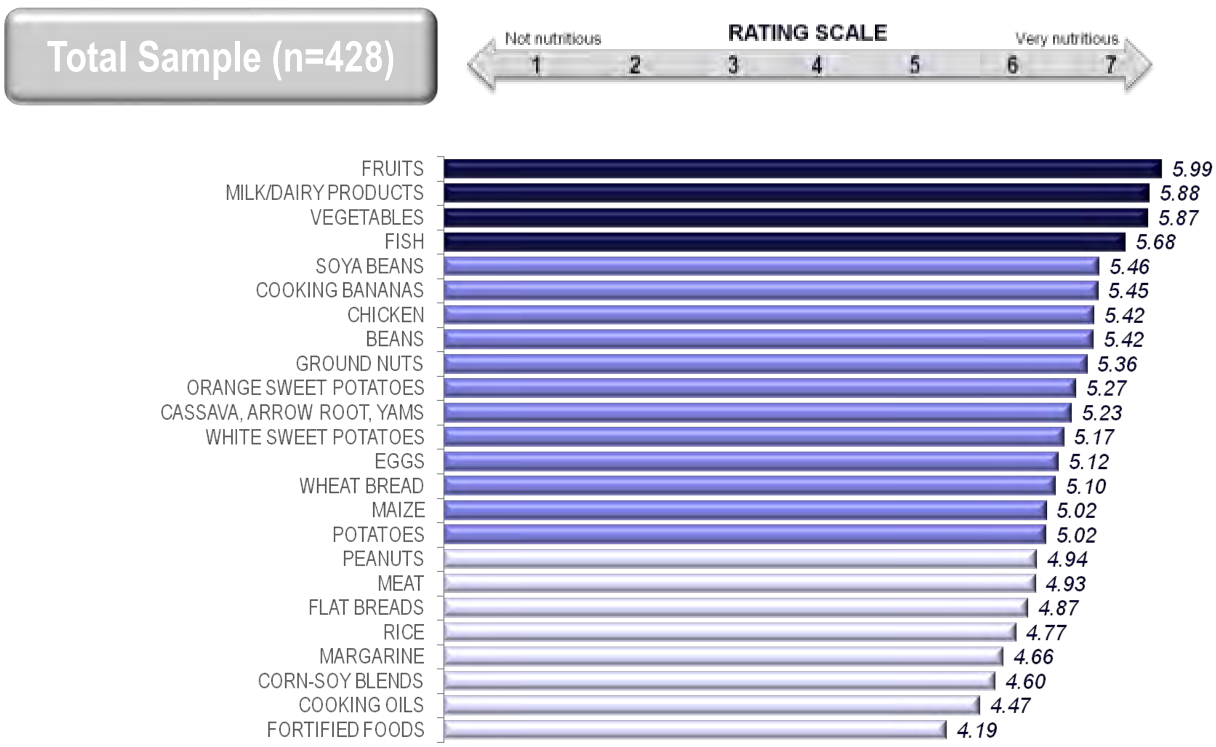
- Kenya consumers have their own idea of what constitutes nutrition. Food must be rich in protein, contain vitamins and minerals, fill you up, come in a good variety and taste pleasant as well.
- Also, traditional foods are high on the agenda.
- To state that all foods are nutritious would be self-evident to Kenyan consumers; this is merely a hygiene factor.

Attitudinal Factors

Three attitudinal factors were identified:

- **Functional:** nutrition is achieved through variety, eating foods containing vitamins and minerals as well as protein-rich foods; food also needs to sate hunger; this factor comprises 43% of respondents
- **Hedonist:** consumers in this segment assume all food is nutritious; food needs to taste pleasant as well as familiar – traditional foods are preferred; this segment accounts for 49.5% of respondents
- **Sceptic:** meats are more valued than other food items; also, foreign foods are seen as more nutritious; this segment accounts for 7.5% of respondents

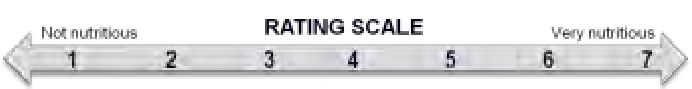
Rating the Nutrition of Different Food Products



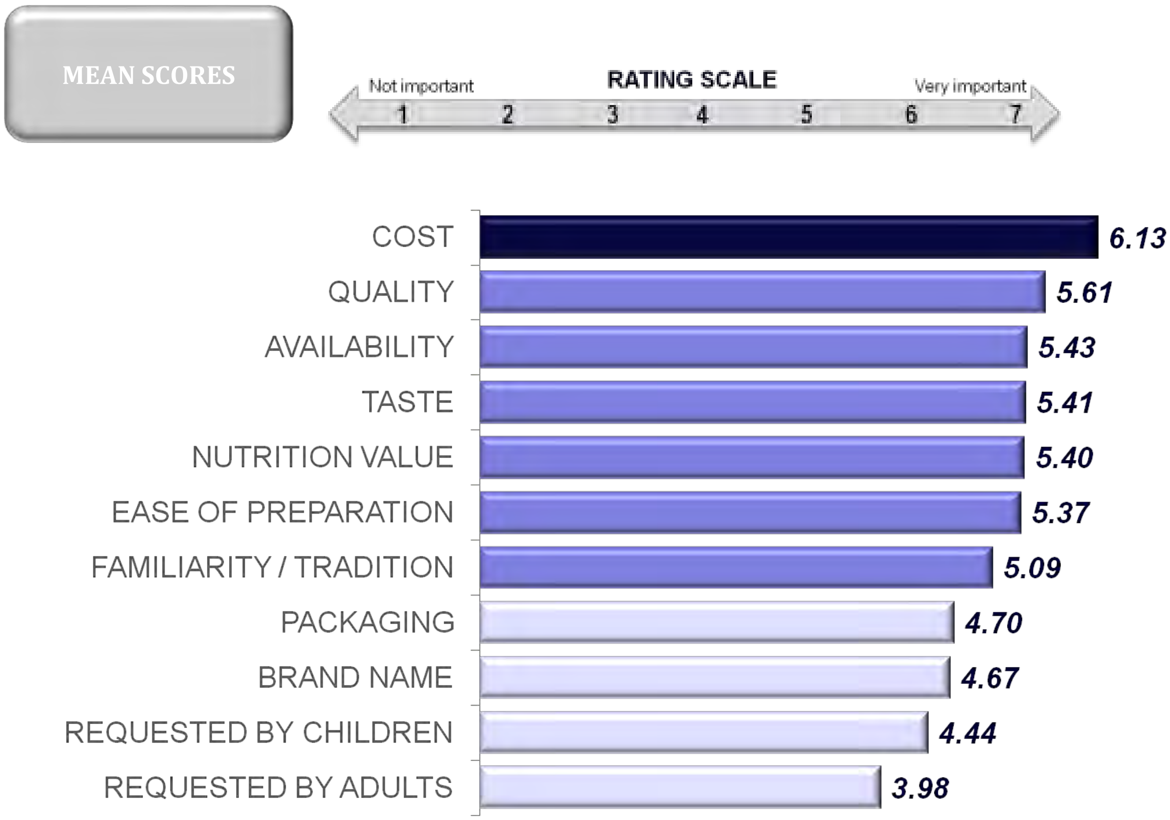
- Fruits, dairy products, vegetables and fish are the most highly rated food products.
- Maize is rated higher than either corn soy blends or fortified foods, which are both rated relatively low and at or near the bottom of all food items.

Ratings of Food Items (by Gender and Food Security Status)

	Total	Male	Female	Food Insecure	Food Secure
Base:	428	151	277	102	326
FRUITS	**5.99**	5.82	6.08	6.44	5.84
MILK/DAIRY PRODUCTS	**5.88**	5.82	5.91	6.31	5.75
VEGETABLES	**5.87**	5.74	5.94	6.26	5.74
FISH	**5.68**	5.58	5.73	6.21	5.52
SOYA BEANS	**5.46**	5.42	5.48	6.03	5.28
COOKING BANANAS	**5.45**	5.43	5.47	5.66	5.39
CHICKEN	**5.42**	5.41	5.42	5.21	5.48
BEANS	**5.42**	5.31	5.47	5.49	5.39
GROUND NUTS	**5.36**	5.29	5.40	5.81	5.22
ORANGE SWEET POTATOES	**5.27**	5.18	5.32	5.82	5.10
CASSAVA, ARROW ROOT, YAMS	**5.23**	5.21	5.25	5.76	5.06
WHITE SWEET POTATOES	**5.17**	4.99	5.26	5.46	5.08
EGGS	**5.12**	5.18	5.09	4.83	5.21
WHEAT BREAD	**5.10**	5.10	5.10	5.47	4.98
MAIZE	**5.02**	4.95	5.06	4.87	5.07
POTATOES	**5.02**	4.93	5.06	4.77	5.10
PEANUTS	**4.94**	4.97	4.92	4.46	5.09
MEAT	**4.93**	5.02	4.88	4.36	5.11
FLAT BREADS	**4.87**	5.00	4.79	5.03	4.82
RICE	**4.77**	4.61	4.86	4.32	4.91
MARGARINE	**4.66**	4.44	4.78	5.02	4.55
CORN-SOY BLENDS	**4.60**	4.48	4.66	3.61	4.91
COOKING OILS	**4.47**	4.48	4.46	3.83	4.67
FORTIFIED FOODS	**4.19**	4.02	4.28	2.98	4.57



Importance of Purchase Decision Factors (N=428)



Ratings of Purchase Decision Factors (by Gender and Food Security Status)

	Total	Male	Female	Food Insecure	Food Secure
COST	**6.13**	5.87	6.26	6.59	5.98
QUALITY	**5.61**	5.38	5.73	5.06	5.78
AVAILABILITY	**5.43**	5.30	5.49	5.98	5.25
TASTE	**5.41**	5.45	5.39	5.44	5.40
NUTRITION VALUE	**5.40**	5.36	5.43	5.73	5.30
EASE OF PREPARATION	**5.37**	5.36	5.37	5.81	5.23
FAMILIARITY / TRADITION	**5.09**	5.23	5.01	5.10	5.08
PACKAGING	**4.70**	4.66	4.73	3.75	5.00
BRAND NAME	**4.67**	4.59	4.71	3.99	4.88
REQUESTED BY CHILDREN	**4.44**	4.55	4.38	4.30	4.48
REQUESTED BY ADULTS	**3.98**	4.03	3.96	3.29	4.20

- Cost, followed by quality, are the more highly rated factors in decision-making.
- Kenyan respondents give greater weight to requests made by children to requests made by household members.

Brand Selection Brand KPIs (by Gender and Food Security Status)

	Total	Male	Female	Food Insecure	Food Secure
Base:	428	151	277	102	326
	%	$	%	%	%
Awareness					
DAIMA MILK	96	97	95	98	95
WIMBI	68	60	72	73	66
SOKO UJI	66	62	69	73	64
KCC MY CHOICE	44	47	42	24	50
CLASSIC FRESH MILK	13	14	13	12	13
CAPITAL FLOUR	2	2	2	1	2
CLASSIC PORRIDGE	2	3	2	3	2
Trial					
DAIMA MILK	84	83	84	91	82
WIMBI	46	32	54	44	47
SOKO UJI	40	34	43	35	41
KCC MY CHOICE	27	26	27	7	33
CLASSIC FRESH MILK	4	5	4	2	5
CAPITAL FLOUR	1	1	1	1	1
CLASSIC PORRIDGE	0	1	0	1	0
Usage					
DAIMA MILK	67	62	70	85	62
WIMBI	25	16	30	26	24
SOKO UJI	19	11	23	18	20
KCC MY CHOICE	13	15	12	4	16
CLASSIC FRESH MILK	2	2	2	0	3
CAPITAL FLOUR	0	1	0	0	1
CLASSIC PORRIDGE	0	0	0	0	0

Brand Strengths

	DAIMA MILK	WIMBI	SOKO UJI	KCC MY CHOICE	CLASSIC FRESH MILK	CAPITAL FLOUR	CLASSIC PORRIDGE
% Awareness	96	68	66	44	13	2	2
Conversion (% Awareness to Trial) ➔	87.8	67.9	59.9	61.2	32.1	50.0	0.0
% Trial	84	46	40	27	4	1	0
Conversion (% Trial to Usage) ➔	80.2	53.8	48.2	49.6	50.0	0.0	0.0
% Usage	67	25	19	13	2	0	0

- The case study focused on Classic Foods and three of its brands: Classic Fresh Milk, Capital Flour: Sifted Maize Meal and Classic Porridge.
- According to Technoserve, Classic Porridge has not been launched yet. Classic Flour is available and is known in four locations, while Classic Milk is known in nine out of the ten study locations.
- Classic Milk is the only Classic Foods brand with measurable, albeit minute, levels of trial and usage.
- Unlike Daima Milk or KCC My Choice, Classic Milk cannot convert awareness into trial; or trial into repertoire usage.

Brand Usage and Attitudes

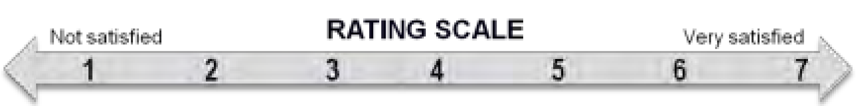
- Although Classic Porridge had a 2% level of awareness – triggered perhaps by recognition of the word "porridge" – the brand had no triers or users. According to Technoserve, the brand has not even been launched yet.
- Capital Flour: Sifted Maize Meal had a mere two respondents who use the brand.
- The brand with the highest usage level, Classic Fresh Milk, despite being more widely known (13%) and tried (14%), still only had 9 users
- Hence, detailed analyses of usage patterns or brand and satisfaction ratings by demographic breakdowns are impossible.
- Results for Classic Fresh Milk will be reported as Totals and as absolute figures, unless otherwise indicated.

Brand Ratings

	All Aware of the Brand		
	Classic Fresh Milk	Capital Flour	Classic Porridge
Base:	*56*	*9*	*10*
	Mean Scores		
Quality	2.76	2.25	3.13
Cost	2.45	3.00	2.88

	All Triers of the Brand		
	Classic Fresh Milk	Capital Flour	Classic Porridge
Base:	*18*	*3*	*2*
	Mean Scores		
Nutritional Value	3.00	3.00	2.50
Taste	3.06	3.00	3.00

	All Users of the Brand		
Base:	*9*	*2*	*0*
	Mean Scores		
Satisfaction with the Brand	3.89	4.50	n/a



- Although mean scores should be taken with a grain of salt, due to the low bases, enthusiasm for any of the three brands seems limited.
- Although Classic Fresh Milk is seen as a budget brand, the quality does not make it a value-for-money brand.
- Among those who tried Classic Fresh Milk, neither taste nor nutritional value are given top marks.
- Satisfaction ratings are just around the neutral mid-point of the scale.

Frequency of Purchases and Source of Awareness

Frequency of Purchase:

	Classic Fresh Milk	Capital Flour
Base:	*9*	*2*
	*	*
everyday		
Several times a week	8	
Once in a week		
Several times a month		1
Once a month	1	1
Less often		
Do Not Know		

Reasons for not buying more frequently:

	Classic Fresh	Capital Flour
Base:	*1*	*1*
	*	*
Too hard to find		1
Not packaged appropriately		1
Too expensive	1	

Source of Awareness:

	Classic Fresh Milk	Capital Flour
Base:	*9*	*2*
	*	*
FRIEND/RELATIVE/ASSOCIATE	5	2
NEWSPAPER	3	2
TV	2	2
RADIO	2	2
SIGN/POSTER/BILLBOARD	2	
SHOP	2	
MAGAZINE	1	1
NTERNET	1	
SUPERMARKET	1	

- Word of mouth is the most important source of awareness among users of Classic Fresh Milk.

