

STRATEGIC ACTION PLAN

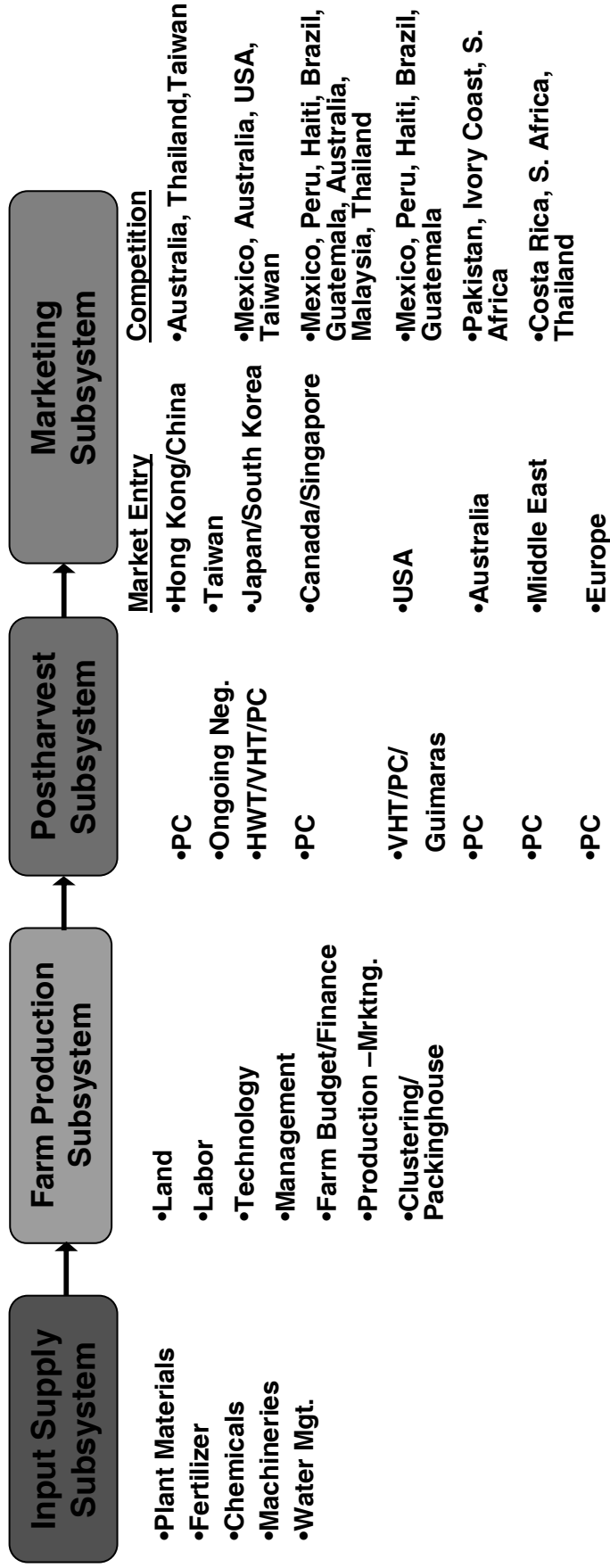
-MANGO



OUTLINE OF PRESENTATION

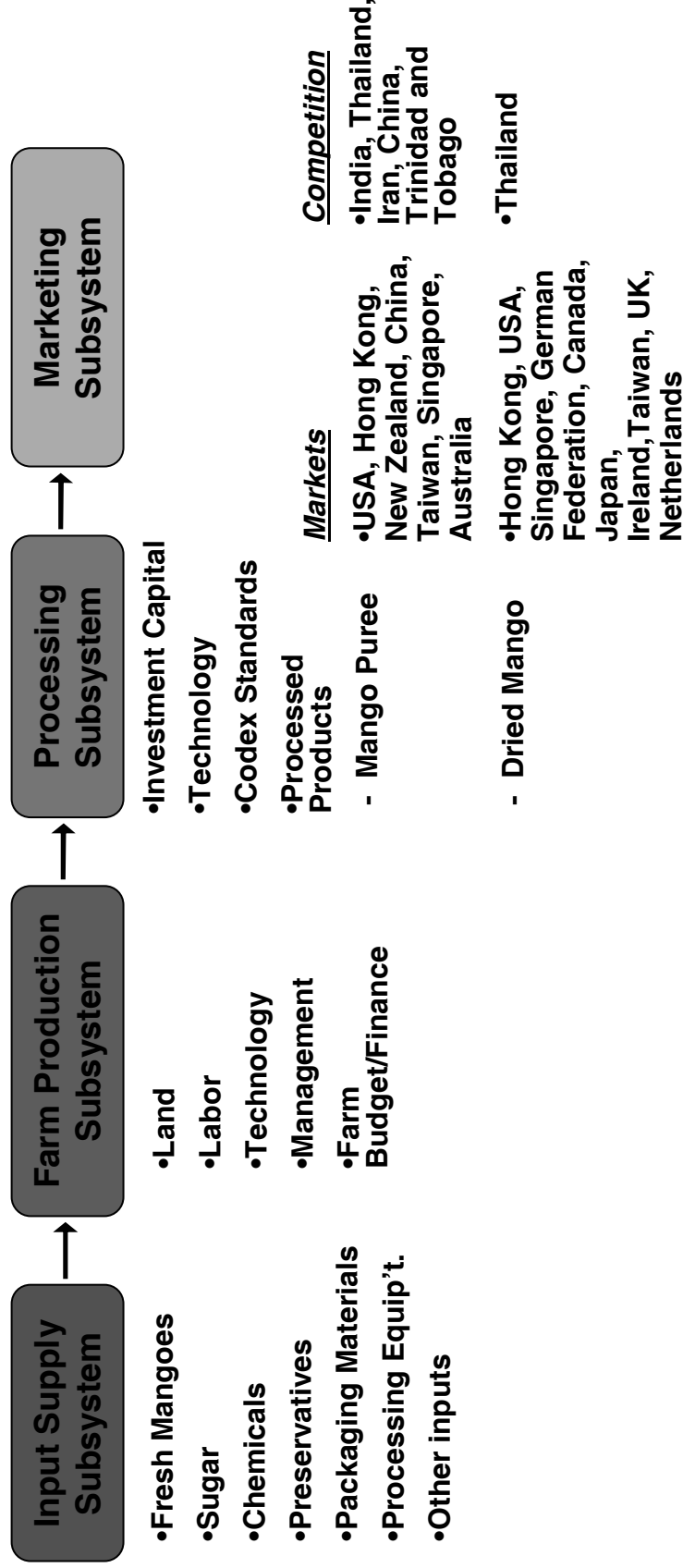
1. Mango Agribusiness System
(Fresh and Processed)
2. SWOT
3. Mango SAP
4. Industry Targets
5. Constraints and Required Action
6. Plan Implementation, Monitoring and
Evaluation
 - a. *Institutional*
 - b. *Policies*

1a. FRESH MANGO AGRIBUSINESS SYSTEM



Government Sector Support	
<i>Policies/Legislative Agenda: Food safety and Quality Standards</i>	
<i>Programs/Projects: HVCC, ACEF</i>	
<i>Support Services/Regulations: Research, Development and Extension, Institutional Development, Market Information/Promotion, Quarantine, Credit</i>	
•FPA/BPI	•DA-RFUs/LGUs/ SCUs •DA-RFUs/BPI/ SCUs/ BAFPS •AMAS/Attaches/ BAS/NSO
<i>Private Sector Initiatives</i>	
•Nursery Operators/PSIA	•Producers/Associations
•Input Suppliers	•Sprayers/Contractors
	•Financing Institutions
	•Exporters/Associations
	•Traders

