Access to Inputs for Agricultural Exports in Sierra Leone

Improving policies and regulatory frameworks for access to seeds, fertilizers, and essential machinery

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About the paper

This paper was produced by the International Trade Centre (ITC) within the framework of implementing the Sierra Leone West Africa Competitiveness Programme, which is financed by the European Union under the 11th European Development Fund and implemented by the United Nations Industrial Development Organisation in partnership with the International Trade Centre. It intends to be used as background documentation to contribute to dedicated advocacy and public-private dialogue focusing on this topic to identify concrete actions for regulatory improvement.

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Acronyms

Unless otherwise specified, all references to dollars ($) are to United States dollars, and all references to tons are to metric tons.

AGOA: US African Growth and Opportunity Act
AFCFTA: African Continental Free Trade Area
AU: African Union
CET: Common External Tariff
DTIS: Diagnostic Trade Integration Study
EBA: Everything But Arms (EBA)
ECOWAS: Economic Community of West-African States
EPA: Economic Partnership Agreement
ESG: Environment, Social and Governance
ETLS: ECOWAS Trade Liberalization Scheme
FTA: Free Trade Agreement
GDP: Gross domestic product
FDI: Foreign Direct Investment
ITC: International Trade Centre
NTM: Non-tariff measure
SME: Small and Medium Sized Enterprise
TSI: Trade Support Institution
WTO: World Trade Organization
SLeCAD: Sierra Leone Chamber of Agribusiness Development
MAF: Ministry of Agriculture
MTI: Ministry of Trade and Industry
PMB: Produce Monitoring Board
IFDC: International Fertilizer Development Centre
Executive summary

Access to agricultural inputs continues to pose a severe challenge to priority export sectors, including those of cocoa, palm oil and cassava, in Sierra Leone. Stakeholders that were consulted and interviewed highlighted difficulties in accessing seedlings, fertilizers and essential machineries. If access constraints for these inputs can be overcome, agricultural output and ultimately farmers’ incomes would be improved.

Stakeholders indicated that the domestic marketplace for agricultural inputs is underdeveloped in Sierra Leone, despite recent policy efforts to encourage private sector-led supply chains. Affordable agricultural inputs are often completely unavailable. When they are available, quality standards are poorly enforced, leaving farmers with adulterated, mislabeled, or defective seedlings and fertilizers. The expertise and spare parts needed to operate and maintain essential processing machinery is often unavailable, leaving farmers reliant upon poor quality locally fabricated tools or antiqued, unhygienic and unproductive traditional processing methods.

Solutions suggested by stakeholders covered public sector investments and policies to help strengthen the private-sector supply chain for agricultural inputs, such as streamlining certification, licensing and importing processes, providing tax and subsidy schemes, and expediting the establishment and functioning of sector regulatory bodies. The purpose of this Position Paper is to provide a background to the challenges faced in accessing agricultural inputs in Sierra Leone and to collate preliminary recommendations by stakeholders for subsequent evaluation in public private dialogues.
1.0 INTRODUCTION

A lack of affordable access to agricultural inputs continues to severely constrain farmers in Sierra Leone. Government and private sector stakeholders identified improvements in agricultural inputs – specifically seedlings, fertilizers and essential machinery – as a key priority in public-private dialogues held in 2020. This Position Paper builds on those dialogues to provide an overview of the challenges faced in accessing agricultural inputs in Sierra Leone and collates preliminary recommendations by stakeholders on possible ways forward.

A supportive use of quality seeds and fertilizers, as well as essential production machinery, has been proven to be a key factor in realizing reliable yields and trade competitiveness. Good quality seeds, fertilizers and essential machineries may also contribute to better quality of the agriculture produce, resisting weather changes, and showing better resilience to disease threats. Overall, it can be said that productivity-level inputs and service costs for fertilizers, pest and disease control, and quality management determine yield volumes, prices and ultimately farmers’ incomes.

Based on consultations held with key stakeholders, it is clear that farmers in Sierra Leone experience important challenges in gaining access to seeds and fertilizers, as well as machinery and equipment for the production process. As a result, businesses face burdensome delays and considerable costs that undermine the development of the agricultural sector and the potential of cocoa, palm oil and cassava exports.

Continuous dialogue and exchange of perspectives between the government and the private sector and other stakeholders, is crucial. Firstly, to create mutual understanding, and identify and address gaps in domestic legislative frameworks and processes. And secondly, to ensure that upcoming reforms and policy-changes incorporate the right balance and mix of policy instruments chosen.