Pack Size & Purchase Price

	Classic Fresh Milk	
Base:	*9*	
	*	
Pack Size	500ml	7
	1 litre	2
Purchase Price	500ml	85 KES
	1 litre	112.5 KES

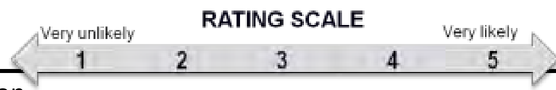
	Capital Flour	
Base:	*2*	
	*	
Pack Size	1kg	1
	2kg	1
Purchase Price	1kg	57 KES
	2kg	120 KES

- Classic Fresh Milk is bought mainly in 500 ml packs at an RSP of 85 shillings. The 1 litre pack sells for 110-115 shillings.

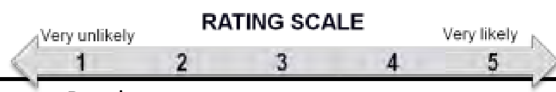
Degree of Liking, Recommending and Purchasing Again

	Classic Fresh Milk	Capital Flour
Base:	*9*	*2*
	Mean Scores	

	Classic Fresh Milk	Capital Flour
Liked by Adults	4.11	4.00
Liked by Children	4.22	4.50



	Classic Fresh Milk	Capital Flour
Recommendation	3.56	3.50



	Classic Fresh Milk	Capital Flour
Likelihood of Repeat Purchase	4.11	3.00

- Both brands score low on being liked, regardless of whether by adults or by children. Mean scores are close to the neutral mid-point.
- Brand recommendation is at best lukewarm.
- The handful of Classic Fresh Milk consumers tends to be more likely to by the brand again, whereas the two users of Capital Flour are uncertain.

Demographics 1/4

	Total	Male	Female	Food Insecure	Food Secure	JUJA	THIKA	RUIRU	KIBERA	KAYOLE	KITEN-GELA	TASSIA	MWIKI	HURUMA	ATHI RIVER
Base:	*428*	*151*	*277*	*102*	*326*	*41*	*43*	*42*	*42*	*47*	*40*	*44*	*45*	*41*	*43*
Sex of Respondents															
Male	**35**	100	0	27	38	27	47	40	26	30	55	48	11	22	49
Female	**65**	0	100	73	62	73	53	60	74	70	45	52	89	78	51
Sex of Head of Household															
Male	**71**	95	58	64	73	61	77	62	50	72	88	75	62	68	93
Female	**29**	5	42	36	27	39	23	38	50	28	13	25	38	32	7
Age of Respondents															
Mean Age	**29.84**	30.46	29.50	31.05	29.46	28.85	29.23	25.95	33.98	27.32	29.80	27.41	34.02	29.66	32.21
Marital Status of Respondents															
Married-monogamous	**53**	42	59	51	54	49	40	43	48	51	65	45	62	61	67
Single	**40**	54	32	38	40	46	58	57	29	45	33	52	18	34	28
Widowed	**3**	1	4	6	2	2	0	0	14	0	0	0	7	2	0
Separated	**2**	2	3	2	2	2	2	0	0	4	3	0	7	2	2
Divorced	**1**	0	2	0	2	0	0	0	2	0	0	2	7	0	0
Married-polygamous	**1**	1	1	3	0	0	0	0	7	0	0	0	0	0	2
Number of Household Members															
Mean Household Members	**2.91**	2.36	3.20	3.25	2.80	2.73	2.44	2.31	3.62	2.43	3.03	2.18	3.91	3.17	3.28
Number of Household Members 65+															
Mean Household Members 65+	**0.06**	0.01	0.08	0.08	0.05	0.00	0.19	0.02	0.07	0.00	0.00	0.02	0.18	0.00	0.07
Number of Household Members 15 - 64 Years															
Mean Household Members 18-64	**1.94**	1.75	2.04	1.97	1.93	1.95	1.60	1.69	2.12	1.72	2.10	1.66	2.44	1.98	2.12
Number of Children 5 - 14 Years															
Mean Number of Children 5-14	**0.59**	0.42	0.68	0.77	0.53	0.59	0.33	0.36	1.02	0.47	0.48	0.23	0.98	0.78	0.67
Number of Children below 5 Years															
Mean Number of Children <5	**0.32**	0.18	0.40	0.42	0.29	0.20	0.33	0.24	0.40	0.23	0.45	0.27	0.31	0.41	0.42

Demographics 2/4

	Total	Male	Female	Food Insecure	Food Secure	JUJA	THIKA	RUIRU	KIBERA	KAYOLE	KITEN-GELA	TASSIA	MWIKI	HURUMA	ATHI RIVER
Base:	*428*	*151*	*277*	*102*	*326*	*41*	*43*	*42*	*42*	*47*	*40*	*44*	*45*	*41*	*43*
Education of Head of Household															
Standard 1-4	**0**	0	1	0	1	0	0	0	2	0	3	0	0	0	0
Standard 5-8	**11**	12	10	23	7	15	2	0	14	13	23	14	4	10	16
Formal 1-2	**7**	5	9	5	8	0	9	2	12	13	3	7	0	0	26
Formal 3-4	**35**	35	35	27	37	68	16	40	45	9	63	23	22	37	33
Post secondary	**44**	46	43	42	45	15	72	52	24	62	5	57	69	54	26
Adult literacy	**2**	1	2	2	2	0	0	5	0	4	3	0	4	0	0
None	**1**	1	1	1	1	2	0	0	2	0	3	0	0	0	0
Education of Head of Respondent															
Standard 1-4	**1**	0	1	2	1	2	0	0	0	0	3	0	0	0	5
Standard 5-8	**13**	11	14	25	9	17	2	5	14	15	25	11	9	7	23
Formal 1-2	**5**	6	5	6	5	2	9	0	14	0	3	7	0	2	14
Formal 3-4	**36**	35	36	25	39	61	12	43	45	23	63	27	20	32	37
Post secondary	**44**	47	42	39	45	17	77	50	26	57	8	55	67	59	19
Adult literacy	**1**	1	1	2	1	0	0	2	0	4	0	0	4	0	0
None	**0**	0	0	1	0	0	0	0	0	0	0	0	0	0	2

Demographics 3/4

	Total	Male	Female	Food Insecure	Food Secure	JUJA	THIKA	RUIRU	KIBERA	KAYOLE	KITEN-GELA	TASSIA	MWIKI	HURUMA	ATHI RIVER
Base:	*428*	*151*	*277*	*102*	*326*	*41*	*43*	*42*	*42*	*47*	*40*	*44*	*45*	*41*	*43*
Rooftop Material															
Corrugated metal	**75**	68	80	79	74	90	49	64	86	57	78	45	98	95	95
Tile	**16**	24	11	1	20	0	44	36	0	36	0	36	0	0	0
Plastic sheeting	**3**	4	2	4	2	10	0	0	0	0	15	0	0	0	5
Wood	**1**	1	1	0	1	0	7	0	0	0	0	0	0	0	0
Flooring Material															
Concrete/flag stone/cement	**78**	72	81	81	76	93	60	88	88	62	68	64	82	90	84
Tile/bricks	**11**	15	8	1	13	0	14	12	0	36	0	36	2	0	0
Earth/mud	**9**	9	9	17	6	5	12	0	12	2	25	0	16	10	9
Wood	**3**	3	3	1	3	2	14	0	0	0	5	0	0	0	7
Exterior Walls															
Concrete/flag stone/cement	**60**	48	67	66	58	88	47	83	57	60	13	64	82	85	21
Tile/bricks	**13**	17	10	2	16	0	28	17	0	36	0	36	0	0	7
Wood	**10**	14	8	14	9	7	14	0	0	0	33	0	13	2	30
Other	**9**	13	6	6	10	2	0	0	5	2	45	0	0	0	37
Earth/mud	**8**	8	9	13	7	2	12	0	38	2	10	0	4	12	5
Toilet Facilities															
Pit latrine	**45**	48	43	48	44	93	16	60	52	30	73	32	20	15	63
Flush, shared	**26**	23	28	37	23	0	40	7	19	32	13	32	42	68	7
Flush, private	**13**	17	11	0	17	7	16	21	7	38	0	34	0	0	0
Ventilated improved pit latrine	**12**	9	14	10	13	0	21	12	17	0	13	0	38	10	9
Community toilet	**4**	4	5	5	4	0	7	0	5	0	3	2	0	7	21
Source of Drinking Water															
Piped into plot/yard	**50**	46	51	29	56	56	23	64	60	66	43	66	49	61	7
Public tap	**43**	44	43	65	37	41	70	7	40	34	45	27	51	34	81
Piped into dwelling	3	5	3	1	4	0	5	21	0	0	0	0	0	5	2
Tubewell/borehole	3	3	3	4	2	2	0	5	0	0	13	2	0	0	5
Protected dug well	0	1	0	0	1	0	2	0	0	0	0	2	0	0	0

Demographics 4/4

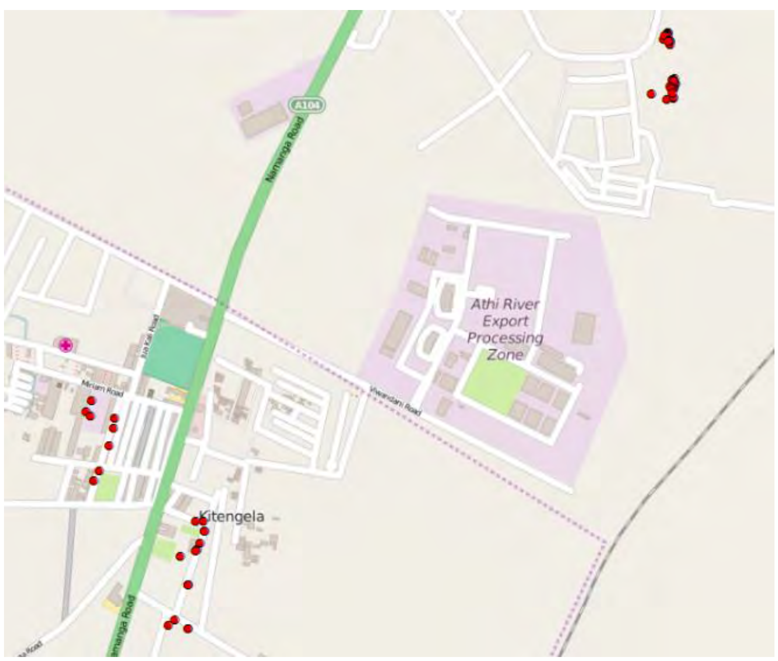
	Total	Male	Female	Food Insecure	Food Secure	JUJA	THIKA	RUIRU	KIBERA	KAYOLE	KITEN-GELA	TASSIA	MWIKI	HURUMA	ATHI RIVER
Base:	*428*	*151*	*277*	*102*	*326*	*41*	*43*	*42*	*42*	*47*	*40*	*44*	*45*	*41*	*43*
	Household Connected to Electric Grid														
Yes	**86**	85	86	80	87	98	84	98	93	98	88	89	51	88	72
No	**14**	15	14	20	13	2	16	2	7	2	13	11	49	12	28
	Cooking Fuel														
Kerosene	**46**	42	47	68	39	37	60	38	36	45	43	50	53	71	23
Charcoal	**32**	32	32	27	34	63	14	26	31	19	35	16	40	5	74
Piped or liquid propane gas	**14**	20	12	3	18	0	19	33	5	34	23	30	0	0	0
Electricity	**2**	4	1	1	2	0	5	0	7	2	0	5	0	0	0
Firewood	**1**	0	2	0	2	0	2	2	0	0	0	0	7	0	2

- While 65% of respondents were women, 71% of heads of household are men.
- The average age of respondents is 30 years, 54% of respondents are married, while 40% are still single.
- The average number of household members is three persons, as these are households within the greater Nairobi area, thus a lower number of household members compared to the national average (4.4; source; 2009 Census) is expected.
- The urban setting also explains the high proportion (86%) of households connected to the electric grid.
- Yet, the main sources of cooking fuel are kerosene and charcoal.

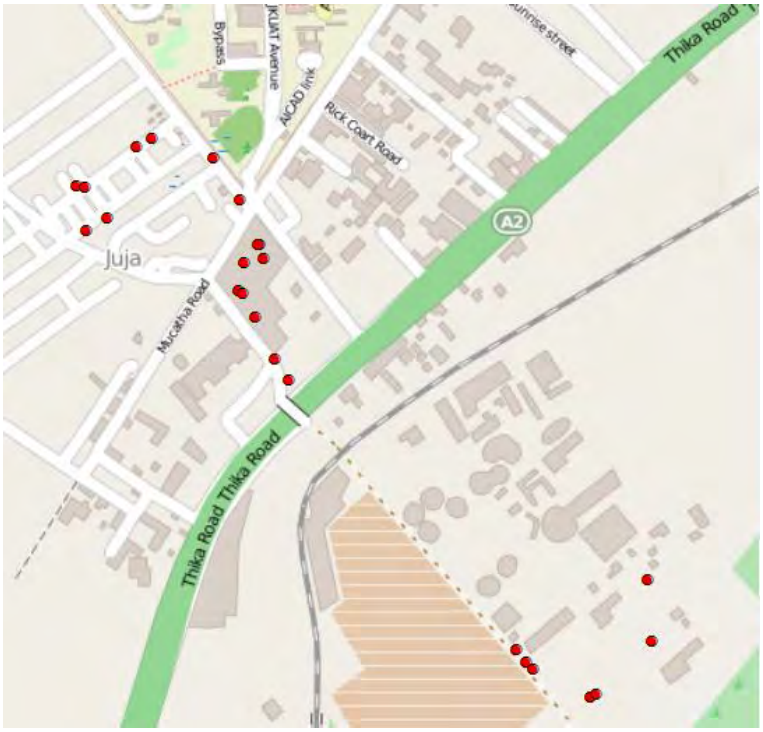
Kenya Case Study Mapping-General View

Kenya Case Study Mapping- Nairobi Area

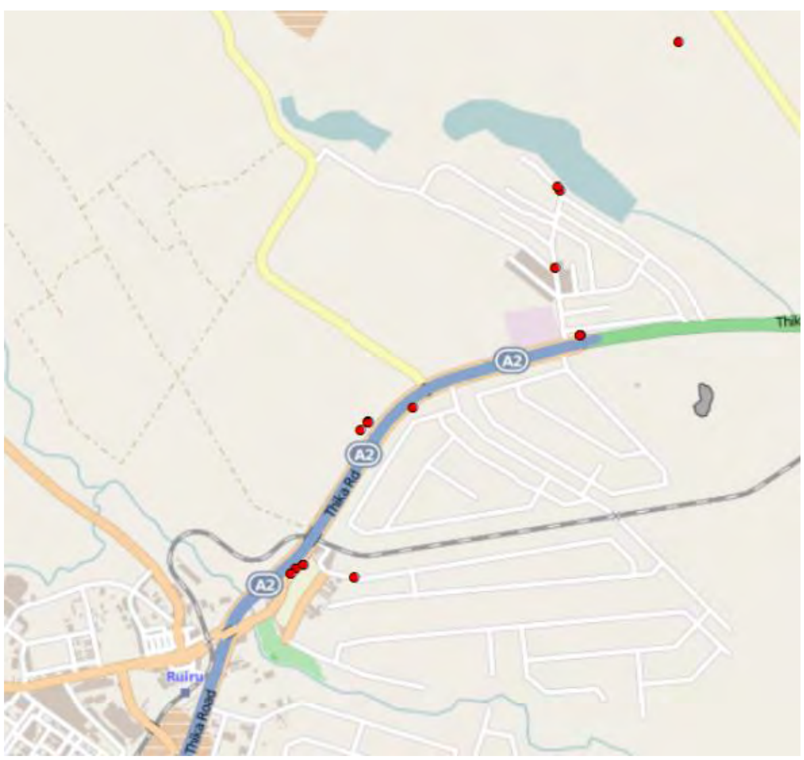
Kenya Case Study Mapping-Athi & Kitengela



Kenya Case Study Mapping- Juja Area



Kenya Case Study- Ruiru Area



Kenya Case Study-Thika Area

ANNEX 8: IN-DEPTH CASE STUDY FINDINGS, ZAMBIA

Introduction

The evaluation team conducted an in-depth case study of COMACO in Zambia. COMACO produces two nutritious food products that it sells in the Eastern Province of Zambia. The two COMACO products and brands covered by the case study include It's Wild Peanut Butter and It's Wild Yummy Soy (a corn soy blend).