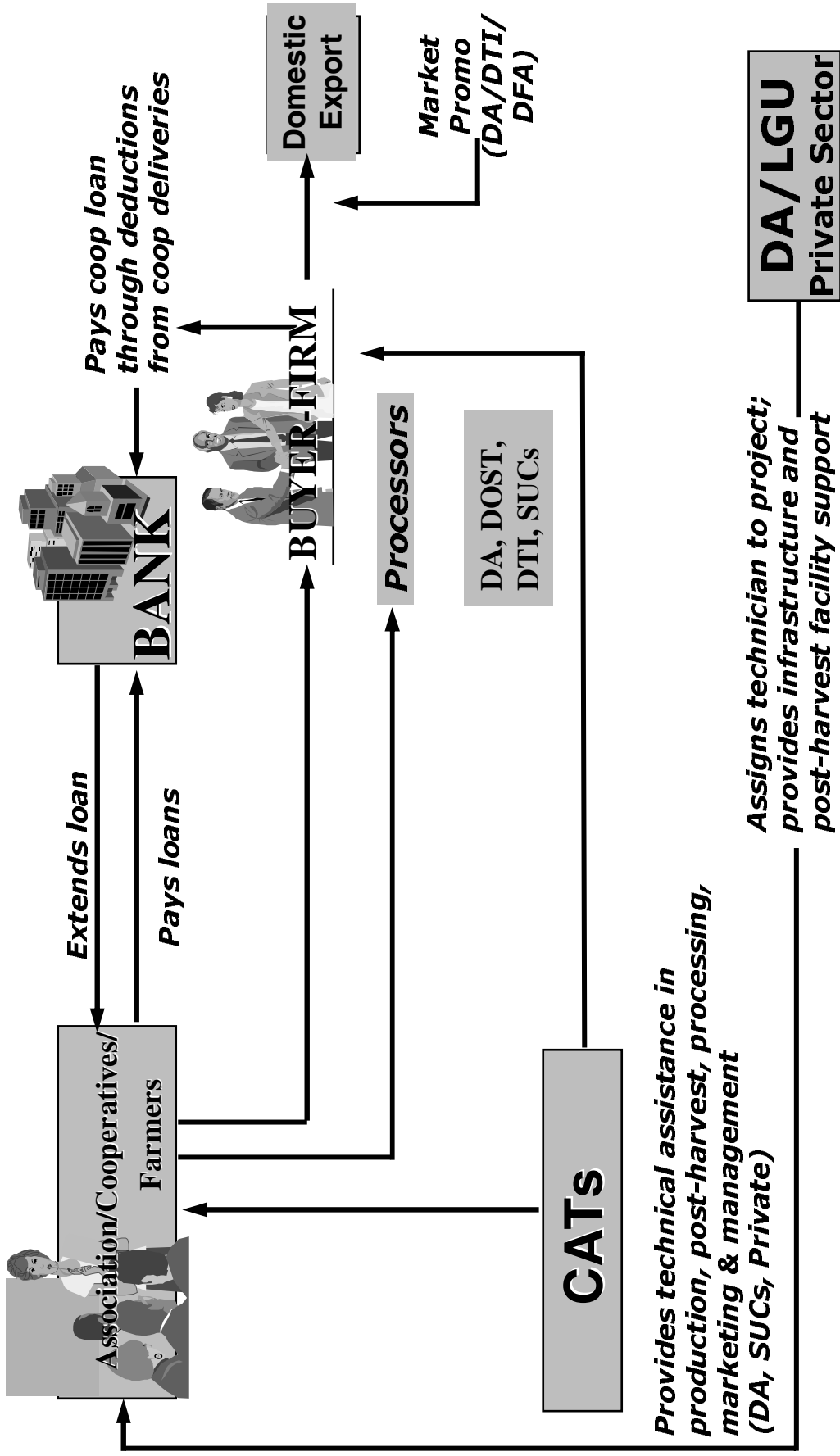
1b. PROCESSED MANGO AGRIBUSINESS SYSTEM



<u>Government Sector Support</u>	
<i>Policies/Legislative Agenda:</i> Food Safety and Quality Standards	
<i>Programs/Projects :</i> HVCCP/ACEF	
<i>Support Services/Regulations:</i> Research, Development and Extension, Institutional Development, Market Information/Promotion, Product Analysis, Package Testing, Nutrition Labeling Tests, Product/Process Standardization, Credit	
<u>Private Sector Initiatives</u>	
• Processors/ Associations	• Exporters/ Associations
• Mango Producers/ Associations	• Traders/ Associations

1c. Producers Linkage with User Scheme

(An Illustrative Sample)



2. SWOT

STRENGTHS:

- Carabao mango is considered one of the best varieties
- 5th most consumed fruit in the world (after citrus, grapes, banana and apple)
- Year-round production possible
- Peak season coincides with the most favorable market in Hong Kong/China
- Suitably grown in different agro-climate regions with available areas for expansion
- Priority fruit crop supported by major programs of DA, DTI and DOST
- Availability of production and processing technologies

2. SWOT

WEAKNESSES:

- Lack of quality (certified) planting materials
- Erratic and relatively low yield
- Predominance of backyard farms hence the problem on inconsistent supply of quality fruits
- Susceptible to range of insect pests, diseases and disorders
- Disaggregate sector and multi-layered resulting in marketing inefficiencies
- Highly perishable (short storage life)
- Long gestation period
- Lack of quality assurance plan (QAP) and HACCP
- High freight cost and inadequate transport facilities/ price fluctuation

2. SWOT

WEAKNESSES:

- Inefficient dissemination of technologies/information
- Inadequate marketing and other critical information to support decision-making of industry players
- Investors' reluctance to fund establishment of new business opportunities

THREATS:

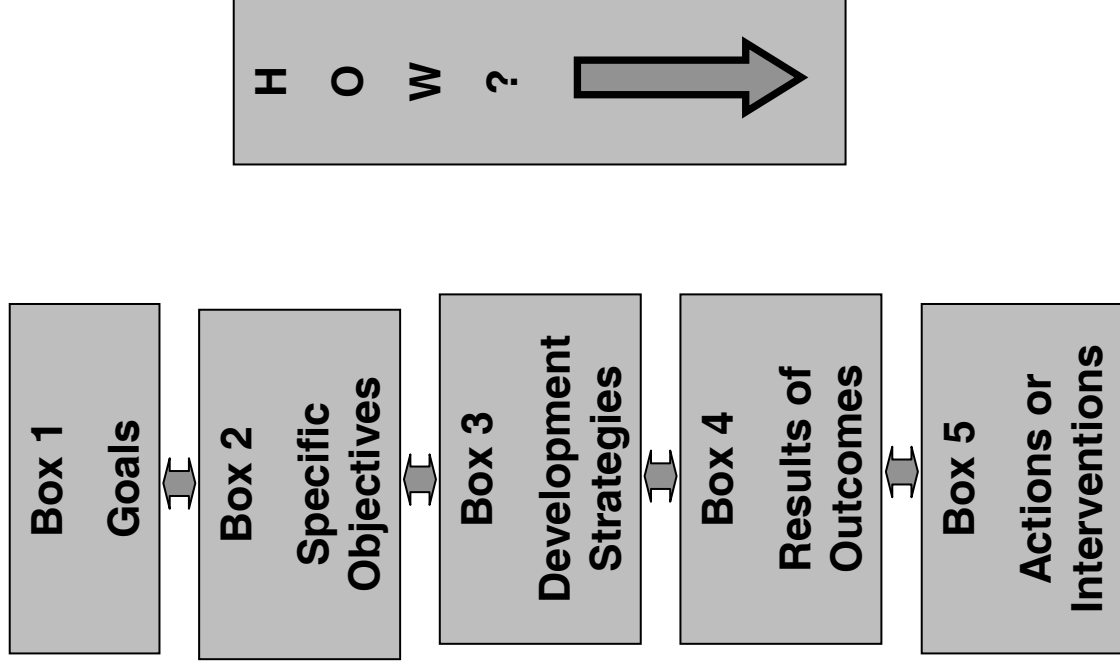
- Potential alternative markets (Taiwan/ China) are new members of WTO hence will implement sanitary protocol
- Unmet demand during off-season hence the danger of losing export market through export substitution from other mango-producing countries
- Agrarian reform law
- Prohibition/Regulation of additives in processed products

