GENDER SENSITIVE VALUE CHAIN ANALYSIS FOR MEDICINAL AND AROMATIC PLANTS IN FAYOUM

Final Report

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GUIDANCE AND SUPERVISION:
Malika Abdelali-Martini, Regional Gender Officer (Agriculture and Rural Development)
Food and Agriculture Organization of the United Nations (FAO),
REGIONAL OFFICE FOR THE NEAR EAST AND NORTH AFRICA
CAIRO, EGYPT, TEL. 0020 2 33316000 EXT. 2810
Malika Abdelali-Martini Malika.Martini@fao.org

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ABBREVIATIONS AND ACRONYMS

BDS	Business Development Services
CAPMAS	Central Agency for Public Mobilization and Statistics (National Statistics Agency)
CBI	Dutch Centre of Promotion of Imports from Developing Countries
CDA	Community Development Association
DRI	Desert Research Institute
ECOA	Egyptian Center of Organic Agriculture
EGP	Egyptian Pounds
EOS	The Egyptian organization of standardization and quality
EMAP	Agro-industrial initiative for upgrading the Egyptian Medicinal and Aromatic Plants sector
ESHEDA	Egyptian Spices and Herbs Export Development Association
ESMAP	Egyptian Society for the Producers, Manufacturers and Exporters of Medicinal and Aromatic Plants
EU	European Union
FA	Farmer Association
FAO	Food and Agricultural Organization of the United Nations
FEC	Food Export Council
FAODA	Fayoum Agro Organic Development Association
FOA	Faculty of Agriculture
GSVC	Gender Sensitive value Chain Analysis
IFAD	International Fund for Agricultural Development
IMC	Industry Modernization Centre Egypt
LU	Labor Unit
MAP	Medicinal and Aromatic Plant
MoALR	Ministry of Agriculture and Land Reclamation
MoSS	Ministry of Social Solidarity
NENA	Near East and North Africa
NSCE	North and South Exchanges Consultant
OA	Organic Agriculture
OPA	Organizational Performance Assessment
PO	Producers Organization
SFOAP	Support to Farmers Organizations of Africa - North Africa Program
SSA	Sustainable Small-Scale Agriculture
UNIDO	United Nations Industrial Development Organization
USA	United States of America
VC	Value Chain
WB	World Bank

1 EGP = 0,13 USD 1 EGP = 0,11 €

EXECUTIVE SUMMARY

The main purpose of the study, which was conducted by NSCE under the FAO's Regional Initiative on Sustainable Small-Scale Agriculture (SSA) for Inclusive development, is to generate a deep understanding of the value chains with all actors involved and producers organizations and an action plan for gender mainstreaming and women's empowerment within the value chains and producers organizations catalyzing the sustainable and inclusive development of SSA in the region and in Egypt in particular.

The Medicinal and Aromatic Plants (MAPs) value chain was selected for the study, because it presents a high growth potential for all the actors involved along the chain, as well as strong opportunities for women empowerment.

The study followed a two-fold objective:

- To conduct an in-depth gender-sensitive value chain analysis (GSVC) of the MAPs value, and;
- To carry out a rapid assessment of producers organizations (POs) capacity development needs in the Egyptian MAPs' sector.

To achieve those goals, the study pursued the following steps:

- Mapping out the Egyptian MAPs value chain;
- Identifying the positions and roles of women at each node of the MAPs value chain;
- Assessing the capacity development needs within the Producer Organizations (POs) involved in the MAPs value chain;
- Analyzing key age and gender-based specific constraints and opportunities along the chain, including within the POs;
- To develop an action plan in order to improve the overall performance of the Egyptian MAPs value chain, to develop or reinforce the capacities of the POs, while contributing to the empowerment of women and young people.

The methodological framework combined different qualitative research tools. A broad literature review firstly provided the study with a deep understanding of the MAPs value chain, its actors, the linkages between them and the constraints they are facing to. To complete the desk review, individual interviews were conducted with the main stakeholders involved in the MAPs value chain, including input suppliers, farmers, representatives of POs, traders, exporters, and key informants. Focus Group discussions (FGDs) were also carried out with different groups of farmers, and members of POs, disaggregated by gender and age. Additional FGDs were conducted with young women graduates of the University of Fayoum, to get a better understanding of specific constraints and opportunities faced by young women when it comes to employment.

A two-day workshop was held in Cairo to present the preliminary results of the study and discuss them with key national and local stakeholders, including: national and local governmental authorities; the representatives of the four target POs; key apex organizations, and key actors involved in the MAPs sector (eg. traders, exporters…); national research institutes; technical staff interested in becoming facilitators in cooperatives development as well as FFS facilitators; and the potential partner organizations. It enabled to validate the preliminary findings, to enrich the analysis with debates and discussions, to highlight the gaps in the GSVCA and the organizational assessment to be addressed in the final report, to identify a national pool of facilitators and to develop a joint plan of action for the development the MAPs sector in Fayoum's context.

The main findings of the study are presented and discussed below.

MAPs production is labor intensive and employs about 2% of Egyptian agricultural workers (around 140,000 workers). While the number and the involvement of women are significant in the MAPs value chain, it remains little discussed and generally, within the development literature, under conceptualized, and absent from the national statistics.

The MAPs value chain is composed of various actors who include input suppliers, producers, producers organizations (POs), local traders, wholesalers at different administrative levels (village, Governorate, regional), processors, retailers, exporters and foreign traders (importers, brokers, wholesalers, retailers, caterers). Other institutions that support or influence the MAPs value chain include among others: the Ministry of Agriculture and Land Reclamation, the Ministry of Trade and Industry, the national network of agricultural research institutes (including the National Research Centre, the Horticulture Research Institute, the Desert Research Institute, the Faculty of Agriculture (FOA) of Fayoum), Non-Governmental Organizations (NGOs) such as FAODA (Fayoum Agro Organic Development Association) working to promote organic farming systems and to improve farmers' livelihoods in Fayoum, MAPs stakeholders associations including the Egyptian Society for the Producers, Manufacturers and Exporters of Medicinal and Aromatic Plants (ESMAP) and the Egyptian Spices and Herbs Export Development Association (ESHEDA), or the agro-industrial development initiative aiming at upgrading Medicinal and Aromatic Plants sector in Egypt (EMAP), as well as certification bodies especially certification of organic products (such as ECOA for example).

The MAPs value chain is characterized by the scattering and poorly organized nature of its upstream base (producers) and its better organized and more formally structured actors downstream (large processors and exporters). The VCA distinguishes two main channels depending on who is piloting the chain and on target end-markets (which determine a certain level of expectations and requirements for end-product quality and services). The first channel which carries the biggest volumes is foreign market-oriented and is leading by the large exporters/processors. The second one is leading by local traders and rather destined for domestic markets. Overall the value chain operates with little vertical integration (except for a few very large companies) and almost no horizontal collaboration, despite the presence of producers organizations in the MAPs sector.

The rapid assessment of four selected producers organizations (POs) involved in the MAPs sector – three are farmers associations (FAs) and one is an agricultural cooperative – revealed that there is a strong need to support the capacity development of those organizations, so they, in their turn, can be able to entirely fulfill their role and help (women and men) farmers improve their position in the value chain. Constraints identified relate to internal capacities development needs such as organizational management, information and financial management, as well as external capacities such as networking, advocacy and lobbying. As POs are membership based, their efficiency depends on their capacity to provide demand-driven services and benefits to their members. In most case, POs fail to provide sufficient business services to their members and to go beyond delivering common business services (eg. guidance for good agricultural practices and quality improvement). There is a need for developing further capacities that enable POs to organize commercially-viable agribusiness micro-enterprises, to train their members as entrepreneurs, and to efficiently link them with the markets. Supporting POs integration within agricultural value chain also means advocating for law amendments in favor of POs development.

Regarding the gender dimension of the MAPs value chain, women are mostly concentrated at the production level. They are mainly involved in manual and high-intensive labor activities, including weeding, harvesting, removal of plants, drying, sorting, and home transformation. They often work as unpaid family workers on the family farm. Young women can also be employed on large-scale farms as labor workers, but only before they get married. Children may assist women, as unpaid family workers, more particularly during harvesting peaks. Women involved in farm management and marketing operations are very scarce. For a large majority, even if they work hard on the family plots, they have a very low and indirect participation in decision-making

processes within the farm and the household. One of the reasons is that contracts, selling, negotiations and the use of sale proceeds are predominantly managed and controlled by farm men-only.

Moreover, it is worth to mentioning that traditional and customary laws and practices are more followed by rural communities than the set of national laws promoting free mobility, gender equality and women empowerment. This situation explains why women are excluded from most of the activities along the chain which entails moving about freely, outside the house, and often being in contact with men (as seller, buyer, and technical adviser…). This also explains the very low number of farm women, and women-owned agri-businesses, involved along the chain.

In line with the above, rural women have globally a lower access to a broad range of services (education background, cash loans and credits, technical and extension services, market information, POs' support, etc.) than men. It is also the case with young people. Women and youth lack the capital, networks and opportunities. The spaces for women to develop their own network of business contacts and technical supports are particularly limited and often restricted to the domestic sphere (ie. the relatives and the neighbors). Besides, rural women and young girls are globally less educated than their male-counterparts of similar age.

When it comes to POs, women and men are considered to be equal in terms of membership and access to POs' resources and services provision. It is worth noting that being a member of POs represents a very good opportunity for farm women to get access to a set of services and information that they would not have had access to otherwise, e.g. inputs supply (seeds and fertilizers), training sessions about good agricultural practices, diseases management, marketing information, and (sometimes) market outlets. Even so, many farm women suffer from a lack of access to extension services, irrigation water, post-harvesting handling services, and professional laborers. Moreover, the participation of women and youth to POs is lower than men, in terms of quality and quantity. As a matter of fact, POs are also subject to the reproduction of age and gender-specific constraints and inequalities. Membership conditions may be 'excluding' for women and youth (access to and control over resources and property rights). The representation of women and youth in leadership and management of POs is very low. Either they practice self-exclusion from leadership and management positions by lack of self-confidence, or they are mistrusted by the rest of the POs' community when it comes to managing business operations or occupying leadership positions. Globally they have a lower access to services than men. Even if training sessions and agricultural extensions services are designed to target both women and men, many men attend them on behalf of their wife. At last, the cultural norm of women's restricted mobility, time constraints, and reproductive responsibilities, prevent them to attend meetings and to participate into collective decisions, and finally contribute to the justification for women discrimination for higher level positions.

Women are also 'visible' but to a less extent at downstream nodes of the MAPs chain. Women represent by up to 50% of the total workforce in the horticultural and MAPs processing sub-sectors, when it comes to tasks that have to be done by hand, ie. hand-sorting, -sieving, -grading and packing. They have no or little access to training and education. For that reason, they mostly occupy low-paid jobs, as unskilled workers in processing units, located in rural or (peri-) urban areas. The processing sub-sector employs a large number of young men workers too. They are mainly employed as unskilled workers to carry out physical tasks, or to perform the same 'hand-done' operations as women. Among workers who are employed as skilled workers and/or are in charge of work supervision, the number of women is globally low. Finally, women receive lower wages than men for the same job, and enjoy weaker working conditions.

The presence of women as entrepreneurs or business-owners (e.g. company manager, shopkeeper) along the MAPs value chain is very marginal. When they do, women generally belong to the high-educated and urban population, they are not married (ie. divorced, widow), and they often perform such business under special circumstances, ie. by inheritance from the father/husband. Indeed, even when women get access to high-

education levels, they have to overcome many obstacles to get and save their job. They are very often limited by mobility and time constraints (eg. working hours that prevent them reconciling family life and work, distant location of work and unavailability of transportation), restricted by their own family circle's expectations, as well as discouraged by external social norms meaning gender discrimination (in terms of jobs, wages, social insurance, working conditions and security). They also face difficulties in business licensing and registration, have limited access to business information and are unrepresented in professional associations. In parallel, the number of women employed in the governmental sector is low. Whereas the public sector was historically the first sector for women employment, it is currently registering a global decline which has consequences in terms of employment rate, for both women and men. Moreover, our survey showed that women rather prefer to work in the private sector (better salaries; higher job quality and status; major challenges; opportunities for leadership and advancement, etc.), even if it may be more difficult for them to enter it (gender discrimination against women; distant workplaces, especially for women living in rural areas; lack of information and networks regarding job vacancies; lack of experience and negotiation skills; etc.).

Corrolary: women labor force participation rate (24%) in Egypt is low with a high disparity in urban/rural women labor participation, 28% and 6.7%.

Yet, the increasing presence of women in Fayoum faculties of agriculture, agribusiness and commerce indicates a strategic opportunity to change the role of women in the agricultural value chain from manual labor and unpaid family workers to professional women contributing to the overall value chain of the governorates agriculture. As seen previously, young women graduates face higher gender-specific constraints than their male colleagues, in the private sector employment, and in the community to balance work and family obligations. Lack of information and access to counseling lead them to a period of unemployment and discouragement followed by the decision to concede to the family pressure to get married and give up employment.

One of the main conclusions of that study is that the integration of well-educated young women can contribute to the development and "densification" of the agricultural value chain at large, and MAPS more specifically, in filling up the critical 'vacant positions' in the value chain that hinder the performance of the overall MAPs value chain, in a way that promotes gender-friendly practices within the prevailing rural conservative culture. Those 'vacant positions' that jeopardize the overall performance of the MAPs value chain, while representing a high opportunity for women employment, were identified as following:

- Extension officers, for young graduates and more particularly for women;
- Trained female sales intermediaries;
- E-marketing and E-commerce Trained females;
- Trained workers (agri-food processing, marketing and distribution levels);
- Self-employment women (starting their own agriculture related businesses);
- Transportation, cooling, and trading related jobs;
- Administrative, accounting and IT positions in the VC related businesses;
- Web-based administrators.

Additionally, the study led to the identification of various opportunities and levers to enhance the participation and position of women in the MAPs value chain. There is a high potential within the target value chain for developing/reinforcing (new) markets/brands for women's MAPs products (at the national and international levels), and for women home-made value addition processes. Moreover there is a strong recognition among NGOs and POs working in rural development, of the need to better include women and youth in their program. NGOs and POs can efficiently act as 'catalyst' of socio-economic initiatives focusing on women and youth. Taking advantage of positive national and international trends (governmental efforts and international sustainable certification schemes in favor of women's empowerment and gender equality), they can give rise to synergy through multi-stakeholders partnerships and projects:

- Related to (but not only): handicrafts production, organic MAPs production, fair-trade certification, benefiting both women and men;
- Based on: training sessions (capacity building, technical, business training);
- Developing linkages with the private sector through improved market based skills;
- Raising gender awareness and empower women in rural areas (within mixed groups).

To support such initiatives for an inclusive and sustainable development of the overall agricultural value chain, with a focus on POs capacity development, gender mainstreaming and youth empowerment, the study drew up a list of recommendations, as follow:

- Collect gender-disaggregated data to target small-scale women farmers and entrepreneurs/business women;
- Develop gender-sensitive guidelines and training materials;
    - Gender trainings for Farmers Associations staff;
    - Information management, financial and business management for Farmers Associations officers;
    - Business and marketing skills for both women and men farmers;
    - Gender awareness programs for both women and men;
- Support self-gender assessment within Farmers Associations;
- Develop training materials to improve Farmers Associations institutional capacities for advocacy and lobbying;
- Support Development of Alternative Income-Generating Activities for Women;
- Support the development of agricultural education and extension systems that benefit women and young people;
    - Incentives for women's para-professional extension officers;
    - Farmer Field Schools initiatives;
- Policy discussions/advocacy to address systemic barriers to resources.

1. INTRODUCTION

1.1. CONTEXT AND OBJECTIVES OF THE STUDY

The present study takes part of the regional initiative on "Sustainable Small-Scale Agriculture for Inclusive development" (SSA) conducted by the FAO.

The overall objective of this regional initiative is to support the Near East and North Africa Countries (NENA) in reducing rural poverty in the region through a cohesive programme addressing small-scale agriculture development. In particular, the initiative is aimed at the promotion of decent rural employment and an inclusive economic growth that will benefit small farmers from the region and, in particular, the most vulnerable groups among them: women and youth.

To achieve those goals, the initiative is built on a three-tier approach: (i) get a better understanding of various types of smallholders, their labor dimensions, linkages with markets and barriers in order to support evidence-based policy and strategies and to prioritize interventions as well as better target public and private investment; (ii) sustainably improve productivity, quality, value addition, social sustainability and viability of the sector; and (iii) empower smallholders, including strengthening professional organizations, and fostering the creation of decent rural employment opportunities for youth and women (FAO; 2015). The initiative targets governmental institutions, as well as smallholders, cooperatives, formal and informal rural institutions and producers' organizations, in order to address challenges to the development of small-agriculture in the region and advance policy options.

In line with the objectives of the SSA initiative, the purpose of the present study is:

a. to generate a deep understanding of the value chains with all actors involved,
b. with a focus on producers organizations and their capacity development needs,
c. to develop an action plan for gender mainstreaming and women's empowerment within the value chains and producers organizations;
catalyzing the sustainable and inclusive development of SSA in the region and in Egypt in particular.

To achieve that goal, the study will address the following objectives:

- To conduct a Gender Sensitive Value Chain Analysis on MAPs in Fayoum and provide entry points for intervention to empower the actors of the value chain including women and men farmers, youth, communities and Producers' Organizations.
- To determine the capacity development needs for the Producers' Organizations and actors of the VC in Egypt and map out relevant capacity development documentation that addresses existing gaps.
- To determine the capacity needs for women empowerment to improve their value chain participation (agricultural trainings; lead positions in trainings, extension agencies and self-help groups; make agreements and sign production contracts with other chain actors; or access to credit).

1.2. METHODOLOGY

The study was carried out by NSCE, under the supervision of the FAO's Regional Initiative on Sustainable Small-Scale Agriculture (SSA) for Inclusive development. The study was conducted during a four-month period, from August to December, 2015; and mobilized a multidisciplinary team of experts from NSCE, in the following areas: rural development in Egypt, agricultural value chain and gender analysis, organizational strengthening and capacity building development.

The methodology developed for the two-fold study relied on a qualitative research approach that combined a comprehensive desk review and (individual and collective) interviews with the key actors involved in the MAPs value chain:

a) The first phase of comprehensive desk review aimed at drawing a map of the MAPs value chain in Fayoum and getting an in-depth understanding of the different actors at each nodes of the chain, as well as the linkages between them, and the main constraints and challenges they are facing to. It also included a preliminary attempt for the identification of women's positions and roles along the chain.

b) The second phase of data collection included interviews conducted with the key actors involved on the MAPs value chain of the Governorate of Fayoum. It was based on individual interviews or focus group discussions, according to the categories of actors targeted.

Semi-structured interviews focused on what value chain actors are doing, on relationships among them, on the division of work (age and gender-based) and on related costs and benefits. They were addressed to input suppliers, producers, producers' organizations officers, local traders/wholesalers/retailers, processors, and large export buyers/processors/distributors.

They were completed by focus group discussions (FGD) with POs members and a sample of young women University graduates, and unstructured interviews with key informants. Focus group discussions were held in order to provide a deep understanding of the behavior, attitudes as well as to grasp the main challenges and obstacles hindering women and youth inclusion in the MAPs sector in general and within POs in particular. Separate FGDs were held with women and men farmers respectively. Mixed FGDs with 'youth groups' were conducted in order to better understand the ways that male and female participants from various age and gender perspectives both overlap and diverge.

The findings from the literature review and fieldwork were presented during a restitution workshop, held in Cairo, Egypt, on November the 2nd and 3rd, 2015. The objectives of the workshop were to review, discuss and validate (the results with the main stakeholders, and to elaborate an action plan for an inclusive strategy to strengthen the MAPs value chain, including POs capacity development, women empowerment and gender mainstreaming. The workshop revealed the need for conducting additional fieldwork, in order to:

- better understand the dynamics within the value chain and the relations between the different actors;
- refine women positions and roles at each node of the value chain;
- complete an organizational analysis of the POs.

Eventually, a total of 140 actors involved in the MAPs value chain in Fayoum were interviewed.

Value chain node	Number of actors	Data collection Mode	Number of respondents (~n)	Female	Male	Youth
Input suppliers	n.a.	Interviews	4	-	4	-
Farmers	n.a.	Interviews	12	4	8	-
FAODA	110 men 55 women ? young people	Women-only FGD (1) Young women University graduates FGD (1) Men-only FGD (1) Mixed Youth FGD (1) Interview (3)	7 17 5 6 3	7 17 - 2 -	- - 5 4 3	- 17 - 6 -
CDA Monshaat Sakran	80 men 20 women ? young	Women-only FGD (1) Men-only FGD (1) Mixed Youth FGD (1)	7 5 7	7 - 3	- 5 4	- - 7

	people	Interview (3)	3	-	3	-
CDA Youssef ElSeddeik	125 men	Women-only FGD (1)	6	6	-	-
	15 women	Men-only FGD (1)	4	-	4	-
	? young	Mixed Youth FGD (1)	12	8	4	12
	people	Interview (3)	3	-	3	-
Coop Monshaat Demo	730 men	Women-only FGD (1)	8	8	-	-
	400 women	Men-only FGD (1)	6	-	6	-
	? young	Mixed youth FGD (1)	11	10	1	11
	people	Interview (2)	2	-	2	-
Local buyers/traders	n.a.	Interviews	5	-	5	-
Exporters/processors	n.a.	Interviews	5	1	4	-
Bankers/finance institutions	n.a.	Interviews	2	-	2	-
Key informants	n.a.					
Research centers/univ.		Interviews				
Governmental bodies		Interviews				
Industry associations		Interviews				
NGOs and donors		Interviews				
TOTAL						
POs capacity development needs assessment		Interviews (11) FGDs (12)	11 114	- 41	11 20	- 53
GSVC		Interviews (28)	28	5	23	-
Total respondents		Interviews (21) FGDs (12)	**140**	**73**	**67**	**(53)**

The thorough detailed methodology of the study, as well as the interview guidelines for each type of actors and interviews (collective versus individual ones) are presented in appendixes 1 and 3, respectively.

1.3. STRUCTURE OF THE REPORT

The present final report is intended to present the different findings collected through the various steps of the study (briefly presented formerly and described in details in the appendix 1 and the inception report).

The final report opens with an introductory chapter. A first section deals with the context and objectives of the study, replacing the study in its regional scale and purpose by presenting the SSA initiative of the FAO, and lists the mains goals of the assignment. A second section presents a brief review of the methodology developed, exposing the different steps and tools employed to carry out the study. A last section presents the findings from the literature review. It is divided into 5 sub-sections, dealing with gender and value chain development (a) ; woman in agricultural value chain (b) ; POs capacity development, and age and gender specific issues (c) ; a rapid overview of the MAPs value chain in Egypt (d), Fayoum, and a focus on women in the MAPs sector (e).

A first chapter presents the findings regarding to the POs needs rapid assessment. They are divided in two main sections, (1) a descriptive analysis of the selected FAs and Co-ops, and (2) a rapid capacity needs assessment.

A second chapter details the results from the GSVC, focusing on (1) the identification of women roles and gender sensitive mapping, and (2) the analysis of key age and gender based constraints and opportunities.

Finally, a last chapter of conclusions and recommendations completes the present final report.

1.4. RATIONALE FOR THE STUDY/LITERATURE REVIEW

1.1.1. Gender and value chain development

Over the past decade, development practitioners have increasingly shifted their attention from farming systems to targeting agricultural value chains to improve smallholder production and participation in markets.

Value chains are understood to consist of the linked set of activities and actors that bring a product from conception to its consumers through to its disposal. Value chain analysis involves collecting information about firms and market connections to identify strengths or weaknesses in the coordination of these activities and to examine the power and position of firms in relationship to other actors in the chain. The goal is to identify how firms can improve their performance by reducing costs or enhancing the distinctiveness of their products or services (or both), a process known as upgrading (USAID, 2012).

In the agricultural sector, a diversity of actors now operate, from smallholder farmers to multinational food corporations, each with different needs, objectives, strengths and weaknesses. Not only do they each have their own concerns and interests, they may work in different ways with different partners, increasing the challenges of coordinating the different elements of domestic and internationally-oriented agricultural value chains. Managing the global food system must contend with demands for efficiency and sustainability while at the same time encouraging greater equity in access and participation. The value chain approach has emerged as a very popular analytical tool to address these challenges and to shape implementation of agricultural programming.

This scheme includes different actors from all levels; from farmers up till exporters (Ministry of the foreign affairs Denmark, 2010). The participation of women in the value chain is vital for a better economy and the entire upgrading of the value chain, however gender inequality occurs in the value chain, where the labor force of women is much less than that of men. The determinants of this inequality are plenty, including; lack of mobility, lack of access of markets, thus inability to connect to other value chain actors, limited access to resources, and most importantly social norms and restrictions that cause lack of control over decisions taken (USAID, 2011;Ministry of Foreign Affairs Denmark, 2010).

1.1.2. Women in agricultural value chains

1.1.2.1. Role of Culture and Society

Women participation in labor force (13.3%) is much weaker than men (45.6%) as per a survey conducted in 2012 (SYPE, 2014). Although women participation as manual labor in the agriculture value chain is significant, it remains invisible in the statistics. Participation of women as skilled labor and managers in the agricultural value chain is weak due to the social perception of women's roles in the community and social dominance of men (USAID, 2011). Another reason that impedes women from significantly participating in the value chain is their dependence on other jobs that guarantee an immediate flow of cash even if it comes in small lumps (Spence, 2012; USAID, 2011). This is due to women's need of money for daily household expenses. Since society and culture hinder women's participation in the labor world, the involvement of women in the value chain will not only empower women economically, but it will also empower women socially; allowing them to earn independence financially and socially, thus have control over their decisions (USAID, 2011).

1.1.2.2. Transition of women and youth

Youth unemployment is a major problem that has long existed in Egypt, especially among women. Maia Sieverding (2012) concluded that around 6.5 million female youth are neither in school nor working, underlining the high rate of female youth unemployment. There are many factors causing this poor employment flow. Sieverding stated that only 11.2% of female youth are involved in wage employment, this percentage shows the huge gap between male youth employment and female youth employment. Moreover,

education and marriage play a vital role in the employment of women. As it was stated by Sieverding, only 11.4% of married female youth have jobs compared to 25.3% of unmarried female youth. Given the fact that 66% of unemployed female youth stated that they couldn't work because of household responsibilities and 87% of unemployed female youth with university education shows the conflict between domestic responsibilities and work, regardless of the high level of education. Other factors of female unemployment included women's inability to broadly look for jobs. In other words, unlike men youth, women youth have very limited ways of looking for jobs, which in return lessens women's chances of finding jobs. As Sieverding showed, women youth mostly depend on government employment, further; it has been showed that female youth wouldn't likely inquire about a job in the private sector by phoning nor by visiting the job location, thus, limiting their chances of finding jobs (Sieverding, 2012).

In a study by Ghada Barsoum in 2014 on *The Labor Market Transition of Young Men and Women*, the gap between the gender employments was clear. In fact, it has been stated that the percentage of male youth employment is around 70.6% compared to the low percentage of female youth employment (19.4%). Additionally, this study revealed another reason behind youth unemployment. The study explains that unemployment is also caused by the generation's high access to education, where graduates graduate looking forward to working a professional job but find the contrary. This is caused because of the insufficiency of professional jobs and the high number of educated graduates, causing surplus in university graduates. Besides the low rate of women labor force, Barsoum also discussed the poor quality of jobs. Moreover, there is considerably a big number of female youth involved in unpaid family jobs (28.9%). Correspondingly, male youth are involved in unpaid family jobs (14.2%). The study also discussed the majority of female youth who fails to complete their transition to satisfactory jobs. This corroborates with Sieverding's explanation regarding the interference of family and household responsibilities in the young women's career (Sieverding, 2012; Barsoum, 2014).

1.1.2.3. Leadership and Entrepreneurship

Leadership is a very important characteristic that can transfer standard graduates to entrepreneurs or further upgrade them to become leaders and better their career chances. Thus, education is not the only vital factor to create successful employees or entrepreneurs, leadership is also as important to create not just an employee, but a successful one. In regard of women empowerment, it is important to consider the importance of enhancing women's leadership skills, so a brighter professional career would be guaranteed. For instance, in a review by The USAID on *Women's Entrepreneurship and Leadership Training Graduation*, the significant impact of the entrepreneurship and leadership training on women was clear, where women graduates showed notable contribution toward progressing livestock. Knowingly, they became role models who are not only expected to be successful employees, but also business women and even effective mentors positively influencing women in their communities (USAID, 2015).

Women's entrepreneurship has proven essential in the contribution to a strong economy. Carmen Niethammer explained in a study on *Women, Entrepreneurship and the Opportunity to Promote Development and Business* that the number of successful businesses owned by women has been increasing over time, significantly contributing to "development beyond enterprise growth and turnover numbers." (Niethammer, 2013). Nevertheless, women, like in any other sector, still face many constraints impeding them from becoming entrepreneurs. One constraint that seems to hinder women not only from becoming entrepreneurs but also from participating in the labor market generally as Sieverding and Barsoum agreed is family responsibilities. For women in Egypt and other tradition-oriented countries, family is always the first and only priority (European Training Foundation, 2009), thus work does not necessarily come in the list of priorities, and if it does and contradicts with household responsibilities, women simply compromise their jobs (Sieverding, 2012; Barsoum, 2014). This kind of mindset is based on the idea of "following the herd" as it was stated in a USAID study (USAID, 2011). Sometimes even when women decide to overcome the social constraints, still remains other restraints that make it harder to become entrepreneurs. Time and mobility have also been

common constraints burdening women who try to achieve entrepreneurship. This occurs when classes are too distant from the targeted women and in some instances women feel the need for childcare services (Niethammer, 2013).

1.1.2.4. Work in the governmental and private sectors

The majority of labor force flow is centered in both governmental and private sector, however, youth usually have preferences when it comes to choosing between both sectors. As it was conducted by Caren Nelson in *UAE National Women at Work in the Private Sector: Conditions and Constrain*t; salaries and non-monetary benefits in the public sector are better than in the private sector. Moreover, the working hours in the public sector are limited and generally less than the working hours in the private sector (Nelson 2004). Similarly, Barsoum showed that the estimate number of young students who wanted to work in the governmental sector in Egypt is incredibly higher than private sector (73.4%) while only 16.4% demanded to work in the private sector and 5.8% wanted to work in their own farm or operate in their own business (Barsoum, 2014). Additionally, the rate of unemployed youth who stated that they wanted to work in the governmental sector was strikingly high (80.5%), women also showed an overwhelmingly high interest in working in the public sector, where their percentage was 86.8, which even exceeded the rate of male youth interested in working in this sector (66.7%). Youth in rural areas preference was also towards working in the governmental sector, where their percentage exceeded the youth in the urban area (87.9%). With the extremely high rate of interested youth in the governmental sector and not enough jobs in this sector, comes unemployment, (Barsoum, 2014). In accordance with the survey conducted on labor in UAE, youth in Egypt explained favoring working in the public sector mostly for 3 reasons; status, security and benefits (Barsoum, 2014).

