



## COUNTRY FACT SHEET ON FOOD AND AGRICULTURE POLICY TRENDS

### Socio-economic context and role of agriculture

Mozambique is recognized as one of the most successful countries in Africa for its startling post-war reconstruction and economic recovery since the 1992 Peace Agreement. The country has had strong economic growth: per capita GDP has increased on average 2.6 percent per year in the 1990s, 4.2 percent in the 2000s and 4.6 percent in the 2010s. The economic growth is mainly based on capital-intensive projects, mostly in the extractive industry.<sup>1</sup> Despite such positive economic growth and political social stability,

Mozambique still remains as one of the poorest countries in the world. Alongside, the country is highly dependent on foreign aid, and official development assistance accounted for 14.9 percent of GDP in 2011.<sup>2</sup>

According to the *State of Food Insecurity in the World (2015)*,<sup>3</sup> Mozambique has achieved the MDG1 hunger target of halving undernourished population by 2015.<sup>4</sup> Yet, chronic under nutrition, poverty and households' vulnerability to food and nutrition insecurity due to natural disasters and other

Selected indicators		2007	2009	2011	2013	
SOCIO-ECONOMIC	GDP (current billion US\$) *	9.11	10.7	13.1	15.4	
	GDP per capita (current US\$) *	407.7	453.3	527.5	584.0	
	Agricultural value added (% of GDP) *	27.7	30.9	29.8	28.7	
	Agricultural value added (annual % growth) *	(average 2007-2013)	5.1			
		(2013)	3.6			
	Total population (thousand)	22 171	23 361	24 581	25 834	
	Rural population (% of total)	15 439	16 178	16 916	17 648	
	Agricultural labour force (% of total labour force)	81.2	80.7	80.2	79.7	
	Human Development Index **	(2012)	0.393 (ranking 178)			
AGRICULTURAL PRODUCTION & TRADE	Per capita cultivated land (ha)	0.24	0.25	0.24	NA	
	Area equipped for irrigation (ha)	118 000 (2012)				
	Value of total agriculture (current million US\$)	3 597	4 865	8 605	NA	
	Value of cereals production (current million US\$)	280	622	1 064	NA	
	Yield for cereals (hg/ha)	8 848	8 843	10 411	8 178	
	Cereal import dependency ratio (% average 2009-2011)		27.3			
	Top 3 commodities	Production quantity	Cassava, Sugar cane, Maize (2012)			
		Production value	Cassava, Meat indigenous, Beans (2012)			
		Import quantity	Wheat, Maize, Cake of Soybeans			
		Import value	Wheat, Soybean oil, Food Prep Nes			
Export quantity		Sugar raw centrifugal, Molasses, Tobacco (unmanufactured)				
Export value		Tobacco (unmanufactured), Sugar raw centrifugal, Cashew nuts				
Top 3 trade partners (2011)	Import value	NA				
	Export value	NA				
FOOD SECURITY & NUTRITION	Top 3 commodities available for consumption		Cassava and products, Maize and products, Rice (milled equivalent) (2011)			
	Dietary energy supply (kcal/capita/day)		2 094	2 176	2 267	NA
	General (g) and Food (f) CPI (2000=100)		214 (g), 244(f)	255 (g), 285 (f)	319 (g), 372 (f)	NA
	People undernourished (million)	(2008-2010)	7.8			
		(2011-2013)	7.2			
	Proportion of undernourished (%)	(2008-2010)	33.3			
		(2011-2013)	28.5			
	Prevalence of child underweight (% of children under 5)		18.3 (2008)	NA	15.6	NA
	Prevalence of stunting (% of children under 5)		43.7 (2008)	NA	43.1	NA
Prevalence of wasting (% of children under 5)		4.2 (2008)	NA	6.1	NA	
Global Hunger Index ^		(2013) 21.5% (Alarming)				
Access to improved water sources (% of population) *		46	48	49	51	

Source: FAOSTAT; \*Source: WB; \*\*Source: UNDP; ^ Source: IFPRI.