Through policy advocacy and public-private dialogue and interviews with key stakeholders, this Position Paper investigates the challenges faced in accessing agricultural inputs across three priority value chains: cassava, cocoa and palm oil. Policy changes are described, key challenges are analysed, and suggested options provided based on stakeholder feedback for policy reforms aimed at improving access to seeds, fertilizers and essential machinery.

These efforts were supported by ITC under the EU-funded WACOMP Sierra Leone programme. This programme supports trade-related advocacy and dialogue as a tool for improving the competitiveness of Sierra Leone’s agri-business sector, targeting both supply-side and demand-side constraints and opportunities.
2.0 POLICY AND MARKET OVERVIEW OF KEY AGRICULTURAL INPUTS

2.1 Description of key agricultural inputs: seedlings, fertilizers and essential machineries

The agricultural inputs considered in this position paper are seedlings, fertilizers and essential machinery. These were identified by stakeholders comprising representatives of both the public and private sector in public private dialogues held in Sierra Leone in 2020. Each of these inputs were considered by stakeholders to have severe access or availability challenges that inhibited productivity in the cassava, palm oil and cocoa sectors.

These findings were consistent with existing research on agricultural challenges in Sierra Leone. The 2015 Sierra Leone Comprehensive Food Security and Vulnerability Assessment reported that the most commonly cited constraints faced by farmers were the unavailability of improved seeds (cited by 45 percent of farmers), lack of access to credit (cited by 41.5 percent), insufficient household labour (31.5 percent), pests or crop disease (27.7 percent), lack of tools (24.7 percent), and the unavailability of fertilizer (19.1 percent) (World Bank, 2021). Access to seedlings, fertilizers and essential machinery amounted to three of the top six constraints.

As a result of access constraints, input utilisation remains low in Sierra Leone. The use of improved varieties of seeds by farmers is low for most agricultural commodities. Fertilizer use at 4kg/ha in Sierra Leone, compared to 9kg/ha for sub-Saharan Africa, is low due to high prices and a lack of commercial markets for fertilizable commodities. Land preparation, cropping, harvesting and threshing is largely done by hoe, cutlass and bare hands, and labour is relatively expensive and dominated by women. There is a lack of processing facilities, and markets for machinery maintenance and spare parts.

Low inputs utilisation contributes in turn to low crop yields. Yields remain low at 5.5mt/ha for cassava, 100-200kg/ha for cocoa, and 4t/ha for oil palm. In comparison, yields of 35mt/ha for cassava (Adiele, et al, 2020), 400-530kg/ha for cocoa (Bymolt, 2018), and 32mt/ha for palm oil are feasible in other West African countries (Rhebergen, 2019). This feeds an unproductive circle in which low productivity undermines market opportunities which in turn undermine investments into inputs to boost productivity. Farmers ultimately face conditions in which they can extract less value from their farms.

2.2 Policy and institutional context

The Medium-Term National Development Plan (MTNDP, 2019-2023) serves as the main policy strategy framework for the Government of Sierra Leone to steer the country towards improved economic growth and development impact. Economic diversification is an important policy objective under the Medium-Term National Development Plan 2019-2023, including diversifying through the agriculture, fisheries, and tourism sectors.

The overarching policy direction for the agricultural sector in Sierra Leone is guided by the National Agricultural Transformation Programme 2023, which details plans for achieving the agricultural objectives of the MTNDP. The NATP focuses on developing agricultural value chains by improving the availability of inputs (seeds and fertilizers), increasing productivity and production, and establishing crops and livestock processing zones across the country. This strategy is expected to address current high post-harvest losses, improve linkages between agriculture and industry, and suggestion access to financial services and markets. The approach also targets rural communities, particularly women, the youth and farmer-based organizations, as well as improving rural institutions and infrastructure aimed at revitalising rural communities.

The most significant policy change for access to inputs in Sierra Leone has been the gradual shift from a centralized government-led model of procurement and distribution to a private-sector led model since 2017. Several new agriculture institutions have recently been established, or are in the process of being set up, to regulate private sector players within this new model. These include the National Fertilizer Regulatory Agency Act 2018, the National Fertilizer Policy 2017, the Seed Policy 2017, and the Sierra Leone Seed Certification Agency Act 2018. For essential machinery, a Machine Rings initiative involves lease-to-own
public-private partnerships with operators leasing machinery from the government. The MAF maintains the responsibility to provide agriculture advisory/extension services to smallholder farmers.