Age seems to be a crucial factor in determining female employment. For example, in a study conducted on *women's empowerment in agriculture* in Southern Bangladesh, Western Highland Guatemala, and Uganda, it was discovered that age played a great role in the employment of women, as it was stated that 36% of employed women in Bangladesh aged from 26 to 55, not younger or older. Also, in Guatemala, 31% of empowered women aged from 26 to 45 and 29% of women older than 65 were empowered, in comparison with only 6% of empowered women under 26. Further, in Uganda, 28% of women under 26 were empowered in agriculture; while the higher rate of empowered women in agriculture ranged from 46 to 55 years old (53%) (International Food Research Policy Institute, 2012). The previous conducted results show the importance of age as a major determinant of employment, further, the results show the high rate of unemployment among young women. Comparing people's preference towards governmental and private sectors, one would find that working in the private sector is the least favored for number of reasons.

1.1.3. POs capacity development, value chain, and age and gender-specific issues

Cooperatives are independent organizations that are based on memberships of community members, these organizations aim at providing a variety services for their members, such as ; improved access to markets, natural resources, information, communications, technologies, credit, training and warehouses. Since cooperatives are non-discriminant entities, their services are not limited to gender or colour. Thus, cooperatives aim at empowering all their members- men, women and youth, economically and socially by establishing employment opportunities. Therefore, the amenities offered by agriculture cooperatives tend to contribute to the reduction of poverty (FAO, 2012).Nevertheless, the effectiveness of a rural producer organization is not guaranteed because its success depends on different factors including; governance and management; group composition; membership commitment; external linkage and support; and community and agro ecological factors (Ragasa, et al, 2012).

1.1.3.1. Producer organizations and Value Chain

Value chain and producer organizations are directly correlated. A value chain describes a set of activities executed in the production of a product. Further, the value chain interprets activities performed by all actors involved in a certain organization, sector or firm, such as farmers, processors, traders and retailers (Miller and

Da Silva, 2007). On the other hand, a producer organization is responsible for offering a variety of services to its members as well as community. Thus, "producer organizations are considered instrumental in increasing the value generated throughout the chain" (Bijman and Wollni, 2008). A producers' organization can help better the effectiveness of a value chain by ensuring that the quality of products as well as its alignment with the standards demanded. Further, they can also "mobilize support from other stakeholders and can help farmers negotiate a fair share of the total profit generated" (Bijman and Wollni, 2008). Moreover, the presence of a PO can help in the implementation of quality control systems. They can also contribute to reaching a higher product quality by enabling innovation process (Bijman and Wollni, 2008) accordingly; a value chain would be strengthened and boosted, thus ensuring a better quality of products as well a better quality of living to the people of the community.

1.1.3.2. Youth Organizations

It has been estimated that youth represent 60% of the entire population in Egypt. (WB, 2007) Thus, youth's role in the development in Egypt is very important. Consequently, attention paid to the development of youth by building their capacities and improving their skills will enhance their team-leader skills, thus contribute to the advancement of Egypt. Nevertheless, studies have shown that there is high rate of unemployment among youths, especially among females. In fact, 16% of young people aged from 15 to 29 were unemployed ; moreover an even higher rate of unemployed young people was among youth aged from 18 to 24, where their percentage was 19%. As for female youth, their percentage of unemployment (32%) almost tripled the percentage of male youths 12%. (The Population Council, 2010). This contrast between the high percentage of youths and high rate of unemployment show the need for the development of youths and manifestation of job opportunities. One of the best ways to boost the youths' skills and capabilities is through NGOs and youth organizations. In contradiction with the need for youth organizations, the actual existence of these organizations is insufficient. Youths organizations represent 0.5% of the NGOs in total. (WB, 2007).

In a deeper outlook, one would find that there are different types of youth's NGOs with different approaches. The first type is youths' organizations. A youths' organization is an entity based on a high number of youth participants, where the board and employees are mostly youth. Youths associations in Egypt are closely associated with Youth Association for Population and Development which was established 1995. Youth Association for Population and Development strongly believed in the youths' major role in the overall development in Egypt and work on enhancing their ideology by working on different projects that focus on youths' augmentation. They also make conferences that discuss the different methods and approaches that can improve the youths' role in the community. Another type of NGO that focuses on youth empowerment is Youth-serving NGOs. Youths-serving NGOs are other organizations that work on the development of youth in the community; however, their main concern is providing services to the young people without integrating them in the management tasks and planning for activities. Third types of NGOs that integrate youth are Youth-Led NGOs. These NGOs although these organizations are usually led by a group of young people they don't necessarily focus their services on youths (WB, 2007).

1.1.3.3. POs and Women

Women's role in the agriculture world is crucial; however, their participation in the rural organizations and decision-making is contrastingly poor. "This inequality of participation in the rural organizations remains intricately tied to the inequality in opportunities and responsibilities encountered by women" (Tanwir and Safdar, 2013). This goes back to different factors that limit women's involvement in community and rural organizations. These factors include; women's double burdens, triple roles and consequent work overload, their lack of access to and control over productive resources and access to formal financial and technical assistance and their lower levels of capacity and education. Although women are mainly known as caregivers, their role is actually crucial in other activities such as farming and cash earning. This overload makes it harder for women to pay attention to any further activities. Women's multiple responsibilities and workload don't only limit their access to rural organizations but also occupies so much of their time that they are left out with no time to add any extra responsibility to them. In fact, it has been estimated that the average time women

spend working is 16 hours a day, unlike men who spend less time working. Additionally, the majority of the activities women perform are unpaid (United Nations Statistical Division, 1995/2000/2005).

Women's lack of access to and control over productive resources is mostly limited by the cultural norms and society's customs. (FAO, 2011) The limited access to productive resources has long-term as well as short-term consequences. Ownership of assets helps in allowing women to be economically secure by providing inducements to broaden women's access to investment opportunities (Doss et al., 2008). Regardless of women's important role in rural areas, their participation in POs still remains insignificant due to a number of hinders that impede women's participation in the decision-making.

1.1.4. Rapid overview of the MAPs value chain in Egypt, Fayoum

MAPs from Fayoum exchange many hands before reaching final consumers within and outside Egypt. Figure 1 presents a schematic picture of the MAPs value chain.

The MAPs value chain is composed of various actors who include input suppliers, producers, producers organizations (POs), local traders, wholesalers at different administrative levels (village, Governorate, regional), processors, retailers, exporters and foreign traders (importers, brokers, wholesalers, retailers, caterers).

Other institutions that support or influence the MAPs value chain include among others: the Ministry of Agriculture and Land Reclamation, the Ministry of Trade and Industry, the national network of agricultural research institutes (including the National Research Centre, the Horticulture Research Institute, the Desert Research Institute, the Faculty of Agriculture (FOA) of Fayoum), Non-Governmental Organizations (NGOs) such as FAODA (Fayoum Agro Organic Development Association) working to promote organic farming systems and to improve farmers' livelihoods in Fayoum, MAPs stakeholders associations including the Egyptian Society for the Producers, Manufacturers and Exporters of Medicinal and Aromatic Plants (ESMAP) and the Egyptian Spices and Herbs Export Development Association (ESHEDA), or the agro-industrial development initiative aiming at upgrading Medicinal and Aromatic Plants sector in Egypt (EMAP), as well as certification bodies especially certification of organic products (such as ECOA for example).

The governance of the MAPs value chain in Egypt is mainly left to market forces and cooperation among actors is an exception. The present MAPs value chain is characterized by the scattering and poorly organized nature of its upstream base (producers) and its better organized and more formally structured actors downstream (large processors and exporters). The VCA distinguishes two main channels depending on who is piloting the chain and on target end-markets (which determine a certain level of expectations and requirements for end-product quality and services). The first channel which carries the biggest volumes is foreign market-oriented and is leading by the large exporters/processors. The second one is leading by local traders and rather destined for domestic markets. Overall the value chain operates with little vertical integration (except for a few very large companies) and almost no horizontal collaboration.

The value chain actors, the horizontal and vertical linkages between them, and the general constraints they use to face, are described in further detail in the Annex 2.

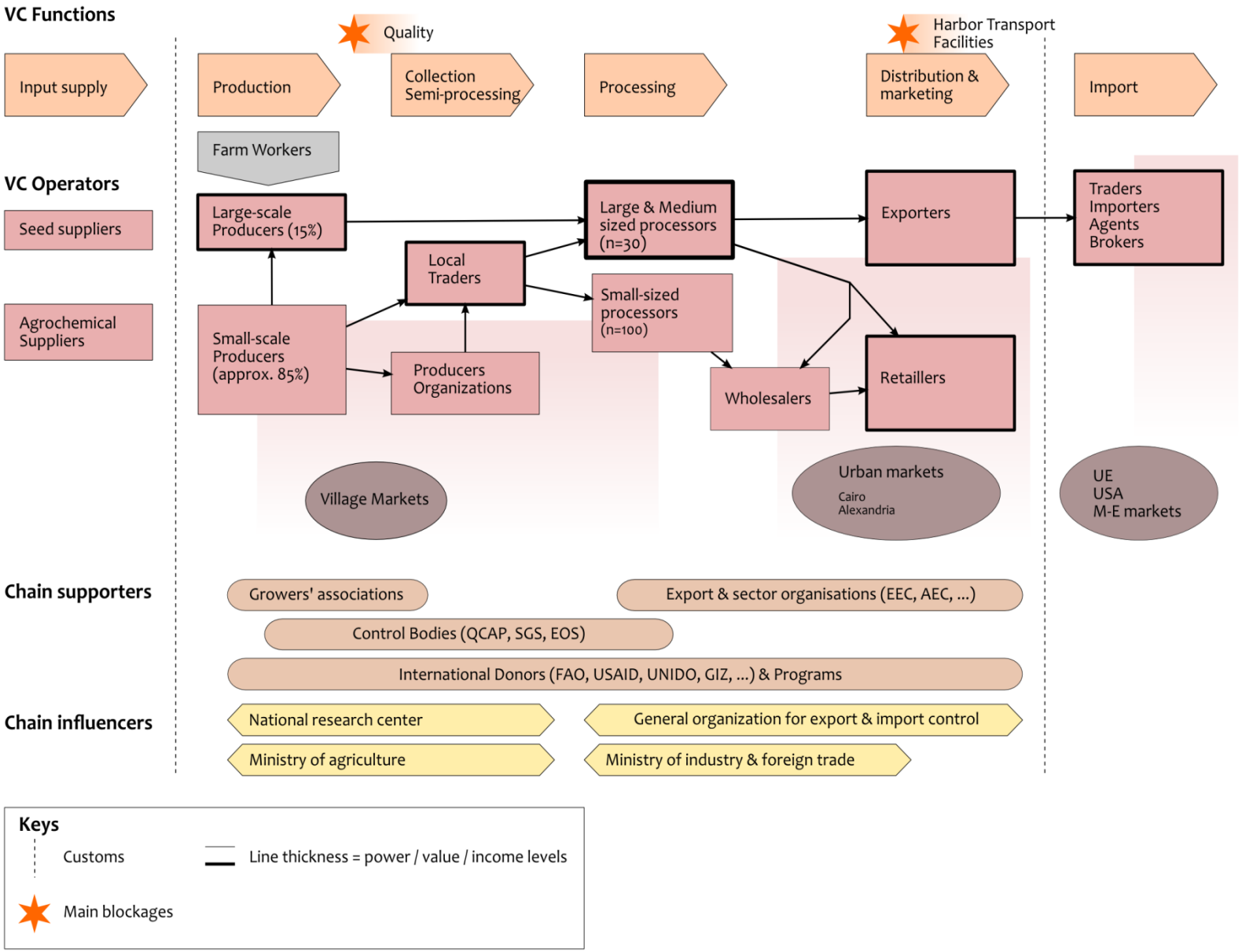


Figure 1 : Mapping of the Egyptian MAPs value chain (the author, 2015)

1.1.5. Focus on Egyptian women in the MAPs sector

The 2012 World development report on gender equality and development indicates that 46 % of Egyptian female work force is employed in agriculture. Women perform agriculture and farming-related activities on family owned land as unpaid labor, as well as for non-family members, as paid workers. Women form the majority (75 %) of the work force involved in harvesting, handling, sorting and packing processes within post-harvest centers (WB, 2012).

Although women have long been involved in the MAPs sector, the economic benefits accruing to them have not kept pace with the economic and market growth registered by the MAPs industry, and their knowledge and skills are often undervalued. Women face many constraints that jeopardize the potential benefits they should reap from their participation along agricultural value chains. Overall the mobility of women, their access to education, infrastructure, social and health services and their control over resources is more restricted than that of their counterparts. That all translate for women in the agricultural sector into limited access to resources, land ownership, market information/knowledge, services (extension services, trading support, and financial services) and professional network. In addition as most of rural women are limited to the domestic spheres most of their productions (fresh and processed products) are done at home; which is discouraged by safety standards/industrial regulations; and which is not accounted for and is considered from the non-paid work as the society lists this among the routine daily tasks of women (FAO, 2005).

Despite changing attitudes, when women are paid, the income they receive from their participation in the production, processing, and marketing of the MAPs is not commensurate with their roles. In fact a recent study states that in the MAPs sector "a stronger position is accepted" as women focus more on quality than on quantity (UNIDO, 2011). However they continue to be paid less than men for equal tasks (the actual labor costs are 2 euros per hour) and remain trapped in low paid jobs and informal employment. In 2011, the percentage of female employees in the Egyptian MAPs sector was about 40% at the large-scale producers and their participation in the processing industry was very limited (*ibid.*, 2011).

Another main constraint is the lack of specific representative body for women in the MAPs industry and more generally in the agricultural sector. Their limited access to resources and the weight of tradition (land ownership, membership fee, etc.) can make it difficult for women to join a mixed producers' organization (FA, PO, cooperative). When they belong to mixed organizations, women have less access to services and they are frequently not well represented in and excluded from decision-making processes. Women's limited participation within organizations also undermines their ability to participate in policy processes outside the organization. Culture and traditions characterized by hierarchical relationships in which women are expected to obey men and older community members also complicate women's participation in producer organizations. Young people, and even more so the young women, face additional challenges in having their voices heard.

The lack of available data show that there is a real need to conduct further research and in-depth study on the specific roles women play into the MAPs sector and the way they are involved in (and benefit from) MAPs value chain, specifically in POs, as well as the conditions under which they may exert a leverage effect in order to improve living conditions and sustainable growth. Lastly, a greater emphasis needs to be placed on the specific opportunities and constraints young people face in the MAPs sector in general and in POs in particular.

The following figures roughly show where women, man and children are involved at each node of the MAPs value chain. The 'big picture' that derives from it shows that women and men are more numerous and both involved in the upstream activities of MAPs production. Women are less involved in activities adding value to the final products such as marketing and distribution, in particular; and in the export distribution channel, in general. At the level of local markets (wholesale, retail markets), there is a lack of reliable data to our knowledge. Further details about the respective role of men and women at each node of the value chain and gender gaps, constraints and opportunities will be made available through the fieldwork.

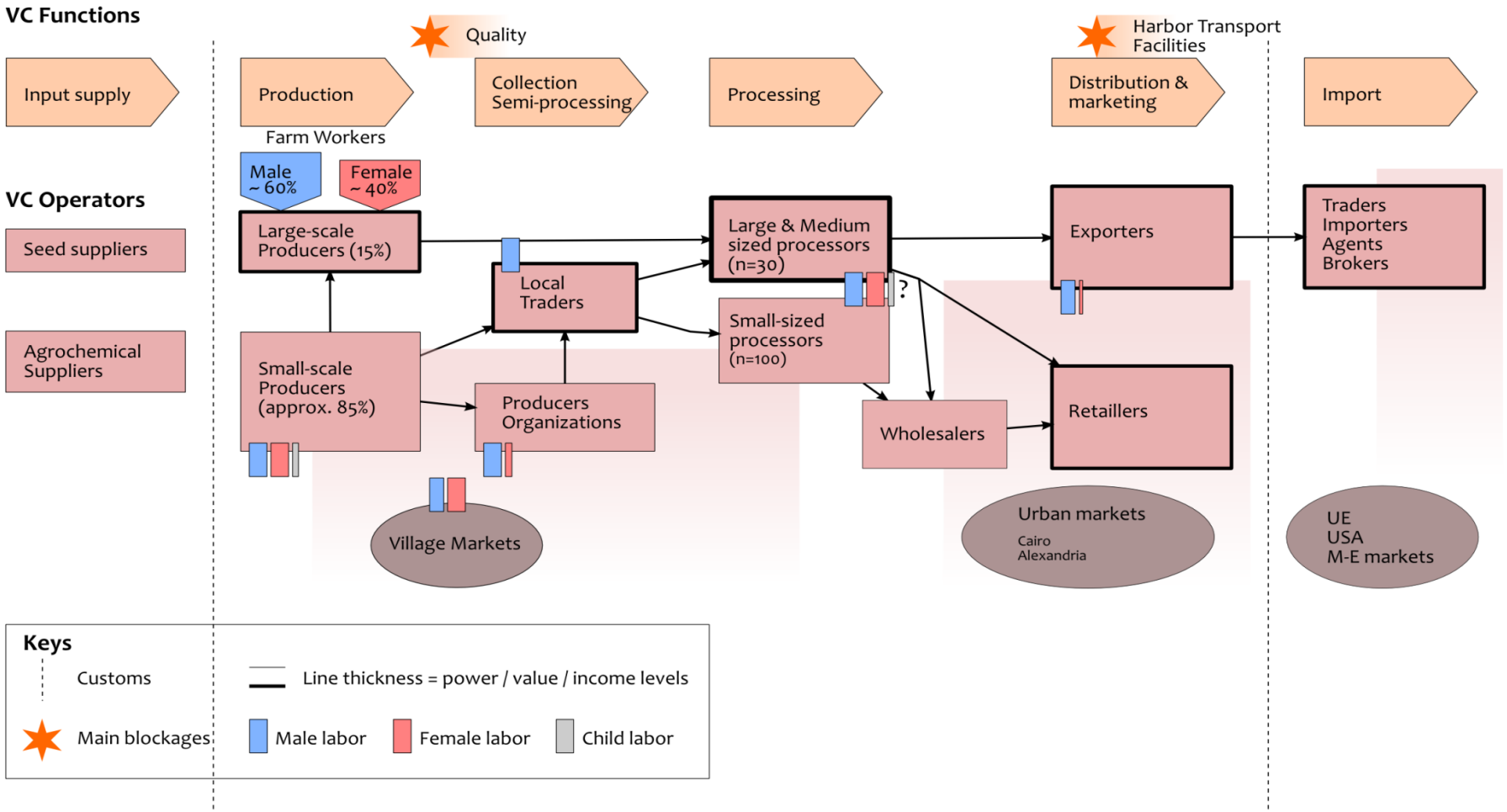
Table 1 : Pre-Identification of gender roles and positions at each node of the chain

ACTORS	STRUCTURE & FUNCTIONS/ACTIVITIES	GENDER ROLES & POSITIONS
Input suppliers	• Small and medium-sized companies in semi-urban and rural areas • Supply agricultural inputs, i.e., seeds, fertilizers, pesticides • No specialization on MAPs agricultural inputs • Additional agricultural services and technical support to farmers	• Low number of women involved • No data
Producers	• A wide number of small-scale farmers ~ 3 fd → 85% of national production × Small-sized farm, majority of land tenants, family labor × Low mechanization, traditional irrigation system, own seeds × Crops rotation – MAPs crops + horticultural crops + cereal (wheat) + fodder crops • Soil preparation, seeding/planting, watering, manual or chemical weeding, fertilizing, pest control, harvesting, post-harvest handlings • Sell MAPs directly to village markets, local traders, and Fas - domestic market • Sub-contracting small farmers by large-scale growers (n~15) • Small- as large-scale growers hire permanent and seasonal laborers	• Large number of women working at the farm level • Mainly involved in manual and high-intensive labor activities : weeding, harvesting, removal of plants, drying, sorting, home transformation • As unpaid family workers • For women who are not married, as waged laborers • Child labor ? as unpaid family workers, assist women in harvesting operations
Producers organizations	• Distinction between Co-ops and FAs (CDAs, NGOs) • The Agricultural Cooperative Organizations (Co-op) × Large membership (thousands of members) × Main functions : input supply, land protection, and support to farmers in agricultural production × Very small amounts of MAPs • The Farmers Associations (FAs) × Lower membership (<250 members) × Broader scopes of activities : support in agricultural production, GAPs, post-harvest operations (drying, grading, storage, packing, transportation), marketing functions (local traders, large-scale growers, exporters) × Promote the development of non-traditional and high-value crops with an export potential, such as MAPs × Contribute to social, economic and environmental community-development projects (self- or donor-funded projects) with a focus on women and youth	• The Agricultural Cooperative Organizations (Co-op) × Women's membership and participation is low – no gender-specific incentives • The Farmers Associations (FAs) × Youth and women's membership is lower than men × Community development projects help improve awareness of gender issues × Under-representation of women in the decision-making processes × Women are confined to traditional roles (children care, health awareness programs for the social part ; handicrafts and small breeding for the economic part)
Local traders	• Pivotal role between small-scale farmers and processors/exporters • Solid position and bargaining power in the chain (asymetry of information vàv farmers)	• Low number of women involved • No data available

	• Possibly, technical support to farmers for quality requirements • MAPs collection, basic processing operations and quality control, sorting, transportation	
Processors	• 3 types of processors : × Large-and medium scale processors (n=30), all export-oriented, located in metropolitan areas, modern equipment × Small-scale processors (n=100) produce dried herbs, seeds and leaves, essential oils for the domestic market • Activities : cleaning, drying, sieving, grading, blending, color sorting ; size reduction, steam sterilization, and extraction for essential oils ; packaging, standardization • For large processors/exporters, links with foreign companies to develop production lines and benefit from technical and marketing trainings • Search for consistent, high-quality products and big volumes. • Trust-based business relationships. Verbal agreements. • Main suppliers : local traders and large-scale farmers, and more recently, some farmer associations	• Participation of women appears to be limited (CBI, 2013) • No further data available
Exporters	• 3 types of exporters : × Exporters with own farms and facilities for processing and packing × Exporters with screening and packing facilities × Exporters without land or factories • Located in metropolitan areas, the largest ones have processing factories close to the production sites –control all the steps, from production to export • Strong positions in the chain, both in the domestic and export markets	• Number of women involved • No data available
Wholesalers/ retailers	• Domestic channels × Village markets → consumers × Wholesaler (3 wholesale markets in the country) → purveyors → retail markets • Many large exporting companies (with own processing factories) are responsible for repacking for retail	• Number of women involved • No data available

Services providers	• Governmental bodies (MoALR + extension services, and MoIFT) • Specialized consultants • Private companies involved in the VC E.g. input suppliers or exporters/processors/local traders when provision of technical support to (sub-contracted) producers • Business Development Services providers (e.g. the Egyptian Spices and Herbs Exporters Association – ESHEDA -, the Food Export Council –FEC –) • Certification bodies (e.g. the Egyptian Organization of Standardization and Quality - EOS) • Research institutes (e.g. the National Research Centre, the Horticulture Research Institute, the Desert Research Institute, the Faculty of Agriculture (FOA) of Fayoum), • NGOs (e.g. FAODA) and related donors-projects, as well as farmer associations and cooperatives	• Number of women involved • Low number of women as extension officers • No data available

Figure 2 : Preliminary gender map of the MAPs value chain in Egypt (source: the author, 2015



2. POS CAPACITY NEEDS ASSESSMENT: FINDINGS AND DISCUSSIONS

The rapid assessment of POs capacity development needs with a focus on governance and gender equality is based on a case-study approach including a sample of 4 producers organizations involved in the MAPs chain in Fayoum, as follow:

- The Agricultural Cooperative in Monshaat Demo – Co-op Monshaat Demo
- The Fayoum Agro Organic Development Association - FAODA
- The Shabab Elghad Association for Social Development and Organic Agriculture – Shabab Elghad Association
- The Community Development Association in Youssef Elseddeik – CDA of Youssef Elseddeik

The description of these 4 POs gives an overview of the organizations' memberships, their internal management system, the type of services provided and how operations are managed, which audience groups they target, how they are financed, their relations to external stakeholders, their capacity to engage in policy and development processes, and how this is articulated with their vision and objectives. The main constraints and opportunities faced by Co-ops and FAs are then summarized.

2.1. DESCRIPTIVE ANALYSIS OF THE SELECTED FAS AND CO-OP

2.1.1. The Agricultural Cooperative in Monshaat Demo (Co-op Monshaat Demo)

The Agricultural Cooperative in Monshaat Demo was founded in 1957 and registered with of the Ministry of Agriculture and Land Reclamation (MoARL). The mission of the Co-op was to support the new smallholders which had benefited from the Agrarian Reform both economically and socially. The Co-op was also expected to help developing and maintaining the land's productive capacity and empower these new small farmers for the sake of the national economic stability under the direct supervision of the MoALR. In return, the government provided the Co-op with provision of facilities and services (technical and financial supports) and supported the development of the cooperative leaders' skills. Yet, now, the government form of support has mainly gone but the submission of cooperatives to government's control remained.

The purpose of the Co-op, as formulated by its general manager, corresponds to the list of services delivered by the Co-op to its members: supplying fertilizers and pesticides, distribution of seeds, technical support (integrated pest management) and trade facilitation. The Co-op in Monshaat Demo is composed of about 1130 members, of which 400 farmers are women. But the target group of the Co-op mentioned by the general manager is 71 farmers only. The conditions for joining the Co-op are to get a land ownership and be reputable. There is no a minimum ownership entrance level. The membership provides advantage such as subsidized agricultural inputs and technical support. According to the general manager, women and men farmers have equal access to these services. The total area covered by the Co-op is 1050 feddans. The proportion of MAPs cultivated is very low, as the Co-op producing strategy is to focus on cereal production (e.g. maize). The Co-op employs a team of workers under the supervision of its agricultural cooperative department. They are in charge of agricultural inputs distribution and technical assistance to farmers. According to the chairman, one third of them appear to be women employees.

The Co-op mission was formulated by the Board of director as follows: *"to provide awareness to the farmers about the new technology"*. The Board of directors is composed of 6 members, all of them are male. Their role and responsibilities are defined as follows: *"to work towards the development of the association to better serve its members"*. They meet each other once a month in addition to the annual General Assembly (GA). They are responsible for formulating the mission of the Co-op, strategic and business plans, reviewing budget changes if any, and deciding about the potential entry of new members. The board of directors decisions are being

announced through their meetings and writing down meeting minutes which are available to any members who want to consult them. One can note here that about 30% of the Co-op members are illiterate.

Figure 2 : Composition of the Board of the Demo Co-op

Name	Position	Gender	Age	Education	Profession	Years in the board
Farid Abdel Azim	Director	male	57	Intermediate	Director	2
Wahid Ibrahim Mohamed	Secretary	male	45	Higher	Farmer	2
Sokhry farahat Hassan	Member	male	55	Intermediate	Farmer	2
Ahmed Moawad	Member	male	60	None	Farmer	2
Wahid Sabri	Member	male	57	None	Farmer	2
Abdelsattar Afifi (Died 6 months ago)	Member	male	52	None	Farmer	2

The following table briefly presents the composition and status of people who are responsible for management and operational tasks.

Level	Age	Gender	Education	Profession	Contract Status	Salary Status
Management						
Farid Abdelazim	55	Male	Intermediate	Director		1200
Operations						
Nageh	51	Male	Intermediate	Supervisor		950
Shaaban	53					1000
Magdy Hazkial						

Figure 3 : Composition of the management and operational staff of the Monshaat Demo Co-op

When the general manager is asked about who controls the benefits and decides how they must be distributed, he states that the decision-making process is in the hands of the chairman and the general manager. The Co-op holds a strategic plan which is established by the Board of directors. Its elaboration does not include consultation with the team workers, beneficiaries or partners. Its execution is hindered by the lack of financial resources. According to the general manager the organizational structure enables the Co-op to perform well: *"their governance system ensures good performance and less conflict"*; the Co-op management staff has *"the required decision-making skills"*; and they have implemented *"a monitoring system to evaluate their performance and progress"*. Nevertheless they suffer from *"poor infrastructure"* and *"inadequate channels of information"*.

The Co-op does not focus on developing networking and partnerships with other associations or cooperatives involved in the same field of work or in complementary activities in the same area, as the general manager explains: *"Each association works on its own"*.

No specific measure or incentive is taken to encourage the participation of women to meetings or any other decision-making place. According to the management staff there is no distinction to make between men and women in participating to the Co-op activities as a whole (e.g. agricultural inputs supplying, production training, and Co-op's meetings). For that reason, the Co-op does not take into account specific age or gender-related issues in its vision definition or mission statement.

Regarding the main capacity development needs faced by the Co-op and its members respectively, they can be summarized as following. According to the management staff, farmers must be provided with microfinance and accounting knowledge, market analysis and management skills. No specific additional needs are

identified for women farmers. At the level of the Co-op, they need to improve their leadership and management skills, and extension programs. One of the main constraints faced by the Co-op is the lack of financial resource. Creating a new section for marketing of agricultural products is considered as the main challenge to enable the Co-op thriving in the value chain. When it comes to address specific gender issues and capacity development gaps, awareness and extension programs are considered as the two main options.

What emerges from the FGDs with the Co-op's members is the following picture. None of the interviewed groups of farmers (i.e. men, women and youth) has a clear idea of the Co-op structure and governance (total membership, number of women, number of management staff, composition of the Board of Directors, frequency and place of meetings, etc.). Regarding decision-making process within the Co-op, small-scale farmers have no voice. It is more significant when it comes to the group of women who appears to be totally excluded from decision-making process and places. Nevertheless it is interesting to note that women are the only group of farmers who cultivate small amounts of Chamomile and Calendula. Women are also the only ones to declare having access to market cash/credit/loan through the Co-op membership, in addition to the 'traditional' services delivered by the Co-op (i.e. inputs supply, production training and extension services).

2.1.2. FAODA

The Fayoum Agro Organic Development Association (FAODA) was created in 2003. The association is registered as a NGO with the Ministry of Social Solidarity (MoSS). At the beginning FAODA was specialized in promoting and developing organic farming practices within the agricultural community in Fayoum. Today the association is well established and "*works efficiently in managing many programs and projects to serve the community*". The association now covers broader areas such as agro-ecology practices and marketing for small growers, water resources management, micro-credits for women, handcrafts production and marketing, fair-trade certification schemes, etc. To achieve its goals, the association works specifically towards the introduction of new businesses, promotion of handcrafts (i.e. women income generating activities), and the opening of market channels for farmers.