1 Government of the Republic of Mozambique. 2014. National Investment Plan 2014-2018

2 Idem

3 FAO. 2015. The state of food insecurity in the world (2015). Available at [www.fao.org/3/a-i4646e.pdf](http://www.fao.org/3/a-i4646e.pdf)

4 The prevalence of undernourishment decreased from 56.1 percent in 1990-92 to 25.3 percent in 2014-16.

emergencies are some of the underlying challenges.

Agriculture which is considered as the largest sector of Mozambique's economy has great influence on the people's

lives in the country. The agricultural sector contributed up to 29 percent of GDP in 2013 and is the key source of overall growth. Approximately 80 percent of households are involved in the sector.

## 1. Government objectives in agriculture, food and nutrition security

The Government of Mozambique declared eradicating poverty as a priority for economic development, where action plans for this purpose are designed and implemented among line of ministries and special units. Mozambique's **Agenda 2025** adopted in 2003 represents the long term development vision of the country. In this vision, agriculture is perceived as one of the main means to reduce rural poverty by increasing productivity and access to technology and markets.

In 2014, the government approved new **National Development Strategy (ENDE, Estrategia Nacional De Desenvolvimento) 2015-2035** providing a framework for the preparation and operational medium term plans such as the **Government's Five-year Plan (Plano Quinquenal do Governo- PQG) 2015- 2019**. The plan focuses on inclusive growth and has established five priorities and three pillars. The priorities are centralized around peace and sovereignty; development of human and social capital; promotion of employment, productivity and competitiveness; development of economic and social infrastructure; and finally sustainable and transparent management of natural resources and the environment. The Plan highlights the role of agriculture as a fundamental component of development and industrialization.

Each sector is responsible for designing its own development strategy under the PQG guidance. The current overarching agricultural strategy is the **Plano Estratégico de Desenvolvimento do Sector Agrário (PEDSA) 2011-2020**, whose general objective is *"to contribute towards the food security and income of agricultural producers in a competitive and sustainable way, guaranteeing social and gender equity."* The PEDSA reflects directives and priorities set out in the

Comprehensive Africa Agriculture Development Programme (CAADP). Also, the implementation of PEDSA is regulated in the **National Agrarian Investment Plan (PNISA) 2013-2017**. PNISA was officially launched in April 2013 with stated objectives: (i) to reach an average growth of the agricultural sector of 7 percent per year in the next 10 years; (ii) to reduce chronic malnutrition in children under 5 years of age from 44 percent in 2008 to 30 percent in 2015 and 20 percent in 2020, and (iii) to halve the proportion of people suffering from hunger by 2015.

Furthermore, Mozambique has developed the **Green Revolution Strategy (ERV)**, which aspires in the medium and long term for the development of *"a prosperous, competitive, equitable and sustainable agricultural sector"* whose main objective is *"to contribute to food security, income and profitability of agricultural producers and to a rapid, competitive and sustainable increase in market- oriented agricultural production"*.

Additional governmental policies and strategies pertinent to the agriculture, food security and nutrition are illustrated in the annex. Among the important strategies we highlight the **National Strategy for Food Security and Nutrition (ENSAN)** approved in 1998, which is being operationalized through the **National Plan for Food Security and Nutrition (PASAN II)**. The strategy was revised in 2007, covering the period of 2008-2015 (ESAN II). ENSAN adopted an integrated approach and comprises six specific goals and five strategic pillars that correspond to the main dimensions of food and nutrition security with a human rights perspective. Evaluation of ESAN II and formulation of ESAN III is under preparation and should take place by the beginning of 2016.

## 2. Trends in key policy decisions (2007 to 2015)

### 2.1 Producer-oriented policy decisions

Mozambique's general agriculture policy has been to transform the sector, shifting production away from mainly subsistence activities and promoting access to international markets. Yet, so far many households are still dominated by small (less than 10 hectares) and medium farms (10-50 hectares) grow rice, cassava and maize (which are the main food crops in Mozambique), and farmers received input support over the past years. Aside from

small-scale subsistence farming, most cash crops are produced by large farm enterprises, and, in order to enhance the infrastructure, the government is increasing attention to irrigation.