2.2.1 Seedlings policy

Seedlings policy has advanced with the introduction of the Sierra Leone Seed Certification Agency Act (SLeSCA) 2018 (Act No. 5 of 2018) and the Sierra Leone Seed Certification Agency Regulations (2020). These seek to regulate a private sector driven seed value chain that will replace the former centralized government-led seed sector, which relied on state subsidies and was found to be ineffective (World Bank, 2021). The SLeSCA will govern seed certification, quality declaration, seed sampling, packaging, labelling, sealing storing and testing. It requires seed growers to be registered and determines the conditions and fees under which licenses are granted for seed inspectors, samplers, analysts, testing, processing and selling.

In accordance with the SLeSCA, the importation of seeds requires approval by the Controller of Seeds based on compliance with seed standards and is restricted to actors with seed seller licenses. The Seed Certification Agency Regulation is aligned with the ECOWAS Harmonized Seed Regulations ensuring access to varieties already listed in the West Africa Catalogue of Plant Varieties and Species. Beyond this, seeds for plant varieties are released only after two years of testing by the Seed Certification Agency and the national varieties catalogue needs more frequent updating. The Government of Sierra Leone policy is for domestically grown seed varieties to replace the need to imported varieties (Sierra Network, 2022).

The SLeSCA aims to improve the availability, affordability and standards of quality-certified seeds. However, the SLeSCA is a relatively recent policy development and the formal private seed sector remains in its nascency (Mabaya, et al, 2021). Most farmers continue to rely on the informal sector for access to seeds and face substantial issues with seed quality and mislabelling.

The seed sector is supported by the Sierra Leone Agricultural Research Institute (SLARI). The Institute was established in 2007 through an Act of Parliament as the sole government agricultural research and agricultural technology generating body, for the benefit of the farming, fishing and forestry sectors in Sierra Leone. SLARI’s work is guided by its strategic and operational plans that are aligned to those of the West and Central African Council for Agricultural Research and Development and based on the integrated agricultural research for development (IAR4D) paradigm.

SLARI intends to relaunch a Seed Multiplication Programme to focus on seed availability, access and quality. SLARI is currently the major breeder and supplier of cassava cuttings country-wide, providing the domestic breeding varieties of SLCAS 4, 5, 6, and 7, with a scaling-up supply program to achieve seed security.

Private sector participation in seedling sourcing remains in its nascency. Seeds are mostly accessed through Government programmes like AVDP (Agricultural Value Chain Development) and through INGOs such as Solidaridad and FAO. Large private estates such as Gold Tree, Planting Naturals and Natural Habitat also provide seedlings as pre-finance planting materials to smallholder and out-grower farmers. Cocoa seedlings (2 years hybrid first generation) are mainly sourced from Ghana while three oil palm varieties (Dura, Pisifera and Tenera) are mainly sourced from Malaysia and Ghana.

2.2.2 Fertilizers policy

The Ministry of Agriculture (MAF) developed and adopted its first ever national fertilizer policy in 2017, which shifted from a government-led fertilizer strategy to a private-sector-led strategy and set a goal of a fertilizer application rate of 50 kg/ha by 2029 (Tillen, 2019). To ensure continuity, this strategy has been incorporated into the five-year plan (National Agricultural Transformation Programme 2023) of the current government’s New Direction Agenda. The policy was harmonized with the 2012 ECOWAS Regulation on fertilizer quality control C/REG.13/12/12, the purpose of which was to harmonize the rules governing quality control of fertilizers across ECOWAS member states. To implement the policy, Sierra Leone’s Parliament passed the National Fertilizer Regulatory Agency Act 2017.

The National Fertilizer Regulatory Agency (NaFRA) is now a new government agency in charge of regulating the fertilizer sub-sector, but is yet to be operational. When fully operational, the NaFRA will be responsible for:
- Regulating and supervising the packaging of fertilizer
- Inspecting and analyzing fertilizers distributed in the country (quality control)
- Regulating the importation and exportation of fertilizers
- Maintaining a National Fertilizer Registry
- Issuing licenses to importers, exporters, and manufacturers of fertilizers

The primary goal of the NaFRA is to improve fertilizer quality control through the regulation of a licensed private sector for fertilizers. It aims to promote a functioning market by facilitating the removal of trade barriers that impeded national and international trade in fertilizer. Currently, the market struggles with poor quality fertilizers, underweight bags and nutrient deficient fertilizer (Conteh, 2020). There is little quality control of fertilizers in the market and labs at SLARI and Njala University are not properly equipped for fertilizer analysis (Conteh, 2020). Adulteration of fertilizer with filler is common. Labelling is unregulated and farmers cannot be certain that bags of fertilizer contain the specified fertilizer at the weights advertised (Conteh, 2020).