The mission of FAODA is "to improve the livelihoods of small producers and their families through implementing effective activities to support the movement of organic farming and sustainable management of natural resources" (definition from their website). The mission statement of FAODA explicitly includes the following goals related to age and gender-based specific issues: support the women empowerment and the youth development activities in the agricultural community in Fayoum Governorate. As claims by its program manager, FAODA "*is supporting gender equity and providing the same opportunities to male and female*". The vision and mission of FAODA are established with the participation of the Board of directors, general assembly members and executive board.

The structure of the association is composed as follows:

- The Board of directors which is composed of 7 members, one of them is a woman who occupies the position of secretary (the composition of the Board is presented in the table below). The role of the Board is to formulate the five-year strategic plan and to make sure that it is well executed in an efficient way. They do not interfere in the implementation. The Board's meetings are organized at the end of each month, and once a year for the general assembly meeting. They can also organize non-ordinary meetings according to urgent needs.
- The executive team is responsible for the implementation of the different projects. 40 % of them are women employees.
- The general assembly composed by all members of the association. They meet once a year to decide about their main tasks, new members, changes to operate, etc. They can also question the Board of directors on their role and responsibilities within the association.
- The FAODA volunteers. They are about 10 and mainly involved in administrative functions.

Name	Gender	Position	Age	Education	Profession	Years in the board
Omar Mohamed Kamel	Male	Director of Board	45	Bachelor of Commerce	Farmer	4
Omar Mahmoud Khaled	Male	Vice Director of Board	65	Intermediate	Farmer	4
Shaimaa Mohamed Abdeltawab	Female	Secretary	35	Bachelor of Commerce		4
Ahmed Tawfik	Male		40	Dar El Ulom	M&E Expert - UNICEF	4
Omar Fekry Ali	Male	member	62	Bachelor of Education	Pension	4
Karim Ali	Male	member		Bachelor of Education	Coordinator	4
Walid Makram Mohamed	Male	member	40	Bachelor of Commerce	Accountant	4

Figure 4 : Composition of the Board of the FAODA

The governance system appears to perform in a way that fosters the ability of the association to function effectively. The core values defended by the association are: affiliation, respect, transparency, integrity and excellence. The structure and organization of FAODA is clear and transparent. The association benefits from adapted infrastructures. The NGO has built a special department for managing the information – internally and externally. FAODA encourages the participation to decision-making process of all its members (as a condition for membership). Lastly, they have developed a monitoring system to assess their performance and progress.

Located in the village of Elsafrawiya in the district of Ibsheway, the total area covered by the association is 1000 feddans, of which the selected MAPs products represent more than half of the total cultivated area: 300 feddans cultivated in Chamomile, 200 feddans in Calendula and 75 feddans in Fennel. *"Small farmers, organic producers, women headed families, youth and SMEs"* are the main target groups defined by the association. To join it, candidates have to be Egyptian and motivated (a high level of participation to activities and of meetings' attendance is expected), and they have to pay the registration fee which is about 100 LE/year. According to the FGD with women, this registration fee may be scaled down depending on the financial capacity of each member. It cannot be thus considered as a barrier to entry, *a fortiori* for women members. FAODA accounts with about 150 members. One third of them are women. In the field of agricultural services, FAODA provides farmers with extension services (in collaboration with the governmental services) and training (e.g. organic farming practices, quality and certification schemes issues, income-generating activities, market information); export and local market outlets; and assists them in collecting, semi-processing, storing and transporting their products, according to their respective needs. The separate FDGs reveal that all members can have equal access to the different services but they have different needs. Men mostly request for extension services whereas women and young members are more focused on training about income-generating activities and market access. Nevertheless, the association officer raises the fact that globally women benefit fewer services than men who use these services on behalf of women.

The association has a good reputation and has successfully developed a network of partnerships and links with private and public actors (e.g. village leaders, MALR, NGOs, foreign donors). In the field of agricultural activities, they have direct links with training centers, the governmental extension services departments, export councils, and production unions. These enable FAODA to have a solid position in the MAPs chain and to efficiently support farmers. The export market takes up two thirds of total volumes produced, the remaining volumes reaching local markets. They generally succeed in offering to their members higher prices than the

prevailing market prices. However they do not have the capacity for direct export and often suffer from the lack of commitment of exporters.

In addition to supports to farmers FAODA implements a large number of projects aiming at the community development as a whole. Projects are funded by international donors (e.g. USAID, EU, World Bank), national and international NGOs (e.g. the Nahdet El Mahrousa association, Creative Learning/Aid to Artisans) and national private actors (e.g. Industry Modernization Centre – IMC Egypt, Vodafone Egypt). Through marketing commissions and issuing GAP certificates, FAODA manages to make financial provision, although limited, and to self-finance some projects such as the handcrafts project with girls and women. Nonetheless the association remains dependent on external financing to implement these projects.

According to the association officers, the association members need microfinance and accounting knowledge, management and marketing skills, and extension support. They identify specific needs for women and youth: technical support, business orientation, microfinance, marketing and entrepreneurship. Regarding the association's staff capacity development needs, they state they mainly need to improve their leadership and management skills. At the level of the association, establishing a new section for agricultural products marketing and developing extension services should be enable the association to reinforce its position within the chain and vis-à-vis its members.

When it comes to address specific gender issues and capacity development gaps, the promotion among women of hand-working activities and the implementation of awareness and extension programs are considered as two main options by the association officers. They are conscious that there are many cultural and social issues which jeopardize the autonomy and development of women, more particularly in rural areas *("rural code"*). Regarding the specific role that could be played by FAODA to promote greater gender-equity in the agricultural sector: *"the association has still no definite role even if gender equity is internally considered"*; one of the association officers interviewed thinks that the association could develop the concept via trainings and meetings.

2.1.3. The Shabab Elghad Association

The Shabab Elghad Association for Social development and organic agriculture was founded in 2004 with the MoSS. Located in Sakaran, the mission of the association is to support the social and economic development of the community, through serving the needs of local smallholding farmers and their families. The association mostly works in the following fields: developing organic cultivation, health care and social care. The association accounts with 100 members, 20 of them are women. To become a member, one needs to be a smallholder (i.e. to have a land ownership that does not exceed 5 feddans), to have a good reputation and solid experience in organic agriculture. During the separate FGMs, the men declare that the membership fee is 50 LE/year whereas young people claim that it is 90 LE/year and women did not know about it. The association covers 500 feddans. About 160 feddans are cultivated with Chamomile (10 feddans), Calendula (80 feddans) and Fennel (70 feddans).

The organizational structure of the association relies on the Board of directors and specialized committees implemented within the association: the marketing committee, the education committee and the women committee. Two women take part of the Board of directors composed of 11 members that meet monthly. The detailed composition of the Board is described in the table below. Each member has his own role and responsibility in each committee inside the association. There is a gendered distribution of roles: women are used to manage awareness campaigns whereas men are more involved in trainings and extension activities in organic production and marketing.

Name	Position	Gender	Age	Education	Profession	Years in the board
Ahmed	Director	Male	58	Higher	Farmer	4

Mohamed Ahmed						
Mahmoud Adelaziz	Teller	Male	57	Higher	Farmer	4
Abdelbaqy Hamed	Secretary	Male	57	Higher	Farmer	4
Mostafa Ahmed	Member	Male	48	Intermediate	Farmer	4
Fayka Salah	Member	Female	41	Intermediate	Farmer	4
Hanan AbdelAleem	Member	Female	46	Intermediate	Farmer	4
Adleya Mohamed	Member	Male	42	Intermediate	Farmer	4
Abdelghany Abdelaziz	Member	Male	44	Intermediate	Farmer	4
Mohamed Abelmoez	Member	Male	41	Intermediate	Farmer	4

Figure 5: Composition of the Board of the Shabab Elghad Association

What emerges from the individual interview with the processing manager is the poor level of efficiency of the association due to the absence of full-time commitment from the management staff. The interview with the chairman shows quite a different picture: *"the management board is the key success of the association"* (…) *"the association is efficient and achieving its goals"*. However, the association appears to have achieved a good level of governance through sharing of information and a decision-making process that is open, transparent and collective (within the Board of directors, within committees or during the annual general assembly). The level of infrastructure is satisfying. The association has communication channels as well as extension channels used for the diffusion of agricultural information among members. A monitoring system is in place and routine evaluations are conducted twice a year.

In the field of agricultural services, Shabab Elghad provides farmers with extension services (in coordination with the governmental extension services) and training (e.g. organic farming practices, quality issues, organic and fair-trade certification schemes issues, market information); export and local market outlets; and assists them in accessing organic and fair trade certification, collecting, semi-processing, storing and transporting their products. The separate FDGs agree that men and women do not have equal access to the association services in facts, whereas all the activities offered by the association are opened to men and women. Globally men get more access to the services than women. They mostly request for production trainings, extension services and market information that are not or less provided to women and young members. Women declare to receive production and capacity development trainings from the association.

The association is firmly grounded in the local community. Shabab Elghad now addresses the needs of about 70% of the farmers located in the village. The association has good relationships with the village leaders, governmental bodies, funding agencies, as well as with other national NGOs involved in complementary fields of work (such as the Shoura foundation managed by a women-only Board and specialized in the improvement of women and children livelihoods conditions and employment of rural poor). In the agricultural sector, they have built strong links with the agricultural research center, extension services, and certification agencies (ECOA, EOS, Fair Trade Labelling Organization). They have also developed business relationships with many buyers, traders and exporters, and they generally succeed in offering to their members higher prices than the prevailing market prices. Marketing commissions, and added-value generated by the fair trade market, enable the association to achieve a good level of sustainability. In addition to supports to farmers Shabab Elghad has implemented a heath care unit to benefit to the community.

According to the association officers, the association members need extension support, market access and financial support. They specify that there is a need for women and youth to get technical support and

marketing skills. When it comes to the association's staff capacity development needs, there is a need for leadership and management skills' improvement. The association wants to develop its field of intervention and being more involved in broader projects at the national level for example. At the local level, they have to be very responsive to their marketing plan and the market trends. To raise the question of gender issues, they suggest implementing direct awareness programs (targeting women) and gender equity promotion campaigns.

2.1.4. The CDA of Youssef Elseddeik

The Community Development Association of Youssef Elseddeik was founded in 2000 with the MoSS. Located in Youssef Elseddeik, the mission of the association is to support local farmers and their families. The association accounts with 125 members, and there are 15 women. Conditions for joining the association are very flexible. There is no specific requirement for ownership *("nor minimum nor maximum"*). The most important points are to be part of the area, have a good reputation and being voluntary. Men have to pay a registration fee of 10 LE/year whereas women and youth have free entrance. The association covers 1000 feddans. The half of the cultivated area is occupied with selected MAPs: Chamomile is cultivated on 300 feddans, Calendula on 200 feddans and Fennel on 5 feddans.

The organizational structure of the association relies on the Board of directors and heads of sections such as the agricultural, marketing and communication sections. According to FGDs, 10 persons constitute the management team and two of them are women. Additional interviews provided us with a quite different picture (see tables below). The Board is composed of 9 people and 2 of them are women. Management and operational functions are performed by a team of 9 members; and 2 of them are women.

Figure 6: Composition of the Board of the CDA of Youssef Elseddeik

Name		Gender	Age	Education	Profession	Years in the board
Abdelrahman Mohamed	Director	Male	48	Higher	Farmer	1
saadawy Mohamed	Vice Director	Male	46	Intermediate	Farmer	1
Mohamed Farag Atia	Teller	Male	47	Intermediate	Farmer	1
Abu El Kheir Mohamed	Secretary	Male	43	Intermediate	Farmer	1
Mohamed Selim Saqek	Member	Male	35	Intermediate	Farmer	1
Mohamed Hassan	Member	Male	37	Intermediate	Farmer	1
ZaghlolAhmed	Member	Male	42	Intermediate	Farmer	1
Entessar El Sayed	Member	Female	43	Intermediate	Farmer	1
kareema Saad	Member	Female	44	Intermediate	Farmer	1

Figure 7: Composition of the management and operation staff

Level	Age	Gender	Education	Profession	Salary Status
Management					
3	44	Male	Intermediate		Volunteering
2	38	Female			work
Operations					
4	42	Male	intermediate		Volunteering work

There are no more data available about the position and distribution of tasks between men and women. *"Decisions are made by the management team and it's for the good of the association members"*. There is a strategic plan which is available to all members but no business plan. Management skills are satisfying and enable the association to perform well. . A monitoring system is in place and routine evaluations are

conducted monthly. However, the association states about its lack of accurate infrastructure and information that should be improved. The governance system appears to be 'top-bottom' and further details should be made available.

The CDA of Youssef Elseddeik supports farmers with technical information (production training) and provides extension services via a cooperation initiative with the formal extension department of Fayoum. The association assists farmers in collecting, semi-processing, storing and transporting their products. The CDA has notably invested in mobile cooling units and drying plants. Recently the association has improved its packing unit and has engaged in marketing operations. One of the main successes registered by the association on the last few years is to be able to directly export agricultural products. Although all the activities offered by the association are opened to men and women, the separate FDGs have shown different pictures about the real access of men and women respectively. The groups composed of mixed young people and of men-only agree to say that men and women are equal access. The women-only group declares that men get more access to women to the associations' services. As an example, women are the only group of members who are not provided with extension services contrary to men and youth.

The association has many linkages with governmental and non-governmental bodies involved in the field of agricultural development and extension services, and the CDA is linked to agricultural cooperatives for the disbursement of seeds and fertilizers. They built projects by the past funded by CARE Egypt or Chemonics. Marketing commissions enable the association to perform activities.

According to the association officers, the association members need extension support, market access and financial support. This latter is not provided by the association and represents a critical limiting factor for production and social development. They specify that there is a need for women and youth to get technical and financial support, marketing skills and entrepreneurship. When it comes to the association's staff capacity development needs, they did not formulate any need. The association wants to keep developing direct exporting activities and maintaining long-term relationships with trustful exporters. When it comes to the question of gender gaps and capacity development needs, they mention the implementation of awareness and of extension programs as effective ways to address these issues. Regarding the role they could play to promote greater gender-equality, they suggest gendered technical trainings: trainings on agricultural production techniques for men, and special trainings on the food industry and small businesses for women.

2.2. RAPID CAPACITY NEEDS ASSESSMENT

The constraints and capacity needs assessment is organized under five areas for improvement. There are listed below. It is important to note that different POs pursue different purposes (e.g. some focus on social community development, others on market access, and others on inputs distribution). They will, therefore, require different capacities in order to achieve their organizational goals. That said, the overarching purpose of this study is to increase their performance in the MAPs chain and their involvement in addressing issues related to weak governance, age and gender-based inequality, and lack of participation in policy advocacy. As such, the information on capacity needs relates to these purposes. The first three listed are directly relevant to building sustainable POs that can be more involved and thrive in MAPs value chains and in agricultural policy debates. The fourth need is directly linked to the existing capacity and needs for gender mainstreaming in POs.

2.2.1. Institutional development capacities

Constraints identified relate to internal capacities development needs such as organizational management, information and financial management, as well as external capacities such as networking, advocacy and lobbying.

Organizational management: All the associations' managers interviewed have a clear idea about their mandate: serving the needs of farmers and improving the livelihoods of the rural community. Many of them implement their activities according to a multi-year strategic plan (vision, formulation of goals and objectives) and have a business plan; with the exception of the Co-op which does not implement its strategic plan for lack of financial resources. The structure and functioning of all the organizations interviewed is characterized by a unidirectional, top-to-bottom process of executive members-farmers decision-making and transmission. The grassroots members (i.e. the farmers) are not enough involved in strategic planning, implementation and management. This entails supporting membership and leadership development, mobilization of grassroots members and maintaining trustful relationships within the organization. Participatory planning, training in organizational management and extension campaigns are supposed to support it. Among the representatives of the organizations, there is a strong call for the improvement of farmers' skills and knowledge including technical, financial, managerial and marketing skills. In addition, many of the organizations expressed the need to develop capacities of the managers and executive teams in leadership and management skills.

Financial management: Most of the organizations claim for financial support to improve their action fields. Two of them admitted having faced a financial crisis. The reasons respondents gave for this were as follows: insufficient funds, bad marketing performance and agricultural losses. This situation may reflect a difficulty for POs to get access to internal and external financing sources and/or their inability to manage them properly. Although the development of agricultural producer organizations globally suffers from a lack of investment from both the public and private sectors in Egypt, it is also true that many organizations suffer from poor governance and (financial) management, a situation which jeopardizes the efficient performance of their mission and the trust of stakeholders, including farmers, banks, and business relationships. Basic and advanced managerial, financial and marketing skills are needed for both leaders and members.

Information management: For many of the organizations interviewed, their performance is hindered by a lack of information flow and infrastructure. Building a well-structured information management system, both internally and inter-organizationally, is identified as an important area of intervention. It would be more efficient to develop capacities in coordination and collaboration, with a view to federating the organizations. There is a need to help POs build good communication flow and accountability between the different levels of their own organization (between leaders and members) and with other POs at the national level. Specific negotiation and positive communication skills would be largely required.

Networking, advocacy and lobbying: Empowerment of POs and their members is needed to deepen their participation in development processes. To achieve that goal, POs need to be strong and well-organized in order to play a central role in shaping the agenda of decision makers and service providers, defining the most suitable interventions and services according to their needs, as well as how these services should be delivered and financed. Among the POs movement involved in the MAPs sector in Egypt, the current trend can be summarized as follows: 'each producer organization works on its own'. At the national level, there is no collaborative platform through which farmers' voices can be heard and their needs specifically addressed.

Nevertheless, all the POs interviewed have developed 'basic' links at the local level with local government, village leaders and service providers to support them in their day-to-day operations with farmers. According to the interviewees, two of the most important aspects relate to: (1) extension services which are provided to farmers in close collaboration with the governmental extension services of the area, and to; (2) agricultural inputs which are provided through the para-statal cooperative system. Two of the POs interviewed have successfully developed a broader network, including national and international NGOs, donors and funding agencies, large firms, etc., that enable them to lead advocacy initiatives in the fields of environmental protection, child rights, health care and farmers community issues. However the development of lobbying and advocacy actions is often limited to the local level; it constitutes a minor part of the POs activities, and remains a critical priority.

2.2.2. Business and market-related service provision

As POs are membership based, their efficiency depends on their capacity to provide demand-driven services and benefits to their members. They should have the capacity to define members' needs, identify actions to address them and deliver these services in an inclusive manner. It is the best way to ensure a strong and active membership and to remain sustainable and competitive.

Business services: In most case, POs fail to provide sufficient business services to their members. Although the POs interviewed show good capacities when it comes to deliver common business services (such as forecasting of production, guidance for good agricultural practices and quality enhancement, market plans), further capacity development is needed to organize commercially viable agribusiness micro-enterprises, and to train their members as entrepreneurs. These include knowledge on market analysis, business planning and management, existing financial services, and skills in mobilizing internal and external resources to build capital. Development efforts in providing financial services for smallholders should include the financing of: refrigerated cold-chains, processing facilities, facilities producing packaging materials, professional nurseries, and business development services. This is all the more important that small-scale farmers cannot get easily access to savings and credit services. POs have also an important role to play as guarantors of credit for their members – either with banks, exporters or input suppliers (for in-kind loans). In the same time, POs leaders are not well acquainted with existing financial and non-financial services package for SMEs in the agricultural sector, and often refer to microcredit as the best option (high interest rates, low level of capital, lending to non-agricultural clients, etc.).

Market-related services: Providing farmers with market outlets is crucial. Globally, POs face some difficulties in getting good information about market prices, potential business partners beyond the local level and available inputs, more particularly when it comes to up-to-date information. Another problem closely linked to the lack of financial resources is the poor level of equipment available, more particularly for post-harvest operations. However, with the exception of the Co-op which does not perform marketing of its member's products, all the associations interviewed have recently made significant progress in marketing functions. Most of them appear to offer their members attractive prices so that the growers sell their products to the association (rather than to local traders). Nevertheless they are still faced to the following constraints. Business relationships with the private sector have to be built in time, and require POs to demonstrate outputs in quantity, quality, consistency and delivery performances. More particularly business relationships between farmer associations and exporters are tricky and often result in disputes. Poor contract enforcement remains a high constraint. New institutional arrangement should be developed that are able to enforce disputes between farmer associations and exporters. Such institutions would contribute significantly to the rapid development of contract farming and the flourishment of farmer associations. Lastly, dealing directly with supermarkets should be an additional way for POs to improve their market outlets and position in the MAPs value chain.

2.2.3. Post-harvest and value addition service provision

The post-harvest handling of MAPs crops is essential in maintaining the export quality of MAPs. This is all the more important that the MAPs value chain registers between 10 and 30% of post-harvest losses. As for marketing activities, the Co-op interviewed does not perform post-harvest marketing services such as cooling, sorting, packing and sales for MAPs. In addition the Co-op does not seek to promote the development of high-value crops such as MAPs within the organization or develop certification schemes such as GlobalGap, organic or fair-trade certification for example. Technical support provided to farmers is linked to input supply and production. There is a strong lack of support in post-harvest and value addition technologies and services within the Co-op. The Co-op itself should own these technologies and certificates and they should be used by members as common facilities. Such a development ('ownership') should also increase the Co-op financial sustainability.

Regarding the farmer associations interviewed, the picture is different. All of them are engaged in the development of high-value crops (i.e. MAPs) and of value addition technologies and services (e.g. drying units, sorting and packing places, organic and fair-trade certifications). Nevertheless many of them do not own appropriate infrastructures and equipment to properly perform processing, packing, cooling storage and transportation activities. The reasons given were the lack of funds and/or the unavailability of equipment. Providing farmers with GlobalGap, organic and fair-trade certificates enable them to reach alternative export channels and to add value to their products. The cost of these certification schemes makes it insignificant for farmer association members, but unattainable for individual smallholders. Farmer associations have a role to play in developing them. Improvement here is also important from a gender empowerment standpoint, as some certification schemes such as fair-trade should help in boosting the participation and leadership of women within the organizations. Skills training targeting women in GlobalGap should be effective in generating employment opportunities at the level of POs or at the level of processing factories.

2.2.4. Capacity development needs for gender mainstreaming in POs

What did come through from the interviews with POs leaders is the general difficulty they face in acknowledging and interpreting gender biases embedded in their structure, policy and program. Moreover, they are no indications that technical staff or other support staff has received gender training prior to the present study. Within the Co-op, the level of gender awareness and capacity is low. Among farmer associations, the picture is a little bit different. Despite the absence of a written gender policy, the interviews with staff revealed that there is a general appreciation of the basic principle of gender gaps and a common will to improve farmer entrepreneurship of men, women and youth with emphasis on women and youth who have in the past been left out of its activities.

Currently women do not exceed one third of the total membership of each organization, and they are under-represented at all levels of the POs interviewed. All managerial and executive committees and technical departments are headed by men. The administrative areas comprise more women but remain male-dominated. With the exception of one farmer association, there are no specific women committees within the POs. The FGDs revealed that gender should not represent a hindering factor for anyone who is running for an office position. Indeed for 60 % of the respondents there is no difference in being a man or a woman, and all the women-only groups interviewed brought this statement. For one of them, if women are trained and/or get higher access to education, they will be as capable as any other to take up a position of responsibility. But for one third of them (divided between mixed youth and men-only groups): *"men are much better in the management positions"* or *"men are much acceptable by the rural community and we prefer to work with men and trust them more than dealing with women in the decision or services positions"*.

Moreover, none of the POs interviewed are implementing quotas to guarantee the participation of women in decision-making. If women members do not attend the Co-op meetings, women participation is much higher when it comes to farmer associations. For one of them, meeting attendance of all members takes part of the membership requirements.

FGDs showed that men and women members do not have equal access to POs services, although all the POs managers interviewed claim that POs services are opened to women and men in an inclusive manner. For example, only male farmers in our sample get access to extension services. The reason given by male respondents is that *"men do request for such a service and search for extension"*. The reason given by female and young respondents is that *"men can access more than women"*. Gender gaps in accessing other types of services can also be observed. Men benefit more than women in production trainings and market information, while women are more involved in capacity building activities when they exist. Globally, women benefit fewer services than men who use these services on behalf of women, as stated by an association officer. In general, social and cultural factors affect rural women's mobility, and limit and shape their participation in public spaces. Besides the time that women devote to care children and perform household tasks (in addition to

agricultural activities) takes from what might otherwise have been used in training activities offered by their organization.

FGDs also showed that there is a gendered division of labor and tasks when it comes to agricultural activities. There was a near consensus among the different groups of respondents (whether they are youth, women and men) that irrigation and land preparation are carried out by men only while women are expected to assist in weeding and harvesting operations. Only one group of women claimed that *"a woman can do all agricultural activities, especially if she is a widow".* This latter point is a very important aspect of the present study. The weak property rights (including land inheritance rights), in themselves, pose severe constraints to women in benefiting from agricultural activities and in participating in collective actions. Only women without any male relatives are able to manage their farm, not physically, but they have the right to hire people, agricultural machines and to benefit from production training and extension services for example.

To ensure that the interests, needs and priorities of women involved in agricultural production are taken into account by government and other key institutions, it is essential that gender issues are addressed by POs. This necessitates a process of 'gender mainstreaming'; that is the integration of gender issues into all aspects of an organization and its tasks. A participatory gender self-assessment should constitute a very good entry point to this long-term organizational change process to advance gender issues internally. Workshops and other structured meetings should help to raise awareness and sensitive people (including leaders, technical staff and farmers, and women, youth and men) to gender gaps. It could be followed by the development of a Gender Action Plan with clearly defined responsibilities and indicators, to be incorporated into the broader organizational strategic plan. It should be a key step in bringing gender from the margins to the core of each organization, and politically situating gender concerns, at least on paper, as a priority and responsibility for all. A women's commission should be systematically established in each organization and engaged in decision-making. Simultaneously and in order to specifically strengthen the role of women within the organizations, awareness-building activities should be implemented with the male partners, as well as trainings and educational programs targeting women for management skills, self-confidence and leaderships positions.

2.2.5. Strengthening the enabling environment for POs development

At the international and national levels, policy makers emphasize the central contribution of POs to food production and nutrition security, and the role they play in the socio-economic development of poor rural communities.

At the international level, many donor policies appear to be favorable for POs development. As seen previously, many farmer associations take part in several donor-funded projects (e.g. EU, WB). Moreover, international organizations such as UNDP, ILO, UNIDO, FAO, and IFAD have concentrated their efforts, over the last few years, on supporting the development and strengthening of POs in Egypt.

At the national level, Egypt accounts with a wide range of policies that place emphasis on POs (agricultural cooperatives, farmer associations or community development associations), acknowledging their role as agents of change at the local level. Nevertheless many of the national laws and policies enforcement are needed to be reviewed to help POs to have proper impact.

Regarding the case of Co-ops, most of them have strained budgets. Indeed, the Principal Bank for Development and Agricultural Credit (PBDAC) is the main source of financing for agricultural cooperatives. There is no cooperative bank in Egypt (that would be owned and managed by Co-ops) and loans at the grassroots level are mainly provided through Microfinance Institutions (that are not specialized in lending agricultural activities and loaners). This situation results in a lack of funds for Co-ops and their members. Besides, the rigid structure does not allow successful Co-ops to expand. The majority of reasons for constraining the role of co-ops are legislative, such as prohibiting the establishment of, or even participating in, companies; importing and exporting agricultural products; and/or establishing funds to finance procuring

production inputs. In addition the cumbersome registration process is not conducive for the development of new Co-ops. Finally, Co-ops are accountable to the government, not to the members. They generally do not apply principles of good governance and transparency, which often leads to institutional weaknesses and mistrust.

Many farmer associations, meanwhile, have been registered with and supervised by the Ministry of Social Solidarity according to Law 84/2002. They provide social services and agricultural guidance to members; support them in modernizing agricultural practices and in improving income. However, entrepreneurial activities are often limited because of an article in the law which bears a contradiction: it prohibits farmer associations from performing business practices while the same article allows business practices to pursue financial sustainability. The main problem here is not the law alone, but the inability of farmer associations to deal with government regulations and policies due to lack of understanding them.

2.2.6. SWOT analysis

The table below presents a SWOT analysis (assessment of Strengthens, Weaknesses, Opportunities and Threats) of POs involved in the MAPs sector in Egypt, based on our case study conducted with 4 POs.

Table 1 : SWOT analysis of the selected POs involved in the MAPs sector in Fayoum (the author, 2015)

		Positive	Negative
Internal factors	POs level	**STRENGHTS** × Strong local roots in the communities/villages × Recent efforts focused on the development of market-related services, value addition technologies and services provision (except for Co-ops) × Recognition of the need to better include women and youth in agri-business activities × Catalyst effect/agents of changes at the local level × Implementation of donor-funded projects & 'learning by doing' process (e.g. PCM)	**WEAKNESSES** - In the case of Co-ops: × Excessive government intervention × Weak and inefficient apex structures × Lack of its own financial institution × Lack of trained board members and staff × Lack of post-harvesting and marketing services provisions × Lack of women's & youth inclusion × Low level of gender awareness × Poor governance and transparency - In the case of FAs: × Needs for management and leadership skills improvement × Poor financial management × Poor information/communication management × Lack of business services × Lack of business private partnerships × Lack of networking with similar associations × Lack of capacity for advocacy and lobbying
	Policy level	× Recognition of POs by Government and external agencies as development partners in the VCs and in rural communities × Provision of support services (e.g. extension services, research R&D, market information) × Funded-donors projects focusing on women empowerment and/or on the MAPs sector × Favorable political context × Cooperative reform process underway	× Lack of contract enforcement × Too many and out-dated legislation × Law of safety nets in rural areas × Lack of incentives for public-private partnerships and leveraging
External factors	POs level	**OPPORTUNITIES** × Strong development potential of POs × Ongoing donor and NGO support × Overall positive support of the UN agencies × Positive international trends to support co-ops, local products and agriculture (bio/organic, × fair trade) and women empowerment × Increased recognition of the role of POs by donors and pressure groups × Strong network in rural areas	**THREATS** × Harsh competitive market environment evolving due to fast economic and financial changes in rural areas × Migration (of youth) from rural to urban area and abroad due to lack of employment × Environmental deterioration in rural areas and its impact on food security and quality (contaminated water, pesticides) × Business links established by local companies with national and international buyers to capture entire value chain system
	Policy level	× Government willingness to revitalize POs movement, to revise the Co-op law and to strengthen POs support services × National efforts to improve the status of women (National Council for Women)	× Insufficient government spending in agriculture × Increased competitive market environment × More support given to foreign investment and investor-driven companies

3. VALUE CHAIN ANALYSIS AND GENDER DIMENSIONS IN THE MAPS SECTOR IN FAYOUM

This chapter examines the gender composition of the MAPs value chain by highlighting jobs and tasks profiles that are dominated by either men or women, at each node of the value chain. It is followed by a discussion of the specific age and gender-based constraints faced by women and youth. It is based on a case study conducted in October 2015 of key stakeholders – input suppliers, farmers, producer organizations officers and members, local traders, exporters – involved in the production and marketing of three MAPs selected products, i.e. Chamomile, Calendula and Fennel.