#### *Intermittently input support*

The government has provided ad hoc support to rice and maize producers during 2007 and 2008, via distribution of seeds, inorganic fertilizers and pesticides.<sup>5</sup> During the 2009-10 agricultural season the government distributed through the

<sup>5</sup> According to the 2007 National Agricultural Survey (*Trabalho de Inquerito Agrícola, TIA*) only 4 percent of smallholder farmers used fertilizers, 10 percent used improved maize seeds and 4 percent used pesticides. Therefore it appears that/ researches demonstrated that: i) subsidies do not reach a considerable portion of farmers; ii) there is ample margin for increasing productivity through input subsidies.



Women sheathing a pile of corn after harvesting season. The Agricultural Input Subsidy Programme used a voucher system to give farmers a maize input pack (12.5 kg seed and 2 bags of fertilizer)

Action Plan for Food Production Programme (PAPA), 1 600 tons of improved maize seeds and 2 000 tonnes of rice seeds to almost all the provinces, and 150 tons of soya seeds to couple of provinces.<sup>6</sup> The PAPA programme was launched in 2008 to offset the food crisis; the main objective was to reduce imports of rice, wheat and potatoes by 50 percent by 2011 through technical assistance (irrigation, farm implements, improved seeds, fertilizer and pesticides).

Successively, Mozambique piloted a limited two-year subsidy programme in 2009 named the Agricultural Input Subsidy Programme. The programme targeted 25 000 rice and maize producers in five provinces and 17 districts, over the 2009-10 and 2010-11 crop years. The programme used a voucher system, and farmers received either a rice input pack (40 kg seed and 2 bags of fertilizer) or maize input pack (12.5 kg seed and 2 bags of fertilizer). Farmers contributed to approximately 30 percent of the total cost of the inputs. The evidence shows the programme had substantial and persistent impact; the research was done over three years following the one-time subsidy.<sup>7</sup> The government has been considering upscaling fertilizer subsidy scheme to national level, due to lack of finance resources this idea has never been implemented yet.<sup>8</sup>

### Enhancement of seed legislation

In 2013 the government approved a new national legislation on seed production, trade, quality control and seed certification. This legislation aims at developing the seeds; granting accreditation of private sector agents in the seed breeding and providing protection

of new varieties of plants. Mozambique was expected to align its national legislation on seed with Southern Africa Development Community (SADC) regulations. In April 2014 the Ministry of Agriculture with its partners launched the National Platform of Dialogue of Seed Sector to enhance the business environment in the sector. This platform will address the challenges and offer solution to improve performance of the sector, among different actors of the seed value chain including public and private sector and the end users.

### Increased attention to irrigation

Production risks associated with droughts and some other related climate variabilities are high in Mozambique. Advanced irrigation techniques can reduce some of these production risks, and at the same time improve agricultural productivity. Irrigation infrastructure is outdated and there is poor private investment in this sector,<sup>9</sup> which led the government to adopt a policy of developing irrigation infrastructure as a priority. Mozambique adopted in 2010 the National Strategy for Irrigation, followed by establishing the National Irrigation Institute (*Instituto Nacional de Irrigação/INIR*), the institute oversees policy, strategic and operational issues related to irrigation. In addition, in February 2015, the Council of Ministers has submitted to the Parliament a request for approval of an updated regulatory framework for irrigation associations, defining mandates and accountabilities for the operation, maintenance and management of public irrigation infrastructure. The new regulations are designed to increase sustainability of investment in irrigation systems.

6 In an effort to increase crop production in the second season and to compensate for the relatively poor season in the south and parts of the centre, the government also distributed 497 tonnes of maize seeds, 1,412 tonnes of wheat seeds, 2,125 tonnes of seed potato, 107 tonnes of bean seeds and 1.7 tonnes of assorted vegetable seeds. Ninety tractors and various other pieces of agricultural equipment, including hand-held cultivators and irrigation pumps were also distributed (MINAG/DNSA 2010).