NaFRA is yet to fully operationalized due to delays in the deployment of much needed resources for building capacities in its technical and administrative labour forces. It faces financing challenges with competing priority activities at the Ministry of Agriculture and Forestry.

The Ministry of Agriculture and Forestry were procuring as a centralized body agricultural inputs as seedlings fertilizers and crop protection chemicals/materials and machineries/tractors (ploughing, harrowing and ridges services). The ambitious NAT 2023 transformation drive has led to the establishment of SLeSCA and NaFRA in a bid to decentralize the procurement system of GoSL by collapsing into active private sector-led participation in the importation and supplies to cash and food crops across the country.

The major role and mandate of SLeSCA and NaFRA are to provide regulatory services to ensure seedlings and fertilizers and other agro-chemicals being imported, sourced with the appropriate quality and quantity to meet demands.

2.2.3 Essential machinery policy

The policy to boost access to essential machineries involves engaging fourteen private sector operators to lease and manage fourteen ‘Machine Rings’ across the country. This approached replaced a previous centralized-procurement system and marks a new approach to promoting agriculture mechanization. The government has made available 410 machines and worth Le168 billion to farmers through the public private partnerships. This new lease-to-own public-private partnership (PPP) arrangement intends to be business-oriented, with each Ring Operator paying the government for the full cost of the Machine Ring by the end of a lease period. Operators are expected to build profitable businesses that will allow them to make annual repayments to the government.

The approach is supported by an Agriculture Mechanisation Fund, that intends to be resourced from machine operators’ annual repayments. The private sector will access this fund at concessional-interest rates to replace machines and grow their fleet. The Fund also intends to be used to train and certify operators to support mechanisation growth in the country.

The Government in the past used to source machines ranging from on-farm activity tractors to processing plants at community levels. These were managed by rural authorities without a business model, resulting in a lack of technical staff to offer maintenance, repairs and services. The non-availability of spare-parts and poor leadership of the management of these assets frequently resulted in damage to these machines. The advent of the NAT 2023 aims to encourage the participation of private sector-led initiatives in the agricultural machinery sector with well-structured business organizations, access to capital and business resources, and with the aim of developing a business climate to serve the agricultural space in doing business better.

2.2.4 Trade integration policy

To govern its overarching approach to trade the Government of Sierra Leone had developed a National Trade Strategy (NTS), which equally serves as National Implementation Strategy for implementation of the AfCFTA Agreement. Many of the priority products identified in the NTS are agricultural goods. These comprise priorities with “unmet potential”, including cashew, coffee, cocoa, cassava, palm oil, lime, and
ginger. Alongside priorities for “export diversification”, including coconut oil, groundnut oil, cocoa paste, sesame seeds, natural honey, pineapples and mangos, and bovine meats.

Sierra Leone’s trade policy entails a comprehensive set of complementary policies with a wide range of goals, as underlined in the WTO Trade Policy Review of Sierra Leone (2017), including inter alia, goals to: develop a transparent trade-regime; build the required capacity and infrastructure for increased participation in global trade; promote competition; protect consumers; and encourage inflows of aid, private investment, and migrant remittances. Furthermore, the Government supports initiatives that can contribute to eliminating trade-distorting measures, such as through WTO, and promoting trade with other African and ECOWAS countries.

Nevertheless, trade integration remains limited in Sierra Leone. Businesses from Sierra Leone do not currently take sufficient advantage of benefits from trade arrangements. Several underlying causes appear at play from a lack of information and awareness amongst all actors (business, customs and government), structural weaknesses in trade documentation and processes, and supply side constraints.

### 2.3 Market access conditions for key agricultural inputs

Access to agricultural inputs involves supply side dynamics that depend on government provision, domestic supply and imported supply conditions, often to differing extents. For instance, locally fabricated machinery is available in some cases, but may face quality and consistency constraints. Imported machinery can also be available, sometimes both from regional suppliers and suppliers outside of the continent, but often subject to availability and cost constraints.