2. SWOT

OPPORTUNITIES:

- Opportunity of controlled atmosphere (CA) to prolong shelf-life making shipment possible to distant markets
- High demand for selected product lines in inter'l. markets
- Lower tariff imposed by other countries under GATT
- International trade is < 2% of world production; EU is still a developing market (2nd world mango importer)
- Presence of large domestic market
- Strategic geographical location in ASEAN and Asian markets
- Expansion of markets (USA, Australia, South Korea, China)
- Expansion of new plantings in other regions for off-season production

3. MANGO STRATEGIC ACTION PLAN





General Objectives:

- Increase productivity & profitability
- Year-round supply
- Enhance global competitiveness
 - *Price*
 - *Quality*

4. INDUSTRY TARGETS

		TARGETS			
ITEMS	2001/2002	2004	2007	2012	
- Increase Yield (Nat'l./Prov'l.)	baseline	5%	15%	20%	
- Reduce Ph Losses	6-40% rejection	5%	10%	20%	
- Reduce Rejection	20% decay				
* Fresh		5%	10%	15%	
* Processed		5%	10%	15%	
- Year-Round Supply		Extend 3-5 months	Extend 3-5 months	Extend 3-5 months	



5. CONSTRAINTS AND REQUIRED ACTIONS

- **Input/Farm Production**
- **Postharvest**
- **Processing**
- **Marketing**

CONSTRAINTS & REQUIRED ACTIONS

5a. Input Supply/ Farm Production

5a. Input Supply/Farm Production

CONCERN	CONSTRAINTS	REQUIRED ACTIONS
Selection of Site	Unsuitable sites planted new areas – microclimate	Map out every area with prolonged dry season (3-5 months) <i>Document</i>
Plant Materials	No standards, disease status, stocks No reliable source of registered “Carabao” mango strains	Nursery accreditation/ certification in all mango regions: NSIC varieties, disease-free
Distance of planting	Close density planting at 4-6 m, over-crowded, low yield	Planting distance 10m or more Inter-banana, papaya, pineapple
Varietal Improvement	Carabao mango has excellent quality but small, short shelf-life, anthracnose susceptible, poor color	Biotechnology and breeding can produce commercial results in 5 years
	Export off-season fruits to countries as Australia using their choice variety	Test Kensington for off-season in Australia

Selection of Site

A. High elevation > 100 mm *Lychee, Longan, Peach, Cherimoya*
Macadamia,

B. Low elevation < 600 m

Distinct Dry & Wet *Even rainfall*
 4 mo. Dry *distribution*

Require

Mango Durian
 Cashew Mangosteen

Prefer

Chico Rambutan
 Santol Pineapple
 Tamarind Papaya/Langka

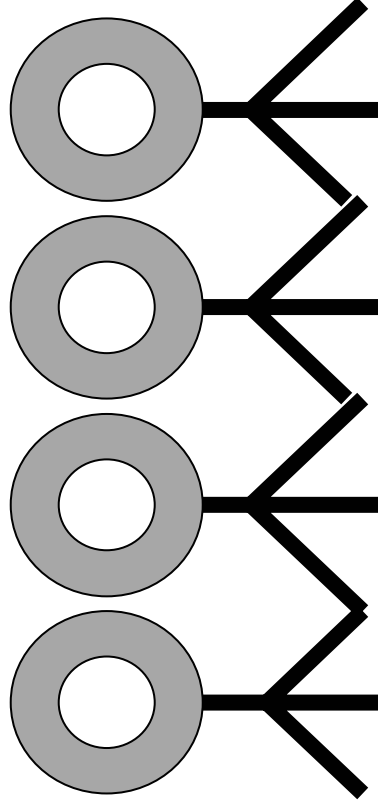
Mango

- *Requires prolonged dry period 4 months.*
- *Good drainage*
- *Other factors as fertility, texture, pH, calcareous soil can be remedied*

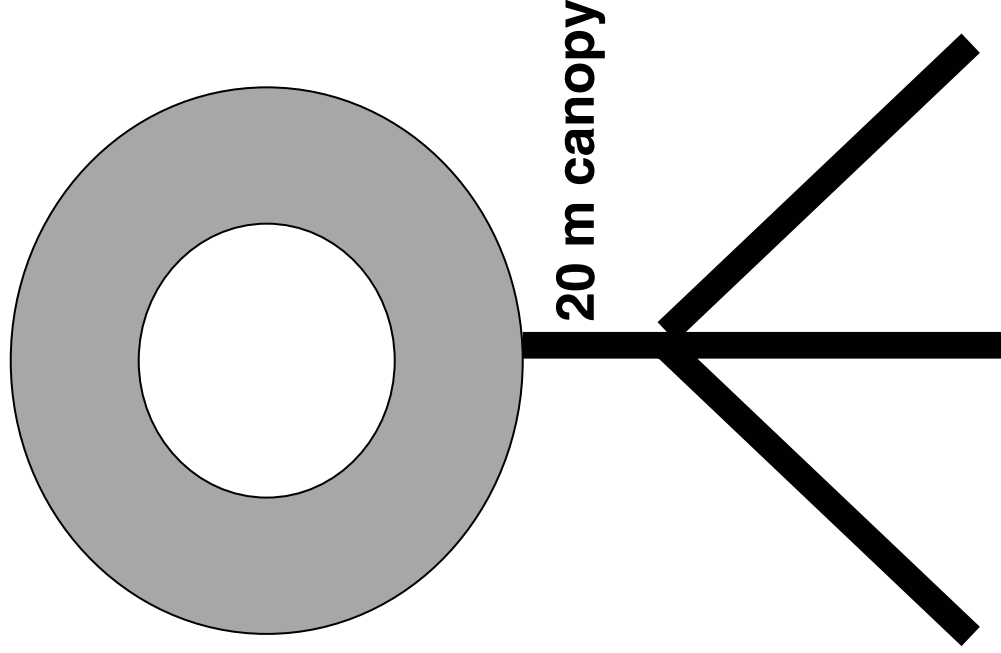
Land Classification by Bu. Of Soils - FOR MANGO

- *Will allow adjustment, changes in unsuitable areas already planted*
- *Identify new areas as basis for new plantations*
- *Identify micro climate for out of season production*
- *Guide for other fruits for suitability*

HIGH DENSITY PLANTING



25 m² @ 5m



5a. Input Supply/Farm Production

CONCERN	REQUIRED ACTION
CONSTRAINTS	

Substitute for KNO₃	KNO ₃ scare, expensive due to military restriction and controlled marketing	Nationwide regional test for timing, dosage, effectivity and quality of fruits : <i>CANO₃</i>
Palawan mango pulp weevil	May be serious threat to mango industry	Study thoroughly, may decide to replace mango in Palawan
Flower Induction	Readiness to flower Control and recognition Dose, timing, injury	More concentrated and refined research
Mineral Nutrition, Irrigation, Pruning Training	Meager studies on yield and fruit quality	In-depth studies especially on fruit quality and yield