For the case study, the evaluation team conducted the following research activities in the Eastern Province: (1) three consumer FGDs in Chipata with lower-income persons responsible for household food purchases, (2) KIIs with 10 retailers in Chipata and three institutional food buyers, and (3) 657 household surveys with randomly selected households in three communities served by COMACO. Respondents to the household survey included the person in the household responsible for making food-purchasing decisions. The three communities included: Chipata, Katete and Lundazi. Table 17 shows the distribution of survey respondents across the three communities. Fieldwork for the in-depth case study commenced on 23rd March and ended on 27th March 2015.

Table 17. Distribution of Household Survey Respondents in Zambia

Region	Sample Points		Dates Covered		Achievement	Back Checks	
	Number	Name	Start March	End March		Accompanied	Telephonic Verification
2 Katete	2	2 Roman Catholic Chibolya	23	24	21	2	2
	3	3 Green Shop Chibolya	23	24	14	1	1
	4	4 Community Borehole	23	24	14	2	2
	5	5 Green Bakery Chibolye	23	24	25	2	2
	6	6 Mutunzi School Chibolya	23	24	13	1	1
	7	7 PGS Shop Chibolya	23	24	38	2	2
	8	8 Katete Community Borehole	23	23	10	1	1
	11	11 Katete Market	23	24	11	1	1
	14	14 Mutunzi School	23	24	21	2	2
	15	15 Blue Roof Chinese Warehouse Chibolye	24	24	12	2	2
	18	18 Bethel School Chibolya A	24	24	28	2	2
	20	20 Bethel School Chibolya B	23	24	15	2	2
1 Chipata	21	21 Magazine Market, Magazine Compound	25	25	12	2	2
	22	22 Mayamiko Mill Magazine	25	25	11	2	2
	23	23 Bethel Primary	25	25	10	1	1
	24	24 Muchini Markets Muchini A	25	25	27	2	2
	26	26 Muchini Market B	25	26	22	2	2
	27	27 Mayamiko School Magazine	25	25	10	1	1
	28	28 Mayaniko Shop Muchini	25	25	10	1	1
	30	30 Edimberg School Muchini	25	25	20	2	2
	33	33 Soweto	25	25	11	1	1
	34	34 Magazine Market	25	26	10	1	1
	35	35 Bethel Corner Shop in Magazine	25	25	8	1	1
	40	40 Muslim Association School	25	26	24	2	2
	41	41 Red Grocery n Salon Muchini	26	26	10	1	1
	42	42 New Apostolic Faith Mission Church	26	27	16	1	2
	43	43 United Apostolic Faith Church Magazine	27	27	15	2	2

Region	Sample Points		Dates Covered		Achievement	Back Checks	
	Number	Name	Start March	End March		Accompanied	Telephonic Verification
3 Lundazi	45	45 Pamoba Shops Williams	26	26	19	2	2
	46	46 SDA Church Teachers	26	26	10	1	1
	47	47 Granary Williams	26	26	10	1	1
	48	48 SP Kiosk One Riverside	26	26	10	2	2
	49	49 AFM Church	26	27	9	1	1
	50	50 Kayeke Shop Williams	26	26	10	2	2
	51	51 Muhone Shop Williams	26	26	11	2	2
	52	52 Lundazi Hospital	26	26	10	2	1
	53	53 Granary	26	26	10	2	3
	54	54 Chiuyu Kiosk Riverside	26	26	10	2	2
	55	55 SDA Church	26	27	14	2	2
	57	57 Kandema Shop Kalopa	26	27	8	2	2
	60	60 Granary Pamodzi	26	27	11	2	2
	61	61 Kaleyske Duda	27	27	20	2	2
	63	63 Tinjani Shops Gunduza	27	27	18	2	2
	64	64 Muhone Shop Williams	27	27	9	2	2
	65	65 Green Shop in Mutendere	27	27	18	2	2
	66	66 Chioke Shop	27	27	12	2	2
		TOTAL			**657**	**75**	**76**

Unlike most of the food processors interviewed, COMACO is a large processor producing a wide variety of food products, including peanut butter, rice, honey, corn soy blends (CSB), beans and animal feed. COMACO sells its products under the brand name 'It's Wild.' It's major customers are the large national retail chains Shoprite, Pick n' Pay, Spar and Melisa that have outlets throughout the country. COMACO also sells to NGOs for school feeding programs. Owing to its relative size and level of sophistication, COMACO's interaction with SAFE has been less concerned with the basics of hygiene and food safety and more with improving the product and growing the market.

Among COMACO's product line, Yummy Soy is the only product that is it attempting to sell within food insecure retail markets, although it is also currently looking at different packaging options to make its peanut butter more affordable to lower income groups.

Findings-Household Survey

Food Security

- Three out of 10 survey respondents have experienced a lack of funds during the past month, which prevented them from procuring food.
- Nineteen percent of survey respondents had to go to bed on occasion without food, while 13% went through a whole 24-hour period without food.
- As such, 30% of survey respondents in the study locations were classified as insecure.

Types of Foods Consumed

- The majority of consumers had grains, cooking oils and vegetables (dark green and other vegetables) on the day prior to the interview followed by sweets, beverages and condiments.

- More nutritious food items, such as meats, dairy products or legumes, were consumed by just 36% of survey respondents.

- There is a gender bias in the foods consumed. Men consume more protein-rich foods, such as meats, fish and dairy, while women eat more vegetables.

Familiarity with Nutritious Foods

- Just over one-half (52%) of respondents are not very familiar or not at all familiar with the concept of nutritious foods; a proportion that ironically increases to 56% among food secure consumers.

- However, consumers are able to provide textbook responses as to what constitutes nutritional value, including: varied diet, protein content and vitamins and minerals.

- These properties, however, are found to be merely "hygiene factors." Traditional foods rank high on the list of priorities, as do the perceptions that all foods are nutritious and that meat-based products are more nutritious than plant-based ones.

Nutrition Ranking of Food Items

- In line with food consumption practices, maize is considered decidedly more nutritious than either corn-soy blends or fortified foods.

- On the other hand, groundnuts, followed by peanut butter, are considered the most nutritious food items.

Factors in the Purchase Decision Making Process

- Cost is the most important consideration in making food purchasing decisions, scoring a mean rating of 6 on a 7-point scale

- Cost is followed by quality, requests by adult household members and taste.

- Interestingly, requests made by children weigh less heavy than requests made by adults.

- Ease of preparation is the lowest rated factor, scoring just 4 out of a possible 7

Brand Performance

- In the Zambia case study, the categories of interest were Corn Soy Blends and Peanut Butter, with the study brands being COMACO's 'It's Wild Yummy Soy' and 'It's Wild Peanut Butter.'

- A competitor brand, Seba Foods' corn soy blend, tops the list with 79% awareness, 74% trial and 69% repertoire usage; hence, there are no bottlenecks down the conversion pipeline.

- Among the study brands of interest, It's Wild Peanut Butter come in at 46% awareness, 35% trial and 23% repertoire usage

- In contrast, It's Wild Yummy Soy achieves just 18% awareness, 11% trial and 6% repertoire usage.

- Other competitor brands perform at very much lower levels.

Brand Ratings

- Among those who are aware of the brands, It's Wild Peanut Butter is rated significantly higher on quality (99%) than It's Wild: Yummy Soy. On the other hand, It's Wild Peanut Butter is rated significantly (99%) more expensive.

- Among those who have tried the respective brand, It's Wild Peanut Butter is rated significantly (95%) higher on nutrition and also on taste (99% significance).

- Correspondence analysis reveals a very clear trajectory for It's Wild Peanut Butter, while at the awareness stage cost concerns prevail. By the time it has been tried and adopted into consumers' repertoire, quality is the main dimension.

- It's Wild: Yummy Soy, on the other hand, does not have a clear-cut trajectory. By the time the brand has become part of consumers' repertoire, it is not strongly characterised by any one dimension. Rather, it is perceived as a brand that is average across all dimensions, but close to the neutral mid point.

Frequency of Purchase

- Both It's Wild brands tend to be purchased once a month. The cost of the product in addition to a lack of available funds on the side of the consumers are the key obstacles to more frequent purchases.

- Consumers of It's Wild Peanut Butter also claim that the product will last them through the month.

Product Satisfaction

- Satisfaction ratings for It's Wild Peanut Butter (6.2 out of a maximum of 7) are significantly higher (99%) than for It's Wild Yummy Soy (mean score: 5.9)

- This pattern persists across demographic breakdowns.

Sources of Awareness

- Word of mouth is the main source of awareness for both products (58% each), while TV and radio are also claimed to be sources of awareness, albeit at lower levels.
- Road shows were mentioned by 21% (It's Wild Peanut Butter) and 15% (It's Wild Yummy Soy) as a source of information about the product.

Pack Size and Retail-Oriented Selling Proposition (RSP)

- It's Wild: Peanut Butter:
    - Although a wide range of pack sizes is being bought (some seemingly re-packaged by retailers), 500g and 1kg are purchased most frequently.
    - The RSP for the 500g packages is 15.48 Kwacha and 49.22 Kwacha for 1kg.
- It's Wild: Yummy Soy:
    - A third of consumers (33%) are uncertain as to what pack size they buy; 1kg, 500g and 2kg pack sizes seem to be the most common.
    - Due to the low bases for the individual pack sizes, the mean RSPs need to be taken with caution. On average, consumers claim to spend 27.4 Kwacha (mean score across all pack sizes).

Liking of the Brands

- Mean scores for each brand are virtually identical, regardless of whether by adults or by children.
- However, It's Wild Peanut Butter is liked better (90%) than It's Wild Yummy Soy.

Recommendation and Repeat Purchase

- No significant differences exist between It's Wild Peanut Butter and It's Wild Yummy Soy when it comes to claimed willingness to recommend the product to others or to buy the product in the future.
- The very few who said they would not buy the product in the future blamed the poor taste qualities as well as high price of either brand.

Conclusions

Findings-FGDs

General Findings

Food is generally purchased from the local markets; however, consumers make regular (weekly or monthly) trips to the supermarkets in town to stock up on goods not readily available in the markets.

"We mostly buy these products from the market."

"I for one buy my food from Kaungu market, though there are also times when I go to town to purchase food from shops like Spar and Shoprite."

"Items like vegetable we buy them every day, but for items like beans, potatoes we buy in bulk and store them."

A few consumers also mentioned 'door-to-door' vendors and wholesalers.

"We buy most of our products from Kapata market, but with foods like vegetables and tomatoes, people who come from the farms always pass through our homes."

Food from the market was considered cheaper than from supermarkets:

"At the main market in Magazine, that's where prices are fair."

Nutritious foods mentioned included a wide range of vegetables and mean, including chicken and fish. Unlike in Kenya, milk was not singled out as a nutritious food.

Respondents understood the term "nutritious food" to mean balanced and containing a range of elements that supported good health. As in Kenya, a nutritious diet is seen as one that will provide strength and energy.

"Food that is balanced, including all the vitamins and proteins."

"They are foods which are balanced, foods that includes carbohydrates, fats as well as vegetables."

"Nutritious foods are foods that give the body strength."

It is, however, the foods that are expected to provide the balance rather than the meal. Thus balance is achieved not by having a range of foods on the plate but by rotating the food eaten.

"If I'm to go to the market to buy things like meat, beans, kapenta (small fish), I will even know how to balance it nicely on a daily basis. Say Monday I prepare beans, Tuesday I prepare kapenta and so on. It is very important to have a better knowledge of what your body needs."

Respondents felt that Zambians were not very well informed on nutrition and did not always make the right food choices.

"Sometimes we buy foods that will not have any value to our body and eating them daily, they may bring a serious effect to the body."

"You find that some children are ever getting sick because we do not know what amount of food they should take in as well . . . maybe they always lack one particular food item but due to the fact that we do not know what is more important, the body therefore, ends up looking malnourished."

The need for nutritious food is strongly linked to childhood and would appear to be less important for adults. This might be due to the fact that much information on nutrition is provided by antenatal clinics.

"In our society you find that the growth of the children is affected because they are the ones who need proper diets for a good growth."

"Some women buy foods suitable for elderly people and give it to the babies because they do not have enough income and also because they don't know how to balance the diets and needs of the people's body needs, like for children, they need foods that will help them grow physically and mentally."

"Some women are taught from the clinics when they go for under five or for antenatal."

Nutritious food is (in the form of vegetables and fruit) widely available and unlike in Kenya, is considered affordable for most of the population.

"Food is not expensive, but it is the matter of you knowing how to make a good selection of food."

"Almost everything is available on each and every market - things like beans, dry fish etc."

Respondents noted, however, that there were a lot of misconceptions about food, which resulted in poor eating habits.

"You find people can't afford to buy chicken and will always want to substitute it with other foods like I can mention soya pieces, nyzongwe which is a nutritious traditional food.

Although respondents did not think food was expensive, they were aware that some people could not afford the foods they needed, and they thought that this group in particular would benefit from more knowledge.

"Some of us just buy foods because they are readily available and cheap on the market."

"We should not just buy because the food is cheap but rather choose the food which will give us good strength and make us look healthy."

Despite the general availability and affordability of food, many respondents admitted that in their day-to-day life they had to carefully consider what to purchase due to financial constraints.

"My husband and I do not really have specific times in which we buy our products for it depends with how often we have enough money. We just eat whatever we can afford for that particular moment."

"When we have enough money, we buy them in bulk, but in the case where we don't have money, we buy whatever we can afford. For example, things like soya pieces are used to replace meat when I don't have enough money to buy the meat."

Respondents agreed that processed/packaged foods display nutritional information on the packaging and that they mainly pay attention to such information when buying food for young children. The expiration data is also considered important, albeit to a much lesser degree than in Kenya.

"We always check the expiry date… We always read from the sides of the products. We check for the dates because in most cases you find that the milk we buy is normally a few days to the expiry dates as well as things like cheese for my children. Early checking of the expiry dates is very important."

COMACO Products

Most respondents are well aware of and have used both the COMACO peanut butter and soy chunks. Both products are considered good quality and nutritious.

"The quality of the soya pieces is good especially now that we have the blue one which has a spice."

"It is easy to prepare, the quality is good as well."

"In my house I buy the peanut butter and yummy soya".

Both products are readily available; however, the soya chunks are more easily found in local markets, while it may be necessary to go to the supermarket for the peanut butter.

"Soya pieces are found in all the markets, Magazine, Kawambwa, Kapata, Saturday market everywhere."

"Its Wild peanut butter, Yummy Soya, these products are readily available in Spar, Shoprite, as well as the COMACO outlet which is found near Protea Hotel in town."

Both these products, moreover, were considered highly nutritious and good for children. In most households, however, their consumption was not limited to children and were consumed by the whole family.

"We buy them because they have a high nutritional value and hence we get them from Gazilla shop found in the local market probably once a month or whenever they are needed."

"We enjoy buying these foods because they have a good deal of nutrients and have no limits to who is supposed to eat them as they are for both the young and the elderly."

"In my home, children are the only ones who use Its Wild peanut butter while the rest of us can use the soya pieces."

The Yummy Soya was described as reasonably priced and easy to prepare. The peanut butter was considered more expensive but very tasty.

"We always have the soya pieces in the house because they're easy to prepare as well as cheap to buy."

"Like soya pieces we buy them every day. The other we don't buy them every day because they are expensive we can't afford them, so we buy them once in a while"

"It's Wild peanut butter tastes like when you fry groundnuts then you pound them. The taste is very nice."

Most product awareness came through word of mouth. Both that and high visibility in the marketplaces appear to be crucial to wide uptake.

"We shall hear about them from our friends that know about them, they will tell us what they like and if we like them too then we buy them."