The following tables show import access conditions for seedlings, fertilizers and essential machinery. HS Codes are identified for each input. These codes are used by government officials in identifying goods being imported and exported in order to collect the proper taxes. They are specified at the four digital level or, where necessary, at the more detailed six-digital level. Import tariffs applied in Sierra Leone follow the ECOWAS common external tariff book and are at the same rate across ECOWAS countries. However, imports from other ECOWAS would be duty-free, provided that they satisfy the ECOWAS Trade Liberalization Scheme conditions. The AfCFTA will see tariffs reduced on imports from other African countries. As shown below, all of the input products identified are part of the ECOWAS AfCFTA schedule A products that will be liberalized most rapidly (between 5 and 10 years) under the implementation of the AfCFTA. After this point, Sierra Leonean importers will be able to import these goods from other African countries (beyond ECOWAS) duty free.

Cassava stem cuttings, cocoa beans, and palm oil seeds are used for variety multiplication to improve the yield or other characteristics of the crop. Import tariffs are low on each of these, with the exception of cassava for which customs codes do not distinguish between cassava for consumption and cassava cuttings for multiplication. In practice, palm oil seeds and cocoa beans are often sourced from other West African countries, such as Ghana, and may therefore benefit from duty-free preferences under the ECOWAS Trade Liberalization Scheme.

<table>
<thead>
<tr>
<th>HS Code</th>
<th>Description</th>
<th>Import tariff (%)</th>
<th>AfCFTA schedule</th>
</tr>
</thead>
<tbody>
<tr>
<td>1207.10 (Palm nuts and kernels)</td>
<td>Palm oil seeds</td>
<td>5</td>
<td>AfCFTA schedule A</td>
</tr>
<tr>
<td>0714.10 (Manioc cassava)</td>
<td>Cassava stem cuttings</td>
<td>20</td>
<td>AfCFTA schedule A</td>
</tr>
<tr>
<td>1801.00 (Cocoa beans, whole or broken, raw or roasted)</td>
<td>Cocoa bean</td>
<td>5</td>
<td>AfCFTA schedule A</td>
</tr>
</tbody>
</table>

Tariffs on fertilizers into Sierra Leone are low. Either a zero percent tariff or at most a 5 percent tariff is applied on fertilizers entering into Sierra Leone.

<table>
<thead>
<tr>
<th>HS Code</th>
<th>Description</th>
<th>Import tariff (%)</th>
<th>AfCFTA schedule</th>
</tr>
</thead>
</table>
Import tariffs on essential machinery are also low in Sierra Leone. Most agricultural machinery items face import tariffs of 5 percent. A small number of items, such as ploughs, face higher tariffs at 10 percent.

Figure 3. Essential machinery

<table>
<thead>
<tr>
<th>Light/specific machinery</th>
<th>Description</th>
<th>Import tariff (%)</th>
<th>AfCFTA schedule</th>
</tr>
</thead>
<tbody>
<tr>
<td>HS Code</td>
<td>Description</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8479.20</td>
<td>Palm oil extraction machine</td>
<td>5</td>
<td>AfCFTA schedule A</td>
</tr>
<tr>
<td>8432.80</td>
<td>Palm oil mill structure &amp; machine</td>
<td>5</td>
<td>AfCFTA schedule A</td>
</tr>
<tr>
<td>8437.80</td>
<td>Cassava processing machine</td>
<td>5</td>
<td>AfCFTA schedule A</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Heavy/general machinery</th>
<th>Description</th>
<th>Import tariff (%)</th>
<th>AfCFTA schedule</th>
</tr>
</thead>
<tbody>
<tr>
<td>HS Code</td>
<td>Description</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8701</td>
<td>Tractor</td>
<td>5</td>
<td>AfCFTA schedule A</td>
</tr>
<tr>
<td>8433</td>
<td>Combine harvester</td>
<td>5</td>
<td>AfCFTA schedule A</td>
</tr>
<tr>
<td>8424.82</td>
<td>Irrigation machine</td>
<td>5</td>
<td>AfCFTA schedule A</td>
</tr>
<tr>
<td>8432.10</td>
<td>Ploughs</td>
<td>10</td>
<td>AfCFTA schedule A</td>
</tr>
</tbody>
</table>

The relatively low tariffs on agricultural inputs into Sierra Leone is not unusual. Import tariff structures across most countries usually apply lower tariffs on inputs and intermediate goods – that help an economy to be more productive – and higher tariffs on final consumption goods. Tariffs are not, however, the only condition affecting access to imported inputs into Sierra Leone. In practice, accessibility and affordability can be undermined by high shipping costs, high port charges, technical barriers to trade, non-tariff barriers, or other taxes, charges and fees applied on imports.
3.0 KEY POLICY CHALLENGES FOR ACCESS TO INPUTS

3.1 Seedling access challenges

The Sierra Leone Agricultural Research Institute (SLARI) should in theory host a seed bank and be engaged in the multiplication of seed varieties. In practice the Institute is severely underfunded and unable to adequately fulfill this role.