5a. Input Supply/Farm Production

CONCERN	CONSTRAINTS	REQUIRED ACTION
Pest/Disease/ Weed Control	IPM+Biocontrol for commercial growers; simpler Calendar schedule for small farms	Specific private research for commercial growers; Simpler research for small growers
Research and Technology	Many areas need deeper studies for the export market, i.e. mineral nutrition and fruit quality, bio-technology, breeding, physiology	Requires high caliber expertise, focused funding, flexibility to achieve objective. Piece-meal researches in different institutions cater more to small growers
		Extension system requirement is different for small farmers

CONSTRAINTS & REQUIRED ACTIONS

5b. Postharvest

5b. POSTHARVEST

CONCERN	CONSTRAINTS	REQUIRED ACTIONS
<u>HARVESTING</u>		
* Maturity	– Seasonality of production forces growers/suppliers to harvest immature fruits	increase year-round supply
<u>MARKET PREPARATION</u>		IPM & Cultural Management
* Sorting/Grading	No price differentiation between sorted & assorted produce	Planting in suitable micro-climates develop & implement a well-planned quality assurance program (QAP)
	Quality requirements for export not consistent	strong market linkage between producers/growers' association and traders (exporters/local processors)
	Lack of awareness in PNS standards	total systems approach (production to marketing)
	Weak forward and backward linkage	