7 Carter, M.R., R. Laajaj and D. Yang., 2014. *The Impact of Voucher Coupons on the Uptake of Fertilizer and Improved Seeds: Evidence from a Randomized Trial in Mozambique*. Available at: <http://basis.ucdavis.edu/wp-content/uploads/2014/07/Carter-Laajaj-Yang.pdf>

8 World Bank. 2012. *Agribusiness indicators: Mozambique*. Washington DC, available at [http://siteresources.worldbank.org/INTARD/825826-1111044795683/23184690/ARD\\_ESW\\_Agribusiness\\_Indicators\\_Mozambique\\_final.pdf](http://siteresources.worldbank.org/INTARD/825826-1111044795683/23184690/ARD_ESW_Agribusiness_Indicators_Mozambique_final.pdf)

9 World Bank. 2011. *Mozambique's infrastructure: a continental perspective*. Africa Infrastructure Country Diagnostic- Country Report. Washington DC

## 2.2 Consumer-oriented policy decisions

Mozambique has been enjoying a strong economic growth. Despite that, poverty rates have been stagnating in the past decade. Therefore, the government has given more prominence to consumer-oriented policies and social protection programmes to eliminate poverty and to achieve sustainable economic growth to the most disfranchised groups.

### *Organizing a national social protection floor*

Mozambique has been working towards establishing a social protection floor and organizing it at different levels.<sup>10</sup> In 2007 the Social Protection Law was adopted which has set the legal and institutional framework with broad social components (social, health, education and social inclusion), followed with new regulatory framework in 2009 and more precise definition of the components was included in 2010 National Strategy for Basic Social Security (ENSBB). The ENSBB has been expanded into a comprehensive social safety net programme that formed the Strategic Operational Plan for Basic Social Security programmes in 2011. This process has been accompanied with scaling up spending significantly; it has risen from around US\$ 13 million in 2008 to US\$ 57 million under the 2013 budget. Furthermore, a budget allocation of around 0.8 percent of GDP is envisaged by the Government for the 2014–16 budget; revenues from the booming natural resource sector have the potential to widen the available fiscal space for such forecast.

### *Expanding cash transfer programme*

Mozambique has one of oldest Sub-Saharan Africa's governmental non-contributory cash transfers called the Food Subsidy Programme (*Programa Subsídio de Alimentos, PSA*) which was launched in the 1990s. This is the largest unconditional cash transfer programme targeting extremely poor households in which no adult is able to work (households headed by the elderly or by persons with disabilities), the regular monthly transfer is intended to be used to buy food. In 2008 the PSA underwent two important reforms. First, the subsidy scale increased: the subsidy amount for the first (direct) beneficiaries rose from MZN 70 to 100 (US\$ 2.5 to US\$ 3.6), and the additional benefit for dependants increased from MZN 10 to 50 (US\$ 0.36 to US\$ 1.80) per dependant up to four. The second reform has foreseen greater focus on the inclusion of eligible dependants as indirect beneficiaries in the payment scheme, and the monitoring and evaluation system. In addition, transfer payments to families are budgeted to increase by 12.6 percent in 2014 due to an increase in the number of pensioners.<sup>11</sup> Since 2014 the PSA has been transformed into a

larger programme, the Basic Social Subsidy Programme which involves the review of the transfer amount in order to ensure greater impact and a greater focus on children as indirect beneficiaries. The geographical scope of the programme will expand to national coverage, including potentially beneficiaries living in rural and urban areas.

### *Attempts to phase out fuel subsidies*

In 2008 the government introduced an urban transportation subsidy and suspended fuel-related taxes until July 2009. Shortly after, the government froze fuel prices in April 2009 and asked fuel importers to sell below market prices. In March 2010 when international oil prices were at less than half of the 2008 prices, the government attempted to phase-out the fuel subsidies gradually in view of replacing them with a better targeted and more effective alternative measures targeting truly vulnerable groups. The government began raising fuel and some food (i.e. bread) prices gradually but this has been the trigger for deadly riots and protests. The 30 percent price increase was revoked and the phase-out date extended.

In 2013, the amount the government paid to fuel distributors represented a 0.5 percent of GDP covering subsidies accrued in 2012 and 2013. In 2014 fuel subsidies represented 0.2 percent of GDP, reflecting declines in international fuel prices. As of 2015, the fuel market is not liberalized yet and the government is monitoring the evolution of prices in the international markets and adjusting prices accordingly.