There is a high level of loyalty and participants appear entirely satisfied with the products as they stand.

"We shall continue to buy them for as long as they are still on the market; even if they became a bit improved we shall forever continue to buy them."

"We will buy them because they are affordable."

Findings-KIIs

Institutional Buyers

The evaluation team conducted interviews with three of COMACO's institutional buyers. COMACO sells High Energy Protein Supplements (HEPS) to these three buyers who in turn are supplying the food to a variety of food insecure groups that include people living with HIV/AIDs, orphans and vulnerable children, pregnant women and students via school feeding programs. Each of the institutional buyers has a long-term contract with COMACO and so far is highly satisfied with COMACO's performance.

"When you make an order, they really work hard to make sure you receive the order."

"The food that we order from COMACO has been supplied without challenges, so from that angle I will say there is adequate supply as compared to the demand that we are presenting to them."

"They have been responsive to our requests, and they have been able to deliver to our distribution schedules without any challenges really. They also ensure that the correct documentation is collected and just maintaining the standards and the quality of the products. Up until the point of dispensation has been pretty good, and wherever we have faced challenges or inconsistencies, they have been able to come back to us and rectify."

The buyers do, however, have some concerns about COMACO moving forward related to its capacity to produce and distribute larger orders, and they would like to see COMACO take more initiative to identify and address problems/issues.

"So far so good given the current size of our program they have been able to cope. However, if we were implementing the size of a program like we are implementing in Malawi, I don't believe that with their current capacity they would cope."

"Working with them through the commercialization process it's a very slow process for them to uptake certain ideas and for them to respond."

"If we have a problem we have to bring it to their attention instead of them discovering the problem themselves. For example, if cartons that they use to ship the products in, the quality starts off good and then gets bad, ok so it's up to us to go back to them and say your quality its slipping and they are falling apart, they are breaking the product and everything else. They should be catching that sooner themselves."

"They need to improve on their distribution in order to increase their market share; there is significant potential for them to increase their market share."

It is thus not a given, however, that these three buyers will renew their contracts with COMACO. In fact, each of the three institutional buyers is in the process of upgrading its own programs and moving toward a tendering system.

"At the moment we are just purchasing from COMACO, we are in a tendering process, but at the moment our supplier is COMACO."

"Out initial selection was based on our own knowledge of suppliers in Eastern Province of Zambia. And at the time of entry to Zambia, our knowledge was only restricted to COMACO. So we chose COMACO on the basis that we knew them and we had confidence that they will supply. This is why when we started our program we started a tendering process to see if there are other producers."

Yummy Soy is the mainstay product for COMACO's institutional clients, and it is purchased in large quantities for distribution to the needy across Zambia. In two of the three cases, COMACO distributes its product directly on behalf of the buyer to the schools and hospitals, while in the third case, the buyer has enlisted the army's help to distribute the product across the country.

"The food is . . . is delivered by COMACO to the health facilities and it goes to the patients . . . that have been diagnosed as malnourished and HIV positive."

"Our supply chain is very short, we request COMACO to produce and deliver to the user. So COMACO itself delivers to the schools. We purchase from COMACO, and they distribute to the last user. There is no one between COMACO and the schools."

"Our partners are the Zambia defence force. The role they play is that they are the ones who pick the supplements from COMACO to distribute to their sites. They help us to distribute with transport because we are all over we are not just in Lusaka."

Obviously these buyers are knowledgeable about nutrition and well informed on the benefits of food aid. They suggested that although Zambia grows enough food, there is still hunger and malnutrition among the various at risk groups they serve.

"I have read and I have heard that Zambia in the last season produced more cereal than it needs. So to me as a very basic person I should think that when you produce more than you need you are food secure, …I will restrict my comments to our program. I will tell you that there are more schools that would want our program in their schools. So if they want the program, it means that they believe that children are hungry, because our program is targeted at children who are going to school. It is a program that feeds

children in their places of learning. So because I have been informed by our authorities that they is need to expand the program I should believe that there is demand for such kind of a program in our case it is school feeding."

"Now there is very severe malnutrition based on those studies that have been recently completed. So children are still in the range of 40% of the children in Zambia that are malnourished. So there is a problem you have markets going up, people buying but for some reason there is a population of children that . . . are not improving, and so there is a gap right now and no one understands that gap or what can be done about it yet. But there is a lot of effort being put into it."

Each of these three institutional buyers believes that the foods they are providing make a real difference to the quality of life of the recipients.

"I think there is overwhelming demand for it."

"I've been visiting these clients who are accessing this same commodity and according to them it is very helpful."

"In the 25 schools that we are working on, enrolment has increased. And attendance to school has also increased. And we are told by teachers and parents that participation of learners in class has also increased. So I can talk of those positive impacts of this program at this point."

The institutional buyers have noted improvements in COMACO's production systems and product quality since it has begun working with SAFE.

"With regards to the quality of the products, it has improved."

"I would say they have become more prepared with time."

"Providing technical assistance to improve the quality and to get the CSB plant certified for good manufacturing processes which they have just attained."

Retailers

Several of the retailers noted that COMACO is one of the few producers with whom they deal directly.

"There is Comaco who brings these Yummy products, these we know them, but these others just emerge from nowhere."

"Those who sell It's Wild products . . . have the care to bring their products to us, but these other ones, we just follow them."

"Comaco supplies on their own. There are just from here. They even supply rice, they bring with their car to various shops. They supply honey as well, yummy soya and so on."

Price however is a key challenge (notwithstanding comments in the FGDs), and retailers believed that nutritional foods were more expensive than alternatives.

"If you do not have enough money, then you cannot afford that thing despite it being nutritious, so prices are a problem."

"Prices should be revised, so many nutritious foods have become very expensive. Like I can give an example of the peanut butter that we have just ordered, which is very expensive. If only they could work on making the price to be favourable."

The retailers insist they sell what customers buy and thus will be encouraged to stock more nutritious products once there is sufficient demand. They believe there is need for more communication about nutrition and nutritious products through radio, TV and road shows.

"People need to be sensitized because I think most people are ignorant so they need to be educated so they know."

"Education to the customers and to us people who go to order these things. Then the distributors and producers need to do a lot of homework, explain a lot either on radio, or television, or billboards how best their products work, how it can help customers in full and in factual."

"The companies that manufacture these products should always advertise the products so that we do not just buy products that people may not be aware of."

Once the pricing is right and the demand is there, the retailers will have no hesitation in stocking a wide range of nutritional foods.

"Definitely, for as long as we are aware of these products and the people seem to have an interest in them, remember at the end of the day, it is my business that is at stake."

"As a business man, as long as the products bring us money we will not be hesitant in selling them in the near future. Also because we know that the foods are on demand, so we shall always offer them to the society in a bigger quantity."

COMACO does not directly target the food insecure with its packaged products. The supermarkets and smaller retailers they sell through are more up-market than many people can afford. According to a key informant at COMACO:

"At the moment, only our yummy soya is channelled to food insecure and addressing malnutrition. We are in the process of looking at different packaging options to make our peanut butter more affordable to lower income groups, but obviously products like honey and rice are not traditionally consumed by lower income groups so those are the Shoprite customers."

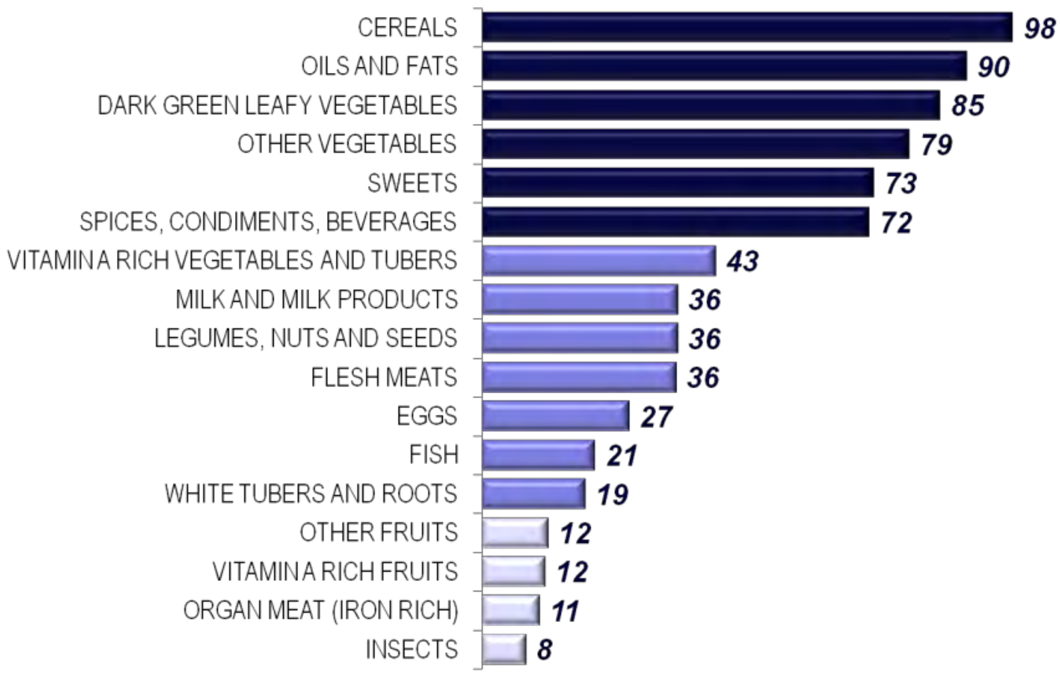
Household Survey Detailed Results

Food Security Status

	Total	Male	Female	Chipata	Katete	Lundazi
Base:	*657*	*116*	*541*	*216*	*222*	*219*
	%	%	%	%	%	%
LACK OF RESOURCES TO GET FOOD	**30**	27	31	32	34	25
DID YOU GO TO SLEEP AT NIGHT HUNGRY BECAUSE OF LACK OF FOOD?	**19**	18	20	19	24	15
DID YOU GO A WHOLE DAY AND NIGHT WITHOUT FOOD?	**13**	15	12	12	14	12
	FREQUENCY: LACK OF RESOURCES TO GET FOOD					
Base:	*200*	*31*	*169*	*70*	*75*	*55*
RARELY (1-2 TIMES)	**50**	45	51	46	60	42
SOMETIMES (3-10 TIMES)	**36**	42	34	40	28	40
OFTEN (MORE THAN 10 TIMES)	**15**	13	15	14	12	18
	FREQUENCY: GO TO SLEEP AT NIGHT HUNGRY BECAUSE OF LACK OF FOOD					
Base:	*127*	*21*	*106*	*41*	*54*	*32*
RARELY (1-2 TIMES)	**46**	43	47	51	54	28
SOMETIMES (3-10 TIMES)	**39**	38	39	32	35	53
OFTEN (MORE THAN 10 TIMES)	**15**	19	14	17	11	19
	FREQUENCY: GO A WHOLE DAY AND NIGHT WITHOUT FOOD					
Base:	*83*	*17*	*66*	*25*	*32*	*26*
RARELY (1-2 TIMES)	**45**	29	48	52	53	27
SOMETIMES (3-10 TIMES)	**40**	53	36	28	44	46
OFTEN (MORE THAN 10 TIMES)	**16**	18	15	20	3	27

- 30% of respondents experience occasional lack of resources to procure food.
- 1 in 5 go to bed hungry on occasion.
- 13% occasionally go without food for an entire 24-hour period.
- Respondent Classification:
  - Throughout the report, respondents are characterized as “food insecure” if they experienced at least one of these issues (e.g., 200 respondents).
  - Respondents that experienced none of these issues were classified as “food secure.”

Foods Consumed Yesterday



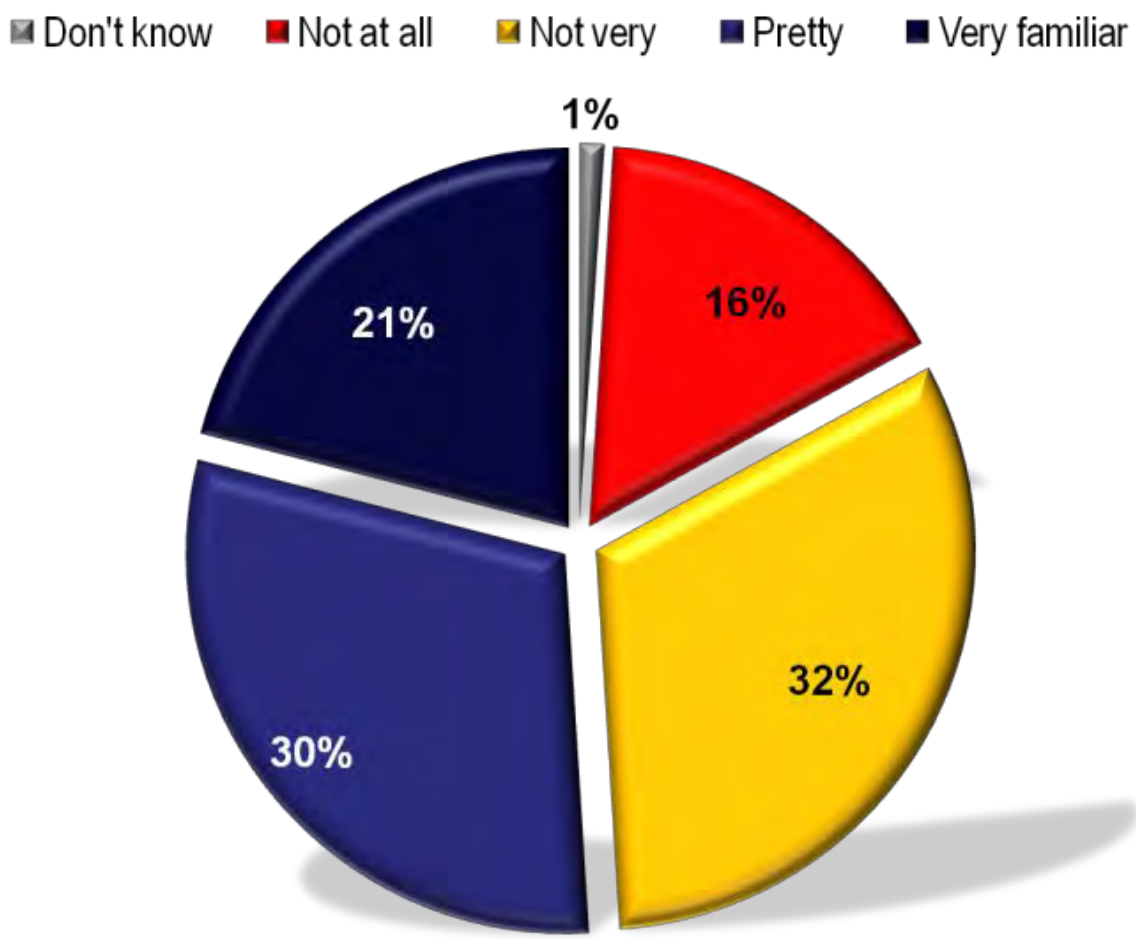
- Cereals, fats and vegetables account for the bulk of food items consumed.

Foods Consumed Yesterday (by Gender, Food Security Status and Region)

	Total	Male	Female	Food Insecure	Food Secure	Chipata	Katete	Lundazi
Base:	*657*	*116*	*541*	*200*	*457*	*216*	*222*	*219*
	%	%	%	%	%	%	%	%
CEREALS	**98**	100	98	98	99	98	100	98
OILS AND FATS	**90**	90	90	87	91	94	89	87
DARK GREEN LEAFY VEGETABLES	**85**	79	**86**	83	86	89	85	82
OTHER VEGETABLES	**79**	74	**80**	76	81	83	76	79
SWEETS	**73**	73	73	63	77	79	75	65
SPICES, CONDIMENTS, BEVERAGES	**72**	76	71	72	72	73	71	72
VITAMIN A RICH VEGETABLES AND TUBERS	**43**	46	43	38	46	43	45	43
LEGUMES, NUTS AND SEEDS	**36**	39	36	31	39	28	38	43
MILK AND MILK PRODUCTS	**36**	**48**	34	24	**42**	36	42	31
FLESH MEATS	**36**	**41**	35	32	38	35	41	32
EGGS	**27**	**41**	25	22	30	24	34	24
FISH	**21**	22	21	18	22	19	25	19
WHITE TUBERS AND ROOTS	**19**	22	19	15	21	19	18	20
OTHER FRUITS	**12**	16	11	12	12	10	15	12
VITAMIN A RICH FRUITS	**12**	18	10	13	11	12	14	9
ORGAN MEAT (IRON RICH)	**11**	**21**	9	9	12	4	**20**	8
INSECTS	**8**	10	8	5	10	6	14	5

- There is little variation in the types of foods consumed across demographic breakdowns.
- An exception is that men tend to consume more animal proteins, while women consume more vegetables.