MANGO DISEASES

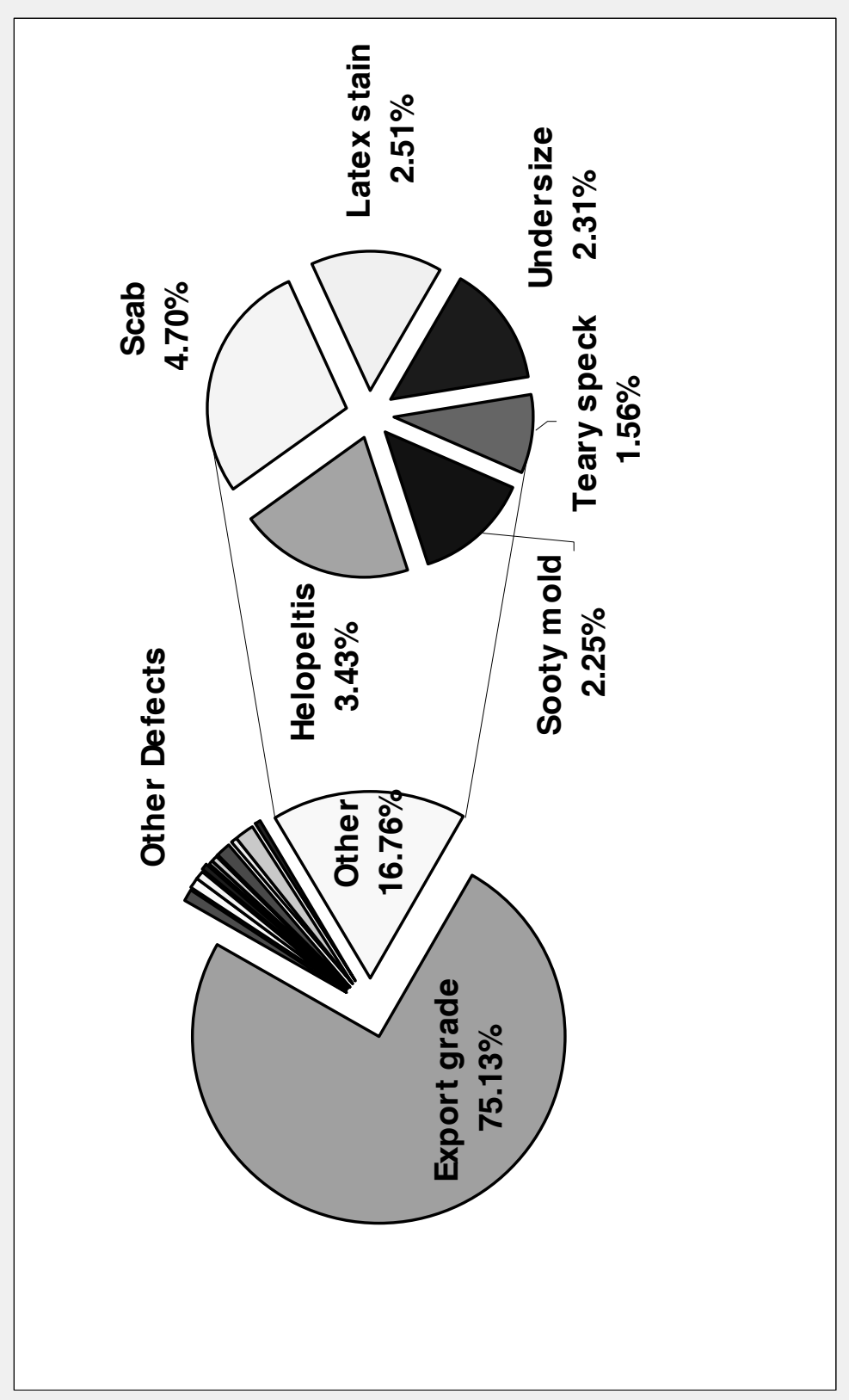


Stem-end Rot

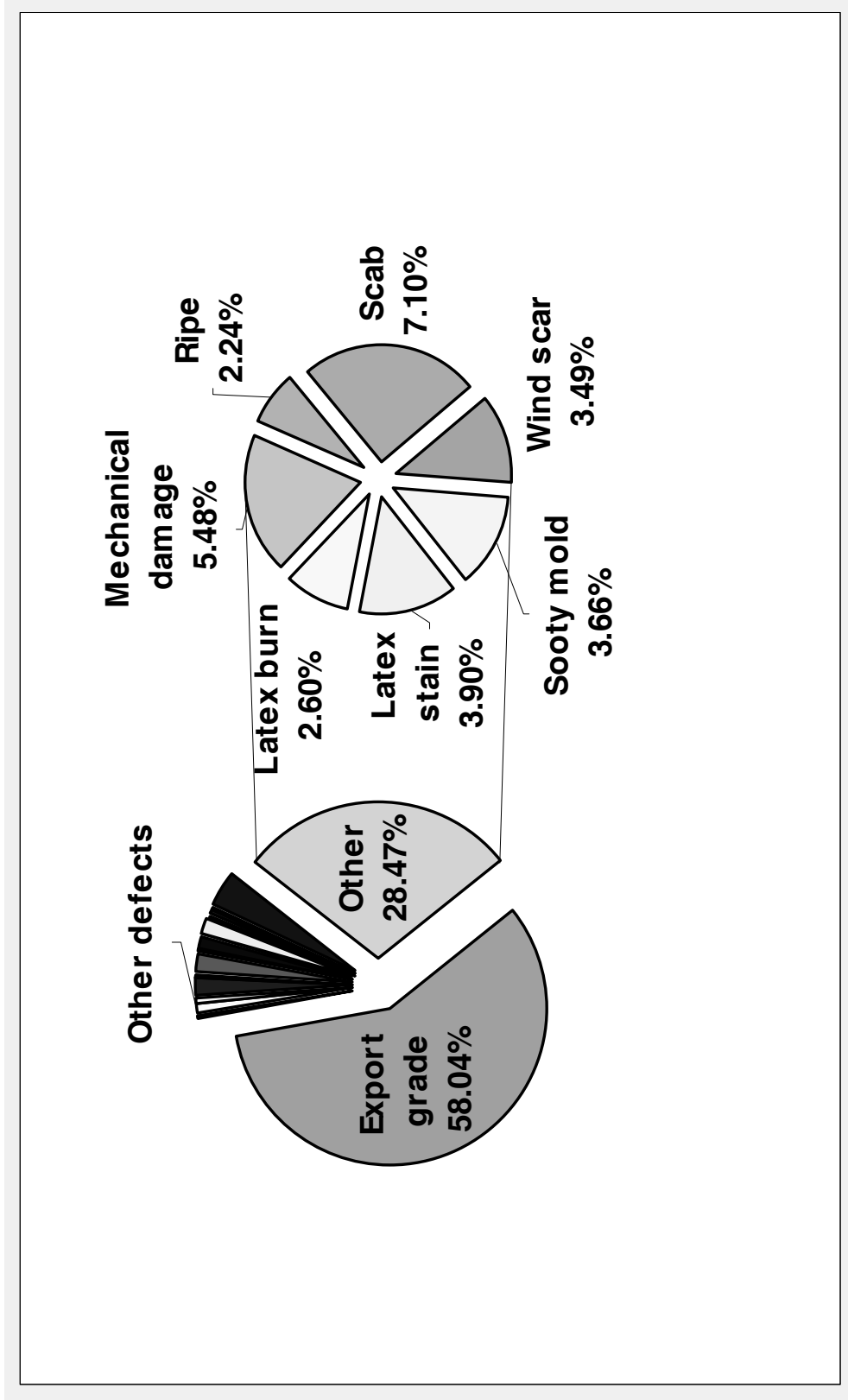


Internal Breakdown

Quality Profile of Fruits Harvested in Guimaras, 1998-2000



Quality Profile of Fruits Delivered in Exporters' Packinghouse, 1997 & 2000



5b. POSTHARVEST

CONCERN	CONSTRAINTS	REQUIRED ACTIONS
*Disease Control	Lack of facilities in production areas No incentives/premium paid on treated fruits	Establish field/mobile packaging house with facilities in major production areas
*Quarantine Treatment/Req't.	Current HWT procedure takes time, only HWT is approved for export Current HWT procedure takes time, only HWT is approved for export treatments	Conduct comprehensive studies on alternative quarantine treatments
		Undertake export promotion in countries not requiring quarantine treatments (Canada, Middle East)

5b. POSTHARVEST

CONCERN	CONSTRAINTS	REQUIRED ACTION
* Pesticide residues	Regular monitoring system in place	Upgrade laboratory facilities and capability of analysts
* Packaging	High initial investment cost of plastic crates and system of crates movement not in place	Forge market tie-up between growers' association and traders/ buyers
<u>TRANSPORT</u>		
* Temperature management	<ul style="list-style-type: none"> - Availability of refrigerated vans and port facilities for refrigerated transport - Fruits not considered as priority cargo 	Provide investment incentives in transport (cold chain, refrigerated transport)
* Long distance shipment	Commercial trials on controlled atmosphere (CA) storage not completed yet	Fast track commercial trials in collaboration with exporters

CONSTRAINTS & REQUIRED ACTIONS

5c. Processing

5c. Dried/Dehydrated Mango Process Flow

<u>Constraints</u>		<u>Required Action</u>
<ul style="list-style-type: none"> • Poor quality of raw materials due to disease and insect infestation • High cost of raw and processed ingredients inputs (mango and sugar) • Non-conformance to food safety systems standards (GMP, SSOP and HACCP) • High overhead costs (fuel and electricity) • Non-conformance to international standards (labelling) • High equipment investment • Lack of processing time-temperature control • High transportation cost • High capital requirement for “bulk purchase” of packaging materials, such as plastics and laminates. 	<pre> graph TD A[Raw Materials Receiving] --> B[Sorting] B --> C[Washing] C --> D[Peeling] D --> E[Slicing] E --> F[Syruping] F --> G[Cooling] G --> H[Drying] H --> I[Packaging] I --> J[Temporary Holding & Storage] J --> K[Distribution] </pre>	<ul style="list-style-type: none"> • Extensive IPM training • Expanded GMP and HACCP training program • Energy audit • Compilation/updating of importing country standards and dissemination to processors * Upgrade DOST laboratory * Overhaul the food import and export inspection & certification systems to conform with Codex guidelines * Training for food import/export inspectors to conform with Codex guidelines • Continue BOI incentives program for duty-free importation of capital equipment for export-oriented processing enterprises • Explore guarantee and credit facility for facilities improvement to meet quality and safety standards • Processing seminars • Explore air lines and shippers tax rebates to decrease freight cost for export products • Socialized pricing for product and package testing services by FDC
<p>25 March 2003</p>	<p>Mango Strategic Action Plan</p>	

5c. Mango Puree Process Flow

<u>Constraints</u>	<pre> graph TD A[Raw Materials Receiving] --> B[Sorting] B --> C[Washing] C --> D[Trimming] D --> E[Pulping] E --> F[Extraction] F --> G[Deaeration] G --> H[Sterilizing] H --> I[Cooling] I --> J[Aseptic Filling] J --> K[Cooling] K --> L[Temporary holding & Storage] L --> M[Distribution] </pre>	<u>Required Action</u>
<ul style="list-style-type: none"> ● Poor quality of raw materials due to poor post-harvest handling techniques ● High cost of raw and processed ingredients inputs ● Non-conformance to food safety system standards (GMP, SSOP and HACCP) ● Poor design of pulpers ● Poor processing controls ● Less efficient, less productive technology ● High equipment investment ● High capital requirement for bulk purchase of packaging material ● High cost of transportation ● Lack of awareness on importing country standards 		<ul style="list-style-type: none"> ● Training on post harvest technology ● Expanded GMP and HACCP training ● Explore guarantee and credit facility for facilities improvement to meet quality and safety standards ● Training on basic processing controls ● Adopt newer, more efficient technologies ● Continue BOI incentives program for duty-free importation of capital equipment for export-oriented processing enterprises ● Socialized pricing for product and package testing services by FDC ● Explore air lines and shippers tax rebates to decrease freight cost for export products ● Compilation/updating of importing country standards and dissemination to processors ● * Upgrade laboratory to conform to Codex standards ● * Overhaul the food import and export inspection and certification systems to conform with Codex guidelines ● * Training for food import/export

CONSTRAINTS & REQUIRED ACTIONS

5d. Marketing

5d. MARKETING

CONSTRAINTS

SUPPLY CHAIN MANAGEMENT

- * Marketing tied-up with spraying/orchard management
- * Multi-layered marketing channels
- * Lack of coordination in the supply chain and marketing
- * Need for assembly of small ungraded volumes
- * Assorted grades sold by producers
- * Poor/multi handling
- * High rejection rates/Los by buyers/ importers
- * Limited supply during early and late months of the year
- * Unpredictable supply/seasonality causes wide price fluctuations
- * Inability to deal with supply surges
- * High cost of packaging materials
- * Poor transport/handling facilities
- * Low loading priority
- * Low adoption of value-adding/food technology for extended shelf-life

REQUIRED ACTIONS/PROGRAMS

- * Promote producer linkage with users scheme: Production-Marketing Clusters of coops with buyers/processors
- * Legislate grades and standards developed with the industry
- * Transport Enhancement Program
- * Food Safeguard Quality Inspection Services
- * Conduct Seminars on Value-Adding
- * Conduct Rapid Marketing Appraisals