## 2.3 Trade- and market-oriented policy decisions

In the late 1980s, Mozambique has experienced several trade-related policy reforms, moving from centrally planned to market-oriented economy. Mozambique has one of the most liberalized trade regimes in the region. Since 2001 the country is member of SADC, under which it has been gradually eliminating import duties although "sensitive" products have experienced smaller reductions (duty and VAT still applied for key staple food (maize and rice). As a result of liberalized regime, agricultural export and imports volumes have witnessed dramatic increase over the past decade, for example the imports increased from US\$ 1.2 billion in 2002 to US\$ 8.1 billion in 2013. At the same time, there have been some mega export projects (including sugar, Banana, shrimp, tobacco, and cashew) attracted by investment, which increased exports from US\$ 682 million US\$ 3.7 billion over the same period. As part of the national strategies (i.e National Poverty Reduction Strategy 2011-2016), the government has declared that it will support and nourish the trade sector, as a

<sup>10</sup> According to the International Labour Organization (ILO), the Social Protection Floor (SPF) "is a global social policy approach to ensure universal access to at least access to essential health care, basic income security for children, basic in income security for disabled, unemployed and older persons". This UN initiative was launched to cope with the effects of the economic crisis and ensuring social protection for all.

<sup>11</sup> IMF. 2014. Republic of Mozambique: second review under the policy support instrument and request for medication of assessment criteria. Available at: [www.imf.org/external/pubs/cat/longres.aspx?sk=41602.0](http://www.imf.org/external/pubs/cat/longres.aspx?sk=41602.0)

mean to push pro-poor growth, reduce poverty and improve food security.

### **Restrictive monetary and fiscal policy**

Following the Civil War, the Central Bank has been enforcing a restrictive monetary and fiscal policy. As a result inflation rate has reduced, averaging 6.5 percent from 2009 until 2013, and in 2014, the inflation rate was registered at about five percent.<sup>12</sup> However, the unstable climate conditions such as the intensity of the flood in the beginning of 2015 and the damage it caused the country's agriculture sector, has created peculiar challenge to the inflation stability.<sup>13</sup> In 2015, the inflation went above ten percent, and most of the December inflation accounted for by food prices, this situation has created pressure on the government to agree on the need for further tighten monetary policy.

## **3. Emerging issues and challenges**

### **Support enabling environment for private investment**

In 2003 Mozambique has committed to CAADP and consign for the allocation of at least 10 percent of the national budget to agriculture development (Maputo (2003) and Malabo (2014) Declarations) to enable a six percent annual growth in the agricultural GDP.<sup>15</sup> Also, the general policy frameworks like PQG and PEDSA set specific objectives like establishing legal frameworks and policies that are conducive to agriculture investment and enable private investment and private sector development. The investment plan- PNISA has the potential to benefit from the financial returns of hydrocarbon sector and the natural gas discoveries in the country. Also, the plan is supposed to contribute to enabling environment for private investment in the agrarian sector. However hydrocarbon sector gains are also overshadowed by market price uncertainties an only likely to impact on the long run.

### **Creating room for improvement in land property policies**

The Agenda 2025 stated a clear interest in restoring state control over land properties on the basis of the constitutional principle, which affirms that land belongs to the state and the state should ensure access, efficient allocation, and regulation of commercial transactions on land use and tenure. In 2007, the government agreed to implement reform in the land use rights system and accelerate issuance of land use certificates – DUATs (*direito de uso e aproveitamento de terras*) to promote "security" for small

### **Lower import tariffs and stronger regional integration**

In 2007 the tariff was reduced with maximum rate lowered from 30 percent to 20 percent, and the simple average MFN tariff was 10.2 percent. In addition, a 17 percent VAT is levied with exception on certain necessities (food, soap, sugar and cooking oil). As a result of Mozambique liberalized trade regime and necessity to align its policy with its regional commitments, by the end of 2014; Mozambique had to eliminate all tariffs for SADC members (except about 96 sensitive goods to South Africa) which are either at 3 or 10 percent tariff (e.g edible oils, dried beans, citrus...etc). And as mentioned before, the MFN is reasonable low and in range similar to other countries. SADC established the SADC free trade area in January 2009. As a full signatory of the protocol Mozambique has reduced then 92.6 percent of its tariff lines with other SADC members to zero.<sup>14</sup>

landholders and agribusiness investment. The change was mainly to reduce processing time and cost to get rural land use rights (by March 2013), and passing regulations and procedures that allow communities to engage in partnerships through leases or sub-leases (by June 2013).<sup>16</sup> In 2014, regulations to allow communities to lease and sublease their lands have been drafted and examined by stakeholders before proceeding to legislation. However, due to the October 2014 elections, the legislation was not expected to be presented to the cabinet before the end of 2014. Many changes, improvements are expected on land issues with a revitalized Land Forum working on a number of key thematic areas, from land registration to issues related to the dissemination of legislation among stakeholders.