Familiarity with Nutritious Foods



- Just 21% of respondents have a very clear idea about nutritious foods.
- While 48% of respondents are more or less unfamiliar with the concept of nutritious foods.

Familiarity with Nutritious Foods (by Gender, Food Security Status and Region)

	Total	Male	Female	Food Insecure	Food Secure	Chipata	Katete	Lundazi
Base	*657*	*116*	*541*	*200*	*457*	*216*	*222*	*219*
	%	%	%	%	%	%	%	%
Very Familiar	**16**	12	17	18	15	***21***	10	18
Pretty Familiar	**32**	30	32	***38***	29	33	34	28
Not Very Familiar	**30**	34	30	30	31	30	31	30
Not At All Familiar	**21**	22	21	15	***24***	15	***25***	22
Don't Know	**1**	2	1		1	1	1	1

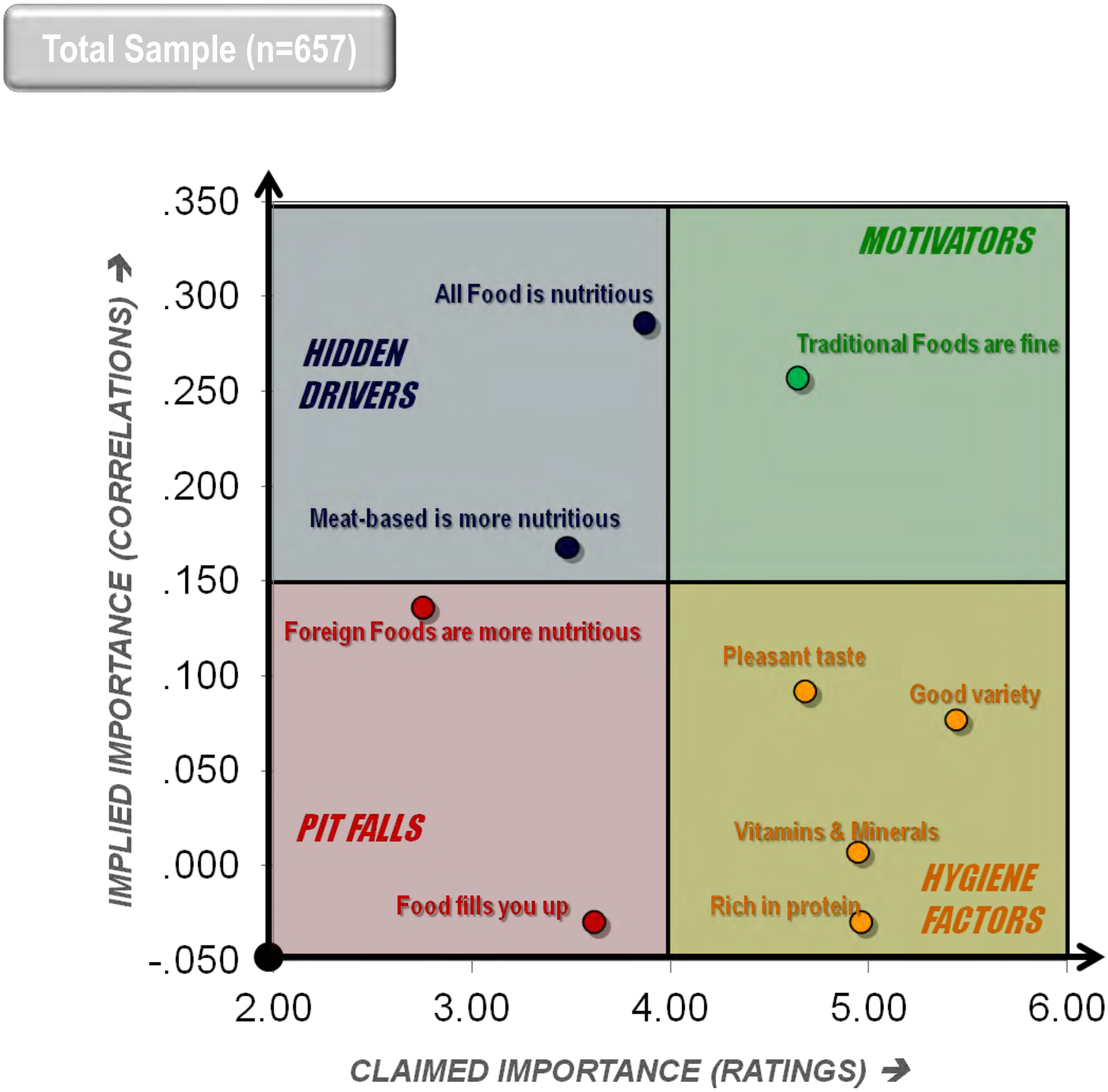
- Food-insecure respondents are more familiar with the concept of nutritious food than food-secure respondents.
- There is a higher degree of familiarity in Chipata than in the other two locations.

Assessment of Properties of Nutritious Foods (by Gender, Food Security Status and Region)

	Total	Male	Female	Food Insecure	Food Secure	Chipata	Katete	Lundazi
Base:	*657*	*116*	*541*	*200*	*457*	*216*	*222*	*219*
	mean scores							
Having a good variety in your food ensures you get the nutrition you need	**5.44**	5.34	5.47	5.12	5.58	5.51	5.23	5.58
The food is rich in protein	**4.96**	5.08	4.94	4.99	4.95	5.05	5.05	4.79
The food contains vitamins and minerals	**4.95**	5.13	4.91	5.42	4.74	5.01	5.07	4.77
The food has a pleasant taste	**4.68**	4.44	4.74	4.38	4.82	4.67	4.80	4.58
Our traditional foods are just fine; there is no need to change our diets	**4.64**	4.70	4.63	4.67	4.63	4.12	4.69	5.11
All food items are nutritious	**3.87**	3.66	3.91	3.76	3.92	3.82	3.75	4.04
The food fills you up and you don't feel hungry anymore	**3.62**	3.81	3.57	4.05	3.43	3.21	3.93	3.70
Meat-based foods are more nutritious than plant-based foods	**3.48**	2.88	3.64	3.52	3.00	3.40	3.63	3.38
Foreign foods are generally more nutritious than our local foods	**2.76**	2.80	2.75	2.89	2.70	2.39	2.78	3.10
I always prepare nutritious food for my family	**4.78**	4.98	4.74	4.53	4.89	4.32	4.62	5.40

- "Good variety" is rated highest, followed by "rich in proteins" and "contains vitamins & minerals."
- However, "pleasant taste" is also perceived as a characteristic of nutritious food, while "traditional diets" are considered entirely adequate in terms of nutrition.
- Respondents also tend to assert that they make an effort to provide nutritious food for their families.

Implied vs. Claimed Importance (Dependent Variable: *I always prepare nutritious food for my family*)



- While respondents assert that nutritious food choices are important to them, the actual impact on what they are likely to serve their families seems to contradict that.
- "Tradition" is a motivator, followed by the opinion that all food is nutritious.
- Although taste, variety, vitamins and protein content are rated highly, they have minor impact on food choices.

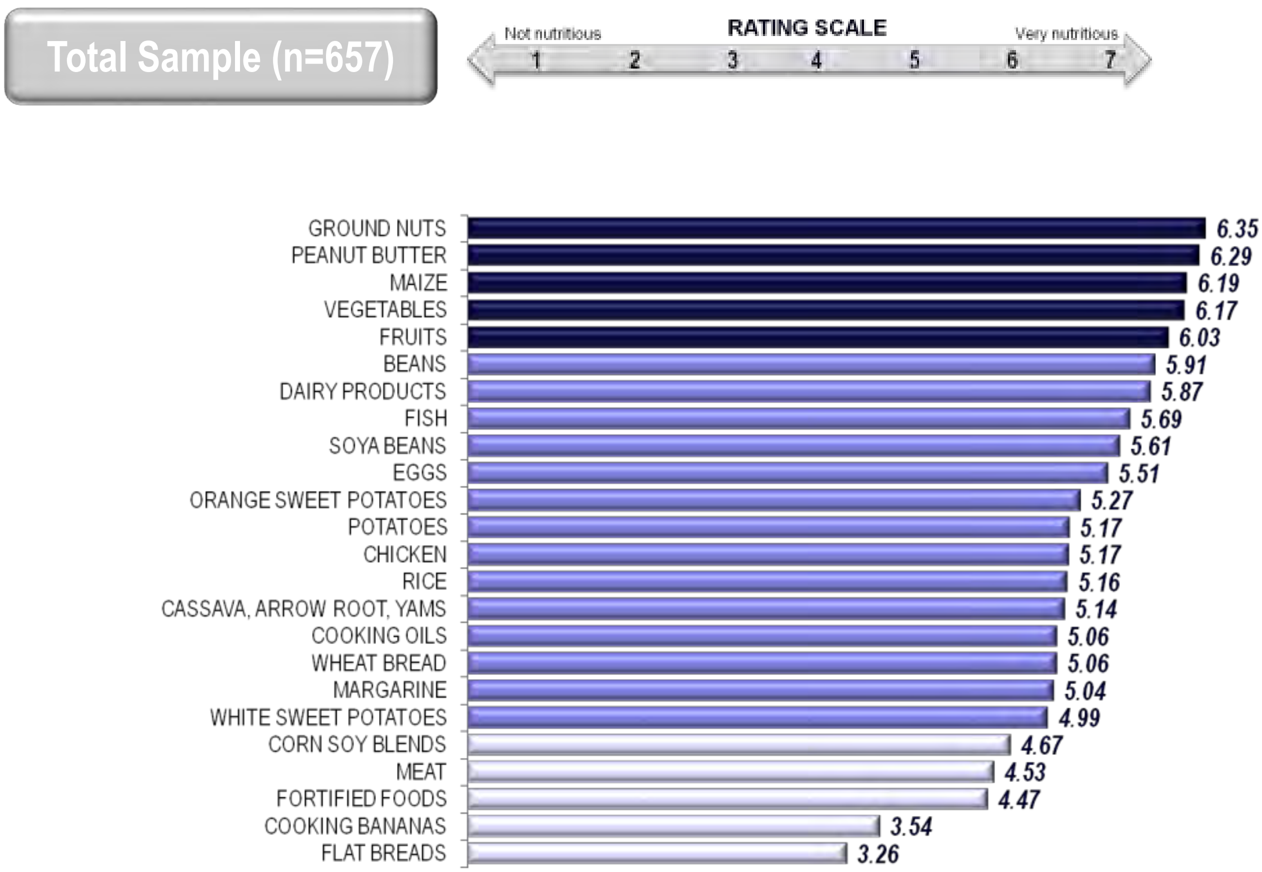
Attitudinal Factors

Extraction Method: Principal Component Analysis.
Rotation Method: Varimax with Kaiser Normalization.

Four Attitudinal Factors

- Four attitudinal factors were identified among Zambian respondents:
    - **Traditional:** This factor accounts for 36% of respondents. They feel traditional foods serve them fine; they also suspect that meat-based foods are more nutritious; and they feel they make an effort providing nutritious foods to their families.
    - **Functional:** Foods need to fill you up and keep you sated. Consumers in this segment also feel that foreign foods are more nutritious. This segment makes up 22% of respondents.
    - **Healthy:** Consumers feel that food needs to provide them with vitamins and minerals as well as proteins. This segment makes up 15% of respondents.
    - **Hedonist:** Food needs to taste good, and all food is said to be nutritious. This segment makes up 27% of respondents.

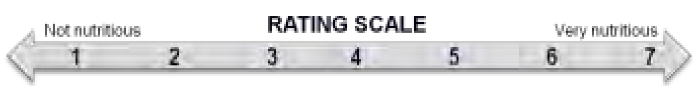
Rating the Nutritional Status of Different Food Products.



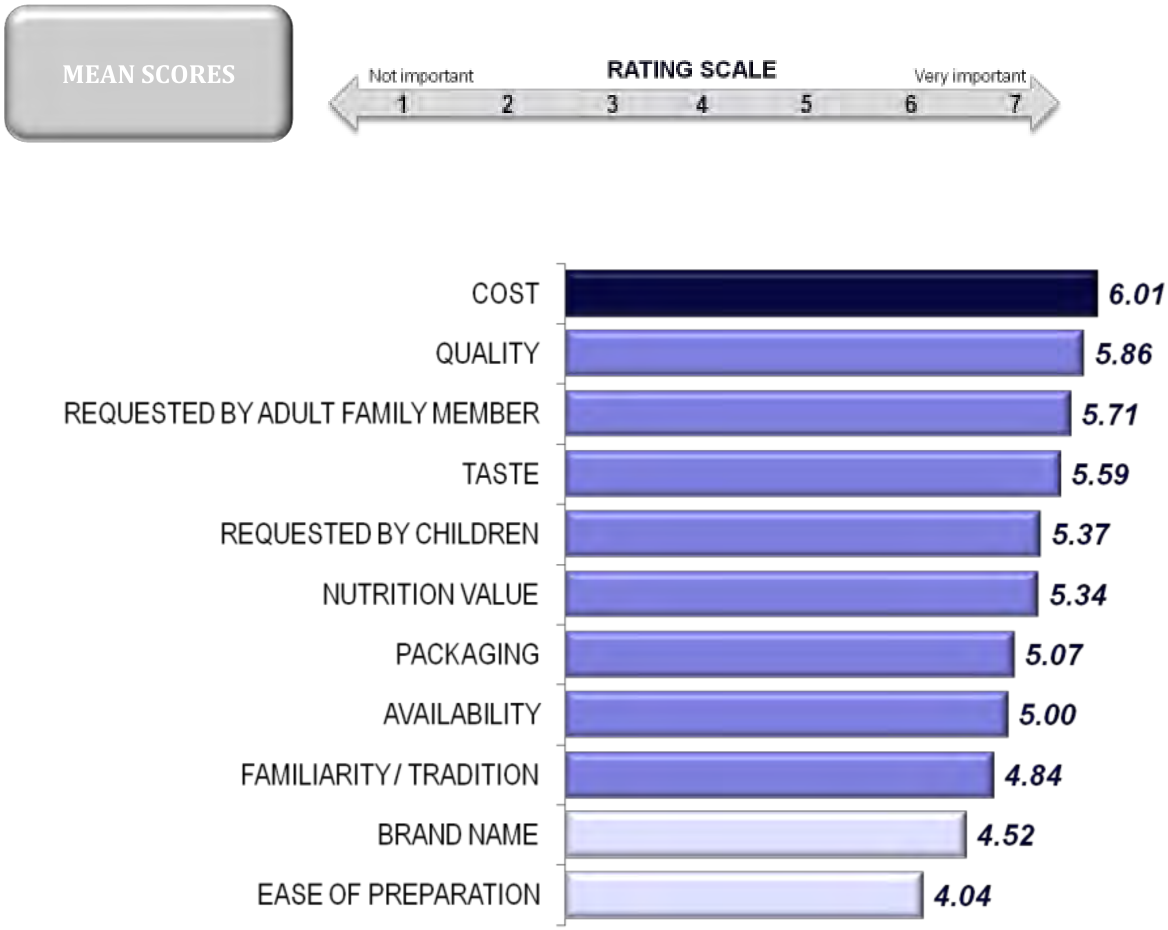
- While consumers rate groundnuts and peanut butter highly on nutritional value, maize is rated much higher than corn-soy blends and fortified foods.