5d. MARKETING

CONSTRAINTS

MARKET ENTRY

- * Stringent quarantine regulations
- * High tariffs of importing countries/target markets
- * Seasonal supply
- * Long distance markets
- * Need for technology to extend shelf-life
- * Prohibitive air freights
- * Low awareness of Philippine variety/familiarity with red blush varieties

REQUIRED ACTIONS/PROGRAMS

- * Market Access Program/Export Incentives
- * Establish quarantine protocol in collaboration with private sector and SUC
- * Explore piggybacking/country trade and other arrangements
- * Expand off-season planting and use of CA technologies
- * Commercial testing and use of technologies
- * Airlines and shipper tax rebates
- * Market Promotion/breeding program

MARKET INFORMATION/INTELLIGENCE

- * Lack of information on:
 - Importers (tariff/duties/policies)
 - Customer reaction
- * Lack of knowledge on competition
- * Need to determine competitive positioning in terms of price & packaging

- * Support NIN implementation/AFMA
- * Support BAS Statistics Improvement Program (database on aging trees/census)
- * Market information from attaches
- * Market studies on target markets and competition

5d. MARKETING

CONSTRAINTS

MARKET PROMOTION

- * Costly
- * Uncoordinated
- * Lacks focus

REQUIRED ACTIONS/PROGRAMS

- * Cost-sharing: government DA-DTP-DFA and industry
- * DTP as lead; DA for development of new products/markets
- * Strategize by market/trade show
- * “Active Export Behavior”
- * Direct consumer campaign
 - Media (Japan/South Korea)
 - In-store promotion
- * Need for translation of labeling
- * Focus on purchasing power and consumer/cultural preferences
- * Quality Seal – Quality Inspection Services

5d. MARKETING


CONSTRAINTS

Inefficient flow of services and information to industry associations

Need to update Industry Association Services on:

- * Laws and regulations
- * International standards
- * Market prices
- * R & D updates
- * Information sharing
- * Problem solving
- * Lobbying government action
- * Resource sharing

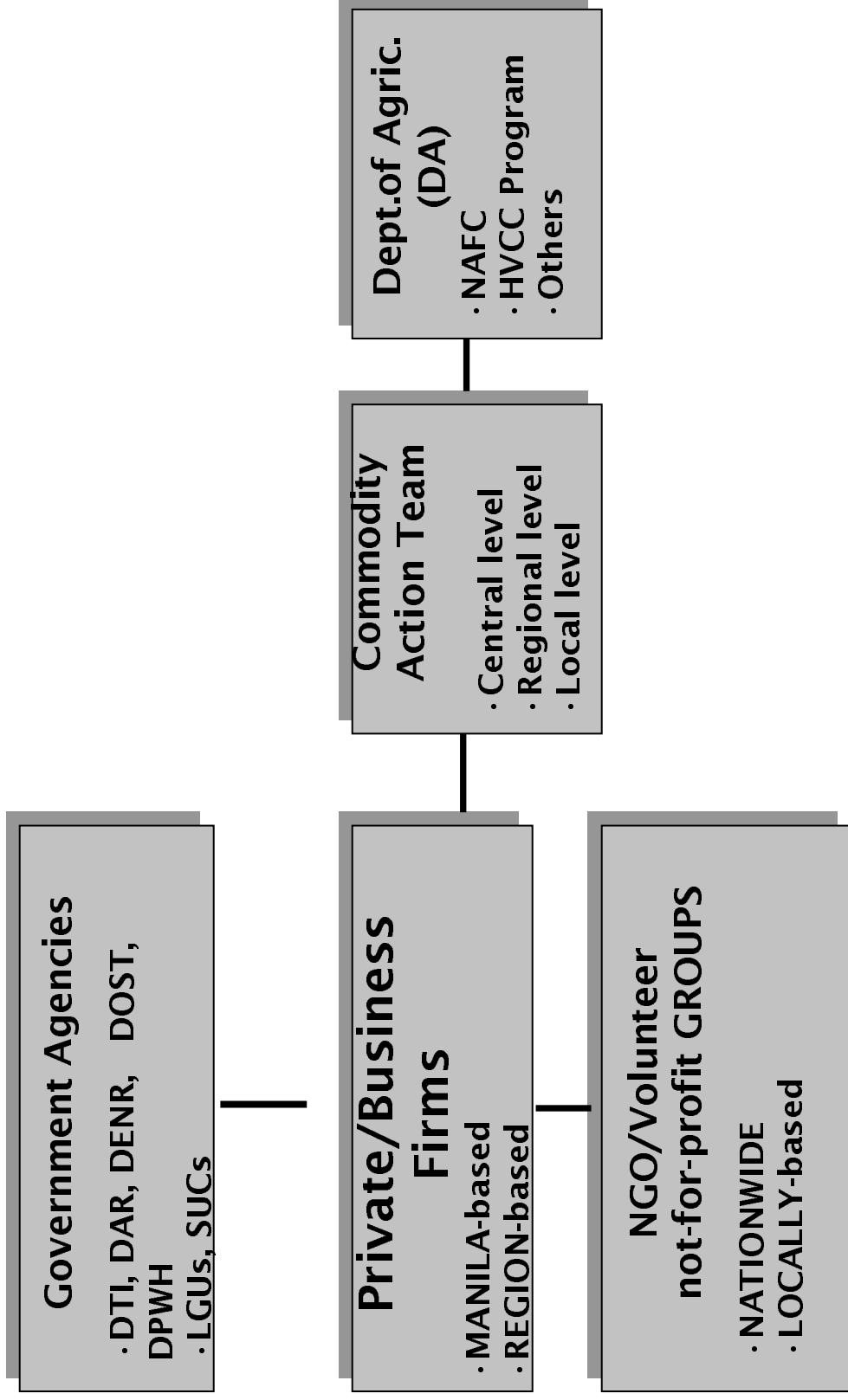
REQUIRED ACTIONS/PROGRAMS



6. PLAN IMPLEMENTATION, MONITORING & EVALUATION

- **Institutional
Strengthening/Arrangements**
- **Policies**

6a. Mango Strategic Plan Implementation Structure



6b. MANGO INDUSTRY INSTITUTIONAL FRAMEWORK FOR PLAN IMPLEMENTATION

GOVERNMENT (All levels)	INDIVIDUAL FIRMS, FARMERS & COOPS (for-profit)	ASSOCIATIONS (non-government/non-profit)
Present Role: Provision of wide range of public and private goods & services	Present Role: Various stages of agribusiness cycle	Present Role: Intermittent involvement in policy & planning activities
Support Services * Central-production inputs; credit; market promotion * LGUs- production inputs	Production –planting; farm maintenance; harvesting	Promotion of interests of member-firms, coops or farmers
Infrastructure * Central –roads * LGUs –small-scale irrigation	Processing –packaging; fumigation	Policy advocacy

MANGO INDUSTRY INSTITUTIONAL FRAMEWORK FOR PLAN IMPLEMENTATION

GOVERNMENT (All levels) INDIVIDUAL FIRMS, FARMERS & COOPS (for-profit) ASSOCIATIONS (non-government/non-profit)

Research and Extension Warehousing

Regulatory Transport –Shipping; stevedoring; trucking

Policy and planning Trading –wholesale & retails
Research & Extension

Recommended Role:
Concentrate on “public goods”, phase out from production inputs infrastructure

Recommended Role:
Sustained involvement in policy & planning activities

* Central –roads (DPWH); large-scale irrigation (NIA;BSWM)
* LGUs –small-scale irrigation (OPA/OMA)

Production inputs – seeds; equipment; financing

Industry plan implementation & re-planning (Commodity Action Teams; NAFC)