### **Support to production and productivity**

There is an evidence show that despite the high agriculture contribution to the GDP, the yields of staple crops has been sluggish or declining in the last decade. Therefore, the country has aimed at transforming the agricultural sector and support production. The budget established for the different programmes and subprogrammes of PNISA is estimated to be 122 billion MZN or US\$ 4 billion, the production and productivity activities are going to receive the biggest allocation of the budget- about 85 percent. The investment plan intends to increase production of food crops, develop rural infrastructure and improve agriculture sector performance overall, the government believes this would

12 African Development Bank (AfDB). 2014. African Economic Outlook. Abidjan

13 KPMG.2015. Monitoring African sovereign risk- Mozambique snapshot. Available at: [www.kpmg.com/Africa/en/KPMG-inAfrica/Documents/2015%20Q1%20Snapshots/KPMG\\_Mozambique%202015Q1.pdf](http://www.kpmg.com/Africa/en/KPMG-inAfrica/Documents/2015%20Q1%20Snapshots/KPMG_Mozambique%202015Q1.pdf)

14 The tariff reduction schedules of each SADC free trade area member provide for three main categories of products: category A (capital goods) to be liberalized from the first year of becoming a member (i.e. 2000), category B (revenue sensitive products) to be liberalized by 2008 and category C (sensitive products) to be liberalized by 2012.

15 The Maputo Declaration goals and commitments have been reaffirmed by the Malabo declaration of 26-27 June 2014 with additional complementary ambitious policy goals regarding private sector investment, marketing or climate change, among other measures.

16 New Alliance. 2013. Cooperation framework to support the New alliance for food security and nutrition in Mozambique. Available at : <http://feedthefuture.gov/sites/default/files/resource/files/Mozambique%20Coop%20Framework%20ENG%20FINAL%20w.cover%20REVISED.pdf>