Ratings of Food Items (by Gender, Food Security Status and Region)

	Total	Male	Female	Food Insecure	Food Secure	Chipata	Katete	Lundazi
Base:	*657*	*116*	*541*	*200*	*457*	*216*	*222*	*219*
	mean scores							
GROUND NUTS	**6.35**	6.34	6.35	6.28	6.38	6.52	6.33	6.20
PEANUT BUTTER	**6.29**	6.41	6.27	6.20	6.34	6.49	6.22	6.17
MAIZE	**6.19**	6.01	6.23	6.30	6.14	6.44	6.08	6.05
VEGETABLES	**6.17**	6.15	6.17	6.16	6.17	6.34	6.20	5.96
FRUITS	**6.03**	5.97	6.04	6.03	6.03	6.26	5.89	5.94
BEANS	**5.91**	5.70	5.96	5.85	5.94	6.06	6.02	5.65
DAIRY PRODUCTS	**5.87**	5.90	5.87	5.76	5.92	5.76	5.93	5.92
FISH	**5.69**	5.70	5.69	5.61	5.73	5.94	5.66	5.49
SOYA BEANS	**5.61**	5.66	5.60	5.56	5.63	5.81	5.42	5.59
EGGS	**5.51**	5.47	5.51	5.28	5.61	5.77	5.49	5.26
ORANGE SWEET POTATOES	**5.27**	5.05	5.32	5.31	5.26	5.48	5.20	5.14
POTATOES	**5.17**	5.09	5.19	5.07	5.22	5.27	5.12	5.14
CHICKEN	**5.17**	5.20	5.16	5.11	5.20	5.27	4.94	5.30
RICE	**5.16**	5.07	5.18	4.85	5.30	5.20	5.10	5.18
CASSAVA, ARROW ROOT, YAMS	**5.14**	5.13	5.14	4.93	5.23	5.25	5.15	5.00
WHEAT BREAD	**5.06**	5.09	5.06	4.86	5.16	5.13	5.12	4.94
COOKING OILS	**5.06**	5.22	5.03	5.35	4.94	4.78	5.04	5.37
MARGARINE	**5.04**	5.16	5.02	5.26	4.95	4.81	4.98	5.33
WHITE SWEET POTATOES	**4.99**	4.71	5.05	5.00	4.98	5.25	5.08	4.65
CORN SOY BLENDS	**4.67**	4.88	4.62	4.48	4.75	4.87	4.66	4.47
MEAT	**4.53**	4.73	4.48	4.33	4.62	4.30	4.24	5.05
FORTIFIED FOODS	**4.47**	4.69	4.42	3.97	4.69	4.43	4.46	4.52
COOKING BANANAS	**3.54**	4.06	3.43	3.50	3.56	2.99	3.25	4.39
FLAT BREADS	**3.26**	3.35	3.24	2.90	3.42	2.80	3.14	3.85



Importance of Purchase Decision Factors



Ratings of Purchase Decision Factors (by Gender, Food Security Status and Region)

	Total	Male	Female	Food Insecure	Food Secure	Chipata	Katete	Lundazi
Base:	*657*	*116*	*541*	*200*	*457*	*216*	*222*	*219*
	mean scores							
COST	**6.01**	6.13	5.98	5.98	6.02	5.88	6.05	6.11
QUALITY	**5.86**	5.72	5.89	5.46	6.03	5.83	5.85	5.89
REQUESTED BY ADULT FAMILY MEMBER	**5.71**	5.50	5.75	5.75	5.69	5.79	5.50	5.84
TASTE	**5.59**	5.62	5.59	5.22	5.76	5.75	5.55	5.48
REQUESTED BY CHILDREN	**5.37**	4.72	5.51	5.43	5.34	5.69	5.33	5.08
NUTRITION VALUE	**5.34**	5.60	5.29	5.40	5.32	5.11	5.51	5.41
PACKAGING	**5.07**	4.84	5.12	4.61	5.27	5.38	4.93	4.91
AVAILABILITY	**5.00**	4.97	5.01	4.54	5.20	4.96	5.01	5.02
FAMILIARITY / TRADITION	**4.84**	4.68	4.87	4.66	4.92	5.19	4.77	4.57
BRAND NAME	**4.52**	4.63	4.50	4.00	4.75	3.82	4.88	4.85
EASE OF PREPARATION	**4.04**	4.46	3.95	4.35	3.91	3.77	4.01	4.34

- Cost and quality are the most important factors in the decision-making process.
- Requests by adult family members have a slightly higher impact than requests made by children.
- Brand name and ease of preparation are relatively minor concerns; however, all factors are claimed to play a role in decision-making.

Brand Key Performance Indicators (KPIs) (by Gender, Food Security Status and Region)

	Total	Male	Female	Food Insecure	Food Secure	Chipata	Katete	Lundazi
Base:	*657*	*116*	*541*	*200*	*457*	*216*	*222*	*219*
	%	%	%	%	%	%	%	%
	Awareness							
Seba Foods: Corn-Soy Blend	**79**	78	79	80	79	81	73	84
It's Wild: Peanut Butter	**46**	45	47	49	45	41	49	49
It's Wild: Yummy Soy	**18**	22	17	20	17	15	21	18
Freshpikt Peanut Butter	**9**	15	8	11	9	9	9	10
Jungle Beats Peanut Butter	**7**	13	6	9	6	6	5	11
Chankwakwa Corn-Soy Blend	**4**	8	3	7	3	2	4	6
	Trial							
Seba Foods: Corn-Soy Blend	**74**	71	75	75	74	77	67	78
It's Wild: Peanut Butter	**35**	34	35	31	37	28	38	38
It's Wild: Yummy Soy	**11**	10	11	8	12	8	12	11
Freshpikt Peanut Butter	**5**	5	5	4	6	4	5	7
Jungle Beats Peanut Butter	**3**	4	3	3	4	3	2	5
Chankwakwa Corn-Soy Blend	**1**	4	0	1	1	0	1	1
	Usage							
Seba Foods: Corn-Soy Blend	**69**	65	70	66	70	72	62	73
It's Wild: Peanut Butter	**23**	16	24	13	27	20	26	22
It's Wild: Yummy Soy	**6**	4	6	3	7	4	6	8
Freshpikt Peanut Butter	**2**	3	2	2	2	1	3	2
Jungle Beats Peanut Butter	**1**	1	1	2	1	0	1	2
Chankwakwa Corn-Soy Blend	**0**	2	0	0	0	0	0	0

Brand Strengths

	Seba Foods: Corn-Soy Blend	It's Wild: Peanut Butter	It's Wild: Yummy Soy	Freshpikt Peanut Butter	Jungle Beats Peanut Butter	Chankwakwa Corn-Soy Blend
% Awareness	**79**	**46**	**18**	**9**	**7**	**4**
Conversion (% Awareness to Trial) ➔	*93.3*	*75.4*	*58.5*	*54.8*	*46.8*	*24.0*
% Trial	**74**	**35**	**11**	**5**	**3**	**1**
Conversion (% Trial to Usage) ➔	*93.2*	*64.8*	*58.0*	*38.2*	*36.4*	*0*
% Usage	**69**	**23**	**6**	**2**	**1**	**0**

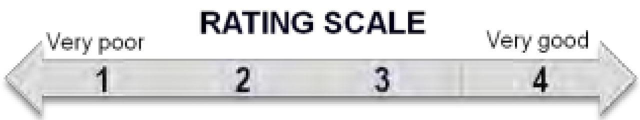
- *It's Wild Peanut Butter* and *It's Wild Yummy Soy* are the two brands of interest in this case study. Both brands are produced by COMACO.
- Neither of these brands have particular bottlenecks down the conversion pipeline – the issue is that awareness levels are low, particularly so for *Yummy Soy*. This clearly indicates a lack of brand support.
- Among the presented brands, *Seba Foods' Corn Soy Blend* is leading in terms of KPIs, and the conversion ratios indicate attractiveness and delivery on brand promise

Brand Usage and Awareness

- Two COMACO products were selected for inclusion in the case study:
- It's Wild: Peanut Butter - 149 respondents / 23% Usage

- It's Wild: Yummy Soy - 40 respondents / 6% Usage

Brand Ratings (Base: Those aware of the brand) (by Gender, Food Security Status and Region)



IT'S WILD: PEANUT BUTTER

	Total	Male	Female	Food Insecure	Food Secure	CHIPATA	KATETE	LUNDAZI
Base:	*305*	*52*	*253*	*98*	*207*	*89*	*108*	*108*
Quality	**3.28**	3.15	3.31	3.18	3.32	3.23	3.28	3.32
Cost	**2.78**	2.57	2.83	2.88	2.73	2.88	2.59	2.90

IT'S WILD: YUMMY SOY

	Total	Male	Female	Food Insecure	Food Secure	CHIPATA	KATETE	LUNDAZI
Base:	*118*	*26*	*92*	*39*	*79*	*32*	*46*	*40*
Quality	**2.93**	2.58	3.01	2.97	2.91	2.69	2.95	3.08
Cost	**2.36**	2.16	2.41	2.41	2.34	2.23	2.24	2.58

- On quality, *It's Wild Peanut Butter* is rated significantly higher (99%) *than It's Wild Yummy Soy.*
- However*, It's Wild Peanut Butter* is rated significantly (99%) more expensive than *It's Wild Yummy Soy.*

Brand Ratings (Base: Those having tried the brand) (by Gender, Food Security Status and Region)

IT'S WILD: PEANUT BUTTER

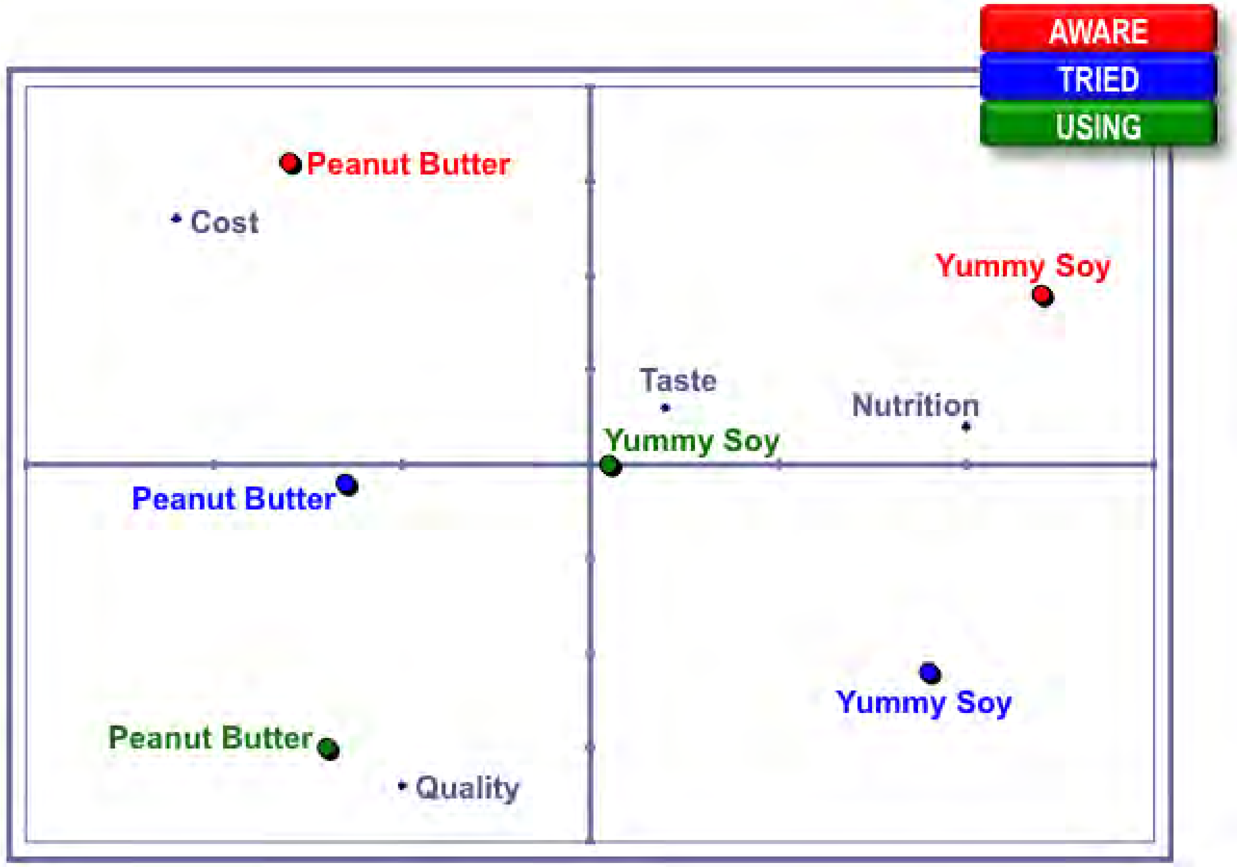
	Total	Male	Female	Food Insecure	Food Secure	CHIPATA	KATETE	LUNDAZI
Base:	*230*	*39*	*191*	*62*	*168*	*61*	*85*	*84*
Nutritional Value	**3.52**	3.61	3.50	3.54	3.51	3.41	3.60	3.51
Taste	**3.49**	3.50	3.49	3.48	3.49	3.48	3.54	3.44

IT'S WILD: YUMMY SOY

	Total	Male	Female	Food Insecure	Food Secure	CHIPATA	KATETE	LUNDAZI
Base:	*69*	*12*	*57*	*16*	*53*	*18*	*26*	*25*
Nutritional Value	**3.35**	3.40	3.34	3.23	3.38	3.27	3.28	3.48
Taste	**3.21**	3.20	3.21	3.00	3.26	3.33	3.16	3.17

- In terms of nutritional value, It's Wild Peanut Butter is rated significantly (95%) higher than It's Wild Yummy Soy.
- On taste, It's Wild Peanut Butter again outperforms It's Wild Yummy Soy (significant at 99%).

Perceptual Shifts Based on Familiarity (Correspondence Analysis of Ratings; Explained variance: 97%)



- For Peanut Butter, there is a clear trajectory from Awareness (characterised by cost concerns) to Usage (quality).
- Yummy Soy does not show a comparable trajectory; rather, users perceive the brand partaking in all characteristics, but to a lower extent.