3.1. YOUTH AND GENDER DIMENSIONS OF THE MAPS VALUE CHAIN IN EGYPT

3.1.1. Input supply

MAPs fertilizers and pesticides are the major inputs supplied by specialized companies to MAPs growers in Fayoum. Input suppliers also offer farmers additional agricultural services and technical support. These companies are small-sized, located in peri-urban areas and generally managed by a single-man. According to our sample, the profile of the owner/manager is a high-educated man, aged 40-50, married and family head. This type of business is male-dominated: there are no or very few women being employed or conducting such a business. Only one in four farmers benefiting from their services is a woman. According to interviewees, women do not face specific constraints. Both men and women, as farmers, need more training, education and extension programs. The main constraints faced by input suppliers relate to liquidity problems, due to "*farmers (who) are not buying their inputs in cash and usually pay after the harvesting*". At the meso- and macro-levels, they meet some legal issues with the regulations and requirements of the MoALR and lack of control on the unidentified pesticides that are informally imported in the country. According to individual and collective interviews with farmers, these companies are not the only ones which supply farmers with agricultural inputs at the local level. Most of the farmers get access to inputs through their producer organization. When it comes to seeds specifically, some of them use their own seeds. Another source is local markets which are characterized by informal business, no traceability, and no quality control of products.

3.1.2. MAPs production level

Legal framework and social custom enforced by family and community discriminate against women, resulting in low levels of women's land ownership, the inaccessibility for women to agricultural land lease agreements, and the impossibility of managing farming and rural business activities without the presence and control of male relatives. It is worth noting here that most of the small-scale growers in Fayoum are tenant farmers. For these reasons, there is a very few number of women who are managing their farm on their own in the selected area, and the research team was unable to reach individually any female farmer during fieldwork. Consequently, individual interviews with farmers resulted in the overrepresentation of men in most of the MAPs production activities and related decision-making processes. Data cross-checking with separate focus group discussions' outcomes allowed us to balance the analysis. The main findings resulting from individual and collective interviews with farmers are presented below.

Profile of small-scale farmers interviewed. The interviewed individuals were in an age group ranging from 38 to 57. Two farmers mentioned secondary education as the highest education achieved. One has a Bsc. Degree in Education and combines the functions of grower and teacher. All the others declared to have no education. All of them are married and head of a family with 3 children up to 5. They are located in villages: 2 of them live in Demo, 2 in Sakaran, 2 in Ishbeway, and 2 are in Youssef Elseiddek. Half of the interviewed individuals are members of producer organizations. Finally, all the farmers interviewed have over 12 years of experience as MAPs growers; a majority of them having more than 30 years.

Data on farming and marketing system applied. The size of the farms varies from 2 to 6 feddans, with an average of 3,8 feddans. The areas under MAPs cultivation range from 0,5 to 3 feddans, with an average of 1,8 feddans. For a majority of them (i.e., 5 farmers), MAPs cultivation represents between 40% and 60% of the total cultivated area. For 2 farmers, MAPs production does not exceed 30% of the total cultivated area. For the last one, MAPs occupy 100% of the total land area. All of them produce Chamomile, Calendula, and Fennel, and two of them also grow other MAPs species such as Peppermint, Lemongrass and Basil. Quasi unanimously the farmers mentioned that the main objectives of MAPs growing are high revenue and low cultivation costs. According to our sample of individuals interviewed, Calendula is the main MAPs cultivated in Fayoum in terms of volume, followed by Fennel. The biggest volumes are produced by small and medium-scale farmers whereas large scale producers might account for 10% of the total production in the area. When asked about value, the main important crops cited are, by order of importance, Calendula, Fennel and Chamomile.

Farmers were asked to describe the main activities they perform in their MAPs plots, respectively. A cropping calendar for each MAP is presented below. There are three main peak seasons: land preparation for planting takes place in September-October; (hand) weeding mainly takes place in November-December. Some of the farmers stated that, in the case of Calendula, weeding must have to be carried out throughout the year. The (hand) harvesting season for Chamomile and Calendula stretches from February to April and sometimes to May. Fennel is harvested in May. When farmers were asked about the best period for marketing the selected MAPs, all of them stated that it is possible to sell MAPs in a dried form throughout the year.

Table 2 : Farming calendar for Chamomile

	Sept	**Oct**	**Nov**	Dec	Jan	**Feb**	**Mar**	**Apr**	May	Jun	Jul	Aug	Sept
Land preparation	x	**xxx**											
Planting/sowing		xx	xxx										
Weeding			**xxx**	xx									
Harvesting				x	x	**xxx**	**xxx**	**xxx**	x	x			
Drying				x	x	xxx	xxx	xxx	x	x			
Marketing/selling	xxx	xxx	xxx	xxx	xxx	xxx	xxx	xxx	xxx	xxx	xxx	xxx	xxx

Table 3 : Farming system for Calendula

	Sept	Oct	**Nov**	Dec	Jan	**Feb**	**Mar**	**Apr**	May	Jun	Jul	Aug	Sept
Land preparation	**xxx**	x											
Planting/sowing		xxx	x										
Weeding	x	x	**xxx**	x	x	x	x	x	x	x	x	x	x
Harvesting						**xxx**	**xxx**	**xxx**	xx				
Drying						xxx	xxx	xxx	xx				
Marketing/selling	xxx	xxx	xxx	xxx	xxx	xxx	xxx	xxx	xxx	xxx	xxx	xxx	xxx

Table 4 : Farming system for Fennel

	Sept	**Oct**	Nov	**Dec**	Jan	Feb	Mar	Apr	**May**	Jun	Jul	Aug	Sept
Land preparation	x	**xxx**											
Planting/sowing		x	xxx										
Weeding			x	**xxx**									
Harvesting									**xxx**				
Drying													
Marketing/selling	xxx	xxx	xxx	xxx	xxx	xxx	xxx	xxx	xxx	xxx	xxx	xxx	xxx

When asked about labor, all farmers rely on their families. On average, a range of 3 to 9 family members are directly involved in production and marketing operations, from 0,8 to 3 total LU/feddans. Family workers are mainly composed by men (0,76 LU/feddans on average), followed by women (0,62 LU/feddans on average) and young members (0,2 LU/feddans). Depending on the respondents, family members may be paid or unpaid. In situations where family workers are paid, there is a gendered daily wage gap between men and

women – on average, women earn only about 50-70% of what men earn (i.e. 70-100 EGP/day). When it comes to young family workers, the situation is worse. A majority of them are not paid when older family members are paid, otherwise they earn, on average, about one third of what older men earn. With the exception of one farmer who grew only MAPs and reported that he employs 29 people, only family members, on its farm of 2 feddans; all the other ones stated that they also hire external workers. The ratio is about 1 permanent to 5 seasonal workers during seasonal peak periods. The number of permanent and seasonal workers varies a lot from a farm to another (from 11 to 70 hired workers/farm), but globally the sector employs more men than women and young people. The ratio is about 2 men for 1 woman, and 3 men for 1 young worker. When asked about the low number of young people in the agricultural sector, all farmers interviewed put forward the following arguments: young people are not interested in agribusiness; young men seek for high-speed income generation, and prefer jobs in city rather than agricultural jobs in rural areas.

A majority of farmers apply organic farming practices (organic fertilization, manual weeding, and organic pest control management). Among them, 3 farmers sell their products as organic-certified and benefit from the added value of organic agrifood, and 2 farmers sell them as pesticide-free or clean products. The other ones apply conventional methods. Total MAPs conventional yields range from 10 to 12 tons/feddans, and organic yields range from 6,7 to 12 tons/feddans. Drying activities are generally performed after harvesting on drying yards located in the middle of the fields. However, a minority of farmers benefit from drying units and services from the producer association they belong to (e.g. the Shabab Elghad Association). These latter reported a lower percentage of post-harvest losses (between 1 and 5%) than the farmers who perform drying activities at the farm level (who reported about 10% of post-harvest losses).

The production of MAPs is mainly destined for sales. As a matter of fact, some farmers interviewed said that the share of self-consumed MAPs does not exceed 5%, and many of them considered it as non-existent. When it comes to marketing channels, three trends emerged from the interviews. All the farmers who are also members of a farmer association (which performs marketing functions) sell the majority of MAPs production to the farmer association. The transaction is handled under a contract agreement. Some of the farmers interviewed sell to only one large buyer – who is clearly identified – and sometimes they get contractual arrangements. The remaining ones stated that they sell to anyone of them, without any contractual arrangement. All farmers agreed that the key factor for price and access to market outlet is quality. A majority of them raised the fact that the number of buyers/traders is too limited at the local level, resulting in *"negative competition"*. Growers who sell to farmer associations appear to get higher prices than their counterpart who prefer to sell to local traders. According to farmers, Calendula appears to be the most lucrative crop (farm gate prices ranging from 8 000 to 12 000 LE/tons), followed by Fennel (sold between 5 000-6 000 LE/ton), and by Chamomile (sold between 3 000- 5 000 LE/tons). One can note here that the farm-gate prices declared by farmers are well below those declared by industry experts and stakeholders. This in part reflects the problems faced by small-scale farmers in the MAPs sector and the need for them to have a better knowledge of the market structure, and a better access to market information to improve their bargaining power.

Gendered roles and responsibilities. A strong gender bias in the distribution of roles is deeply rooted in global social constructs and perceptions of what is appropriate male and female work and of traditional responsibilities of men and women to the household. According to separate FGDs, land preparation and irrigation are dominated by men, while weeding and harvesting are traditionally assigned to women.

With regards to individual interviews with male farmers, one of the most striking results is that farm and non-farm activities related to MAPs production and marketing are performed either by men-only or by both men and women. The table below summarizes the number of responses received from our sample of farmers when they were asked *"What activities are mainly done by men, women, children in the production and marketing of the specified MAP?"* According to individuals interviewed there is no task that can be carried out by women-only. This result reflects the lack of confidence in women's ability to manage agricultural activities, and the poor level of gender awareness amongst male farmers.

As the survey suggests, women are strongly involved, and 'assist' men, in weeding, transplanting, harvesting and post-harvesting tasks, such as picking, sorting, grading, washing, and crushing, which require manual handling, finesse and dexterity, and which closely resemble those of home food preparation. When it comes to non-farm activities, women mostly support men on record keeping, prices negotiation, and bank savings. One of the most significant aspects in the distribution of tasks between men and women is that women are assigned the domestic sphere and tasks that can be carried out at- and from home. Men are favored for positions requiring physical strength and jobs involving an element of danger, such as canal digging, land preparation, irrigation, and application of fertilizers. Regarding non-farm activities, they are solely responsible for farming management and supervision, hiring labor, sales and financial management, and for all transport and logistics issues.

Table 5 : Gender division of tasks in the production and marketing of MAPs (the author, 2015)

	GENDERED DIVISION OF LABOR		
TASKS	**Men-only**	**Women-only**	**Both**
Wild harvesting (if any)	na	na	na
Plant nursery	5	0	3
Soil preparation	5	0	3
Canal digging	**7**	0	1
Seeding/planting	5	0	3
Transplanting	3	0	5
Watering/irrigation	6	0	2
Fertilization	6	0	2
Weeding	2	0	6
Pest control	4	0	4
Harvesting	1	0	**7**
Removal of plants	0	0	**8**
Storage	1	0	**7**
Grading	1	0	**7**
Drying	1	0	**7**
MAP "home transformation"	2	0	6
Packaging	2	0	6
Transportation (from farm to road /small shops)	5	0	3
Local marketing/selling	6	0	2
Farming management and supervision	6	0	2
Hiring labor	6	0	2
Record keeping	3	0	5
Managing sales	6	0	2
Logistics	**8**	0	0
Negotiating prices	3	0	5
Receiving payments	4	0	4
Financial decisions	5	0	3
Going to the bank for loans	4	0	4
Going to the bank for savings	2	0	6

Others tasks: specify	na	na	na
Total of responses :	109	0	115

Decision-making processes at the farm level. As in the previous case, one of the most notable facts is the lack of decisions about MAPs production and marketing activities being made by women only. According to our sample, all the decisions that have to been taken are either imposed by men or shared between men and women (see table below). Women play a role in decision-making but it is an indirect role.

At the farm level, men generally dominate the decisions related to water management and crop management technique (i.e. conventional versus organic production). Women are mainly associated in the decision when it comes to the choice of crops to produce. This is not surprising since women are expected to assume the role of food provision at the level of the household. It may also reflect the fact that women are often recognized for their knowledge about MAPs.

At the marketing level, most of the decisions appear to be shared when it comes to business orientation, marketing channels and prices negotiation. Many men reported that they are solely responsible for decisions about contractual arrangements and credit services.

Table 6 : Gender division of decision-making in relation to farm activities/business (the author, 2015)

	Men-only	Women-only	Jointly
At Farm Level			
Use of land	3	0	5
What crop/varieties to produce	1	0	**7**
Use of labor	4	0	4
Use of water	**6**	0	2
Certification schemes	**6**	0	2
Needs for technical assistance	4	0	4
Sub-total of responses:	*24*	*0*	*24*
At Marketing Level			
Marketing channel	2	0	**6**
Business orientation	2	0	**6**
Prices negotiation	3	0	5
Contracts negotiation	**5**	0	3
Credits services	**5**	0	3
Sub-total of responses:	***17***	*0*	*23*
Total of responses:	**41**	**0**	**47**

The picture that emerged from our survey shows that decisions within the household are fairly well shared between men and women. However, field observations and experience paint a different picture. It is most likely that the respondents overstated the participation of rural women in decision-making processes. These results should been thus viewed with caution.

Access and control over resources. Women have extremely limited access to resources associated with farming. Women rights to own land are not respected. Water resources are male-dominated. They have less access than their male counterparts to agricultural inputs for mobility constraints and lack of financial resources. Globally they are excluded from contractual arrangements and marketing activities. A high level of rural women is illiterate or poorly educated. Girls and young women tend to leave school earlier than their male peers or do not attend school, due to economic and cultural reasons, while male education is prioritized. Knowledge and skills related to agriculture are gained mainly through informal learning from parents, neighbors and relatives. In contrast, men enjoy the use of a relatively wide range of resources and they control nearly all farm and household resources.

Access to services (i) Extension. As noted earlier, women have extremely limited or no access to extension services. This is attributed to cultural norms which make it difficult for women to participate in such activities when their husbands are present. In addition, extension services account with a weak number of women extension officers. **(ii) Producer organizations.** Cooperative and association membership is usually taken by the head of a household. When they are members of a PO, women mainly benefit from capacity building trainings but continue to be marginalized with regards to technical training, leadership positions and decision-making processes. The male dominance in POs may partly be explained by their strong association with extension services, input supply and/or marketing functions. It also reflects women's lack of property registered in their name until the death of their husbands; their low levels of literacy; and cultural norms which assign leadership roles to men and make it difficult for men to be led by women. **(iii) Market information.** According to farmers interviewed, the most important sources of market information are (in that order) extension services, POs, Research Center, and neighbors. The distance for training centers, the rejection of husbands, the lack of basic knowledge, are so many factors that limit the access of women to market information. In addition, they are generally excluded from the marketing sphere which is mainly managed by husbands or male relatives.

Marketing and control of the benefits. Considered as high-value crops, MAPs are mainly sold by men. Women are not expected to be directly engaged in markets. Despite the distinct roles of women and men in marketing, it was found that decision-making regarding marketing within farm households is generally a joint activity (see the previous paragraph). Nevertheless, women' access to and control over their sale proceeds appears to be very limited, and incomes resulting from MAPs sales are not 'jointly nor equally distributed' across men and women. When asked about the gendered differences in use of the income resulting from MAPs sales, men reported that women are expected to cover household expenses and save money for girls' marriage expenditures. On their side, they are responsible for major items of agricultural expenditure, such as loan repayments for improved seeds and fertilizers, purchase of new materials, tools, payment of transportation costs and wages of local workers.

3.1.3. MAPs trading

Traders are well rooted in the local area. They act as middlemen between a high number of small-scale farmers who produce small quantities of MAPs and some exporters. Their role is to bring MAPs production into line with the market, and to ensure that MAPs products match the specific requirements of exporters. With the exception of farmers and processors/exporters, they have no connection with other actors involved in the chain (such as governmental bodies, NGOs, and research centers for example).

The owners of MAPs trading businesses interviewed have similar profiles. They live in rural areas. They are aged between 47-52, married, and head of family. They achieved a secondary or higher educational degree. They run MAPs trading as an informal business. They have no officially registered company. They employ from 3 up to 7 employees, which are responsible for collecting, transportation, sorting, and pre-packing operations. One of them employs only men, whereas the other one employs both men and women, yet women remain less numerous than men workers (3 women for 7 men). The latter stated that among MAPs sellers he works with, about one third of farmers are women, whereas the other one reported that he buys MAPs from male farmers only. To their knowledge, there is no woman running that business in the area.

When the local traders were asked to specify the major constraints in running their type of business, they both agreed that they have to mostly deal with problems of liquidity (*"trading is not in cash"*), the lack of funds and adequate financial services, and the lack of skilled and trained labor. When asked about potential problems faced by male and female farmers from whom they buy MAPs, one states that both male and female farmers need more production trainings, awareness campaigns and extension programs. The other one did not wish to express a view. Globally there is a low degree of awareness of gender issues amongst local traders.

3.1.4. MAPs processing/exporting

The role of exporters is to carry out processing, packing and exporting MAPs. Their biggest concern is to provide their clients with safe and high-quality MAPs.

Our sample is composed of two exporting companies which have different characteristics. The first one is a small exporting company located in the peri-urban area of Ibsheway. The owner is a man, aged 64, married and head of family. The company employs 7 employees, 3 of them are women. The other company is a medium-sized one, located in Abo-Gonsho, Ibsheway, and owned by a woman. This high-educated woman, aged 65 and widow, has entered in the business, inheriting her husband's exporting company after he died. The company's ownership is jointly shared with a male relative. The company employs 43 employees, 23 of them are women. Men and women workers for exporting companies are mainly young people. According to the owner, one of the main constraints faced by women in this business is that they are paid less than their male counterparts for the same tasks. Both exporters reported that they directly and indirectly buy MAPs from farmers regardless of gender, age, and origin. Yet the percentage of women farmers involved in those MAPs exporting channels remains low, ranging between 10 and 15%.

When asked about the main constraints they face when offering their services or trying to reach small-scale farmers, exporters reported three main problems: the inadequacy and lack of services offered, more particularly of agricultural extension services, the contamination of irrigation water, and the lack of governmental support towards MAPs development. Moreover, they identified a list of technical and capacity development needs for both men and women farmers, including continuous trainings, extension services, higher access to agricultural inputs and to financial services, and awareness programs.

3.2. GENDER-SENSITIVE MAPPING OF THE MAPS VALUE CHAIN

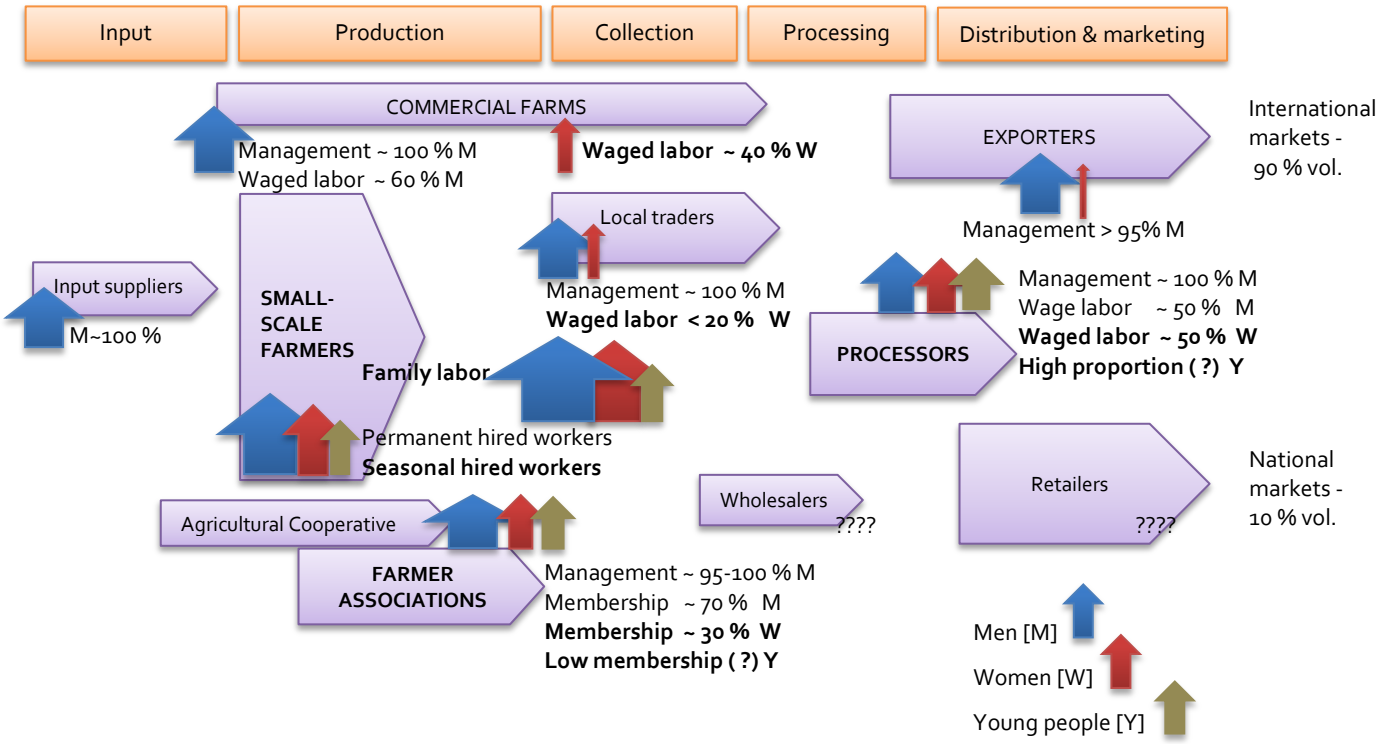
Field observations have confirmed that women do participate with men in many functions, occupations and activities in various areas of the MAPs value chain. They also confirm that women and young people face several key socio-cultural, economic, and political factors that limit their participation into the MAPs value chain, compared with men. They are further detailed in the next chapter.

Women are mostly concentrated at the production level. They are mainly involved in manual and high-intensive labor activities, such as weeding, harvesting, removal of plants, drying, sorting and home transformation. In most cases, women perform these activities on the family farm as unpaid family workers. A number of women who have not married (i.e. unmarried young women, divorced or widow women) are able to work on large-scale farms, primarily as seasonal workers. These women represent up to 40% of the workforce on large plantations. Farm management and worker supervision are male-dominated. Women who do get married have to work after marriage at-home on family plots. Children may assist women, as unpaid family workers, in harvesting operations. At the household and farm levels, women are indirectly and poorly involved in decision-making process. Farm management, marketing activities (such as contracts, selling and negotiations) and the use of sale proceeds are managed and controlled by men only. Farm women and women running agricultural-related small businesses (e.g. MAPs transformation and trading) are very rare and difficult to target. MAPs local trading is dominated by men owned informal businesses.

At the processing/exporting levels, women are little visible. They mainly occupy low-paid, unskilled positions, in processing activities, such as hand-sorting, -sieving, -grading, -mixing, and packing. They are highly vulnerable in terms of employment and benefit lower work conditions and protection than men. Nevertheless they represent about half of the workforce involved in processing and packaging operations on processing/exporting factories.

The next figure present the global gender sensitive picture of the MAPs value chain, the percentages of man and women involved, and the key constraints women face in each chain segment of the chain.

Figure 8 : Gender sensitive map of the MAPs value chain in Egypt (the author, 2015)



Women in agriculture

Constraints

- Reproductive responsibilities
- Misconception men vs. women roles in agriculture
- Lack of law enforcement: women rights, ownership rights, etc.

Women as waged laborers

Constraints

- Weaker wages and employment conditions than men
- Limited access to training, educational background and unskilled jobs
- Mobility constraints/distance to the workplace
- Sexual harassment by male supervisors

Women as entrepreneurs

Smallholder, local trader

Constraints

- Limited access to land, water, trainings and extension services, financial services, agricultural inputs and labor, information networks
- No access to out-of-home activities and markets
- Educational background

Women as entrepreneurs

Shopkeeper, company manager

Constraints

- Educational background
- Business licensing and registration
- Cultural norms and beliefs discriminating against women
- Access to information networks, participation in professional associations

Women as unpaid labor – MAPs production to trade and household functions

Constraints

- No access to independent income, unpaid labor, unrecognized and unprotected

3.3. AGE AND GENDERED-BASED CONSTRAINTS AND CHALLENGES

As seen previously, women and young people face specific constraints that hinder their ability to take fully advantage of agricultural value chain development and opportunities. The successful involvement of women and youth into wealth-creating activities requires an understanding of their age and gender-based constraints at each node of the MAPs value chain, and cultural norms as well as institutional practices that may underpin these.

Age and gender-based constraints are of different types, yet highly interlinked. Some constraints affect women in a general way. Additional constraints affect women's involvement in the MAPs sector, depending on the roles women play.

3.3.1. General constraints

Time constraints. Despite the strong participation of women in the MAPs sector workforce, full engagement of women remains limited by the needs of households and reproductive responsibilities (e.g. food provision, childcare, household chores and so forth), more particularly in rural areas where basic social services and infrastructures are poorly developed. The responsibility carried by rural women for income generation, household and reproductive tasks severely limits women's capacity to participate in additional trainings (e.g. educational, technical, financial, marketing trainings), to invest in the life of their producer organization and community (e.g. meetings, leadership position, etc.), to enter new value chains or to engage in upgrading strategies that require additional investments of time.

Women's rights, lack of law enforcement and women' awareness, resulting in unequal distribution of entitlements. Egyptian law guarantee full enjoyment of civil liberties to all citizens, and the country's institutions are legally prohibited from discriminating against women. In practice, however, women face gender discrimination in many aspects of their life, resulting in poorer access to and control over natural, human, physical, financial and social capital. Gender disparities are more pronounced and persistent for women and girls living in high-poverty areas, such as rural areas in Upper Egypt. Gender gaps widely relate to socio-cultural norms, and customary and traditional practices. A combination of attitudinal barriers and traditions continue to deny women equal access to education, health care, employment and ownership.

A general lack of resources, added to a culture in which rural women's roles are limited to the domestic sphere and farm work, seriously hampers their access to education - a situation which helps to perpetuate gender discriminatory traditional customs and societal attitudes. Indeed, illiteracy or lack of educational background act as a disincentive for affected persons to adequately address their situation. Educational gender gap also limits women and girls' access to socioeconomic opportunities, making them more vulnerable to poverty and marginalization. As a result, and in addition to limited resources and poor status in areas of decision-making, many women and girls lack awareness to fulfill their rights and protect themselves. Moreover, legal, state and civil society institutions often lack the capacity and mechanism needed to protect, promote and uphold women' fundamental rights against societal attitudes and community perceptions. This two-fold problem has wide implications in many areas of women's life: basic social rights (access to health services and insurance), property rights and ownership, access to credit, employment, access to justice, gender-based violence, political rights and civic voice, etc.

Limited mobility and freedom. In line with previous observations, cultural norms impose women and girls restrictions on their mobility, and ability to engage with males from outside their family, or even to leave their own homes. Such controls have strong impact on women's social and economic life, and notably impede women's participation in the value chain, particularly in nodes where men predominate (e.g., as buyers, sellers of inputs, providers of support services). These norms also explain why many women, even if they are graduated, do not work or work during a very short period of their like, that is before they get married.

3.3.2. Specific constraints to youth and women's involvement in the MAPs chain

Waged laborers. The key constraints regarding female participation in waged labor include:

- Different wages and employment conditions to men
- Working hours and distant work location
- Flexible employment heightens uncertainty (no insurance, broken contract, working extra hours, etc.)
- Limited access to training (mainly because women are concentrated in the seasonal or temporary parts of the value chain)
- Lack of experience for young women
- Limited capacity to assert their rights

Unpaid family labor in smallholder production. The analysis of the division of tasks between men and women revealed differences, and hidden, or unrecognized, labor contributions of female family members. Women as unpaid family labor are the most vulnerable and constrained segment in the global MAPs value chain. Although women may perform most of the farm activities, they are partly excluded from decision-making process (this is all more the true when it comes to direct income-generating activities such as marketing functions and sales) and have no control over the use of sales proceeds at the household/farm level. Moreover, women's on-farm responsibilities and mobility constraints prevent them to grasp off-farm work opportunities in the rest of the sector, and they remain without any access to independent income.

Entrepreneurs. Women, as head farmer/smallholder or as agri-business entrepreneurs (e.g. supplier, trader, exporter, agronomist consultant), are very scarce in the MAPs value chain, more particularly in rural areas, where gender-intensified constraints fostered by traditional, cultural and social norms discourage female entrepreneurship in agriculture. These include differentiated access to education, lack of access to land, limited access to finance, agricultural inputs, training, and lack of access to information networks and markets. Specific gendered constraints faced by business women also include a high level of discrimination in employment (and occupation), and, in many cases, the lack of recognition from their male counterparts.

4. DEVOLPMENT OF AN ACTION PLAN FOR GENDER MAINSTREAMING AND POs CAPACITY DEVELOPMENT IN THE MAPs VALUE CHAIN

The present GSVC analysis of the MAPs value chain in Fayoum, Egypt, combined with the rapid assessment of capacity development needs of POs involved in the target value chain, led to the development of an action plan aiming at promoting gender mainstreaming and POs capacity development in the target value chain, as resumed in the table below.

Thematic area	Actions	Roles and responsibilities
Individual	• Improving skills through training and capacity building activities. • Creating links and networks among individuals and improving relationships and linkages with local POs. • Improving team-work and communication skills • Focusing on the local leaders and female 'extensionist' in order to disseminate appropriate ideas. • Efficient M&E system.	Members of associations, Ministry of Agriculture and Land Reclamation, Ministry of Social Solidarity, Non-Governmental Organizations, Producer Organizations, Value Chain

	• Raising individual skills on planning, communication, negotiations and management.	
Organizational	• Restructuring and proper administration of target POs. • Providing support to POs on efficient management systems for operations. • Setting suitable rules and policies for management inside the organizations, which guarantees the involvement of men and women in work equally. • Proper financial management, to guarantee the distribution of services in sustainable and continues manners. • Directing the available resources to guarantee efficient production. • Choosing target organizations should be done via selection criteria and in-depth evaluation.	Members of associations, Ministry of Agriculture and Land Reclamation, Ministry of Social Solidarity, Non-Governmental Organizations, Producer Organizations, Value Chain
Enabling Environment	• Studying available resources for organizations to be efficiently used. • Establishing communication and information entities to support and facilitate operations of the POs. • Improving the regulations and laws that regulate POs in all forms. • National programs for awareness and governance of POs need to be implemented. • Adjusting and updating relevant regulations and laws. • Disseminating awareness of the roles of cooperatives and trying to restructure the cooperatives and stimulate their role in production and marketing.	Members of associations, Ministry of Agriculture and Land Reclamation, Ministry of Social Solidarity, Non-Governmental Organizations, Producer Organizations, Value Chain

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6. ANNEXES

6.1. ANNEXE 1: DETAILED METHODOLOGY

The following sections constitute the methodological part. A second section presents our attempt to select 3 MAPs 'product-based value chains with high potential for a GSVC intervention. The third section gives a detailed description of the research tools and the sampling strategy that have been developed and used during the fieldwork phase.