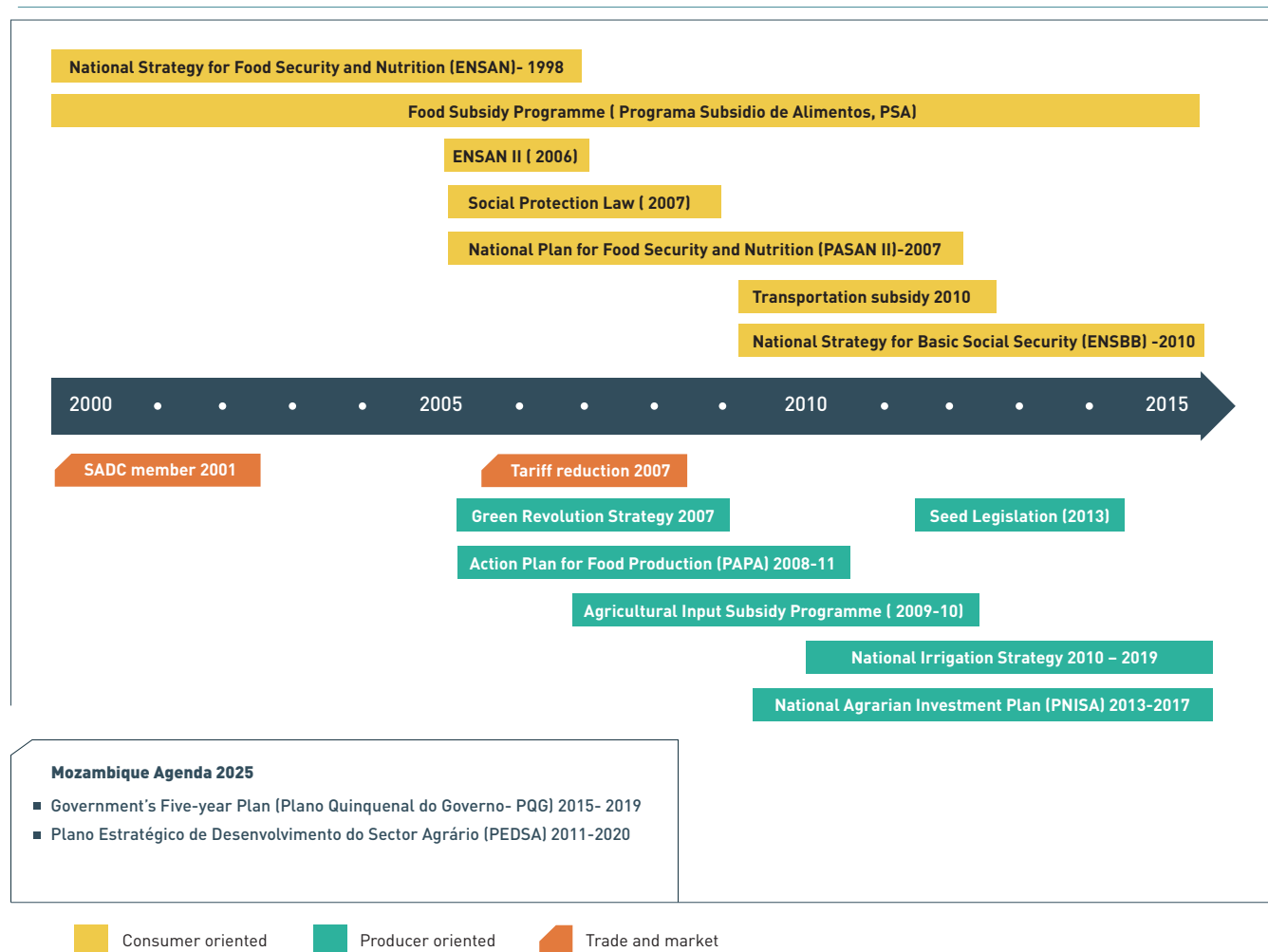
contribute to poverty alleviation and strengthen food and nutrition security in the country. The invest plan is aligned with the 6 percent annual economic growth in the agricultural sector as CAADP's target, as well as PEDSA target of 7 percent agricultural growth annually. The support to agricultural production and productive growth will be through doubling the yields and increase the area under cultivation by 25 percent by 2019.

### Ratification of the Disaster Management Law of Mozambique

Mozambique is considered as one of the most vulnerable countries to climate change variation in Africa, the country faces increased temperatures, reduced precipitation, increased drought and other extreme weather such as recurrence floods and hurricanes.<sup>17</sup> These events are posing threats to the livelihoods, for example between

1981 and 2008, nine flood have struck the country, affecting between 2 000 and 2 million people,<sup>18</sup> in January 2015, the country faced a catastrophic flooding in the central and northern areas of the country. The country is barely able to cope with these challenges; there are many donor based initiatives supporting Mozambique to cope with the consequences of climate change. The government needs to be able to afford to provide the necessary financial means; and Disaster Risk Management (DRM) needs to become an integral component of district development planning in all districts. Therefore, in April 2014, the Mozambican Parliament passed the Disaster Management Law of Mozambique No. 15, this is a comprehensive disaster law with the objective of establishing the legal framework for disaster management.

## ANNEX: MAIN RECENT STRATEGIES AND POLICIES RELATED TO AGRICULTURE AND FOOD SECURITY AND NUTRITION (FSN)



17 USAID. 2013. Mozambique environmental threats and opportunities assessment. Available at: [http://pdf.usaid.gov/pdf\\_docs/pnaea332.pdf](http://pdf.usaid.gov/pdf_docs/pnaea332.pdf)

18 ACAPS. 2015. Mozambique: floods. Briefing note. Available at [www.acaps.org/img/documents/b-acaps-start-bn-mozambique-floods-16-jan-2015.pdf](http://www.acaps.org/img/documents/b-acaps-start-bn-mozambique-floods-16-jan-2015.pdf)

**i** The FAPDA initiative promotes evidence-based decision making by collecting and disseminating information on policy decisions through a freely accessible web-based tool. For more information, please visit:

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or contact us at: [fapda@fao.org](mailto:fapda@fao.org)

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