Frequency of Purchase (Base: Users of the brand) (by Gender, Food Security Status, Region)

IT'S WILD: PEANUT BUTTER

	Total	Male	Female	Food Insecure	Food Secure	CHIPATA	KATETE	LUNDAZI
Base:	*149*	*19*	*130*	*25*	*124*	*44*	*57*	*48*
everyday	**1**	5	0	0	1	0	2	0
Several times a week	**0**	0	0	0	0	0	0	0
Once in a week	**9**	11	8	8	9	2	12	10
Several times a month	**23**	26	22	20	23	30	25	15
Once a month	**40**	26	42	52	37	41	39	40
Less often	**25**	21	25	16	27	25	19	31
Do Not Know	**3**	11	2	4	3	2	4	4

IT'S WILD: YUMMY SOY

	Total	Male	Female	Food Insecure	Food Secure	CHIPATA	KATETE	LUNDAZI
Base:	*40*	*5*	*35*	*6*	*34*	*9*	*14*	*17*
everyday	**5**	20	3	17	3	0	7	6
Several times a week	**0**	0	0	0	0	0	0	0
Once in a week	**13**	20	11	33	9	22	7	12
Several times a month	**5**	0	6	0	6	0	7	6
Once a month	**48**	40	49	50	47	44	57	41
Less often	**28**	20	29	0	32	33	21	29
Do Not Know	**3**	0	3	0	3	0	0	6

Reasons for Not Buying Peanut Butter Frequently (Base: Those buying once a month or less often)

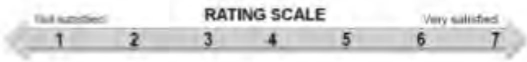
	IT'S WILD: PEANUT BUTTER							
	Total	Male	Female	Food Insecure	Food Secure	CHIPATA	KATETE	LUNDAZI
Base:	*96*	*9*	*87*	*17*	*79*	*29*	*33*	*34*
Too expensive	**43**	11	46	41	43	41	30	56
i prefer making it on my own	**22**	40	19	0	27	46	0	27
lack of money	**22**	20	22	38	18	0	41	18
its enough for the month	**20**	20	19	0	24	23	18	18
do not have enough money	**10**	0	11	0	12	15	0	18
Do not like taste	**9**	22	8	6	10	10	9	9
Too hard to find	**3**	0	3	6	3	3	6	0
only when money is available	**2**	0	3	13	0	8	0	0
one is enough for the family	**2**	0	3	0	3	0	0	9
its geting expensive	**2**	20	0	0	3	0	0	9
has a scent dont like	**2**	0	3	13	0	8	0	0
change of brand	**2**	0	3	0	3	0	6	0
budget for once month only	**2**	0	3	0	3	0	6	0
because it is used along with other peanuts bought from other manufactures	**2**	0	3	0	3	0	6	0
Not part of traditional diet	**2**	0	2	0	3	3	3	0
other adults in the family do not like it or do not want me to buy it	**2**	11	1	0	3	0	3	3
Not sold in the market	**1**	0	1	6	0	0	3	0
Children in the family do not like it or do not want me to buy it	**1**	0	1	0	1	0	3	0

Reasons for Not Buying Yummy Soy Frequently (Base: Those buying once a month or less often)

	IT'S WILD: YUMMY SOY							
	Total	Male	Female	Food Insecure	Food Secure	CHIPATA	KATETE	LUNDAZI
Base:	*30*	*3*	*27*	*3*	*27*	*7*	*11*	*12*
Too expensive	**43**	67	41	0	48	29	18	75
Too hard to find	**13**	0	15	33	11	29	0	17
Lack of money	**13**	0	14	0	14	20	18	0
Do not like taste	**10**	0	11	0	11	14	0	17
it is properly made	**4**	0	5	0	5	0	9	0
i buy in advance	**4**	0	5	0	5	0	9	0
I buy enough to last a month	**4**	0	5	0	5	0	9	0
dont prefer it	**4**	0	5	0	5	0	9	0
budget for once a month only	**4**	0	5	0	5	0	9	0
Not sold in the market	**3**	0	4	0	4	14	0	0

Satisfaction with Brands (Base: Users of brand) (by Gender, Food Security Status and Region)

	Total	Male	Female	Food Insecure	Food Secure	CHIPATA	KATETE	LUNDAZI
Base:	*149*	*19*	*130*	*25*	*124*	*44*	*57*	*48*
Satisfaction with It's Wild: Peanut Butter	**6.20**	6.16	6.21	6.16	6.21	6.45	6.18	6.00



	Total	Male	Female	Food Insecure	Food Secure	CHIPATA	KATETE	LUNDAZI
Base:	*40*	*5*	*35*	*6*	*34*	*9*	*14*	*17*
Satisfaction with It's Wild: Yummy Soy	**5.85**	6.40	5.77	6.00	5.82	5.89	6.50	5.29

- Among total users of the respective brands, satisfaction levels with It's Wild Peanut Butter are **significantly** (99% confidence level) higher than those achieved by It's Wild Yummy Soy.

Sources of Brand Awareness (Base: Users of brand) (by Gender, Food Security Status and Region)

IT'S WILD: PEANUT BUTTER

	Total	Male	Female	Food Insecure	Food Secure	CHIPATA	KATETE	LUNDAZI
Base:	*149*	*19*	*130*	*25*	*124*	*44*	*57*	*48*
FRIEND/RELATIVE/ASSOCIATE	**58**	32	62	64	57	45	63	65
TV	**34**	32	35	16	38	32	42	27
RADIO	**25**	32	24	20	26	23	33	17
ROAD SHOW	**21**	21	21	8	23	14	26	21
SIGN/POSTER/BILLBOARD	**15**	0	17	4	17	11	14	19
MAGAZINE	**3**	5	2	4	2	0	4	4
NEWSPAPER	**1**	0	1	0	1	0	0	2
INTERNET	**0**	0	0	0	0	0	0	0

IT'S WILD: YUMMY SOY

	Total	Male	Female	Food Insecure	Food Secure	CHIPATA	KATETE	LUNDAZI
Base:	*40*	*5*	*35*	*6*	*34*	*9*	*14*	*17*
FRIEND/RELATIVE/ASSOCIATE	**58**	40	60	67	56	22	57	76
TV	**28**	100	17	17	29	33	43	12
RADIO	**23**	60	17	17	24	22	29	18
ROAD SHOW	**15**	20	14	0	18	11	14	18
SIGN/POSTER/BILLBOARD	**13**	20	11	0	15	22	7	12
NEWSPAPER	**3**	20	0	17	0	0	7	0
MAGAZINE	**0**	0	0	0	0	0	0	0
INTERNET	**0**	0	0	0	0	0	0	0

Pack Size and Cost Peanut Butter (Base: Users of the brand) (by Gender, Food Security Status and Region)

IT'S WILD: PEANUT BUTTER

	Total	Male	Female	Food Insecure	Food Secure	CHIPATA	KATETE	LUNDAZI
Base:	*149*	*19*	*130*	*25*	*124*	*44*	*57*	*48*
500g	**60**	83	57	43	63	43	63	63
1 KG	**58**	63	58	72	56	64	44	71
2KG	**11**	5	12	0	14	20	4	13
200g	**4**	0	5	14	3	14	3	0
350g	**4**	0	5	0	5	14	3	0
400g	**4**	0	5	0	5	14	0	13
250G	**4**	0	6	0	6	0	6	0
360g	**2**	0	3	0	3	0	3	0
750	**2**	0	3	14	0	0	3	0
3kg	**2**	0	3	0	3	0	3	0

AVERAGE PRICE PAID BY PACK SIZE BOUGHT

	Total	1kg	500g	2kg
Total	*149*	*87*	*27*	*17*
Mean Cost (Zambian Kwacha	**34.96**	49.22	15.48	21.59

Pack Size and Cost Yummy Soy (Base: Users of the brand) (by Gender, Food Security Status and Region)

IT'S WILD: YUMMY SOY

	Total	Male	Female	Food Insecure	Food Secure	CHIPATA	KATETE	LUNDAZI
Base:	*40*	*5*	*35*	*6*	*34*	*9*	*14*	*17*
1 KG	45	20	49	33	47	44	36	53
not too sure	33	25	38	0	44	50	0	60
500g	33	50	25	100	11	0	60	20
2KG	25	0	29	17	26	33	29	18
750g	8	0	13	0	11	0	20	0
200g	8	25	0	0	11	0	20	0
5kg	8	0	13	0	11	50	0	0

AVERAGE PRICE PAID BY PACK SIZE BOUGHT

	Total	1kg	2kg
Total	*40*	*18*	*10*
Mean Cost (Zambian Kwacha	**27.40**	41.11	25.70

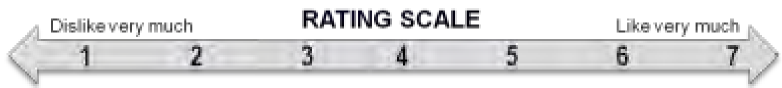
Extent of Liking the Brands (Base: Users of the brand) (by Gender, Food Security Status and Region)

IT'S WILD: PEANUT BUTTER

	Total	Male	Female	Food Insecure	Food Secure	CHIPATA	KATETE	LUNDAZI
Base:	*149*	*19*	*130*	*25*	*124*	*44*	*57*	*48*
Liked by Adults	**6.09**	6.16	6.08	6.04	6.10	6.02	6.16	6.08
Liked by Children	**6.11**	6.42	6.07	5.96	6.15	6.34	6.21	5.79

IT'S WILD: YUMMY SOY

	Total	Male	Female	Food Insecure	Food Secure	CHIPATA	KATETE	LUNDAZI
Base:	*40*	*5*	*35*	*6*	*34*	*9*	*14*	*17*
Liked by Adults	**5.65**	6.80	5.49	5.00	5.76	6.00	6.14	5.06
Liked by Children	**5.63**	4.40	5.80	5.17	5.71	6.56	5.71	5.06



- Among both adults and children, *It's Wild Peanut Butter* is liked better than *It's Wild Yummy Soy* (significant at 90%).

Recommending and Future Purchase (Base: Users of the brand) (by Gender, Food Security Status and Region)

IT'S WILD: PEANUT BUTTER

	Total	Male	Female	Food Insecure	Food Secure	CHIPATA	KATETE	LUNDAZI
Base:	*149*	*19*	*130*	*25*	*124*	*44*	*57*	*48*
Recommendation	**4.61**	4.79	4.58	4.64	4.60	4.50	4.60	4.73
Future Purchase	**4.67**	4.79	4.65	4.64	4.68	4.61	4.72	4.67

IT'S WILD: YUMMY SOY

	Total	Male	Female	Food Insecure	Food Secure	CHIPATA	KATETE	LUNDAZI
Base:	*40*	*5*	*35*	*6*	*34*	*9*	*14*	*17*
Recommendation	**4.58**	4.80	4.54	4.67	4.56	4.78	4.57	4.47
Future Purchase	**4.48**	4.20	4.51	4.33	4.50	4.78	4.64	4.18

- There is no significant difference in the likelihood of recommending either brand or in the intention of buying the brands in the future.

Reasons for Not Purchasing the Brand in the Future

	Yummy Soy	Peanut Butter
Base:	*9*	*4*
Do not like the taste	**78**	**25**
Too expensive	**33**	**25**
the taste is changing now	25	
Not sold in market	22	0
Too hard to find	11	0
Not part of traditional diet	11	25

LOW BASES

- Reasons for not wanting to buy the brands again in the future center around the taste qualities as well as the expense.
- However, given the extremely low bases, the finding should be taken with due caution.

Demographics 1/4

	Total	Male	Female	Food Insecure	Food Secure	CHIPATA	KATETE	LUNDAZI
Base:	*657*	*116*	*541*	*200*	*457*	*216*	*222*	*219*
	Sex of Respondents							
Male	**18**	100	0	16	19	14	23	16
Female	**82**	0	100	85	81	86	77	84
	Sex of Head of Household							
Male	**77**	95	73	73	79	79	79	74
Female	**23**	5	27	27	21	21	21	26
	Age of Respondents							
Mean Age	**34.02**	37.37	33.31	35.32	33.46	34.07	34.02	33.98
	Marital Status of Respondents							
Currently married-monogamous	**70**	60	73	69	71	73	72	67
Single	**11**	31	7	11	12	11	15	8
Widowed	**8**	3	10	10	8	10	5	10
Divorced	**4**	2	5	5	4	2	4	6
Currently married-polygamous	**3**	3	3	2	3	1	1	6
Separated	**3**	2	3	4	2	2	3	3
	Number of Household Members							
Mean Household Members	**5.18**	5.25	5.16	5.45	5.06	5.47	5.15	4.92
	Number of Household Members 65+							
Mean Household Members 65+	**0.19**	0.19	0.19	0.34	0.13	0.24	0.19	0.15
	Number of Household Members 15 - 64 Years							
Mean Household Members 18-64	**2.78**	3.15	2.70	2.73	2.80	2.96	2.78	2.59
	Number of Children 5 - 14 Years							
Mean Number of Children 5-14	**1.38**	1.36	1.38	1.54	1.31	1.42	1.37	1.34
	Number of Children below 5 Years							
Mean Number of Children <5	**0.84**	0.55	0.90	0.85	0.83	0.86	0.81	0.84

Demographics 2/4

	Total	Male	Female	Food Insecure	Food Secure	CHIPATA	KATETE	LUNDAZI
Base:	*657*	*116*	*541*	*200*	*457*	*216*	*222*	*219*
	Education of Head of Household							
Standard 1-4	**10**	14	9	13	9	16	8	7
Standard 5-8	**23**	18	25	23	24	25	23	22
Formal 1-2	**19**	16	20	24	17	18	16	24
Formal 3-4	**22**	22	22	23	22	19	23	25
Post secondary	**16**	19	16	8	20	13	25	11
Adult literacy	**1**	2	1	1	1	0	1	2
None	**8**	9	7	10	7	8	5	10
	Education of Head of Respondent							
Standard 1-4	**16**	13	17	18	16	24	10	15
Standard 5-8	**28**	22	30	32	27	29	28	29
Formal 1-2	**17**	16	18	21	16	12	18	21
Formal 3-4	**17**	23	15	13	18	18	19	13
Post secondary	**9**	17	7	4	11	5	15	6
Adult literacy	**1**	1	1	1	1	0	1	2
None	**12**	8	13	13	11	12	9	15

Demographics 3/4

	Total	Male	Female	Food Insecure	Food Secure	CHIPATA	KATETE	LUNDAZI
Base:	*657*	*116*	*541*	*200*	*457*	*216*	*222*	*219*
Rooftop Material								
Corrugated metal	**88**	80	90	84	90	97	76	93
Tile	**6**	10	5	9	5	2	16	0
Thatched/vegetable matter/sticks	**3**	4	3	4	3	1	3	6
Other	**1**	2	1	2	1	0	4	0
Wood	**1**	3	0	1	0	0	1	0
Plastic sheeting	**1**	0	1	0	1	0	0	1
Mud/cow dung	**0**	0	0	1	0	0	0	0
Flooring Material								
Concrete/flag stone/cement	**59**	60	59	52	62	57	68	52
Tile/bricks	**21**	21	21	15	24	13	17	33
Earth/mud	**19**	18	20	32	14	29	14	15
Exterior Walls								
Tile/bricks	**44**	43	44	45	44	45	38	50
Concrete/flag stone/cement	**39**	37	39	26	44	29	50	37
Earth/mud	**17**	20	16	29	12	26	12	13
Toilet Facilities								
Pit latrine	**87**	83	88	91	86	88	82	91
Ventilated improved pit latrine	**10**	16	9	9	11	8	14	9
Flush, private	**2**	2	2	1	3	4	3	0
Water Supply								
Public tap	**35**	**34**	**35**	**34**	**35**	**48**	**25**	**32**
Tubewell/borehole	**26**	27	26	36	21	23	29	25
Protected dug well	**18**	16	19	19	18	10	30	15
Piped into plot/yard	**15**	21	14	8	19	14	10	21
Tankers-truck/vendor	**3**	0	4	3	4	5	1	4
Unprotected dug well/springs	**1**	1	1	2	1	0	2	2

Demographics 4/4

	Total	Male	Female	Food Insecure	Food Secure	CHIPATA	KATETE	LUNDAZI
Base:	*657*	*116*	*541*	*200*	*457*	*216*	*222*	*219*
	Household Connected to Electric Grid							
Yes	**34**	43	32	21	40	40	35	28
No	**66**	57	68	79	60	60	65	72
	Cooking Fuel							
Charcoal	**78**	74	79	77	79	75	73	87
Firewood	**12**	13	12	20	9	16	15	5
Electricity	**9**	13	9	3	12	9	11	8

- As target respondents were the household decision makers on food purchases, 82% of respondents were women. In contrast, 77% asserted that the heads of household were men.
- The average age of respondents is 34,
- The average household size is five persons.
- Nearly two-thirds (66%) of households had no electricity; however, among those classified as food insecure, that proportion rose to 80%.
- Charcoal is the main fuel used for cooking.

ANNEX 9: IN-DEPTH GENDER FGD FINDINGS

Findings

Training and Promotion

The FGDs asked a number of interrelated questions around training in current positions, promotion opportunities and procedures, and if certain jobs are restricted to men or women, and why. Participants were asked if they were aware of the SAFE project or activities and if there was any direct linkage with their training or promotions.