MANGO INDUSTRY INSTITUTIONAL FRAMEWORK FOR PLAN IMPLEMENTATION

GOVERNMENT (All levels)	INDIVIDUAL FIRMS, FARMERS & COOPS (for-profit)	ASSOCIATIONS (non-government/non- profit)
<p>Research & Extension</p> <p>* Central –basic research (NMRDC; BAR; ATI; BPRE; DOST; NCPC; PCARRD; SCUs)</p> <p>* LGUs –on-farm applied research & extension (OPA/OMA)</p>	<p>Market promotion –with assistance from DA (for developmental marketing); DTI (for developed markets)</p>	<p>Conduct of support services, esp. technology & market information (industry associations; coop federations –with support from ITCAF/BAS; CDA & LGUs)</p>
<p>Policy & planning (DA-OSEC) – including international trade negotiation</p>		<p>Promotion of economies of scale, e.g., market development & marketing; bulk procurement of inputs (industry associations; coop federations)</p>

MANGO INDUSTRY INSTITUTIONAL FRAMEWORK FOR PLAN IMPLEMENTATION

GOVERNMENT (All levels)	INDIVIDUAL FIRMS, FARMERS & COOPS (for-profit)	ASSOCIATIONS (non-government/non- profit)
regulatory		Advocacy –legislation; policy (industry association at national level)
Central –importation (FPA); quality & safety standards (DTI/BPS; BAFPS; FDC)		
LGUs – nurseries accreditation & monitoring (OPA; OMA; with technical support from BPI)		

6C. PLAN IMPLEMENTATION: POLICY

Policy	Agribusiness Cycle Stages	Required Action
Issues/Constraints High cost of major inputs * Fertilizer - 3% tariff * Sugar – 50-65% tariff * Plastic packaging material – 15% tariff	Input Supply; Farm Production, Post-harvest and Processing Sub-systems	<ul style="list-style-type: none"> - Lowering (instead of increasing tariff rates, comparable to competitor countries - Study on pesticide marketing system - Comparative study on fertilizer prices (neighboring countries) - Streamlining of import procedure (e.g., one-step shop; bulk imports) - Streamlining of licensing and registration
Reducing red tape * Registration * Licensing * Importation		

6C. PLAN IMPLEMENTATION: POLICY

**POLICY ISSUES/
CONSTRAINTS**

**AGRIBUSINESS CYCLE
STAGES**

**PRIORITY ACTIONS
RECOMMENDED**

**Restrictions on KNO_3
(as flower inducer)**

**If government decides to continue
to recommend use of KNO_3 as**

Access

flower inducer, access should be

**Disposition report
Palawan**

**eased
Conduct study as basis for final**

**Pursue applied research on CANO
decision**

**Intellectual Property
Rights**

**as alternative to KNO_3
Implement study recommendation
Advocacy for Plant Variety**

Protection Law

**Restriction for export or exit of
planting materials**

6C. PLAN IMPLEMENTATION: POLICY

POLICY ISSUES/ CONSTRAINTS	AGRIBUSINESS CYCLE STAGES	PRIORITY ACTIONS RECOMMENDED
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* Palakasan System

* Provision of export incentives, e.g. Thai cutflowers

Financing

- Policy disincentives to agriculture lending
- Need for innovative financing schemes