6.1.1. MAPs value chains selection

6.1.1.1. Brief Description of the selection process

As stated before, all the actors involved in the MAPs sector (from producers to local and international traders) are not specialized in one or two MAPs production and marketing. They deal with a wide range of MAPs in order to mitigate the risks.

Among the diversity of MAPs produced in Egypt a selection process was performed in order to identify two or three high-potential product-based value chains that meet the objectives of the development intervention which is to build competitive and sustainable value chains with equal age and gender-specific opportunities for all actors involved in the value chains, more particularly for the farmers and their farmer organizations.

The selection process was based on data gathering from various sources and references. Data on MAPs production (cultivated areas and volumes produced at the local and national levels) were derived from the 2013 National Agricultural Statistics of the MALR. The other data regarding the structure of the value chains were mostly compiled from informal discussions with VC players (mainly traders and exporters). The different steps of the selection process can be summarized as follow:

Given the lack of specific data by MAPs sub-sector and products and the lack of specialization of MAPs producers, the starting point for selection was based on a very pragmatic criterion aimed at reaching as many VC players located in Fayoum as it is possible: Which are the main MAPs produced in the Fayoum area in terms of cultivated area and volumes relative to the national production?

Observing market trends and the demand for well-known MAPs products by the current importers from Egypt, we draw up the list of MAPs products that are not widely cultivated in Fayoum (according to the 2013 National Agricultural Statistics) but for which processing and exporting steps are mostly done in Fayoum.

For each product identified, we then looked at the structure of the value chain, the actors involved, the national and international outlets and the value distribution along the value chain. We also identify current trends regarding market growth and new opportunities for development. We also tried to assess from available information the level of participation of women and young people, identifying at which node(s) of each pre-identified value chains they mostly operate.

Simultaneously we questioned the interest of including in the study newly introduced or innovative products like chives, lovage, savory and stevia.

These steps led us to draw up a provisional list of about 10 products which have a potential in the geographical area under consideration. They are summarized in the following tables. The first one describes the main MAPs products cultivated and ranks them in terms of volumes produced in Fayoum relative to the national ones. The second one provides basic information about the structure of each value chain.

Table 7: Overview of the main MAPs produced in Fayoum

	Sub-sector	End product	Cultivated area in Fayoum (fd)	Volume produced in Fayoum (tons)	Share of national volume	National cultivated areas (fd)	National volume (in tons)	Crop calendar
Calendula	herb	dried whole flowers, petals, TBC, whole cut, powder and other grades	495	7643	**100%**	495	**7643**	mid-march
Chamomile	herb	dried whole flowers, petals, TBC, whole cut, powder and other grades	6723	5705	**76%**	8763	**7475**	mid-Sept/May
Marjoram	herb, seeds	dried leaves and seeds	620	1591	**37%**	2520	**4297**	mid-Sept/May
Fennel	seeds	dried whole seeds, broken, seeds, crushed seeds, TBC, powder	711	824	**32%**	2087	**2574**	mid-Sept/May
Basil	herb	essential oils, dried whole leaves, broken leaves, TBC, crushed leaves, powder	540	5546	4%	12080	143823	mid-March/July
Hisbiscus	herb	dried flowers, whole leaves, petals, crushed, T.B.C., powder	na	na	na	613	**310**	mid-March/Nov
Parsley	herb, seeds	dried whole leaves/seeds, broken leaves/seeds, TBC, crushed leaves/seeds, powder	na	na	na	776	14295	mid-Sept/May
Fenugreek	seeds	seeds, powder	Shut-in production due to the scandal of e-coli food contamination in Germany					
Caraway	herb, seeds	whole seeds, broken, seeds, crushed seeds, TBC, powder	67	79	3%	3705	3156	mid-Sept/May
Coriander	herb, seeds	broken leaves, whole seeds, crushed seeds, TBC and powder	na	na	na	3625	3575	mid-Sept/May
Anise	herb, seeds	whole seeds, broken, seeds, crushed seeds, TBC, powder	na	na	na	1091	633	mid-Sept/May

Table 8: Overview of the structure of some of the main MAPs value chains located in Fayoum

	Domestic market			Export market			Main compet/ Producing countries	Prices distribution (EGP/kg)			Companies	Income/ added value creation	N° women in the VC	VC node(s) where women are well-represented
	Vol. (T)	Val. (USD/T)	Places	Vol. (T)	Val. (USD/T)	3 main import markets		Farm Gate	Wholesaler	Retailer				
Calendula	minimal	NA		100%	2000-2900	Germany, Netherlands USA		14-18	NA	NA	NA		na	hand-picking
Chamomile	about 15%	NA	Cairo, Alexandria and Assuit (bulk, wholesale) + touristic areas (consumer packages)	85%	1800-2900	Germany, Netherland, USA	Argentina	**19-22**	20-25	**27-35**	10-20 big sized	consumer packaging and extracts production	na	hand-picking
Marjoram	about 10%	NA		90%	1800-2900	USA, Germany, Netherlands		08-12	10-15	12-19	20-25		na	no
Fennel	about 10%	NA		90%	1800-2900	USA, Germany, Netherlands	Turkey, India	**27-30**	28-32	**30-37**	8-10		na	no
Basil	about 10%	NA		90%	1800-2900	USA, Germany, Netherlands		08-10	10-15	12-17	8-10		na	no
Hisbiscus	> 80%	NA	local markets, urban, touristic areas	20%	1800-2900	Germany, Netherland, USA	Sudan	**28-30**	30-35	**32-40**	15-20	consumer packaging	na	hand-picking
Parsley		NA						08-12	9-15	12-19	10-15	consumer packaging	na	no
Caraway	mainly produced and	NA		80%	2400-3200	Germany, Netherlands USA	India	25-28	26-30	27-33	10-20	consumer packaging and extracts production	na	no
Coriander	imported from other countries	NA		85%	1800-2900	Germany, Turkey and USA	India	08-12	10-14	15-18	7-10 cies mostly owners of drying factories		na	no
Anise		NA		95%	2500-3800	Germany, Turkey, USA	India, Turkey	22-25	25-27	27-30	10-20		na	no

6.1.1.2. Prioritization of MAPs potential value chains

Ten pre-identified candidate MAPs value chains were analyzed regarding the following integrated criteria which reflect the key entry point of the MAPs value chain study:

(1) Market potential and enabling context:
   a. Stable or increasing domestic and/or international demand for the product
   b. Growth potential of certain products/activities (e.g. organic products, new varieties)
   c. Possibility for scaling up
   d. Potential for leveraging public investment and commitment with private investment
   e. Involvement of a large number of stakeholders, including supportive actors (e.g. NGOs, foreign donors, researchers)
   f. Within framework of national and local strategies

(2) Potential of the value chain to improve the role and benefits of the target beneficiaries (i.e. women, youth and POs):
   a. Present inclusion of these groups in the market (whatever functions are they performing, as farm owners, plant owners and workers),
   b. Potential of the product for income-generating activities,
   c. Low barriers to entry for the small-scale and poor entrepreneurs (small scale of production, low start-up costs, not requiring major capital investment, using low-tech skills),
   d. Low risk

(3) Potential of the value chain to address age and gender-specific issues and producers organizations capacity development needs:
   a. Social inclusion (high number of women and/or young people already involved along the VC)
   b. Opportunities for women to move into higher-value production and roles
   c. Opportunities for increased women's involvement into non-traditional roles
   d. Participation of POs in the product-based value chain
   e. Capacity development opportunities for POs (towards export marketing functions for example)
   f. Opportunities for women to enhance their decision-making in the public and private spheres (and at different levels – POs, company)

(4) Other criteria, such as:
   a. Reliable available data
   b. Reference study for comparative analysis
   c. Importance of the crop (cultivation/transformation/commercialization) in Fayoum

They are assessed and summarized in the following table.

Table 9: Matrix for gender sensitive value chain selection

Sub-product or value chain scores: 3=high, 1=low	**Chamomile** *flower crop*	**Hibiscus** *flower crop*	**Calendula** *flower crop*	**Anise** *spice oil seeds crop*	**Fennel** *spice oil seeds crop*	**Coriander** *spice, leaves*	**Parsley** *leaves crop*	**Basil** *leaves crop*	**Marjoram** *leaves crop*	**New products Chives Savory** *leaves crop*
Criteria for growth potential										
Positive growth trend of the value chain, unmet market demand, high interest of buyers	3	3	3	3	3	2	2	2	3	3
Scope for expanding production, value and quality	2	3	3	2	3	3	3	3	3	3
Potential for regional or international competitiveness	3	1	3	2	3	2	3	2	3	3
Criteria potential for gender equality										
High number of women involved in the VC	3	3	3	1	1	2	2	2	2	1
Opportunities for women to move into higher-value production	3	3	3	2	2	3	3	3	3	2
Opportunities for increased women's involvement into non-traditional roles	3	3	3	3	3	3	3	3	3	3
Criteria potential for POs' capacity development										
Participation of POs in the VC	3	3	3	2	2	3	3	3	3	1
Capacities of POs to develop and thrive in the VCs	3	3	3	2	2	2	2	2	3	2
Capacities of POs to receive support from support institutions	3	3	3	2	2	2	2	2	3	3
Additional criteria										
Low entry barriers for small-scale and poor entrepreneurs	3	3	2	2	2	2	2	3	3	1
Main production in Fayoum	3	2	3	1	3	1	1	1	3	1
Data available, reference study	3	1	2	2	3	1	1	1	2	1
Total	35	31	34	24	29	26	27	27	34	24

Building on the marketing trends and well known products required by current importers from Egypt, there are some new plants that are requested for supply such as Chives, Lovage and Savory. These plants are not cultivated in Egypt widely because of lack of experience and absence of service providers like extension services and input suppliers (seeds). However, these plants are cultivated and tested in the last three years under supervision and control of some companies (large size) but they are not sharing information with suppliers to keep the knowledge gap between these companies and competitors. The cultivation information and consultancy are available with minimal number of experts and seeds can be imported. Another innovation in the sector is to cultivate new varieties of commonly produced plants such as Parsley cross (curly parsley), multi-mentha (mint) and sweet fennel (Dutch Fennel). These new varieties are demanded by markets and seeds can be imported too.

Fenugreek was removed from our list of MAPs commonly produced in Egypt because its cultivation and production have all but disappeared since the scandal of E. coli food contamination of German and French consumers by sprouted fenugreek imported from Egypt in 2011. Then the EU banned the import of some Egyptian seeds and beans until 2012 and many other exporters were affected by this decree (especially groundnuts and beans). The domestic consumption of fenugreek is based on imports from other countries. For that reason, we removed it from the analysis.

Coriander, Parsley and Hibiscus are not widely cultivated in Fayoum according to the 2013 National Statistics and were not recorded for that reason but this does not mean exclude them from our panel of potential products because most of their processing and exporting steps are done in Fayoum.

Among them, the Hibiscus sorting and packaging is more operated by female workers. Egyptian hibiscus (Aswanii) is not commercialized for exports because of high prices. Traders use to sell the local production in local markets and touristic areas, and important volumes have to be imported from Sudan to satisfy the local demand. Indeed Hibiscus is extremely popular in Egypt as it constitutes the basic ingredient of the national beverage, i.e. the bright-red hibiscus tea, known as *Karkady*. Because Hibiscus is not export-oriented, there are few reliable and available data about its commercialization.

The production of chamomile has been remarkably successful over the years. Chamomile is mostly produced for export purposes. It is a very well-known plant to the rural communities in Egypt; especially to women who play a strong role in the harvesting stage which requires a lot of care and is closely linked to the quality level achieved of the final product (whether this is dried whole flowers or essential oils). Although women have developed solid skills and knowledge over years about the cultivation and harvesting of Chamomile, their role remains smaller in downstream nodes of the chain. Enhancing the participation of women in the promotion and marketing of Chamomile can be seen as a very good opportunity for both the development of income generating activities (especially for women) and the promotion of the Egyptian Chamomile international reputation (that shall benefit to all the actors). Moreover the Chamomile value chain employs many young workers (most are men) as sorters; sorting operations require a certain level of technicalities and ensure high-income. Besides organic-certified chamomile which is widely cultivated in Fayoum (i.e. the cultivation of organic Chamomile covers 52% of total organic areas in Fayoum) registers high demands from local and foreign consumers who are more and more interested in environmentally friendly and healthy caffeine free products. This can be seen as another strong opportunity for women and farmer associations to be more involved in this high-value segment of the MAPs market, which is all the more accurate in view of the current context of the agricultural sector in Egypt wherein the organic production is not performing well (quality issues and post-harvest losses) and is registering a decline in requests for organic products. Lastly we have a reference study carried out by the FAO ten years ago on the role of women in the Chamomile value chain in Egypt. It is a good comparative tool to examine changes that have been occurred in the meanwhile.

The cultivated area of Calendula flowers is 495 feddans in Fayoum and represents 100% of the total production of Calendula in Egypt which is 7643 tons. The production steps are similar to chamomile and

females can play a significant role in the production of Calendula, especially if hand sorting is promoted among target communities. Moreover the demand for Calendula is growing, principally from companies specialized in body care products such as soaps, body oils and creams. Indeed, Calendula is a basic ingredient for the production of soaps and body oils, including especially high-value products for babies. At the national level, we can cite among others the Nefertari Company which produces 100% hand-made free pesticides body care products and who buys the majority of the herbs used in the production of its body care products to the Fayoum Organic Development Association. The company who was created in 1998 owns now about 20 shops located in all the country (Alexandria, Cairo, Luxor, Giza, Zamalek, Dokki, Maadi, Nasr City, etc.) and e-commercialize a part of its products abroad (except the liquids and oils products because of legal restrictions). Nefertari supports community development by empowering local groups and marginalized communities inside Egypt (with special emphasis on women) by means of integrating them into skills development and income-generating activities either directly or through cooperation with NGOs. The Company employs many women to produce body care hand-made products. The Calendula chain in Egypt provides with raw materials (mostly petals and flowers) number of large sized companies, such as for example the Weleda Company, European leader in the field of natural body care products or the Canadian Sammy Soaps Company which produces soaps with wild crafted Calendula from Egypt. Although Calendula shows very good future prospects its production remains underdeveloped. There are therefore many opportunities for the development and the enhancement of women in the various phases of wild harvest, production, transformation, commercialization and promotion of Egyptian Calendula.

As for Chamomile, Marjoram is a very common MAP in Egypt that has been produced for many years. The production of Marjoram is export-oriented and very small amounts reach the domestic market. In terms of quality, Marjoram is less sensitive than Chamomile, Calendula or Hibiscus when it comes to harvesting and post-harvesting activities. Contrary to those plants, Marjoram can be considered as a low-value crop which is mostly produced and sold for its dried leaves as Marjoram seeds do not constitute the economic part as it is the case for aniseeds or caraway seeds for example. The price distribution along the chain and informal discussions with stakeholders reflect the fact that Marjoram is a less profitable crop for all the actors involved in the chain.

Fennel is an important crop for small farming in Egypt with almost one-third of the national production coming from Fayoum. Seeds are used as raw material for medicinal or aromatic products especially for the exports to Europe and the USA. Less than 10 % is commercialized domestically. Due to these final uses, quality requirements are particularly high. The past 10 years have in particular registered increasing demand for organic-certified Fennel seeds. With Hibiscus, Fennel records the highest prices at each node of the VC (in comparison to other MAP chains) and appears as a very lucrative product. Moreover informal discussions with MAPs value chain stakeholders have revealed that there is an increasing demand for a new variety of Fennel (i.e. sweet Fennel also called Dutch Fennel) which is beginning to be cultivated in Egypt. The role of women in the Fennel chain is more obscure than for other products such as flowers where they have a strong position in harvest activities. Nevertheless, due to the current and future economic perspectives associated with high-quality products' requirements, one can see many opportunities for the development of the role of women in the various phases of the Fennel production. Lastly the Fennel chain registers many young workers performing mostly post-harvest operations.

Based on the precedent analysis, the table below summarizes the 'gender-sensitive lead chains' with the highest potential in the MAPs sector in Egypt. They are ranking in terms of relevance for the development objectives of the GSVC.

Selected VC	Justification
1. Chamomile	Well-known product in rural communities, stable markets, profitable crop, high level of women participation, common acceptance for the role that women play in terms of quality, high number of young workers as sorters, potential for social and environmental certification schemes, potential for enhancing the role and position of women into higher-value and non-traditional activities, a sample of all the MAPs value chain actors involved in the Chamomile chain are located in Fayoum, including POs.
2. Calendula	Well-known product, increasing demand for high-quality and safety products, 'niche' market for wild-crafted Calendula and baby-care products, high level of women involved along the VC, strong potential for the development and the enhancement of women in the various phases of wild harvest, cultivation, transformation, commercialization and promotion. Only-produced in Fayoum.
3. Fennel	Well-known product, stable market with increasing demand for new varieties of Fennel, very profitable crop, quality issues for organic products, women are "invisible" in the chain, high number of young workers. Opportunities to make women more visible along the chain and gain a better position within.
4. Hibiscus*	Historical crop *(Karkadi*), domestic market only, low competitive advantages (Soudan), women involved at different nodes of the chain (cultivation, sorting and packaging). Opportunities to enhance the position of women within the chain. Opportunities to develop the export of Egyptian hibiscus via women-only associations or sustainability certification schemes such as Fair Trade for example (?)

Table 10: Selection of 3 MAPs product-based value chains with high-potential for the GSVC intervention

**The case of Hibiscus is presented here for future research*.

6.1.2. METHODOLOGY: Questionnaires design and sampling strategy

The objective of the fieldwork is to complete secondary data collection gathering the views of MAPs value chain actors and key informants in order to get:

- a rapid assessment of capacity development needed by POs within the selected value chains, with a focus on governance, equity and gender gaps and;
- an in-depth understanding of age and gender-based constraints and opportunities at each node of the selected value chains with a focus within POs.

To reach such an objective, a tailor-made toolkit was designed to facilitate the collection of sex and age-disaggregated quantitative and qualitative data at the macro- (enabling environment), meso- (each node of the chain) and micro-levels (farm/household level) using both a gender and a value chain development perspective, with a focus on the four following dimensions:

- Gendered roles, practices and participation,
- Gendered access to resources and control over benefits,
- Knowledge and beliefs,
- Laws and policies.

Specific tools were developed to identify key POs capacity development needs in the selected value chains. Inspired from the Organizational Performance Assessment Framework (Universalia/IDRC) which analyzes the organizational performance as a function of the internal and external organizational capacities, the organizational motivation and the external environment of the target POs, they also integrate gender considerations (equity and gender gaps) including youth and focus on the analysis of the POs' organizational strategy/capacity to participate in policy-making processes and promote a sustainable agriculture development (including gender equity).

6.1.2.1. Survey methods

A combination of qualitative tools were developed for the different categories of actors involved in the selected value chains, from input suppliers and producers to producers organizations, local traders, processors, distributors/exporters, service providers and enabling bodies.

Data collection during fieldwork was based on semi-structured interviews, focus groups discussions, unstructured interviews and direct observations. Individual semi-structured interviews work to give more insight into the various preliminary mapping elements identified during the first step including desk review and informal discussions with MAPs experts, and allow capturing the important issues relevant to age and gender-specific roles, issues and constraints. They focus on what value chain actors are doing, on relationships among them, on the division of work (age and gender-based) and on related costs and benefits. They are completed by focus group discussions (FGD) and unstructured interviews with key informants. Focus group discussions with farmers were held in order to provide deep understanding of the behavior, attitudes as well as to grasp the main challenges and obstacles hindering women and youth inclusion in the MAPs sector in general and within POs in particular. Unstructured interviews with key informants help to identify and deepen key age and gender issues in relation to the cultural setting and the institutional and regulatory framework in which the MAPs value chain operates. Unstructured interviews and focus group meetings do not only provide a means to check the reliability of data from desk review and from semi-structured interviews but they give also more insight into why actors are doing what they do and how they formulate their decisions.

Semi-structured interviews were designed to obtain qualitative and quantitative data from actors at each node of the MAPs selected chains, including input suppliers, producers, producers' organizations, local traders/wholesalers/retailers, processors, and large export buyers/processors/distributors.

The survey designed for MAPs producers is meant to collect quantitative and qualitative data on cultivation practices, input supply access, decision-making, age and gender-based division of roles in production, farm management and marketing, resources critical to production and marketing, access to and control over resources, control over revenue from MAPs sales and relationships upstream and downstream the value chain. The questionnaire was designed in order to fit the profile of small-scale farmers as well as of larger producers and can be used to carry out both individual and collective interviews with producers. Individual interviews will be preferably conducted with large-scale producers. Collective interviews will be held with small-scale male and female farmers in the selected area.

Separate FGDs were held with women and men farmers respectively. Mixed FGDs with 'youth groups' were conducted in order to better understand the ways that male and female participants from various age and gender perspectives both overlap and diverge. These FGDs enable to give information about the dynamics of interaction between men and women's farmers (e.g. perception on changes in men's and women's roles and gender relations in production and marketing of MAPs, factors promoting or hindering man and women decision making especially in MAPs marketing, group networks and interactions).

These FGDs were conducted among members of the selected farmers associations (3) and cooperative (1) active within the MAPs value chain in the Governorate of Fayoum on one side, and among farmers that are not involved into the selected POs on the other side. This approach ensures that a range of different organizational forms and contexts are included, for maximum insight in the role of POs in addressing small-scale farmers' needs and gender issues. Each focus group comprises between 5 and 12 respondents and tries to guarantee a balance of male and female participants in the case of mixed focus meetings.

Additional semi-structured interviews with representatives of the 4 selected POs complete data from the FGDs. The guiding questions that compose the rapid assessment of POs capacity development needs were developed to better understand the motivations for joining a PO, the organization of the group, the internal governance, leadership and decision-making process, eligibility for membership, the resources required in the running of the POs, networking efforts, how the resources are available, the system of control and share of benefits among members, related to age and gender gaps.

With MAPs local traders and small processors, qualitative and quantitative data were collected through semi-structured interviews. They provide information about men and women's participation (i.e. the proportion of men and women at these levels of the chain), resources that are critical to operate at these levels of the chain, access to the resources for men and women, activities involved in the operation of the business, who does what and why, relationships with upstream and downstream actors, beliefs and perceptions that affect the participation of men and women at specific levels of the chain, and finally any laws and policies that affect the operation of their business.

With large-scale export buyers /processors, survey was designed to understand how they obtain supplies of MAPs, existing networks with upstream and downstream actors, and beliefs, perceptions, laws, and policies that affect their operations.

The interview guide for each type of actors and interview (collective *versus* individual ones) are presented in annex.

6.1.2.2. Actors'map AND SampLing strategy

The table below draw up the list of the different actors involved at each node of the MAPs value chain in Egypt.

Table 11 : List of the various actors involved along the MAPs value chain in Egypt

Value chain stakeholders (men and women)	Key informants

• Input suppliers
• Farmers/Producers
  ○ Small- and medium-scale farmers
  ○ Large-scale producers
• Cooperative
  ○ The Agricultural Cooperative in Monshaat Demo
• Farmers associations
  ○ FAODA
  ○ Community Development Association of Monshaat Sakran, Shabab Elghad Association
  ○ Community Development Association in Youssef ElSeddeik
• Apex organizations
• Middlemen: collectors, local traders
• Transporters
• Processors: small, medium and large-scale ones
• Retailers/Wholesalers (local/regional/nat.)
• Exporters
• Importers/brokers/processors/retailers
• End consumers (domestic/export markets)
• Certification/labeling companies
	• Companies
	• Industry association
	• Sector experts
	• Universities
	• Government agencies
	• NGOs
	• Donor organizations
	with experience in the Egyptian MAPs sector

IDENTIFIED TARGET GROUPS UNDER A VALUE CHAIN PERSPECTIVE
Suppliers
Producers
POs members
Processors/Traders
Key informants
Associations Managers (Chairman / Executive Director)

IDENTIFIED TARGET GROUPS UNDER A GENDER PERSPECTIVE
Women
Men
Youth (a mix of women and men)

Survey participants were selected by referral, through two information channels (i) that will be simultaneously explored (see figure below). The first one starts with end market actors (exporters) asking about his main suppliers and working back up the value chain (until the producers and input suppliers). Key informants also assist our MAPs expert in identifying key market actors among their business contacts. The second one starts with the selected producers' organizations (already identified) which provided full list of their members (by gender and if available by age) to the team who proceeded in selecting farmers groups for each type –mixed, women and men-only, youth/older – of FGDs. The interviews and FGDs that were conducted within the POs also help to identify the business relationships these organizations have with others actors than the farmers (e.g. local traders, NGOs, large producers, processors, input suppliers, exporters).

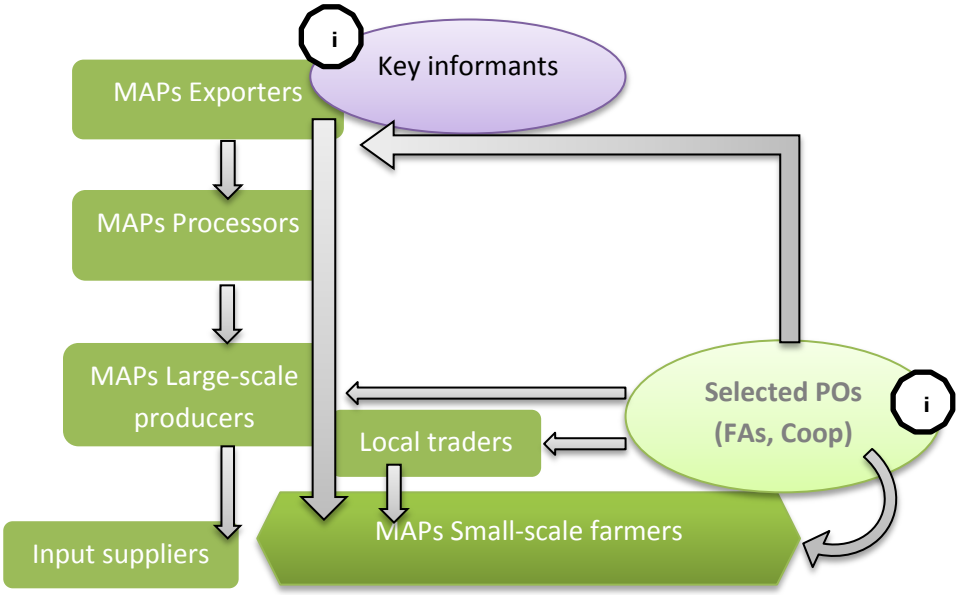


Figure 9: Stakeholders map & mechanism for fieldwork data collection

Our pool of survey participants was selected to provide a broad and representative orientation to the MAPs selected value chains (see table below). The survey did not use random sampling to select participants, as it purpose is not to generate statistical data but an in-depth understanding of the key age and gender-specific constraints and opportunities faced by the different actors involved along the MAPs value chain in Egypt.

Table 12: Matrix for data collection and sampling strategy

Value chain node	Number of actors	Data collection Mode	Number of respondents (~n)	Female	Male	Youth
Input suppliers	n.a.	Interviews	4	-	4	-
Farmers	n.a.	Interviews	12	4	8	-
FAODA	110 men 55 women ? young people	Women-only FGD (1) Young women University graduates FGD (1) Men-only FGD (1) Mixed Youth FGD (1) Interview (3)	7 17 5 6 3	7 17 - 2 -	- - 5 4 3	- 17 - 6 -
CDA Monshaat Sakran	80 men 20 women ? young people	Women-only FGD (1) Men-only FGD (1) Mixed Youth FGD (1) Interview (3)	7 5 7 3	7 - 3 -	- 5 4 3	- - 7 -
CDA Youssef ElSeddeik	125 men 15 women ? young people	Women-only FGD (1) Men-only FGD (1) Mixed Youth FGD (1) Interview (3)	6 4 12 3	6 - 8 -	- 4 4 3	- - 12 -
Coop Monshaat Demo	730 men 400 women ? young people	Women-only FGD (1) Men-only FGD (1) Mixed youth FGD (1) Interview (2)	8 6 11 2	8 - 10 -	- 6 1 2	- - 11 -
Local buyers/traders	n.a.	Interviews	5	-	5	-
Exporters/processors	n.a.	Interviews	5	1	4	-
Bankers/finance institutions	n.a.	Interviews	2	-	2	-

Key informants	n.a.				
Research centers/univ.	Interviews				
Governmental bodies	Interviews				
Industry associations	Interviews				
NGOs and donors	Interviews				
TOTAL					
POs capacity development needs assessment	Interviews (11) FGDs (12)	11 114	- 41	11 20	- 53
GSVC	Interviews (28)	28	5	23	-
Total respondents	Interviews (21) FGDs (12)	**140**	**73**	**67**	**(53)**

All the focus groups meetings and individual interviews took place face-to-face.

6.2. ANNEXE 2: MAPPING OF THE MAPs VALUE CHAIN

This section presents the mapping of the MAPs value chain in Egypt. It was the key preliminary step aimed at deeply understanding the structure of the MAPs value chain, the position of all the actors and stakeholders involved along the chain, the linkages between them, and the main constraints they face to. Additionally, this first step helped at roughly identifying the roles and positions of women in MAPs production and marketing, in order to guide the next steps, more particularly the field research.

This section presents the Egyptian MAPs value chain, the various actors involved and the role they play in each node of the MAPs value chain, "from the field to the fork", with a focus on women participation along the chain and on the role played by producers organizations (POs) in the MAPs sector. This section is based on an in-depth literature review including various sources, previous reports focusing on the MAPs sector in Egypt as well as broader study regarding the Egyptian agricultural sector as a whole, more particularly the horticultural sector which is very close to the MAPs sector in terms of markets, organizational level, actors and institutions involved.

The present MAPs value chain is characterized by the scattering and poorly organized nature of its upstream base (producers) and its better organized and more formally structured actors downstream (large processors and exporters). The VCA distinguishes two main channels depending on who is piloting the chain and on target end-markets (which determine a certain level of expectations and requirements for end-product quality and services). The first channel which carries the biggest volumes is foreign market-oriented and is leading by the large exporters/processors. The second one is leading by local traders and rather destined for domestic markets. Overall the value chain operates with little vertical integration (except for a few very large companies) and almost no horizontal collaboration.