In most cases, with a few exceptions noted here, the participants had no knowledge of the SAFE project per se, but in the case of COMACO, Sylva Foods, Classic, Star of the Lake, and Project Peanut Butter, some of the employees were aware of visits or trainings by TNS or General Mills staff. In the case of Lumuno (preserved chili sauce), TNS provided a half-day workshop for the staff on sanitation and hygiene that workers said had benefited them at home, in the community, as well as at work. It is likely that a great deal of the training provided through/by SAFE is on new processing equipment operation and maintenance and, therefore, benefits male operators and technicians. Female and male workers in the production line at several enterprises—Project Peanut Butter, Classic and Lumuno—received training in Hazard Analysis and Critical Control Points (HACCP) and in other areas of quality control via SAFE.

In general, training was in-house done by section heads or in small enterprises, like Lumuno, by the Managing Director. Classic Foods had the most extensive training period of up to three months while others, including COMACO, had no formalized training periods if a person was hired with previous qualifications, such as in human resources. In the smaller enterprises workers were cross-trained to work in and cover other areas as needed.

Enterprises that had direct project funding from international donors, including COMACO and Project Peanut Butter, offered the most training opportunities from external sources, such as workshops and seminars. The Embassy of Norway offered a five-day gender training and sensitization workshop to COMACO staff that was highly appreciated by the FGD participants.

In no case were men or women prohibited by management from doing or pursuing a certain job. A common thread among the nine enterprises is that women prefer day time jobs and shifts, women tend to be uncomfortable around processing equipment and its operation (noise, weight), and men, not women, handle livestock operations on site, such as the "piggeries" at Gaea. Another example is that men are the cheese makers at Doinyo due to the equipment used. Women and men are paid the same amount for the same work.

Promotions are normally from within the organization and based on characteristics and skills, such as commitment to the job, trustworthiness, communication abilities and a required level of literacy. Previous experience with the new position is not usually a prerequisite. There was no discernable direct linkage between SAFE assistance to the food processor and increased management or leadership opportunities among the FGD participants.

Many of the workers had been employed for more than five years. The security of a regular wage was the primary reason given combined with the lack of employment options. Particularly in the cases of Classic, Gaea and Project Peanut Butter, the employees felt that they were valued and respected members of a "family."

Without exception, FGD participants expressed a desire to have additional training and knowledge about their own jobs as well as the larger enterprise to boost their self-confidence and value as an employee.

Policies

The FGDs queried participants about their awareness of women friendly workplace policies currently in place, which ones have benefited them directly, the enterprise's overtime policy, and recommendations for new or expanded workplace policies of particular benefit to women. Although policies were included in the SAFE baseline gender audits, the program did not/could not mandate policy change.

In all three countries, maternity leave is mandated for its formal employees. Zambia has just increased its leave from three to six months. All nine enterprises grant maternity leave, but mostly unpaid. In Zambia, a Mother's Day of one day of paid leave per month can be used for personal reasons and is usually granted by COMACO to its women employees upon request.

Flexible schedules are not the norm, but is a big work incentive/motivator to the women employees of Gaea who can start work at 9 after they get their children ready for school. COMACO also allows workers to begin earlier to avoid traffic.

Overtime is sometimes required of its workers by all nine enterprises. Payment for overtime to meet a rush order is not usually compensated according to FGD participants, and only when the overtime goes into the nighttime is transport home provided. Saturdays are typically half days and employees get one day off per week. The requirement to work late, and without pay or choice, was a commonly felt hardship among the participants.

Paid maternity leave was most commonly mentioned policy addition desired by the women. This was followed by the provision of paid annual leave among workers in the smaller enterprises. A few other participants recommended an incentive or bonus for overtime.

Formal employees are the only ones who benefit from the above policies. Casual laborers (those working less than six months) do not and would like to become employees.

Income

Several dimensions around income were discussed, including the use of income, the proportion of household expenses covered by the workers' income, how are gaps in income and expenses are met and the decision making process and control of the use of the worker's income within the context of the household. Participants were also queried indirectly about to what extent SAFE led to increased income generation of the workers.

No FGD participants were able to link SAFE client support with and effect on their wages.

The wages from work with the SAFE assisted processor were essential for buying food, paying utilities and meeting all cash expenses of the households headed by women who were single but often supporting their extended family (mother, father, siblings) in addition to their own children. Star of the Lake and Gaea had a high number of single heads of households.

In the majority of cases, the wages were not sufficient to cover all cash expenses, especially school fees of young household members. The portion of household expenses covered by their wages ranged from 50% to 90%. The respondents covered the gap by pay advances from the processors and loans from women's groups. Many women expressed the desire to have a micro retail business on the side that they assumed would be profitable and help fill the gap.

About one-third of the FGD participants were married with spouses who had formal employment. Some had siblings or parents who provided income to meet cash household expenses. Some were single and the head of the household. The younger women who still lived with their parents had the most discretionary income.

The vast majority of women had control over their wages. About half had sole decision-making power on the use of the money, and the remainder consulted with their spouse or other family member and mutually agreed upon priorities and allocation of cash within the household. There were fewer cases where women did not have an equal say in the use of her wages. (This is in sharp contrast with more conservative practices often found in West African Muslim communities. Author's observation.)

Community Participation

This topic included the identification of other groups and organizations where the women participated, their roles and responsibilities, and where/how the skills and, if applicable, leadership qualities were developed. This question also addresses EQ9, regarding the link of SAFE with increased leadership management opportunities for women.

There was no discernable direct linkage between SAFE assistance to their employer and increased management or community leadership opportunities for the FGD participants.

The majority of women belonged to a church and/or a women's lending group. Their church involvement may have led to secondary community involvement, such as visiting HIV clinics. Workers who had administrative skills, such as letter writing or bookkeeping at their place of work, often provided support to the church.

According to a Gaea worker: "My working in Gaea in a permanent job has made me a better person in the community and also socially, because I'm able to meet my obligations in the groups and I can support other women in their plans, and I meet my obligations at home. So my working at Gaea has made a better person compared to the time when I was in the village where the income is not very good."

And from a Classic Foods employee: For an individual to be chosen to be a church leader it means there's something they have identified an innate quality in you; you can preach, relate to people well and that you are up to the task…. In this place (Classic Foods) there is no restriction- you can communicate to anyone. People here are open. It has helped me gain confidence and leadership skills from my boss since *they are not far from me. I can see how they relate to their workers such that when I get a chance to work as a leader at church I can lead them. We have been trained on how to communicate with different people. The Managing Director is a mentor whereby I have learnt how to relate to people more so in my community. I have learnt how to handle individual differences by being understanding and impartial in such matters."*

Community participation was limited by the 6-day work week and household responsibilities. Some women said they would like to have better time management skills. Some of the workers said that they were too tired or too busy to take on additional activities in their communities.

From a staff member at DoinyoLessos: Some days, you have to stay until 8 pm then you can go home and see that baby of three months. And then not all the children are normal. For me, I have a child who is challenging. Imagine I get to the house at 10 pm, I don't even know what I can say.

Moving Forward

In wrapping up the discussion FGD participants were asked how they would like to see themselves in two year's time.

The vast majority of the participants said they wanted to work for themselves, have their own business, either wholly or as a side line to their work at the food processor. Many women also expressed their desire for more knowledge and skills in agriculture extension with the aim of employing and supporting other women. Those women who had limited or no literacy skills, wanted to acquire them. All wanted to make more money and to ensure that their children or school aged extended family members were able to be adequately fed and educated.

From the Human Resource Manager at one of the assisted processors: I am looking at seeing myself running my own business in food processing. I would, if I could, work with the community mostly of women. I could look at applying food processing and preservation (techniques). I have seen most of our vegetables go to waste during the rainy season and I would like to go into that.

Conclusions

The gender FGDs did not reveal a direct linkage or positive correlation between SAFE client assistance with increased leadership opportunities and advancement for women.

Nationally mandated policies, notably maternity leave was adopted to some degree by all nine enterprises but varied in terms of being paid or unpaid maternity leave. The individual enterprise's policy on overtime (paid or unpaid) also varied with COMACO, Classic Foods, Gaea, Lumuno Organics and Project Peanut Butter providing paid overtime to its workers. The workers at firms that did not pay for overtime hours—Sylva Group, Star of the Lake, DoinyoLessos, and Chankwakwa—all noted they would like a policy change to compensate for overtime.

The assistance of SAFE did not have any discernable direct link to wages paid to the workers. If SAFE assistance made an enterprise more competitive and profitable, the firm may have hired more workers, increased the hours or wages of existing female and male formal and casual workers, but this could not be verified by the FGD participants.

Church membership was the primary and sometimes only venue for community participation by the FGD participants, followed by participation in women's lending groups. Both were said to be very beneficial and provided some women with leadership opportunities, trainings or outreach to health clinics. Lack of free time and household responsibilities were given as constraints.

Most women would like to be self-employed and running their own micro enterprise selling products, either full or part time. A few women wanted to begin new careers in health care, and one as a vegetable food processor who wanted to work with women's groups of growers or employ women directly. Another common theme was having sufficient income to school and feed their children and extended families.

The gender FGDs did not uncover evidence of any direct linkage or positive correlation between SAFE assistance and increased opportunities and advancement for women, nor did to reveal that SAFE directly led to increased incomes for women employees. There may have been an indirect benefit to the women employees if SAFE assistance led to expansion or greater profits, which led to increases in pay and/or promotions. This indirect impact was not substantiated in the discussions with the FGD participants.

Recommendations

The five recommendations at the conclusion of the baseline assessment and presented below seek to address the question: *What can be done to improve roles, opportunities and income generation for women?*

1. Increase information and sharing about SAFE, its partners and technical information provided across a broader spectrum of workers at the SAFE assisted food processors. This will better enable the assessment of programmatic impacts on its workers.

From a sales person at DoinyoLessos: "I don't know much about the cheese, but a customer wants you to explain how the product has come, how you have produced it, yet I don't understand. So you feel you are not doing the right thing."

2. SAFE could consider co-sponsoring with assisted food processors on-site life skills development learning activities, such as literacy classes, effective communication (speech), and time and money management for lower and mid level workers. This supports the previous recommendation.

From the Chankwakwa FGD regarding starting back up a literacy course that was previously offered by a local church: "Yes we could come if the classes were restarted." Sunday would be a good time and some of the husbands would be willing to come.

From the production manager at one of the assisted processors: Mostly the problems I face when conducting my job arise from communication breakdown but if there was the right channels of communicating to me, I see no problems arising in my job.

3. SAFE could encourage the food processors to provide gender sensitization workshops and/or trainings for their staff, as was provided to COMACO by the Embassy of Norway in November 2014. SAFE could compile a resource list of individuals or organizations that

provide affordable workshops. Subtopics could include communications, negotiating and decision making, all topics mentioned in the FGDs.

One of the COMACO FGD participants expressed the benefits to women farmers, some who are not literate, on having a say in how the money from farming is spent and that they have a right to make decisions on the spending of the money. "The gender workshop made me stronger in planning with my husband how the money is used."

4. TNS is finalizing a new Business Assessment Tool (BAT) that they will use with all of the new SGBs. The Gender Audit is no longer a separate stand-alone data collection instrument. (Note: the gender audit was only done with about one-quarter of the SAFE clients, and excluded Zambia, and there was no follow up or recommendations.) TNS said that gender related information will be included under human resources as well as under general information. The new tool could be the mechanism to include feedback and recommendations to the assisted processors on where there are gaps or opportunities for transferring training and assistance provided by SAFE to women employees, and the offering of life skills and gender sensitization/empowerment courses/workshops as suggested previously.

5. Broaden women's participation of SAFE assisted clients, to include lower and mid-level workers in the SAFE sponsored market sector trainings.

ANNEX 10: TERMS OF REFERENCE (TOR)

C.2 SCOPE OF WORK

1) Objectives

The TAP BFS-PE TO will support four PEs of BFS centrally-funded/centrally-managed projects or activities.

2) Proposed Activities

To fulfill Evaluation Policy and ADS 203 requirements, the TAP BFS-PE TO Contractor shall, in coordination with BFS, manage, design, and implement four PEs of BFS Feed the Future centrally funded and centrally-managed activities. The TAP BFS-PE TO Contractor shall utilize BFS guidance and templates for the management, design, and implementation of PEs. Given the range and diverse nature of the activities implemented by the targeted BFS mechanisms, expertise across a range of research, M&E and capacity-strengthening food security-related areas will be required, including organizational and staff/consultant expertise in the use of both quantitative and qualitative methodologies in conducting PEs.

The BFS centrally-managed mechanisms to be evaluated are listed below. The parameters of each PE are contained in Attachment J.2.

Activity Final Performance Evaluation

African Cocoa Initiative: The project develops the cocoa sector by fostering public-private cooperative investments in cocoa, improving the genetic quality and productivity of the cocoa, expanding farmer education and training programs, and improving cocoa input supply chains. It works in Cameroon, Côte d'Ivoire, Ghana, Nigeria, and Togo.(http://worldcocoafoundation.org/wcf-african-cocoa-initiative/)

RESAKSS Analysis and Capacity Building: This is a consortium of CGIAR and regional organizations being led by IFPRI to deepen and broaden available food policy information and analysis, as well as networks of food security and policy researchers and practitioners both in country and regionally. (http://www.resakss.org/)

Solutions for African Food Enterprises (SAFE): SAFE provides customized technical assistance to select food processors with the aim of increasing the competitiveness of the African food processing sector and to expand availability of affordable and nutritious foods. SAFE is carried out through an alliance between Partners in Food Solutions (PFS) and TechnoServe. PFS is a non-profit organization formed by General Mills and includes technical expertise from General Mills, Cargill, Royal DMS, and most recently Buhler. PFS provides remote-based, demand driven customized technical assistance to selected food processors which is carried out by TechnoServe, as well as broader trainings on key industry knowledge gaps delivered to larger sector wide groups through seminars. TechnoServe provides the on-the-ground food technology specialists and business advisors to facilitate the on-site customized technical assistance recommended by PFS. SAFE builds on the structures put in place by a two-year predecessor program, the African Alliance for Improved Food Processing (AAIFP) which ended November 30, 2012. SAFE operates in Kenya, Malawi, and Zambia (http://www.partnersinfoodsolutions.com/)

Activity Midterm Performance Evaluation

FTF Partnering for Innovation: This cooperative agreement is focused on finding and commercializing agricultural technologies that have the potential to impact smallholders and supporting private sector engagement within Feed the Future. The program works to engage the private sector to commercialize technologies to the smallholder farmer market and builds and procures public-private partnerships that support Feed the Future efforts.(www.partneringforinnovation.org)

C.3 TASKS

For each Performance Evaluation, the Contractor shall:

Design, plan, and implement independent rigorous PEs of BFS centrally managed activities to determine project or activity performance and/or impacts, focusing on progress, successes, obstacles, constraints, and areas of need and for improvement. Conduct data collection and analysis, and produce reports and briefings on PE findings that follow USAID guidance and format. Contribute to building the capacities of host country institutions (government, NGO, and privates ector) to conduct PEs by including local institutions and individuals in all phases of evaluation design and implementation, to the maximum extent feasible.

In addition to the requirements listed above, the Contractor shall:

1. Confer with USAID and with the Implementing Partner to create the statement of work for the PE, including identifying the PE questions and evaluation methods to be used (within two weeks of PE start date)
2. Identify the evaluation team members and obtain BFS approval (within three weeks of PE start date)
3. Develop the PE Plan and obtain BFS approval (within three weeks of PE team's start date)
4. Conduct desk review of required documents (timing of remaining steps determined in PE Plan)
5. Compile performance reporting data
6. Conduct stakeholder, key informant and/or focus group interviews in person or via phone or email
7. Conduct country visits to identified country(ies), as applicable
8. Conduct field visits while in country, as applicable
9. Provide exit briefing(s) to USAID mission(s)
10. Produce up to two versions of draft PE report, incorporating USAID feedback
11. Provide in-person or telephone briefing on the draft report to BFS and to the implementing partner
12. Produce the final PE report
13. Present the final PE report to USAID and partners in Washington DC
14. Provide data required for Open Data posting.