- Review

credit/lending policies

- Prepare/implement large-scale financing program for mango

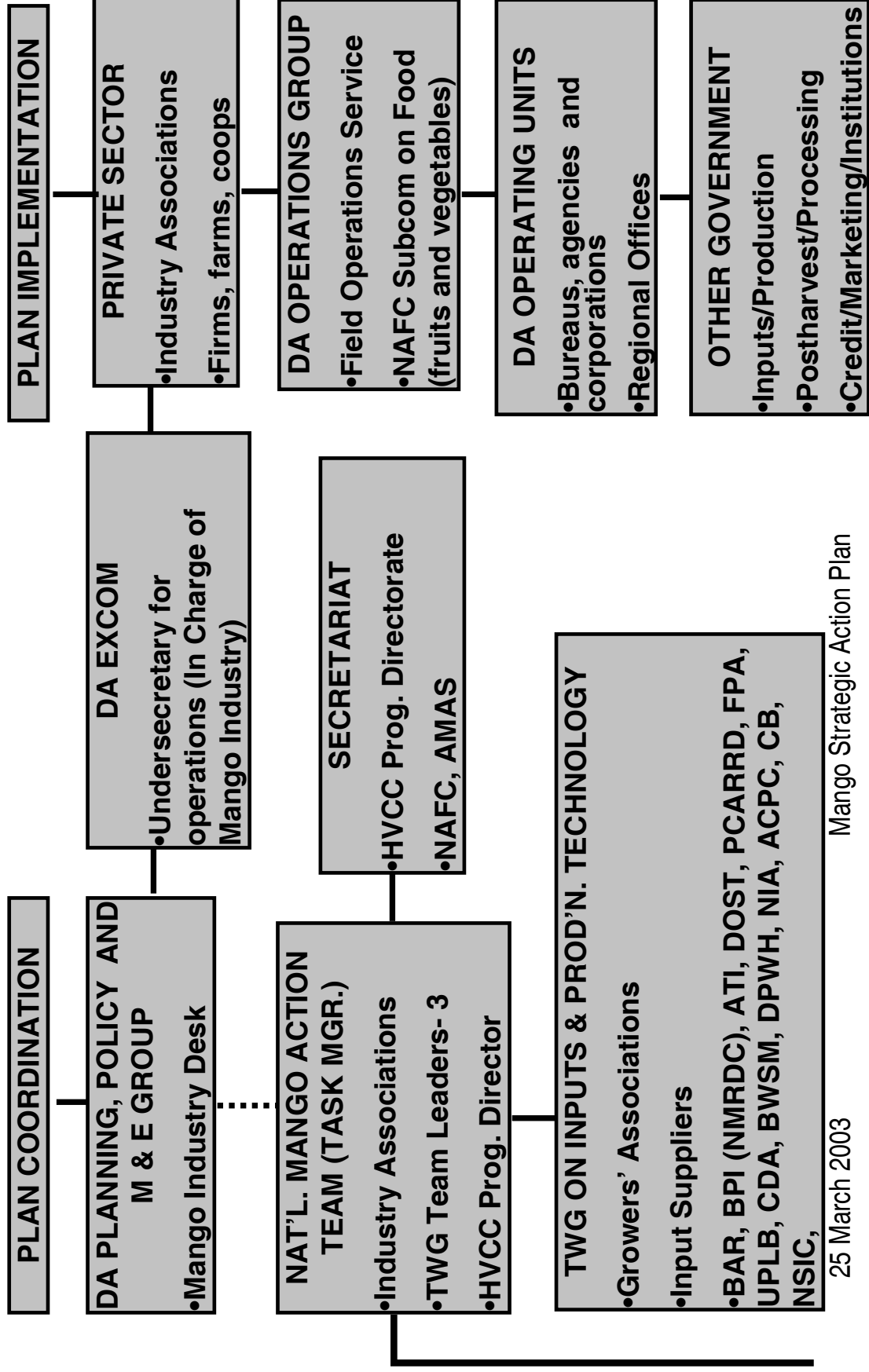
Marketing Subsystem

* Pursuit of on-going deregulation and privatization reforms

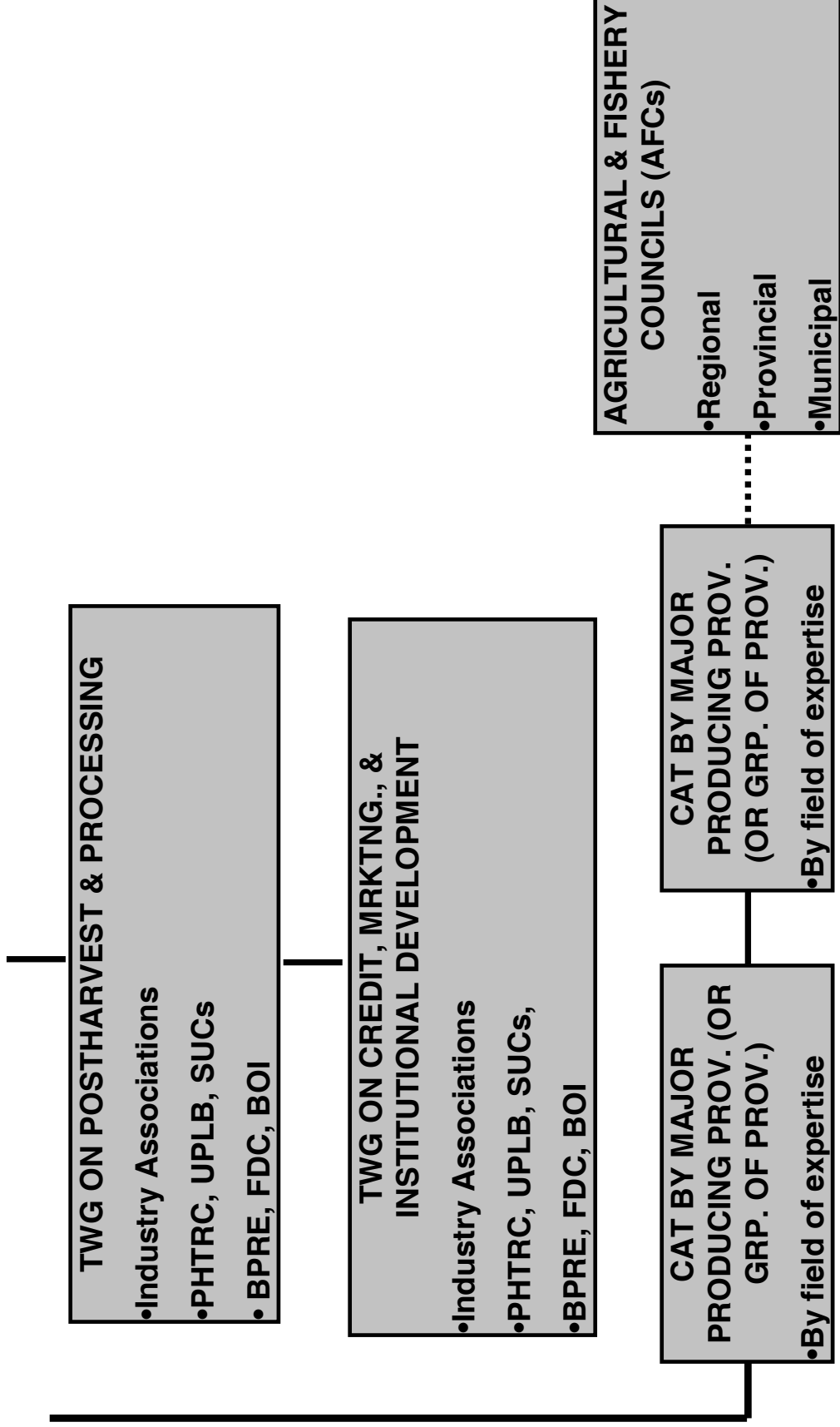
High Transport Cost

Non-priority cargo status

MANGO SAP COORDINATION & ORGANIZATIONAL STRUCTURE



MANGO SAP COORDINATION & ORGANIZATIONAL STRUCTURE



MANGO SAP COORDINATION & IMPLEMENTATION

FRAMEWORK TOR FOR PLAN COORDINATION

FRAMEWORK TOR FOR PLAN IMPLEMENTATION

DA Policy, Planning, M&E Group Direct contact of National Mango Action Team

- Technical resource for policy reform; plan advocacy, monitoring and evaluation

Private Sector (Industry Associations; Individual Firms, Farms, Coops)

- Preparation of programs and projects consistent with SAP
- Implementation of activities specified in SAP and resulting work plan(s)

National Mango Action Team

- Preparation of annual work plan
- Coordination of all plan implementation activities, to ensure coherence/complementation
- Facilitation of agency/institution actions/decisions
- Stakeholder consultations
- Review, monitoring and evaluation

DA Operations Group (FOS, NAFC ...) & DA Operating Units (BAR, BPI, Regional Offices ...)

- Preparation of programs and projects consistent with SAP
- Implementation of activities specified in SAP and resulting work plan(s)

MANGO SAP COORDINATION & IMPLEMENTATION

FRAMEWORK TOR FOR PLAN COORDINATION

FRAMEWORK TOR FOR PLAN IMPLEMENTATION

TWGs

- Technical resource for National Team
- Comments and recommendations on programs and projects
- Preparation of independent proposals (through National Team)

Local Action Teams (for major production areas)

- Mobilization of local expertise as input to TWGs and National Team

Other Government Agencies (DTI, ACPC, BPI . . .)

- Preparation of programs and projects consistent with SAP
 - Implementation of activities specified in SAP and resulting work plan/s
- ### Agriculture and Fishery Councils (regional, provincial, municipal)
- Advice to Local Action Teams
 - Sounding board for policy reform initiatives

SUMMARY OF REQUIRED ACTIONS/PROGRAMS

AGRIBIZ SUBSYSTEM REQUIRED ACTIONS/PROGRAMS

INPUT SUPPLY

- * Accreditation of Nurseries and Certification of Plant Materials
- * KNO₃ alternative = CANO₃
- * Tariff Reduction
- * Red Tape Reduction especially in Licensing and Regulation

FARM PRODUCTION

- * GAP –Good Agricultural Practices
 - Key production areas
 - Plant density
 - Fertilizer and irrigation
 - Pest Control/IPM
- * Production-Marketing Clusters

POSTHARVEST

- * Extending shelf-life technologies
- * Total Quality Assurance and Management Program

SUMMARY OF REQUIRED ACTIONS/PROGRAMS

AGRIBIZ SUBSYSTEM REQUIRED ACTIONS/PROGRAMS

- PROCESSING**
- * **GMP – Good Manufacturing Practices**
 - * **HACCP – Hazard Analytical Critical Control Points**
 - * **Food Quality and Safety Inspection Services**
 - * **Accredited Testing Laboratories**

- MARKETING**
- * **Quarantine Protocols**
 - * **Intelligence and Information System**
 - * **Presentation and Packaging Strategies**
 - * **Competitive Global Positioning**
 - * **Direct Consumer Campaign**
 - * **Market Access Program**
 - * **“Active Export Behavior”**
 - * **Reduction of Tariffs of Importing Countries/
Target Markets**

SUMMARY OF REQUIRED ACTIONS/PROGRAMS

AGRIBIZ SUBSYSTEM	REQUIRED ACTIONS/PROGRAMS
CREDIT/FUND SOURCES	<ul style="list-style-type: none">* Export Credit and Guarantee Facility* ACPC, LBP, Quedancor, HVCC, ACEF, ERAP Bonds
INSTITUTIONAL DEVELOPMENT	<ul style="list-style-type: none">* Industry Associations/Cooperatives
POLICY CLIMATE LEGISLATIVE	<ul style="list-style-type: none">* Make exports competitive in world markets* Private sector oriented/Market-led* Food Quality and Safety Systems Modernization