6.2.1. MAPs Value chain OvervieW

Egypt is a well-known supplier of conventional and organic medicinal and aromatic plants (MAPs) to Europe, USA and the region (e.g. Turkey, Gulf States). Over 80% of MAPs production is located in Upper Egypt and is mainly found in the Governorates of Minya, Fayoum, Beni Suef and Asyut. MAPs are high value export crops. More than 80 % of Egyptian MAPs are exported and generate revenues of approximately US$ 100 million (i.e. 78 million Euro), representing about 10% of the total processed food export from Egypt. According to the Chamber of Food Industry, fennel, marjoram, chamomile, peppermint, coriander and calendula are the main MAPs exported. A maximum of 20 % of the national MAPs production is sold domestically in supermarkets, pharmaceutical manufacturing, cosmetics and food processing, for an estimated value of 25 million USD. MAPs production is labor intensive and employs about 2% of Egyptian agricultural workers (around 140,000

workers). MAPs are generally sold and exported as dried herbs, spices (seeds, ground powder) or essential oils (UNIDO, 2011).

Fayoum[1] is the second largest governorate in producing MAPs in Egypt. MAPs total cultivated area in Fayoum represents 16 % of MAPs national cultivated area, and the number of MAPs locally produced accounts for almost one third of the total number of MAPs present in Egypt. Fayoum is a natural oasis in the Western Desert at about 90 km from Cairo. Fayoum has rich land resource combined with close proximity to natural sources of water for crop irrigation and a climate which confer a season cycle that differ from that of other world's main producing countries (e.g. Eastern Europe) and the possibility of producing MAPs throughout the year (e.g. winter and summer crops). The share of the governorate has grown in the past decade constantly with the support of several programs (such as EMAP for example). In addition, local organizations have developed as supporting structure to the recently initiated farmers' organizations (see the FAODA community development association for example in the specific field of organic farming practices). The success of MAPs in Fayoum can also be measured by the interest developed by some larger firms. For instance, Sekkem Egypt's largest organic-products company has engaged in producing either directly or by contracting farmers in the area.

Globally more herbs than spices are grown, some of them grown in the wild too (e.g. thyme, mint and marjoram). MAPs cultivation in Fayoum is centered on flowers like chamomile, calendula and small amounts of hibiscus; leaves like marjoram, basil, mint and thyme; and seeds like fennel, caraway, anise and coriander (to a less extent). Among Egypt governorates, Fayoum is ranked third with regard to the total organic agricultural land representing almost 20% of the total organic agricultural land in Egypt. Out of them 66% are MAPs (Sadek and Shelaby, 2011). Indeed, Fayoum has a long tradition of producing organic MAPs since the first organic and biodynamic initiatives in the area have emerged at the end of the 80's. About 20% of MAPs cultivation in Egypt is organic and most of them are exported, with the major markets being the EU (mostly the German market), USA, Canada, Australia and Japan. Egyptian organic produces can also be found in the Gulf Emirates. The main organic MAPs products are herbs such as chamomile, coriander, dill, lemongrass, hibiscus, marjoram, parsley, peppermint and spearmint.

Exports drive the MAPs sector in Egypt whereby large downstream actors impose their definition of quality to the whole chain, mainly on food safety, Maximum Residue Levels, organic and other standards (e.g. CSR, GlobalGap, fair trade). For example, to be exported as organic-certified produce and get a premium on the international markets Egyptian MAPs crops have to meet the requirements of the organic regulations of the target importing country such as the EU regulation No. 834/2007, the National Organic Program (NOP) of the USA and the Japanese Agriculture Standards (JAS). In 2007 the draft "regulation to produce, process and handling organic products in Egypt" was introduced. The Ministry of Agriculture and Land Reclamation issued the decrees no. 1,411 and 1,412 to regulate and develop organic agriculture, followed in 2010 by the Ministry of Trade and Industry with the decree no. 993 to regulate processing and marketing of organic goods. Farmers and processors must be certified by certification bodies registered with the Egyptian Organization for Standardization and Quality (EOSQ).

Domestic sales of organic MAPs products are concentrated in high-income areas, around the urban areas of Cairo and Alexandria or in tourist places. MAPs specialized shopkeepers state that more than half of organic MAPs consumers are foreigners. Many pharmacies in Egypt sell organic medicinal plants, essential oils and teas. A number of supermarket chains (Metro, Carrefour and Alfa) have organic sections and sell organic herbs and spices (Kledal et al., 2008). Despite this pattern of fast-growing national and international markets for organic MAPs gained from its significance as a safety production, high quality food and its positive environmental influences, the significant trend today is free of pesticides products only. There are two main reasons for this situation. First, implementing organic certification schemes creates higher costs and

[1] The governorate of Fayoum is divided into 5 districts, with 5 cities and 159 villages.

necessitates additional control measures for producers and exporters. For market actors it means high transaction costs in searching, coordinating and establishing trustworthy partnerships. Secondly, the MAPs sector has been highly affected by chemical and biological contamination (pesticides residues, microbial contamination with E. coli, yeasts and Salmonella) over the last past years, jeopardizing the production and sale of organic produce that meet the requirements of organic international standards.

MAPs from Fayoum exchange many hands before reaching final consumers within and outside Egypt. Figure 1 presents a schematic picture of the MAPs value chain. The MAPs value chain is composed of various actors who include input suppliers, producers, producers organizations (POs), local traders, wholesalers at different administrative levels (village, Governorate, regional), processors, retailers, exporters and foreign traders (importers, brokers, wholesalers, retailers, caterers). Other institutions that support or influence the MAPs value chain include among others: the Ministry of Agriculture and Land Reclamation, the Ministry of Trade and Industry, the national network of agricultural research institutes (including the National Research Centre, the Horticulture Research Institute, the Desert Research Institute, the Faculty of Agriculture (FOA) of Fayoum), Non-Governmental Organizations (NGOs) such as FAODA (Fayoum Agro Organic Development Association) working to promote organic farming systems and to improve farmers' livelihoods in Fayoum, MAPs stakeholders associations including the Egyptian Society for the Producers, Manufacturers and Exporters of Medicinal and Aromatic Plants (ESMAP) and the Egyptian Spices and Herbs Export Development Association (ESHEDA), or the agro-industrial development initiative aiming at upgrading Medicinal and Aromatic Plants sector in Egypt (EMAP), as well as certification bodies especially certification of organic products (such as ECOA).

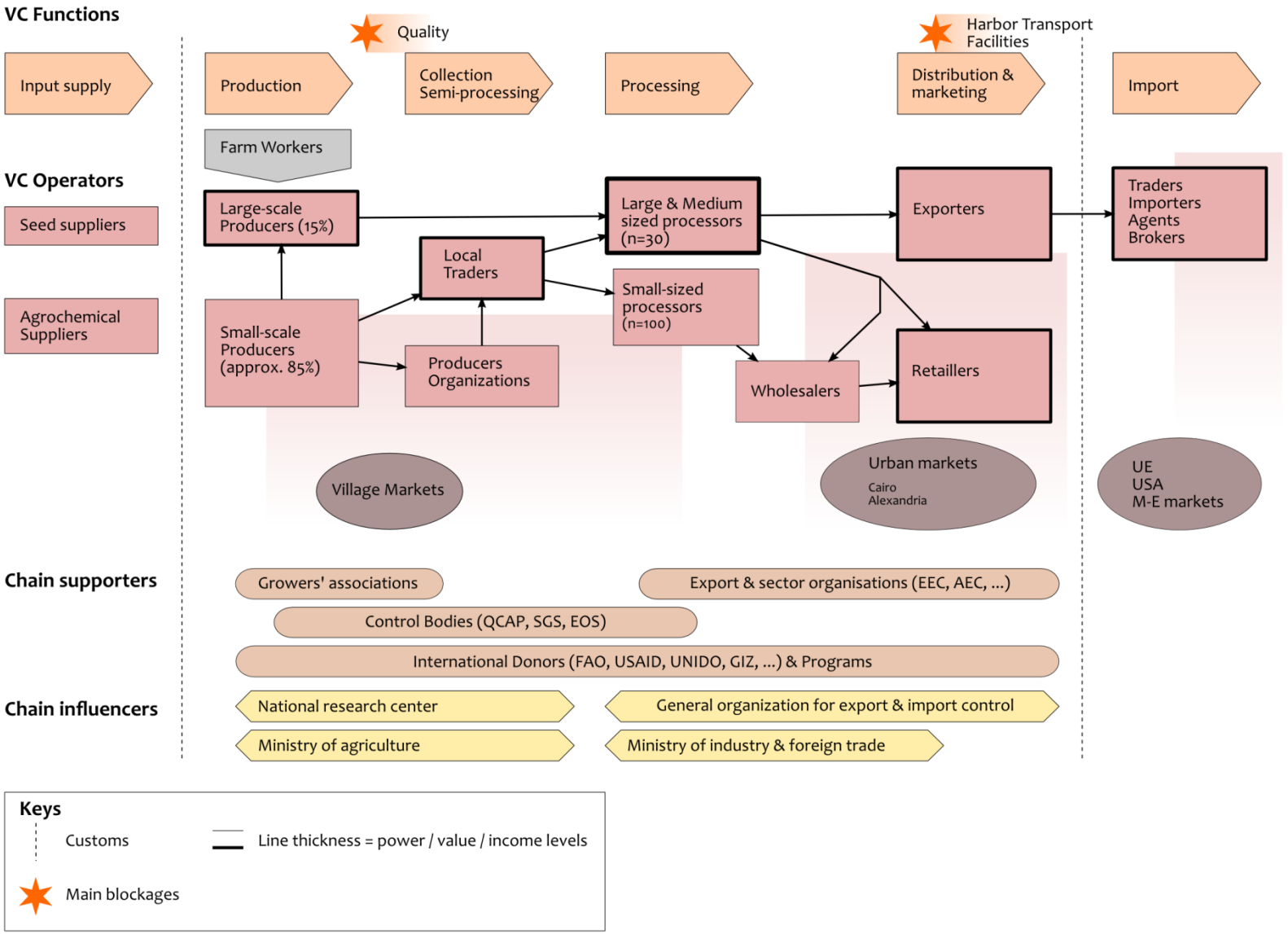


Figure 10 : Mapping of the Egyptian MAPs value chain (the author, 2015)

6.2.2. Value chain Actors

Actors closest to the end market (wholesalers, retailers and large processors/exporters) are generally engaged fulltime in processing and trading MAPs along other crops or products. Their number does not usually exceed one hundred and they are easily identifiable. As one moves upstream, progressively away from the import markets and domestic consumers, actors become more fragmented and marginalized, less visible and sometimes part-time players, even more when it comes to women who are expected to engage in households and childcare related tasks in addition to agricultural activities.

6.2.2.1. Input Suppliers

Input suppliers are specialized in the distribution of agricultural inputs (i.e. seeds or transplants, fertilizers, pesticides, and agricultural equipment) to growers in Fayoum. Input suppliers may also offer farmers additional agricultural services and technical support.

Inputs used in the production of MAPs by smallholders are mainly supplied through the cooperatives located in most districts (as the Agricultural Cooperative Monshaat Demo in Fayoum) and the small agro-input stores that exist in nearly every village. Organic fertilizer in Fayoum is readily available in the form of compost derived from the production of smallholders or through small one-woman enterprises in some villages.

Because of the lack of competition among input suppliers, the choice among seeds varieties, fertilizers and pesticides is often limited and does not necessarily reflect the needs of optimum production. Moreover the small quantities of inputs purchased by individual smallholders do not allow them to bargain for better prices or make purchase directly from wholesalers. Most of the smallholders use their own seeds cultivating in previous season which are more likely to present defects and incompliance with the market demand.

In governorate cities or urban areas, larger agro-input supply companies offer a wider assortment of seeds, fertilizers and pesticides. These companies also stock irrigation equipment and other materials used in agricultural production. They use to supply inputs and farm equipment to networks of wholesalers and directly to large-scale growers producing for export. Some of these companies are also engaged in the production of seeds. Otherwise, they distribute locally imported high-quality seeds, mainly from European companies such as HILD a German seed company or Enza Zaden, an international vegetable seed breeding company. Some of these major multinational agro-input and equipment suppliers are also represented in metropolitan areas. Fuel and equipment repair shops are readily available throughout Egypt to meet on- and off-farm needs.

Smallholders who have entered into a contractual arrangement with an exporter receive, in most instances, seeds as in-kind credit. The exporters and large farms deal directly with wholesalers of inputs and equipment; this enables them to bargain for favorable prices. Also benefiting smallholders is the fact that the cost of the seeds acquired in this way is lower than the cost of the seeds offered through local retail shops (IFAD, n.d.). Another way for smallholder to get access to inputs at lower prices is through the agricultural cooperative organizations which provide them with fertilizers and pesticides sold at subsidized prices.

One of the main challenges of the MAPs sector is the lack or insufficient access to quality seeds for growers. It affects negatively the productivity and the quality of MAPs, and thus the overall value chain performance (CBI,2013 ; UNIDO, 2011). Another problem is the lack of high-quality products (e.g. pesticides, fertilizers) that are suitable for minor crops uses as it is the case in MAPs and organic production.

6.2.2.2. PRODUCERS and labor workers

MAPs cultivation in general and in Fayoum in particular is smallholder-based whereby the majority of farmers own less than 5 feddans with an average size of 2,5 feddans (about 1 hectare) and few medium-scale farmers owning up to 20 feddans (about 8,4 hectares) (CBI, 2013). They operate as owners or tenants. Small-scale producers use to cultivate MAPs jointly with other crop like vegetables (e.g. onion, cabbage and broad bean) and wheat for family consumption and local markets, and fodder crops for animal feeding. Related to the

previous point, areas allotted to MAPs cultivation are generally small, but not so small (less than 2 feddans) nor too large as to exceed 12 feddans (about 5 hectares) (Sallam and Shelaby, 2011).

Small-scale farms are characterized by traditional irrigation systems (with water pumped from the canals and then distributed over the fields), fertilization manual practices and the use of their own seeds which have often many defects that negatively affect the yield and the quality of the end product. Moreover mechanization is limited to soil preparation. Small-scale producers are responsible for 85 % of the national production of MAPs. They produce for and sell to the domestic market only. They sell to village markets, local traders or farmers association.

Beside them operates a very small number of large-scale producers (they are estimated to be about 15 large growers involved in MAPs production) which are responsible of the other 15 % of the MAPs production (CBI, 2013). The larger ones in Fayoum cultivate MAPs in association with fruits and vegetables on areas measuring up to 240 feddans (about 100 hectares) (EMAP, 2011). In these large-scale farms MAPs production is export-oriented and benefits from modern irrigation systems, new seeds and cultivars (including imported seeds and transplants), modern facilities for collection and drying, social and environmental certification schemes implementation, safety standards quality control, etc. These large-scale producers have globally easy access to suppliers of high-value inputs (UNIDO, 2011, CBI, 2013). They have achieved vertical integration in the chain and are strongly linked to the export markets in the EU, the USA and the region. Notably they have developed preferred relationships with traders in the EU (importers, agents and brokers) from which they can receive market information and technical assistance to meet the specific requirements of the European markets/consumers (regarding socio-environmental certification schemes, and tracking and tracing systems). Large-scale producers are familiar with sub-contracting small-scale producers and traders to acquire the quantity of MAPs needed. On the domestic market they supply too, they sell MAPs directly or via local traders to processors and the wholesale market.

Production of MAPs is a labor intensive enterprise. Small-scale producers, as larger-scale ones, generally grow a variety of MAPs in order to mitigate risks. The sequence of activities involved is quite similar across small-, medium- and large-scale producers: land clearing, canal digging, sowing seeds in a nursery bed, transplanting, irrigating, spraying or weeding, harvesting, on-farm post-harvesting handling, pre-processing, transporting and storage before sale.

All large and small-scale producers hire permanent and seasonal workers (Santucci et al., 2013). According to the CBI report (2013) the percentage of female employees in the MAPs sector was 40% at the large-scale producers in 2011. The labor costs were estimated at approximately 2 euros per hour, and women continued to be less paid than men for equal tasks (CBI, 2013).Temporary casual workers are mostly women performing the majority of manual operations and tasks involving seeding, transplanting, manure application, weeding and harvesting, and permanent workers are men employed for irrigation, mechanization work, as farms guards or managers. In the fruit and vegetable sector (including MAPs) in Upper Egypt, Bouzidi et al. (2010) describe the emergence of the use of agricultural labor under specific arrangements where men labor contractors lead and supervise a large number of women labor. The contractor is accountable to the woman's family for her transport and security from the village to the plantation. In the case study, the contractor took 40 % of the women net wage which was around 25 EGP (about 3,50 euros). Most women workers mentioned that they were suffering from poorly and unhealthy transport and working conditions, and from their relationship with the contractor which was often marked "by physical violence and immorality" (Bouzidi et al., 2010). Ninety five percent (95 %) of women wage laborers were single (the other 5% being divorced) with an average age of 19 and illiteracy rate reaching up 80% (ibid.).

As family labor, men and women share many activities, but women are entirely responsible for managing the household, children's care, subsistence crops' cultivation and food reserves. Gender stereotypes indicate specific types of work for women under specific conditions, preventing them from entering other types of

work traditionally reserved for men. Women are typically involved in high-intensive labor activities where most of them are manual (i.e. weeding, harvesting, home food processing and transformation) and located at the farm level, while men are responsible for land preparation and planting, for farm management and trading. For example, due to prevailing patriarchal system it is not accepted for a woman to move around without a male relative. This situation prevents many women from independently developing trading and marketing activities outside the home, getting access to market information, input supply, etc. Men remain mainly responsible for marketing and thus keeping the proceeds from sales. This situation explains why despite the fact that Egyptian women are widely recognized for having over time developed strong skills and knowledge about good farming practices, medicinal properties and cooking uses of local MAPs, women do not easily control the income generated from these products (Abdelani-Martini, 2011).

Figure 11 : Cover picture of the ILO 2012 report "Working Children in Egypt", representing young boys picking some Chamomile blossoms.

The NCLS 2010 reveals that 52% of children (between the ages of 5 and 17) engaged in child labor in Egypt are unpaid family workers in agriculture (ILO, 2012). In accordance with the result above that most employed children work as unpaid family workers in agriculture, the survey shows that 55% of children work on farms, gardens or plantations (ibid.). In the MAPs sector children are mostly involved in production activities especially in transplanting and harvesting alongside women. A reason quoted by rural Egyptians (FAO, 2005) is that women and children make a highest quality picking than men. They also represent lower labor costs. It is worthy to note that the Egyptian Government has recently made moderate advancement in efforts to reduce child labor, more particularly when it comes to dangerous jobs. In 2014, the Government ratified a new Constitution that defines a child as anyone under the age of 18, guarantees children's rights to education, and prohibits children from being employed in dangerous occupations. Additionally, the Government reactivated the National Coordinating Committee to Combat the Worst Forms of Child Labor and participated in a program designed to improve school attendance. However, children in Egypt are mostly engaged in child labor as unpaid family workers, mainly in agriculture and domestic work in poor rural areas. The Government has failed to make available data on the enforcement of child labor laws, including its worst forms, and programs to combat child labor remain insufficient to adequately address the extent of the problem (ILAB, 2014).

6.2.2.3. Producer organizations

Among producer organizations (POs) in Egypt, one has to distinguish between Cooperatives Organizations (Co-ops) and Farmer Associations (FAs) including Community Development Associations (CDAs). Co-ops and FAs or CDAs took roots in different historical contexts, do not necessarily share the same vision and objectives and do not perform the same activities and service provision. A common feature to all POs is the low representation of women although women are estimated to account for more of 75 percent of the agricultural labor force in Upper Egypt. Women, who are active as growers, may be members of producer organizations that are male-dominated, have fewer women members and even fewer women in leadership positions. In Egypt, women-only farmers associations are scarce and the result of very recent initiatives. In fact, the first women cooperative have emerged in 2013 through the "Pro-poor Horticulture Value Chains in Upper Egypt" (Salasel) project.

The findings presented below derive from a previous study recently conducted by NSCE[2] on a sample of POs involved in the MAPs sector in the Governorate of Fayoum. Four of them, i.e. 1 Co-op (the Monshaat Demo Cooperative Organization) and 3 FAs/CDAs (the Fayoum Agricultural Organic Development Association, the CDA of Monshaat Sakran and the CDA of Youssef Al Seddik), are part of the assessment of POs capacity development needs in the present study.

Agricultural Cooperative organizations

In Fayoum agricultural cooperative organizations are well established (the eldest cooperative has been established in 1951 and the youngest one in 1981). The range of activities covers the supply of fertilizers, pesticides and seeds to farmers, the protection of agricultural land against uncontrolled urbanization and for a few of them support to the farmers in agricultural production. Among the cooperative organizations located in Fayoum none of them are specialized in MAPs production and only two of them (the Monshaat Demo Co-op and the Alaweyia Co-op) have registered on the last years very small superficies of cultivated areas under MAPs, covering less than 6% of the total cultivated area of each co-op.

The membership in cooperative organizations is defined by the possession of a landholding certificate and Egyptian citizenship. Membership is guaranteed against payment of a minor annual fee. The membership provides advantage such as the supply of subsidized fertilizers and seeds, extension services, integrated pest management, and support to crop management and agricultural good practices. The number of members varies according to the organization but what appears is the rather small number of women members that do not exceed on average 22% of the total membership; from cooperatives where women are totally absent to one cooperative, the Monshaat Demo cooperative organization, where women compose up to 55 % of the Co-op membership. None of the organizations count women in their management board, or even envisage specific roles for women within the organization or participate in the decision-making process. With the exception of one organization none manages a community oriented service such as child care center or health unit or a food processing unit.

The co-ops organizations put forward the service to farmers as the purpose of the organization. They unanimously agreed about the obstacles to the development of agriculture, of the organization and that are also the cause of the issues that small scale farmers are facing. These obstacles consist of the high prices for fertilizers, the absence of quality seeds, the absence of an effective irrigation and drainage system, the absence of funding possibilities and of the extension services. In addition there is no proper marketing, nor are there subsidies and machinery available for the small scale farmers (NSCE, 2014).

Farmer Associations

Farmers Associations (FAs) have started to appear later (than the cooperative organizations), most of them in the early 2000's. The main FAs involved in the MAPs sector in Fayoum are presented in the table 1 below. A majority of them cultivate MAPs as a minor crop along traditional mayor crops in the region such as wheat and onion. Only one of them, the CDA of Monshaat Sakran, dedicates more than half its cultivated area to MAPs production (which covers 60 % of the CDA's total area).

Table 13: List of the main FAs in Fayoum active in the MAPs sector (source: NSCE, 2014)

Farmer Associations	Number of male members	Number of female members	% of female membership	Production	Area covered (in feddans)

[2] NSCE (2014). "Implementation of the first phase activities for 'Support to Farmers Organizations of Africa - North Africa program' (SFOAP)", Final Report, June 2014.

FAODA*	110	55	33	**Medicinal & aromatic plants,** Onion, Mango	n.a.
Misr Sons Association	9	11	55	Tomato, **Marjoram, Peppermint, Medicinal and aromatic plants**	20,000
Community Development Association of Youssef El Seddik*	160	60	27	Wheat – Onion – **Medicinal &Aromatic Plants** – Transitional Crops	3200 MAPs=100 fd (~3 %)
ElMohebeen Association for Environment development	137	17	**11**	**Medicinal &Aromatic Plants**	n.a.
Community Development Association of Monshaat Sakran*	80	20	**20**	**Medicinal &Aromatic Plants** - Traditional Crops	1000 MAPs= 600 fd
Community Development Association in Azizia	n.a.	n.a.	n.a.	Wheat - Maize - Clover - Tomato - **Marjoram - Basil - aromatic plants**	4,000

**They are the 3 FAs/CDAs selected for the rapid assessment of POs capacity development needs.*

Globally, FAs and CDAs have a broader scope of actions than Co-ops. Active in the field of agricultural development, most of them also provide social and economic support to community members, families and their children, such as health care and nurseries service for example. The activities in the field of agricultural development covered by each of the association are summarized below (Table 2).

Table 14 : Main activities performed by FAs and CDAs in the Fayoum MAPs sector (source: NSCE, 2014)

Association name	Input/ agri	Input/ loans	Producti on	Post-harvest activities					Market ing
	Agricultu ral Inputs	Develp t loans	Guidanc e to GAP	Proce ssing	Pack aging	Stora ge	Trans port	Oth er	Market ing
FAODA*			X	X	X	X		X	X
Misr Sons Ass.			X	X				X	X
CDA in Azizia			X					X	X
CDA of Monshaat Sakran*			X			X			X
El Mohebeen Ass. EDEC	X		X						
CDA of Youssef Al Seddik*						X			

**They are the 3 FAs/CDAs selected for the rapid assessment of POs capacity development needs.*

While the main condition to enter membership for the cooperative consists in the property title for the land holding, the conditions of memberships vary a lot from one farmer/community development association to another. While some of them require a land ownership, the Egyptian citizenship and being older than 21 years old, others only require potential members to be motivated and reputable or pay particular attention to young candidates. Being a member of these associations provide the following advantages: the provision of guidance

and training in good agricultural practices, including organic practices, post-harvesting and marketing support activities, as well as often awareness-raising activities in health, social and economic matters.

The organizations are keen to achieve sustainable projects and examples that are mentioned include a children nursery, support to organic agricultural development, mobile cooling and drying units for MAPs, and handicrafts for women social and economic development.

The main issues that were mentioned by the different associations are the high price of the agricultural inputs and price volatility, the land fragmentation, the lack of commitment from exporters and of potential for export, the lack of funds, inappropriate infrastructures and legal obstacles in getting official approvals.

All the associations interviewed are mixed group (i.e. consisting of women and men as members). Women are less numerous than men and constitute between 11% and 55% of the total membership of the associations. These latter perceived their purpose in supporting small scale farmers, women and more generally of communities that are if not marginalized, at least struggling to survive. For some associations, the activities cover creating job opportunities for women and young people and raise the role of women inside the community, introducing non-traditional crops that especially have an export potential (such as MAPs), create new processing activities and intervene in the price settings between farmers and traders. All activities aim at improving the living conditions of the farmers and of women (NSCE, 2014). Even if women participate in several activities and at different levels within the associations, they are globally under-represented in the decision-making process and often confined to specific fields of activity such as children care and health awareness activities and to handicrafts and small breeding for the economic part.

6.2.2.4. LOCAL Traders/PRE-PROCESSORS

Due to the small volumes produced by a large number of small-scale farmers in the MAPs sector, exporters, processors and even wholesalers use to deal with local traders who collect MAPs from those many farmers. This situation gives local traders a significant role and bargaining power in the VCs of MAPs as they deal with producers and processors/exporters from both sides of the chain and remain one of the main gate for the producers. The traders are not specialized in certain types of MAPs products; they collect, perform very basic processing operations and offer to their clients a wide range of agricultural raw materials (unprocessed MAPs products).

According to previous studies, they generally provide technical and extension services to farmers and usually supervise the harvest operations and transportation from the field to the drying facility. They perform basic cleaning, screening operations, sort the product by quality and sell it accordingly to the processors and exporters. Most of them perform lab analysis to ensure the quality and safety of the purchased products (UNIDO, 2011). In some case, they receive dried MAPs from the producers. As for essential oils they receive fresh produce and perform oil extraction operations in small units. The Governorate of Fayoum accounts with several factories for the distillation of essential oils from MAPs and exporting them. These factories however are small with old technology and machinery. As a result the quality of the end-products is generally low.

6.2.2.5. PROCESSORS

Around 150 companies are engaged in processing MAPs as aromatics, for cosmetic and medicinal purposes, for tea and as food additives. According to the Egyptian Spice and Herb Export Development Association ESHEDA (cited in Sallam and Shelaby, 2011), there are three main categories of MAPs processors which are determined according to their turnover and the scale of investment.

The ten largest companies (HACCP certified) are working in Cairo and Alexandria and are all export orientated (the four largest ones account for 50% of MAPs export). Twenty medium-sized processors are also located in the metropolitan area and produce dried herbs, spices, seeds and essential oils. A majority of them are also engaged in export. It is worth noting here that about 80% of exported MAPs are traded as fresh, dried or crude products, cleaned but not further processed. The 20% remainders include ground spices, essential oils or

oleoresins. The third category are the small processors, 100 in total, of which 60% are producing dried herbs, spices and seeds in Cairo and Alexandria and the other 40% work with essential oils and are based in Upper Egypt (Assiut, Minya, Beni Suef and Fayoum) for sales on the domestic market.

Like traders, the processors deal with a wide range of MAPs produce, whether spices, herbs and seeds. Some of the large companies include an organic line of production. The major crops to be processed include marjoram, fennel, chamomile, basil, geranium, mint, thyme, caraway, aniseed, coriander and calendula.

Classic processing operations for dried herbs and seeds involve the following sequence of steps:

- Drying the whole plants or only the seeds.
- Sieving/milling/grading: classifying into classes according to the requirements of clients, and removing wastage.
- Blending: so as to make the product homogenous, and at the same time remove the long grasses and foreign objects.
- Final Cleaning: through a vibrator to separate the powder.
- Color Sorting (for some products like basil and fennel). This is a very primitive process in Egypt that is in need of much development (Sallam and Shelaby, 2011).
- Packaging: the product is packed in bulk form or in small quantities in plastic bags bearing the company's brand name, according to the needs of the client.

The main steps involved in processing essential oils generally include: cleaning, drying and size reduction steps, sieving, extraction or distillation steps, rectification and standardization (e.g. removal of moistures, color and sediments, enriching of the oils by removing or adding other fractions).

As for the technology used, large and medium companies have modern equipment, trained labor to some extent, and several expansions and agreements with companies in Europe (mainly in Germany) to develop the existing production lines are in progress. Units for steam sterilization have been established so that products being sent to Germany and Turkey to be sterilized can be now sterilized in Egypt. Most of the small-size companies use old and depreciated equipment and machinery (Abdelmoez, 2012).

Processors use to deal with suppliers that can provide them with high-quality, large volumes, and consistent produce, that is mostly with local traders, large-scale producers and more recently with some farmer associations. Suppliers are generally selected by processors according to trust-based business relationships, and contractual arrangements include a high percentage of verbal agreements. Some big companies ensure a major portion of their supply needs with their own MAPs production and complement their volumes by sub-contracting with smallholders and farmers associations or other large-scale producers.

The CBI report states that the role of women in the processing industry is limited (CBI, 2013). To our knowledge, more detailed information about the position of women in this sub-sector is not available.

6.2.2.6. Exporters

Exporters are responsible for the last processing, packaging and transport operations. Like traders and processors, exporters deal with a wide range of MAPs produce, whether spices, medicinal plants and herbs. According to the UNIDO report on the MAPs sector in Egypt, the level of specialization among exporters is very low as the majority of them work in organic, clean, conventional and pesticide free products and most of these stated that they were not interested in certification schemes and were satisfied selling their products as conventional products with acceptable level of maximum residues of pesticides (UNIDO, 2011). However, a small number of exporters are specialized in organic produce and most of them are located in or work with farms in Fayoum (i.e. Sekem group). Moreover exporters have different requirements about the form and quality of the raw material depending on their own processing facilities and target markets. A majority of them receive raw materials in the following forms: raw dried/fresh and/or semi processed. For those exporters

who have no facilities, they export packed products from traders/processors' facilities. If they own drying facilities or dehydration lines (for essential oils) they prefer working with fresh raw plants.

It is possible to distinguish three different types of exporters according to the level of infrastructure owned and to the extent of vertical integration achieved within the MAPs value chain:

- Exporters with own farms and facilities for processing (e.g. drying, screening, dehydration lines) and packing;
- Exporters with screening and packing facilities, and;
- Exporters without land or factories.

Generally the exporters owning land and drying, screening and packing facilities are historical actors of the MAPs sector development and enjoy a very good position in the foreign and domestic markets. In that case, exporters control all the steps of the value chain, from the farm gate to the processing factory and eventually to the exporting level. They use to cover much of their supply needs with MAPs produced on their own farms managed by their company's staff. They outsource the rest from other contracted farms that have been placed under the supervision and technical assistance of the company's staff.

Several exporters, members of the Egyptian Spices and Herbs Export Development Association (ESHEDA) and the Sekem Group, have been engaged over the last ten years in contract-farming arrangements with smallholders to grow different types of herbs, medicinal plants, and spices (e.g. marjoram, hibiscus, basil, mint, fennel, and anise). Logistically, as it would have been not possible to deal with the smallholders individually exporters have started to deal with organized small farmers into farmer associations (thereby allowing production at scale), especially in Beni Suef and Fayoum (such as the Youssef Al-Seddik Association for example).

These big exporting companies are generally located in the metropolitan areas (Cairo and Alexandria) where they benefit from the nearness of agro-food transport and logistics infrastructure, and have also processing plants and/or farms in the MAPs producing areas, mainly in Fayoum, Minya, Beni Suef and Assyut. Being physically located within the producing areas provides exporters with the capacity of supervising the quality and safety of the purchased materials at each nodes of the chain. It enables reducing agricultural losses related to inadequate transport and storage, even more when it comes to high-perishable produce such as MAPs fresh leaves (according to statistics, post-harvest losses in the fresh fruits and vegetables sector ranged from 25% to 50% in 2012-2013). Moreover it is a good way to diminish congestion (and inherent costs) on air cargo spaces in Cairo and Alexandria and thus to become more competitive and profitable because of the new pre-cooling, sorting, packaging and cold storage facility in Luxor airport. High-perishable MAPs products can be pre-cooled and shipped by air from Luxor airport while less perishable produce can be transported to Alexandria in 40-foot refrigerated sea containers for forwarding to Europe by ship. Regarding the lessons learned from the USAID Agricultural Exports and Rural Incomes Project, including contract-farming schemes in Upper Egypt between exporters and smallholders, IFAD reports that *"the relationship between exporters physically located within an area and farmers appears to be much closer than the relationship with exporters in metropolitan areas. The relationship between exporters from within the area who are not involved in producing crops but rely entirely on buying from smallholders through farmer associations is even better"* (IFAD, n.a.).

Smaller exporting companies operate close to the field too. They are a great number located in Fayoum, for the same reasons given above. The exporters who have no farm but processing facilities have generally build their business on trusted relationships with traders and/or contracted farms to ensure the quality and the quantity of received MAPs products. Most of their management and quality control procedures involve gathering information of each supplier and conducting quality and safety analysis of the received products at the gate of their factory. They rarely provide technical support to their suppliers.

The last category of exporters, who do not have farm or processing plant, have to directly purchase the final products from traders or local markets. They have no control over the quality of the final products as they do not supervise any step of its production. In that case, the trader/processor is the only responsible for the shipment from receiving the raw materials till packing and loading containers. Although it is risky for the exporter, this later has no responsibility of rejections in case of quality issues as they pay after the release of payments from importers. However, in case of food safety crises and complaints the exporter can be subject to pursuit by his importers and loose his reputation.

To our knowledge there is no data available about the employment rate and opportunities for women at the exporting node of the MAPs value chains.

Table 15 : Identification of various exporters involved in the MAPs value chain from Fayoum - non-exhaustive list (from various sources)

	Name of the Company	Observations
1	Sekem Group	- Organic specialization - Smallholders contract farming in Fayoum - Exporter/processor/producer - Historic actor of the MAPs sector
2	The Stars of Egypt Export Co.	- SME "start-up" - Located in Upper Egypt - The company owner is a young graduate - Contract farming with farmer associations in Fayoum - The company employs 240 women in sorting and packaging, all trained and certified GlobalGAP and HACCP; and 40 men involved in packaging and container transport - Profit reinvested in the local rural communities
3	Organic Valley	- Located in Fayoum
4	AMD Verde for Import and Export	- Located in Fayoum
5	Safe Herbs and Spices	- Located in Fayoum
6	Egyptian Organic Agriculture Co.	- Located in Fayoum
7	Egy-Herbal	- Located in Fayoum
8	Long Life Herbals	- Located in Fayoum
9	United for Import and Export	- Located in Fayoum
10	Spice Home	- Located in Fayoum - SME - Exporter/processor/producer of fennel seeds, chamomile flowers and calendula - ISO 22000 certified
11	Spice Power Import & Export	- Located in Fayoum - Exporter/processor
12	Future Food Co.	
13	Seadawyherbs	-Located in Fayoum -Family company -Exporter/processor/producer of fennel seeds, chamomile flowers and powder, calendula flowers and petals, and hibiscus flowers crashed and TBC
14	International Company for Food Industries - TIBA	- Located in Cairo
15	Elwadi Export for Agricultural Products	- Located in Cairo - A pioneer in the field of exporting agricultural products
16	Elwefak El Sauidi for Food Industries	- Located in Cairo
17	Dehydro Foods Co.	- Located in Cairo
18	Orient group	- Located in Alexandria
19	AMA for Import and Export	- Located in Alexandria
20	EGINTEX	- Located in Alexandria
21	Organic Land	- Located in Fayoum - No specialization - Exporters/processors – Exporting capacity: 2600 T/year - Organic-certified : ECOA (BIO/JAS/NOP/EurepGap) + USDA - BCS certificate; ISO 22000 - Contract farming schemes ~ 300 feddans - Chamomile, spearmint, peppermint, basil, hibiscus, sage, marjoram, lemongrass, henna

6.2.2.7. Wholesalers/Retailers

The internal market is classified into wholesale, retail and packaging factories. The delivery channels of the MAPs products to the final consumers go through these markets and traders. After leaving the farm, MAPs products are sold to local markets (the village market or the wholesale markets). There are three major wholesale markets in the whole country: the Hamzawy market in Cairo, the Spice Dealers market in Alexandria and the Spice Dealers Market in Assiut, serving the major cities. From these wholesale markets, MAPs transit to purveyors and retail markets (e.g. street stalls, MAPs specialized shops, grocery stores, pharmacies, restaurants, supermarkets and hypermarkets) in urban areas throughout the country.

Table 16 : Name and location of mayor wholesale markets, repacking companies and retailers involved in the MAPs sector

Name of Market / Company	Activity	Location
Hamzawi Market	Wholesale	Al-Azhar Street, Cairo
Spice Dealers Market in Alexandria	Wholesale	Mansheya, Alexandria
Spice Dealers Market in Assuit	Wholesale	Galal El-Din El-Seyouty Street, Assuit
Sekem Company	Repacking for Retail	Bilbais Road, Salam City, cairo
Ottoman Company (Royal)	Repacking for Retail	Port Said Street, Cairo
Al Doha	Repacking for Retail	10th of Ramadan City, Sharkya
Hashem Brothers	Repacking of Essential Oils for retail	Agouza, Giza
Garas	Repacking for Retail	Industrial Zone (3), Alexandria
Carrefour, Alpha, Metro	Retail – hypermarkets chains	Cairo
Small and medium-scale shopkeepers	Retail – street stalls, specialized shops, grocery stores	Cairo
Catering operators, pharmacies	Retail – restaurants, local pharmacies	Cairo

Source: compiled from Central Agency for Public Mobilization and Statistics (CAPMAS), Egypt, 2012, and add-ons.

6.2.2.8. Services providers

Service providers are technical support bodies that deliver services, e.g. training, technical consultation, extension, research, in the field of MAPs production and marketing to the different stakeholders of the MAPs sector.

Many actors perform these functions: governmental bodies (mostly the Ministry of Agriculture and Land Reclamation and its formal extension services, and the Ministry for Industry and Foreign Trade), specialized consultants, private companies involved in the VC (such as input suppliers who provide technical supports to their clients/purchasers and exporters/processors/local traders who provide technical assistance to sub-contracted producers), Business Development Services providers (such as the Egyptian Spices and Herbs Exporters Association – ESHEDA -, the Food Export Council –FEC –) and certification bodies (e.g. the Egyptian Organization of Standardization and Quality - EOS), research institutes (e.g. the National Research Centre, the Horticulture Research Institute, the Desert Research Institute, the Faculty of Agriculture (FOA) of Fayoum), NGOs (e.g. FAODA) and related donors-projects, as well as farmer associations and cooperatives.

According to the UNIDO report on the MAPs sector they are available and numerous in the sector but their role is not formally identified, exception with the governmental bodies (UNIDO, 2011) and they lack efficiency. Many operate individually without a global coordinating approach. The Egyptian MAPs sector should better leverage the existing national network of research institutes.

6.2.3. Relationships and linkages across actors

This section deals with the governance of the MAPs value chain. It describes the factors that influence the relationships among actors—MSEs and larger firms—in the MAPs value chain, and linkages that appear to regulate transactions and allow or prevent skill or information transfer across groups of actors. Competitive value chains are generally characterized by cooperation among actors and firms related both vertically and horizontally.

There is globally little sharing of market and technical information up and down the chain, except for larger actors directly connected to import markets. The governance of the MAPs value chain in Egypt is mainly left to market forces and cooperation among actors is an exception.

6.2.3.1. Vertical linkages

The retail sector in importing countries in Europe, USA and the Region dictate via importers to all downstream actors along the VC their specific quality requirements on quality and safety standards (e.g. EU directives for maximum residue limits in food products, the HACCP-concept), sustainability certification schemes such as organic and fair trade, or business-to-business standards such as GlobalGap and BRC (British Retail Consortium) in the case of EU markets for example.

There is a tendency for the big buyers/importers to contract preferred suppliers/exporters, with the objective of creating long-term relationships within the value chain in order to ensure a better control and transparency of all the chain nodes towards the source (farmers). But the majority of importers/brokers keep buying on the open spot market. One of the reasons why importers prioritize open spot markets rather than long-term contracts is the complexity and the lengthiness of the Egyptian systems for delivering the export documents, mainly due to lengthy inspection procedures on container food shipments (CBI, 2013).

Among the key stakeholders involved in the MAPs chain in Egypt, no leading partners guide the chain development. A majority of large and small-scale actors (producers, processors, traders) operate individually. On their side, Egyptian large-scale producers/exporters focus on sustaining trade relations with importers in Europe, USA and the region as more as possible. A few large Egyptian companies have thus succeeded over years in developing preferred business relationships and getting support from overseas companies in terms of market information, quality management system, certification schemes implementation and international promotion and distribution. Among "success-stories" one can cite the LOTUS organic spices and herbs from the SEKEM group working directly with German companies which distribute and develop new products for German markets or the case of a group of large-scale producers in Fayoum which sell directly their products to the Mountain Rose Herbs Company and get in returns market information, technical assistance and quality control audits from the North-American company. These companies are commercial farms or exporting companies which control all the steps along the chain from MAPs production to transformation and marketing.

For these export-oriented actors, quality and consistency issues have become prominent. In order to facilitate quality control procedures, some of the large-scale producers/exporters-processors who have to fully or partly outsource MAPs production activities, have recently engaged in contract farming schemes arrangements with small-scale farmers, mainly through farmer associations (to allow economies of scale). In that case, the company controls all the steps of the value chain, from the farm gate to the processing factory and eventually to the exporting level. They use to cover much of their supply needs with MAPs produced on their own farms managed by their company's staff. They outsource the rest from other contracted farms that have been placed under the supervision and technical assistance of the company's staff.

The governance structure over the relationship between contracted smallholders and exporters is complex because of specific production requirements and certification schemes. It is difficult to translate the information for easy access by small-scale farmers in general without the direct involvement of exporters. This

makes the costs of switching to a new (group of) smallholder(s) high and time consuming for exporters. That is why direct contractual arrangements between smallholders and exporters-processors are still poorly developed and why a large number of exporters, processors and even wholesalers continue to deal with local traders who collect MAPs from those many farmers.

Local traders play a central role under the present value chain structure, given the number of small-scale farmers producing small volumes and the remoteness of some production zones. This situation gives local traders a significant role and bargaining power in the value chain as they deal with producers and processors/exporters/wholesalers from both sides of the chain and remain one of the main gate for the producers. They generally provide technical and extension services to farmers and usually supervise the harvest operations and transportation from the field to the drying facility. Local traders are generally selected by downstream actors according to their reputation. A majority of them have developed trust-based business relationships with processors but contractual arrangements are still characterized by the high percentage of verbal agreements.

Individually small-scale farmers rarely negotiate price (or quality) from fear of not being able to sell. Advances to the farmer are scarce. Their relations with upstream actors are established on the basis of opportunity – who can deliver requested products of a certain quality on time or who pays on a timely basis upon delivery of products. Suspicion and lack of confidence mark the business relationships among individual small-scale farmers and buyers along the chain.

Value distribution along the chain is unequal; exporters in Egypt and importers abroad profit the most (CBI, 2013). Information sharing and cooperation across layers of actors is an exception (CBI, 2013).

6.2.3.2. Horizontal linkages

Cooperation among actors is globally low.

With the exception of efforts carried out by some farmer associations, horizontal relations among farmers are very poorly developed. There is little evidence of information sharing between producers. For the smallest ones, prices are announced by local traders or the cooperative officer and generally accepted by individual farmers. Large-scale producers get easily access to market information because they are better endowed with market knowledge, communication technologies and business relationships. Nevertheless, the CBI report states that "large-scale producers respect each other but do not cooperate" (CBI, 2013).

Processors, which require a higher degree of technical skills in order to be competitive, do not maintain on a regular basis relationships among each other and do not have a platform to exchange experience and knowledge. Small-scale processors with drying plants or distilleries in the field practice similar technologies, but the variation in material, equipment and application of techniques indicates that firms could benefit from upgrading schemes, training and financing. Processing units managed by larger actor are on the opposite end of technical sophistication, but among them as well, there is a need to improve testing and analyzing of the raw material and the end product. There is no specific association or federation for processors. In the case of essential oil and aromatic extract sub-sector the mayor Egyptian manufacturers are members of the International Federation of Essential Oils and Aroma Trades (IFEAT) which is based in London.

Relationships among wholesalers and exporters are haphazard and inconsistent. Among exporters specifically 80 % of them expressed their negative feedback when they were asked about the establishment of export consortium to help in branding Egyptian products (UNIDO, 2011). There are two main MAPs or H&S exporters associations: the Egyptian Society for the Producers, Manufacturers and Exporters of Medicinal and Aromatic Plants and the Egyptian Spices and Herbs Export Development Association.

These professional associations do not sufficiently operate as lobbying or collaborative structures to address the range of policy issues and of performance issues regarding the Egyptian MAPs value chain

development/upgrading needs. Relationships and linkages between Egyptian companies and overseas importers appear to be stronger than among the Egyptian firms in-country. Better integration at this level could improve the overall efficiency of the MAPs value chain. For example, regrouping and better coordination of logistics would allow some economy of scale and increase the competitiveness of this segment of the value chain. An additional factor that may limit the development of the chain is that it is often tied to donor-funded projects of limited duration.

Lastly, the UNIDO report raises the issue of lack of integration and collaboration between MAPs service players such as extension and research, as well as their isolation from the industry. Some of the most active researchers provide individualized services to the export companies as free-lance consultants (UNIDO, 2011).

6.2.4. General constraints in MAPs production and marketing

Area	Identification	Implications
Production	- Seeds are not available in the quality or quantity needed by the producers, especially the smallest ones - Most producers use their own seeds which are often mixed and have many defects	- Small-scale farmers are not able to increase their yield/productivity - Lack of pure and new varieties and incompliance with market demand (i.e. most of the exporters are not able to source pure varieties or certain varieties not traditionally grown in Egypt)
	- Small farmers perform poor agriculture practices related to the final production of essential oils (chamomile, basil, marjoram, geranium) - Farmers lack knowledge of best agronomic/farm management practices to maximize MAPs yields, appropriate fertilizer and pesticides, seed varieties and quality/safety standards. - Lack of extension services	- The percentage of essential oils produced could be higher. Decrease the overall performance of the VC: loss of quality and yield. - Producers need training on agricultural good practices, especially for essential oils.
	- Small farmers are poorly equipped for post-harvesting operations (i.e. grading, drying and storage). They use solar drying and inadequate storage rooms that can affect the quality of the final product. - High proportion of post-harvest losses and non-exportable rejects. - Lack of extension services - Lack of farm investments and lack of access to financial services	- Loss of quality and risks related to hygiene in the final product. - High proportion of MAPs rejects/refusal by the downstream actors. - Implementation by exporters/processors of new quality and safety management operations including selective buying and contractual arrangements with FAs and local traders related to quality criteria and sometimes technical assistance. - There is a risk that the most vulnerable small farmers will be excluded from contracts. - The need for small farmers to find local outlets for MAPs products that do not match up with export markets requirements. - The need for farmers to develop professional networks and be better organized through FAs for example.
Marketing	- Access to markets - Poor transport infrastructure - High post-harvest losses and lack of outlets on the domestic markets	- Limited income-generating potential for the MAPs discourages expansion, adoption or innovation - High cost of transportation and high level of transport losses - Difficulties to access distant markets and actors in urban areas
	- Lack of transparency, misunderstanding of the functioning of the value chain - Lack of access to reliable output price information, plus seasonal fluctuations in prices, coupled with perceptions of being 'cheated' by vendors	- The practice of selling small quantities individually also reduces farmers' bargaining power and makes them vulnerable to cheating by vendors, thereby discouraging investments in MAPs.
	- There are structural, cultural and historical barriers (e.g. mistrusting the State, administrative and legal factors, individualism) that hinder the development and the effectiveness of POs	- There is a need for individual small farmers to use/promote farmer associations as link mechanisms with nearby local markets, the broader domestic market and the export market. - These POs shall also offer the possibility for horizontal integration into regional and national apex associations, thereby strengthening the availability of marketing information and the bargaining position of the associations.
	- Lack of strong locally contract farming schemes with POs and individual farmers - Lack of contract enforcement	- Potential benefits for smallholders: improved access to markets, improved technology, better management of risk, increased commercial acumen. - Potential risks of exclusion for smaller farmers because of selection bias by firms awarding contracts to larger farms.
Enabling context	- Unstable political context - Inflation rates	- Negative signal to potential investor - Unrest situation, lack of local investment, decreasing yield and profitability

Table 17 : Constraints in the MAPs value chain in Egypt (source: the author, based on the desk review and informal interviews, 2015)

6.2.5. Preliminary gender mapping of the MAPs value chain in Egypt

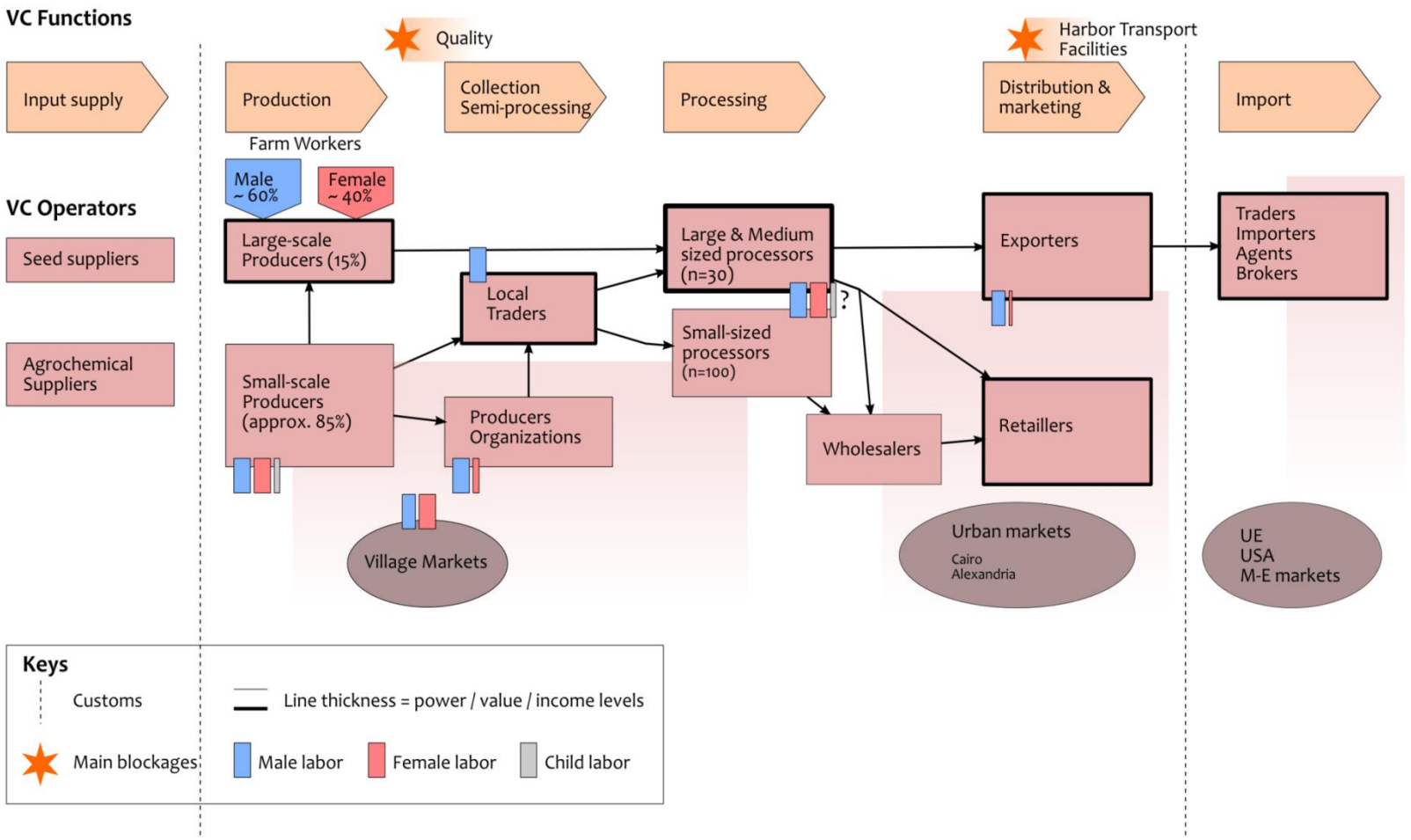
The following figures roughly show where women, man and children are involved at each node of the MAPs value chain. The 'big picture' that derives from it shows that women and men are more numerous and both involved in the upstream activities of MAPs production. Women are less involved in activities adding value to the final products such as marketing and distribution, in particular; and in the export distribution channel, in general. At the level of local markets (wholesale, retail markets), there is a lack of reliable data to our knowledge. Further details about the respective role of men and women at each node of the value chain and gender gaps, constraints and opportunities will be made available through the fieldwork.

Table 18 : Pre-Identification of gender roles and positions at each node of the chain

ACTORS	STRUCTURE & FUNCTIONS/ACTIVITIES	GENDER ROLES & POSITIONS
Input suppliers	• Small and medium-sized companies in semi-urban and rural areas • Supply agricultural inputs, i.e., seeds, fertilizers, pesticides • No specialization on MAPs agricultural inputs • Additional agricultural services and technical support to farmers	• Low number of women involved • No data
Producers	• A wide number of small-scale farmers ~ 3 fd → 85% of national production × Small-sized farm, majority of land tenants, family labor × Low mechanization, traditional irrigation system, own seeds × Crops rotation – MAPs crops + horticultural crops + cereal (wheat) + fodder crops • Soil preparation, seeding/planting, watering, manual or chemical weeding, fertilizing, pest control, harvesting, post-harvest handlings • Sell MAPs directly to village markets, local traders, and Fas - domestic market • Sub-contracting small farmers by large-scale growers (n~15) • Small- as large-scale growers hire permanent and seasonal laborers	• Large number of women working at the farm level • Mainly involved in manual and high-intensive labor activities : weeding, harvesting, removal of plants, drying, sorting, home transformation • As unpaid family workers • For women who are not married, as waged laborers • Child labor ? as unpaid family workers, assist women in harvesting operations
Producers organizations	• Distinction between Co-ops and FAs (CDAs, NGOs) • The Agricultural Cooperative Organizations (Co-op) × Large membership (thousands of members) × Main functions : input supply, land protection, and support to farmers in agricultural production × Very small amounts of MAPs • The Farmers Associations (FAs) × Lower membership (<250 members) × Broader scopes of activities : support in agricultural production, GAPs, post-harvest operations (drying, grading, storage, packing, transportation), marketing functions (local traders, large-scale growers, exporters) × Promote the development of non-traditional and high-value crops with an export potential,	• The Agricultural Cooperative Organizations (Co-op) × Women's membership and participation is low – no gender-specific incentives • The Farmers Associations (FAs) × Youth and women's membership is lower than men × Community development projects help improve awareness of gender issues × Under-representation

	such as MAPs × Contribute to social, economic and environmental community-development projects (self- or donor-funded projects) with a focus on women and youth	of women in the decision-making processes × Women are confined to traditional roles (children care, health awareness programs for the social part ; handicrafts and small breeding for the economic part)
Local traders	• Pivotal role between small-scale farmers and processors/exporters • Solid position and bargaining power in the chain (asymetry of information vàv farmers) • Possibly, technical support to farmers for quality requirements • MAPs collection, basic processing operations and quality control, sorting, transportation	• Low number of women involved • No data available
Processors	• 3 types of processors : × Large-and medium scale processors (n=30), all export-oriented, located in metropolitan areas, modern equipment × Small-scale processors (n=100) produce dried herbs, seeds and leaves, essential oils for the domestic market • Activities : cleaning, drying, sieving, grading, blending, color sorting ; size reduction, steam sterilization, and extraction for essential oils ; packaging, standardization • For large processors/exporters, links with foreign companies to develop production lines and benefit from technical and marketing trainings • Search for consistent, high-quality products and big volumes. • Trust-based business relationships. Verbal agreements. • Main suppliers : local traders and large-scale farmers, and more recently, some farmer associations	• Participation of women appears to be limited (CBI, 2013) • No further data available
Exporters	• 3 types of exporters : × Exporters with own farms and facilities for processing and packing × Exporters with screening and packing facilities × Exporters without land or factories • Located in metropolitan areas, the largest ones have processing factories close to the production sites –control all the steps, from production to export • Strong positions in the chain, both in the domestic and export markets	• Number of women involved • No data available
Wholesalers/ retailers	• Domestic channels × Village markets → consumers × Wholesaler (3 wholesale markets in the country) → purveyors → retail markets	• Number of women involved • No data available

	• Many large exporting companies (with own processing factories) are responsible for repacking for retail	
Services providers	• Governmental bodies (MoALR + extension services, and MoIFT) • Specialized consultants • Private companies involved in the VC E.g. input suppliers or exporters/processors/local traders when provision of technical support to (sub-contracted) producers • Business Development Services providers (e.g. the Egyptian Spices and Herbs Exporters Association – ESHEDA -, the Food Export Council –FEC –) • Certification bodies (e.g. the Egyptian Organization of Standardization and Quality - EOS) • Research institutes (e.g. the National Research Centre, the Horticulture Research Institute, the Desert Research Institute, the Faculty of Agriculture (FOA) of Fayoum), • NGOs (e.g. FAODA) and related donors-projects, as well as farmer associations and cooperatives	• Number of women involved • Low number of women as extension officers • No data available


VC Functions
Quality
Harbor Transport Facilities
Input supply
Production
Collection Semi-processing
Processing
Distribution & marketing
Import
Farm Workers
Male ~ 60%
Female ~ 40%
VC Operators
Seed suppliers
Agrochemical Suppliers
Large-scale Producers (15%)
Small-scale Producers (approx. 85%)
Local Traders
Producers Organizations
Village Markets
Large & Medium sized processors (n=30)
Small-sized processors (n=100)
Wholesalers
Exporters
Retaillers
Urban markets
Cairo
Alexandria
Traders
Importers
Agents
Brokers
UE
USA
M-E markets
Keys
Customs
Line thickness = power / value / income levels
Main blockages
Male labor
Female labor
Child labor

6.3. ANNEX 3. QUESTIONNAIRES GUIDELINES AND ANALYSIS OF DATA

6.3.1. Medicinal and Aromatic Plants Value Chain Questionnaires – 1st Phase of Data Collection

'First' kit for GSVC analysis - individual or collective questionnaires guidelines

Interviewer:

Date: Time: Duration: *min.*

A. BACKGROUND INFORMATION

1. Location: a. Peri-urban b. Rural

2. Location Name (region, district, city/village) or address:

3. Value chain/product (and variety):

a. Chamomile German/Blue Chamomile Other (specify):
b. Fennel
c. Calendula
d. Other product (specify):

4. Respondent(s): a. Group? Yes / no

4.1. If yes:

4.1.1. What type and number:

a. Mixed how many? Men Women Youth*
b. Women only how many?
c. Men only how many?
d. Youth only* how many? Men Women
* Aged 17– 29

4.1.2. If they belong to the same farmers group, specify:

e. Name of the farmers group:

f. Membership total number (**2014-2015 season):
Number of: Men Women Youth

g. Total cultivated area**: feddan
h. Only MAP products cultivated area**: feddan

4.2. If no (bibliographical data):

4.2.1. Grower name:
4.2.2. Grower contact:
a. Address:
b. Telephone/Mobile:
c. Email:
d. Other (fax, website):
4.2.3. Sex: Male Female
4.2.4. Age (years):
4.2.5. Marital Status: Single Married Divorced Widowed
4.2.6. Religious affiliation:
4.2.7. Level of education (number of years of schooling):

e. None
f. Primary
g. Secondary
h. Tertiary (college)

4.2.8. Main occupation:
Other occupation/source of revenue (if any):

4.2.9. Total cultivated area**: feddan
4.2.10. Only MAP products cultivated area**: feddan

4.2.11. Are you the head of the household? Yes No
4.2.12. Household composition? (size, adults/children, male/female)

4.2.13. Are you the breadwinner? Yes No

B. DESCRIPTION OF LOCAL MAPS PRODUCING SYSTEMS AND ACTORS IN THE FAYOUM AREA

5. What are **the main MAPs products/varieties produced in the area**?
5.1. Ranked **by volume**:

5.2. **By value** (economic return):

6. Are there **many producers** in the area who grow the specified product/variety (Chamomile/Fennel/Calendula/Other=specify)? Yes / No :
6.1. Can you think why? (or what are the main objectives of producing the mentioned product(s)?)

6.2. **What proportions of small-scale producers** grow the specified MAP?
6.2.1. How many tons (or any other appropriate volume unit, specify) of the specified MAP do small-scale farmers produce in Fayoum?
6.3. What **proportions of medium-scale** producers?
6.3.1. How many tons of the specified MAP do medium-scale producers produce in Fayoum?
6.4. What **proportion of large-scale** plantations?
6.4.1. How many tons of the specified MAP do large-scale plantations produce in Fayoum?

7. List some **producers' organizations** which are locally involved in the production and marketing of the specified MAP? (Specify name, location, size, type* of POs).
**Farmers association, cooperatives, women only, men only cooperatives/ associations, other*

Name of POs	Name of the Apex Organization it belongs to	Location	Size (number of farmers)	Nature of membership Men only, women only, mixt, youth?	Cultivated area (feddan)	Role (main activities, services delivered to its members)

8. Are there **women farmers' associations/groups** involved in the MAP cultivation in Fayoum?

8.1. If yes, specify name, location, nature and size.

Name of women-only POs	Name of the Apex Org. it belongs to	Location	Size (number of farmers by sex)		Cultivated area (feddan)	Role (main activities, services delivered to its members)
			Males	Fem.		

8.2. If no, can you think why?

9. Who are **the main input suppliers** in the area (you know/you buy to)? (supplier name, location, types of products & services, prices level)

Input supplier name (M/F)	Location	Products and services	Prices level

10. Who are **the main local traders-collectors/processors** (you know/sell to)? (name, location, types of services – transportation, technical support, processing, etc.- and nature of contracts)

Traders **Collectors/processors name (clients) by sex (M/F)**	**Location**	**Activities (technical support, transportation, processing, etc)**	**Contracting type (contract farming systems, other: specify)**

10.1. Are they looking more for quantity or quality or both? Why?

11. What are the main **local markets** for the specified products? (name, size, location, distance to market)

12. What are the main **distant/urban markets** for the specified product?

C. PRODUCTION ANALYSIS UNDER A GENDER PERSPECTIVE

1. Crop calendar: at which time of the year is the mentioned MAP (harvested/sold/etc.)?

1.1. Specified MAP 1:

	Males	**Fem.**	**Sep**	**Oct**	**Nov**	**Dec**	**Jan**	**Feb**	**Mar**	**Apr**	**Ma**	**Jun**	**Jul**	**Aug**	**Sep**
Land preparation															
Planting/sowing															
Weeding															
Harvesting															
Drying															
Marketing/selling															
Other:															
Wild harvesting															

1.2. Specified MAP 2 (if any):

	Males	Fem.	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	Ma	Jun	Jul	Aug	Sep
Land preparation															
Planting/sowing															
Weeding															
Harvesting															
Drying															
Marketing/selling															
Other:															
Wild harvesting															

2. Applied farming system and marketing	
MAP's production:	☐ monoculture - any other crops, livestock?
.....	☐ crop rotation, specify:
	☐ mixed-cropping, specify other crops:
Irrigation type	☐ surface ☐ dripping ☐ spraying ☐ pivot
Soil Type	
Seeds source and type	
Fertilization system	
Pest control system	
Improved farm management practices/technologies?	
Grades	☐ Organic ☐ Clean (pesticide free) ☐ Conventional ☐ Other.....

Experience (years)	
Percentage of annual post-harvest loss (%)	
Net annual production (kg)	
Harvesting and drying activities (farm level)	
Distance to drying yards	
Share of the household consumption (%)	
Share of the production sold to the local/domestic markets	
Share of the production sold to distant markets/exporters	
Main buyers/clients (M/F)	
Contracting type	☐ Contract farming arrangement If yes, provide a briefly description: ☐ local or city spot markets ☐ forward integration ☐ ignore it ☐ Other
Labels, trademarks used	
Average prices	
(min-max)	
Seasonality effects?	

3. Activity profile variation: by gender and age and by paid/unpaid labor

3.1. How many **family members** are involved in the specified MAP production and marketing?

a. Men
b. Women
c. Youth (15-35)
d. Children (less than 17 years old)

3.1.1. Are they paid for their work? If yes, How much? Per day? Per hour?

a. Men
b. Women
c. Youth (15-35 years)

3.2. How many **permanent hired labors** are required during a year/season? Indicate for each category their average wages (min-max).

a. Men
b. Women
c. Youth

3.3. How many **seasonal hired labors**? Indicate for each category their average wages (min-max).

a. Men
b. Women
c. Youth
d. Children

3.4. What **activities are mainly done by men, women, children** in the production and marketing of the specified MAP? Use Xs to indicate the intensity of men's, women's and children participation in the activity in the table below.

XXX = it is a task exclusive to either men or women; XX = mostly of men or women undertake that task; single X = both men and women undertake the task. Ask whether the activity is conducted by hired labor; if yes, denote it with an asterisk in the appropriate column.

Activities/tasks	**Who carries out?**			**Hired/ family labor**		**Why?** If it a task traditionally performed by women only or men only or both, please specify.
	M	**W**	**C**	**H**	**F**	
Wild harvesting (if any)						
Plant nursery						
Soil preparation						
Canal digging						
Seeding/planting						
Transplanting						
Watering/irrigation						

Fertilization						
Weeding						
Pest control						
Harvesting						
Removal of plants						
Storage						
Grading						
Drying						
MAP "home transformation" (specify which one)						
Packaging						
Transportation (from farm to road /small shops)						
Local marketing/selling						
Farming management and supervision						
Hiring labor						
Record keeping						
Managing sales						
Logistics						
Negotiating prices						
Receiving payments						
Financial decisions						
Going to the bank for loans						
Going to the bank for savings						
Others tasks: specify						

4. Decision-making process and participation

4.1. Are there **decisions related to your farm activities/business** which also involve (are shared with) your spouse?

4.1.1. If yes, draw up a list highlighting which decisions are made by men only, by women only or jointly (see table below).

4.1.2. If no, why? Continue with the discussion addressing the question 4.2.

Decisions	Men-only	Women-only	Jointly
At the production level			
Use of land			
What crop/varieties to produce			
Use of labor			
Use of water			
Certification schemes			
Needs for technical assistance			
At the marketing/selling level			
Marketing channel			
Business orientation			
Prices negotiation			
Contracts negotiation			
Credits services			

Other			
POs or professional networks affiliation			

4.2. In your opinion, what are the **main constraints faced** by women, men and young people **in production**?

a. Women
b. Men
c. Youth

4.2.1. What **coping strategies** do men, women and youth employ in handling these constraints? In your view, what could be done to deal more efficiently with the constraints?

a. Women

b. Men

c. Youth

4.3. In your opinion, what are the **main constraints faced** by women, men and young people **in marketing** their production?

a. Women

b. Men

c. Youth

4.3.1. What **coping strategies** do men, women and youth employ in handling these constraints? In your view, what could be done to deal more efficiently with the constraints?

a. Women

b. Men

c. Youth

4.3.2. What are the most **common sources of credit and financial services** for women, men and young people locally?

a. Women

b. Men

c. Youth

4.3.3. What are the **main constraints** faced by women, men and youth in accessing these credit and financial services? What could/should be done to deal more efficiently with these constraints?

a. Women

b. Men

c. Youth

4.3.4. What are the main **constraints to accessing training and information** by women and men? What could/should be done to deal more efficiently with the constraints?

a. Women

b. Men

c. Youth

4.3.5. Are there **organizations or private companies providing you training** on the specified MAP production? If yes, which ones and what type of training?

4.3.6. Are **there differences between training** that women, men and youth can get access to? If yes, which ones?

a. Women

b. Men

c. Youth

4.3.7. What are **the most common sources of information** related to the MAP sector/industry for local growers?

4.3.8. Are there differences between information that women, men and youth can receive? If yes, which ones?

a. Women

b. Men

c. Youth

5. Income management/distribution

5.1. Who mainly manages income from sale of the MAP production/farm activities/agricultural business? What proportion of income would you say is managed by women and men from the sale of MAPs?

a. Women
b. Men

5.2. If you were to rank the importance of MAPs production as a source of income for women and men, where would you put it? Why?

a. Women

b. Men

5.3. In your opinion, what should be the three main uses of income from MAPs sales by men and women?

a. Women

b. Men

5.4. To what extent do MAPs contribute to your revenue? Indicate a % of your total revenue

a. Women

b. Men

5.5. How much do you earn in average per month/per year thanks to the MAPs production?

a. Women

b. Men

Medicinal & Aromatic Plants OTHER ACTORS Questionnaires

- Input suppliers, traders-processors, exporters -

'First' kit for GSVC analysis – questionnaires guidelines

Interviewer:

Date: Time: Duration: *min.*

A. BACKGROUND INFORMATION

1. **Location**: a. Urban b. Peri-urban c. Rural
2. **Location name** (region, district, city/village) or address:

3. **Value chain/product and variety:**
   e. Chamomile German/Blue Chamomile Other (specify):
   f. Fennel
   g. Calendula
   h. Other product (specify):

B. GENERAL: ABOUT THE ACTORS AND THEIR BUSINESS

4. **Names of actors**

5. Contact:
   a. Address:
   b. Telephone/Mobile:
   c. Email:
   d. Other (fax, website):

6. **Sex**: Male/Female
7. **Age** (years):
8. **Marital Status**: Single Married Divorced Widowed
9. Religious affiliation:
10. **Level of education** (number of years of schooling or last completed degree):
    e. None
    f. Primary
    g. Secondary
    h. Tertiary (college)

11. **Type of actors**

11.1. Main occupation: Other occupation/source of revenue (if any):

12. Are you the head of the household? Yes No

12.1. Household composition? (size, adults/children, male/female)

13. Are you the breadwinner? Yes No

14. Type of Enterprise/name of enterprise

15. Area of Operation

16. What are your roles/activities in the specified value chain nodes?

17. How many women and men are involved in your business? (or approximately what proportion of men and what proportion of women)?

18. How many women and men do you employ?

	Permanent Staff (position, skills required)	Average wages (min-max)	Temporary staff (position, skills required)	Average wages (min-max)
Men				
Women				

19. What are the main constraints faced by women in this business?

C. TYPE OF SERVICES OFFERED AND CLIENTS

20. What type of services do you offer?

21. Which clients you offer services to? Farmers/other traders etc.

22. What proportions of men and women farmers or other actors do you offer services to? Why?

23. What constraints do you face when offering your services or trying to reach women and men farmers and other actors with your services?

24. What have been the coping strategies? Are these efficient in handling the constraints? What else needs to be done to deal efficiently with the constraints?

24.1. Women

24.2. Men

25. What constraints do women and men farmers and other actors face when accessing your services?

25.1. What have been the coping strategies? Are these efficient in handling the constraints? What else needs to be done to deal efficiently with the constraints?

25.1.1. Women

25.1.2. Men

26. How do interactions with other actors besides farmers affect your enterprise (e.g. upstream value chain actors, local governments, government policies etc.)?

Medicinal & Aromatic Plants GSVC analysis Questionnaires

QUESTIONS FOR PRODUCER ASSOCIATION MEMBERS - FGD

Interviewer:

Date: Time: Duration: *min.*

Province: Fayoum
District : _____ Village: _____
Name of the PO :
Number of respondents:
Gender: 1. Male 2. Female
Total area covered by the PO (feddan) : MAPs crops : 1. Chamomile 2. Fennel 3. Calendula 4. Other (specify) : Average cultivated area for each crop :

A. ACCESS TO FACTORS OF PRODUCTION

1. Does membership in the producer organization facilitate access to any of the following resources?

- Input supply (specify)
- Production training (specify which ones)
- Capacity building
- Market information
- Markets cash/credit/loans
- Extension services
- Others (specify)

2. Do men and women members of producers' association have equal access to these resources?

Yes No

3 Please explain

B. PRACTICES AND PARTICIPATION

4 What is the criterion for membership in the association or group? What must you have done to become a member of the producer association or group?

5 Are membership fees required to participate in these associations or groups? Yes or No

6 If yes, how often and when are the fees paid?

8 How many men and women are in the association or group?

9 Who controls and decides how benefits are distributed? What decision-making process is used? Women or men?

10 How many members occupy leadership positions in the association or group (committee members/board)?

10bis How many of those in leadership positions are women?

11 in your opinion, what must women have to occupy leadership positions in producer organizations?

12 Are there any special measures in the Article of the Association/Co-op such as quotas to guarantee the participation of women in decision-making? Yes No
If yes, which ones?

13 How often does the producer association hold meetings?

14 When are meetings held? What time of the day are the meetings held? And where are they held?

Do women attend meetings?

15 Is MAPs are a key/main crop in this producer association?
Yes No

16 Please explain.

C. KNOWLEDGE AND BELIEFS

18 How does being a man or woman give a person any advantage or disadvantage in being a MAPs producer?

19 Are there separate fields of work for men and women? Why?
If yes, could you briefly describe them:
- for men only
- for women only
- for both

20 Do you believe that being a man or woman helps someone in running for an association office?

D. LAWS AND POLICIES

20 Are there any laws or policies that affect the activities of producer association?

Medicinal & Aromatic Plants GSVC analysis Questionnaires

INTERVIEWS GUIDELINES FOR PRODUCER ASSOCIATION OFFICERS

Interviewer:

Date: Time: Duration: *min.*

Province: Fayoum
District : _____ Village: _____
Name of the PO :
Responsible person for giving the data:
Occupation (in the PO):
Gender: 1 . Male 2 . Female
Total area covered by the PO (feddan) : MAPs crops (tick the appropriate MAPs): 1. Chamomile 2. Fennel 3. Calendula 4. Other (specify) : Average cultivated area for each crop :

A. PERFORMANCE RAPID ASSESSMENT UNDER A GENDER PERSPECTIVE

1. What objectives does the PO pursue? What activities are mainly conducted?
2. Who are the target groups of the organization?
3. Is the organization relevant to clients'/ members' needs? How effective is the organization in the fulfillment of its mission?
4. What are the main benefits of POs membership for women and men?
5. Who controls and decides how benefits are distributed? What decision-making process is used?
6. Do women have access to POs' services such as training, inputs, technical assistance and market information …?
7. How women and men are represented/included at each level of the POs organization and how are they involved in decision-making process and governance? Are there separate fields of work for men and women?
8. How efficient is the organization in the use of its human, financial and physical resources?

11. Is the organization able to sustain itself economically? Does the organization receive funds or support for foreign donors or any other actor? If yes, specify.

B. MOTIVATION

12. Is there a clear mission that drives the behavior of staff/members?

13. What are the key values and assumptions that move the organization to perform well or poorly?

14. What are the memorable events in the organization's history?

a. The milestones

b. The successes

c. The crises

15. What incentive systems exist in the organization to encourage good performance?

16. Does the organizational vision, mission statement or constitution acknowledge gender-specific issues? If yes, specify

C. CAPACITY DEVELOPMENT NEEDS ASSESSMENT

17. Does the organizational structure facilitate or hinder the organization in achieving its mission and goals?

18. Is the infrastructure adequate to support performance?

19. To what extent does the organization's governance affect its performance?

20. Does the work at various levels of the organization flow smoothly, or is it blocked? If blocked, is the cause an inadequate problem-solving process?

21. Does the organization have adequate decision-making skills?

22. Is there adequate, inadequate or excessive planning and policy procedure development in the organization at all levels (from the governing board to departments and individual projects)?

23. Are there adequate channels for flow of information at all levels?

24. Is adequate monitoring and evaluation occurring to improve performance?

25. What are the main capacity development needs faced by the POs members?

26. What are the main capacity development needs specifically faced by women members?

27. What are POs key capacity development needs – including in terms of governance, gender equality and participation to policy processes – to prosper in the selected VCs?

D. EXTERNAL ENVIRONMENT

28. Is the organization developing linking relations (i.e. connections with other actors) to exert influence over other stakeholders?

29. Does the organization have adequate bridging relations (i.e. formal and informal cooperative relationships) with similar organizations?

30. How is the organization affected by the "rules of the game"?

31. How is the organization affected by the political environment?

32. How is the organization affected by the macro-economic environment?

33. How is the organization affected by the social and cultural environment?

34. What are legal, cultural, social, educational, environmental, political, and other opportunities/constraints to redress gender inequalities?

Main Constraints

Main Opportunities

E. IN CONCLUSION

35. What can be done to address gender issues and capacity development gaps?

36. What can be done to make the most of opportunities?

37. What role can POs play in the selected VCs to promote greater gender-equality?

6.3.2. Data Analysis – 1st Phase

6.3.3. Medicinal and Aromatic Plants Value Chain Questionnaires – 2nd Phase of Data Collection

Medicinal & Aromatic Plants VALUE CHAIN Questionnaires

For Farmers:

Please list the following information of the respondent:

Name	
Age	
Education	
Profession	
Gender	
Contacts	

Please fill the following table on the staff family members working at your facility / farm

Name	Age	Gender	Education	Position	Contract Type	Salary Status

Background

1. Tell us a little about your involvement in growing? When did you start? What motivated you to begin?
2. Where is the land you use for? How did you obtain your land? What is the size of your land?
3. What else do you produce?
4. What is the importance of MAPs farming income relative to other income-generating activities you do? (Rank these in order of importance)
5. How much MAPs did you produce last year? How much did you sell last year?

Money management

6. How do you raise cash when you need it for MAPs farming (e.g. savings, income from other activities, borrow from family/friends, loans)? If you don't raise cash for MAPs, how do you raise cash when you need it for your most important crop?
7. How important is investing in MAPs farming relative to other activities? Would you borrow for it? Savings? Loans?
8. Do you participate in saving Gama'iya? What is the purpose?
9. If so, are the other people in the group MAPs farmers?
10. Do you use money from saving Gama'iya to invest in MAPs farming?
11. Do you have a bank account?
12. If so, do you save? Where/How do you save?
13. How does the use of the cell phone help you in the management of your crop: (getting information for production, marketing, training, other crop related needs / transaction?

Business practices around production

14. What inputs do you use?

15. How did you find out about these inputs (e.g. input suppliers, other farmers)?
16. Do you hire labor?
17. What are the challenges you face in managing hired labor?
Do you have special challenges in hiring/recruiting female labor?
18. Describe any challenges you face in accessing the products to use.
19. Describe any challenges you face in purchasing the products to use.
20. Describe any challenges you face in understanding what to buy and/or how to apply products.
21. Can you give an example of any new business practices you have adopted in the past year – in buying, selling, getting information, borrowing, etc?
22. What motivated you to make this change?
23. Can you give an example of a good business practice you didn't adopt but wanted to? Why didn't you adopt the practice?

Business practices around marketing

24. Where do you sell your MAPs?
25. How do you get reliable information on market prices? Do you use your cell phone to get any information on MAPs?
26. Who do you sell to (e.g. brokers, transporters, processors)?
27. Do your buyers offer you any financial incentives, like pre-financing for inputs? Do they buy on a partial payment basis?
28. Who in your household decides how much to sell/when to sell/who to sell to?
29. Who controls the income from the sales?
30. Are you a member of a farmer-based organization? If so, tell me a little about this association and your participation. What motivated you to join? What benefits have you gained? [Press them to think about vertical and horizontal links.]
31. What issues do you discuss with association leaders? With other farmers?

Challenges : (please list the internal and external challenges facing your farm / business)

	Internal	External
General challenges		
Gender specific challenges		

Opportunities: (please list internal and external opportunities that can affect the progress of your business)

	Internal	External
General Opportunities		
Gender specific opportunities		

At this point you can close with Exercise 2: Exploring value chain relationships or you can use a simplified version, below. On a scale of 1- 6, in general, how would you describe your relationship with the following value chain stakeholders? [Add or subtract actors as needed.]

Value Chain Actors	Ranking from 1-5 (1 is the less intervention)		
	Men	Women	Comment Why did you give this score and do you trust this value chain actor
Small Scale Farmers			
Large Scale Farmers			
Traders/collectors			
Pre-processors			
Processors			
Exporters			
Importers			
Service providers such as input suppliers and certification			
Governmental authorities			

For Input Suppliers:

Please list the following information of the respondent:

Name	
Age	
Education	
Profession	
Gender	
Contacts	

Please fill the following table on the staff working at your facility

Name	Age	Gender	Education	Position	Contract Type	Salary Status

Background

1. Tell me a little about how you started your input supply business. For how many years have you been an input supplier? What motivated you to start the business?

Business Practices

2. What type of MAPs inputs do you sell? Do you provide additional services, e.g. spraying?
3. How far is your store from your customers' farms?
4. How much of your current business is with MAPs farmers? Do you have experience selling to FBOs? Do you have experience selling to women's groups?
5. Do you sell to MAPs farmers from within or outside your community? Are there differences in the way you sell to those within and outside your community?
6. Do you have women customers?
7. Are there differences in what men and women buy? Are there differences in how men and women use the inputs?
8. How do you let customers know about new products?
9. Do you provide training on how to use new products? Do both men and women understand how to use inputs?
10. Do you use different strategies to communicate information to men and women? Is illiteracy an issue for your customers?
11. Do men and women adopt better practices at different rates? What do you think motivates women to adopt better practices? What do you think constrains them from adopting better practices?
a. E.g. Seeing other people, seeing good outcomes, simplified processes, good information, incentives to invest time and money
12. Are your suppliers loyal to you? Do you feel there are any differences between men and women suppliers in their loyalty to you?
13. Is there anything different in the way you deal with men and women suppliers of Inputs?

14. What kind of capital is needed by farmers for inputs?
15. Do you ever offer credit to your customers? If so, do you do this with both men and women farmers? How do you choose who gets credit?
Do you face problems in collecting debts? If so which ones? Any particular remark on women and men behavior in taking credit and repaying?

Finance and management

16. What kind of a relationship do you have with the bank?
17. How do you raise cash when you need it for trading?
    a. E.g. savings, income, borrow from family/friends, loans from other institutions
18. Do you keep records of your business? Why? What kind of records do you keep?

Challenges : (please list the internal and external challenges facing your business)

	Internal	External
General challenges		
Gender specific challenges		

Opportunities: (please list internal and external opportunities that can affect the progress of your business)

	Internal	External
General Opportunities		
Gender specific opportunities		

On a scale of 1- 6, in general, how would you describe your relationship with the following value chain stakeholders? [Add or subtract actors as needed.]

Value Chain Actors	Ranking from 1-5 (1 is the less intervention)		
	Men	Women	Comment Why did you give this score and do you trust this value chain actor
Small Scale Farmers			
Large Scale Farmers			
Traders/collectors			
Pre-processors			
Processors			
Exporters			
Importers			
Service providers such as input suppliers and certification			
Governmental authorities			

For Traders:

Please list the following information of the respondent:

Name	
Age	
Education	
Profession	
Gender	
Contacts	

Please fill the following table on the staff working at your facility

Name	Age	Gender	Education	Position	Contract Type	Salary Status

Background

1. Tell us a little about how you started MAPs trading. For how many years have you been a MAPs trader? Do you work with anyone else in the business? Do you grow MAPs yourself?

Buying

2. What type of MAPs do you buy?
3. What is the geographic spread of your MAPs buying activities? How many suppliers do you have?
4. Who do you buy from? Do you have regular suppliers? Are they men or women? In what ways do your business practices vary for different categories of suppliers?
5. Do you buy MAPs from farmers (or buyer aggregators) from within or outside your community? What is different about the way you buy from those within and outside your community?
6. How do you determine the price at which you buy?
7. Do you provide financial incentives, like pre-financing for inputs to suppliers? Do you do this with men suppliers? Do you do this with women suppliers? Explain any differences between men and women.
8. Do you ever buy on a partial payment basis? Do you do this with men suppliers? Do you do this with women suppliers? Explain any differences between men and women.
9. Do you buy all year long? What else do you do in the low season?
10. Are your suppliers loyal to you? Do you feel there are any differences between men and women suppliers in their loyalty to you?
11. Is there anything different in the way you deal with men and women suppliers of fruit?
12. [If female:] As a woman trader, is there anything difficult about buying?

Horizontal relationships

13. Please tell me about any ways that you cooperate with other MAPs traders.
14. Please describe any ways that you compete with other MAPs traders.
15. How do you ensure the product you buy is the quality you need? The variety you need?

16. How do you ensure you can get the volumes you need?

Finance and management

17. How do you raise cash when you need it for MAPs trading?
a. E.g. savings, income, borrow from family/friends, loans from other institutions
18. Do you keep records of your business? Why? What kind of records do you keep?

Selling

19. Who do you sell to?
20. How do you find buyers? How do you know how much they will buy?
21. Do you have regular buyers? Do you sell to the same buyers every year? Which buyers do you sell most often to?
22. Who are your biggest buyers?
23. How far do you travel to sell?
24. How do you transport your goods (rent vehicle and driver; own vehicle)?
25. How do you get reliable information on market prices? Where do you get the best prices?
26. If you sell to processors, do you deliver to them?
27. [If female:] As a woman trader, is there anything difficult about buying?

Challenges: (please list the internal and external challenges facing your business)

	Internal	External
General challenges		
Gender specific challenges		

Opportunities: (please list internal and external opportunities that can affect the progress of your business)

	Internal	External
General Opportunities		

Gender specific opportunities		

On a scale of 1- 6, in general, how would you describe your relationship with the following value chain stakeholders? [Add additional actors as necessary.]

Value Chain Actors	Ranking from 1-5 (1 is the less intervention)		
	Men	Women	Comment Why did you give this score and do you trust this value chain actor
Small Scale Farmers			
Large Scale Farmers			
Traders/collectors			
Pre-processors			
Processors			
Exporters			
Importers			
Service providers such as input suppliers and certification			
Governmental authorities			

For Exporters:

Please list the following information of the respondent:

Name	
Age	
Education	
Profession	
Gender	
Contacts	

Please fill the following table on the staff working at your facility

Name	Age	Gender	Education	Position	Contract Type	Salary Status

1. How long have you been working as an Exporter? What products do you sell?
2. What are your hours of operation? When do you start? When do you finish?
3. Who do you buy from? Do you have regular suppliers of MAPs? Are they men or women?
4. Whom do you sell to? Do you have regular buyers of MAPs? Are they men or women? In what ways do your business practices vary for men buyers and women buyers?
5. How do you know how much they will buy?
6. Do you provide financial incentives, like pre-financing for inputs to suppliers? Do you do this with men suppliers? Do you do this with women suppliers? Explain any differences.
7. Do you ever buy MAPs on a partial payment basis? Do you do this with men suppliers? Do you do this with women suppliers? Explain any differences.
8. How does MAPs compare to other crops you sell in terms of demand? In terms of price?
9. What do you hire labor for?
10. Please tell us about any ways that you cooperate with other MAPs Exporters
11. Please describe any ways that you compete with other MAPs Exporters.
12. How do you raise cash when you need it for trading (e.g. savings, income from other activities, borrow from friends/family, loans from other institutions)?
13. Do you keep records of your business? What kind of records do you keep?
14. [If female:] As a woman trader, is there anything difficult about buying? Is there anything different about selling?

Challenges : (please list the internal and external challenges facing your business)

	Internal	External
General challenges		
Gender specific challenges		

Opportunities: (please list internal and external opportunities that can affect the progress of your business)

	Internal	External
General Opportunities		
Gender specific opportunities		

On a scale of 1- 6, in general, how would you describe your relationship with the following value chain stakeholders? [Add additional actors as needed.]

Value Chain Actors	Ranking from 1-5 (1 is the less intervention)		
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Large Scale Farmers			
Traders/collectors			
Pre-processors			
Processors			
Exporters			
Importers			
Service providers such as input suppliers and certification			
Governmental authorities			

Medicinal & Aromatic Plants Producers Organisations Assessment Questionnaire

Dimension: Enabling environment

1. What are the regulations and laws affecting your producer organization and how?
2. Describe the context surrounding your organization in terms of:

Political:

- Economical:
- Environmental:
- Cultural:
- Technological:

3. Is the legal framework conductive to performance and why?
4. Do the different Ministries/departments involved in the administration of the agriculture sector have adequate technical capacity?

Dimension: Organizations (formal, informal, public and private including CBOs, CSOs)

5. Is the mission clearly formulated?
6. Is the mission understood & accepted by stakeholders?
7. Is the mission clearly supported by the staff & management?
8. Is the organisation legally registered?
9. Does the organisation have a clear constitution?
10. What are the strengths and weaknesses at institutional level?
11. Is institutional knowledge at a sufficient level? Is there adequate practical experience in the sector?
12. Which Ministries/departments (central and local level) are involved in the development, administration, implementation and enforcement of legislation, regulations?
13. Are the technical capacities of civil society organizations and the private sector adequate?
14 Does the relevant Ministry /department have a programme for staff training to improve skills at various levels?

Dimension: Individuals

15. What skills are commonly found in this sector?
15. Are there learning opportunities preparing individuals to respond to country needs at a technical level?
16. Is there adequate practical experience in the sector?

Linkage ranking between Value Chain Members:

Value Chain Actors	Ranking from 1-5 (1 is the less intervention)		
	Men	Women	Comment Why did you give this score and do you trust this value chain actor
Small Scale Farmers			
Large Scale Farmers			
Traders/collectors			
Pre-processors			
Processors			
Exporters			
Importers			
Service providers such as input suppliers and certification			
Governmental authorities			

For the Bankers:

Please list the following information of the respondent:

Name	
Age	
Education	
Profession	
Gender	
Contacts	

1. What types of products and services do you offer?
    a. E.g. loans, savings accounts, current accounts, money transfer, cell phone banking, other technology enabling banking
2. What are your criteria for opening savings accounts? Are these criteria a problem for women?
3. Who is your target market? How do you segment your market (for designing and/or marketing your savings and loan products)?
4. Do you do any client research before designing your products? Do you consider client cash flow in design of products? Is cash flow different for men and women?
5. What percentage of your clients are women?
6. What percentage of your clients are current account holders?
7. What percentage of your clients are savings account holders?
8. What percentage of your clients are borrowers?
9. Do you have any savings or loan products specifically for women?
10. What factors do you take into account in designing products for women?
11. Which products are most popular for women? Why?
12. Which products are not popular with women? Why?
13. Are women regular savers? Why or why not?
14. In your experience, have you found women to be more credit-worthy than men? Why or why not?
15. In your experience, are women good money managers? (Do they know how to budget, manage cash flow, manage debt, save, negotiate?)
16. In your experience, are women confident money managers? Are they active decision-makers? Do they understand the value of financial services?

6.3.4. Data Analysis -2nd Phase