Government policy has recently seen an intentional shift from state-led seedlings provision to regulated private sector procurement and delivery of seeds. The private sector provision of seedlings involves only a small number of actors. Though some are more established and experienced, many are new start-ups without much experience.

The former centralized government procurement and supply of seedlings was constrained by bureaucratic procurement processes in the chain of command with no clear organized standard operating procedures. Supplies were not synchronized with the demands of planting periods and seedlings that were available were often of poor quality or old-aged seed varieties with long planting period. Most seedlings under the centralized programme did not meet minimum compliance standards or qualities prescribed in state regulations. Many issued seeds were of poor health, suffered from limited availability, and were difficult for farmers to access during planting periods.

3.2 Fertilizer access challenges

A study conducted jointly by the International Fertilizer Development Center (IFDC) and the Economic Community of West African States (ECOWAS) to analyze the quality of fertilizer in five West African countries tells a compelling story (IFDC, 2013). Extensive fertilizer market research and product testing found the existence of severe nutrient deficiencies in bulk blends due mainly to inappropriate blending technology, frequent bag weight shortages, low quality in some fertilizer imports, and degradation of fertilizer physical attributes due to manual handling and inadequate storage.

A major factor limiting use of quality fertilizers and agricultural productivity is the unavailability of properly packaged fertilizers in quantities small-scale farmers can afford (IFDC, 2016). Most often, fertilizers available on the market are packaged in 50 kg bags and sold at prices that are unaffordable for small-scale farmers, effectively preventing them from applying fertilizers on their farms. Many mid-level fertilizer distributors, retailers and agro-dealers in West African markets repackage fertilizers into smaller quantities that fit into small-scale farmers smaller budgets. This solution, however, creates subsequent problems with respect to adequate packaging standards, adulteration, and storage.

The government of Sierra Leone provides little to no quality control of fertilizers on the open market. Corporate farms sometimes pay service providers such as the Sierra Leone Agricultural Research Institute (SLARI) and Njala University to test their imported fertilizers. However, the labs at SLARI and Njala University are not properly equipped for complex fertilizer analysis. Labelling is also unregulated: agro-dealers and retailers repackage fertilizers into smaller sizes without appropriate standards due to little inspection. Farmers cannot be certain whether these smaller repackage quantities contain the appropriate and marketed ingredients at the weights advertised. Quality control issues like these decrease trust between agro-dealers and farmers and discourage fertilizers adoption among farmers (Tillen, 2019). There is anecdotal evidence suggesting high levels of mislabelled nutrient content and bag weight in Sierra Leone. Some bad actors’ open sacs of fertilizer, replace portions of the contents with fillers, and sell the sacs for full price. A joint report published by ECOWAS, UEMOA (West African Economic and Monetary Union), and IFDC (International Fertilizer Development Centre) in March 2013 found high non-compliance with fertilizer standards in Sierra Leone.

In their fertilizer market survey in Sierra Leone, Tillen Group (2019) found that the majority of fertilizer imported in 2018 into Sierra Leone was Urea and various NPK blends. Urea comprised 41% of all types of fertilizer while NPK 4-5-50 and NPK 10-10-30, both of which are used for Oil Palm production, comprised 25% each. Eight different NPK blends were imported by port in 2018. Other NPK include 15-15-15 and 17-
17-17, which are commonly used for rice and vegetables, as well as specialized blends like 18-8-15, 20-0-20, and 11-29-15.

Available literature on fertilizer use in West Africa, as well as several expert interviews conducted by the Tillen Group (2019) during their fertilizer market survey, suggests that NPK 15-15-15 is one of the most common fertilizer brands on the market in the region. However, only one import of 35MT (equivalent to less than 0.36% of the market), was made in Sierra Leone in 2018. The study found that the majority of NPK15-15-15 on the open market was imported from neighbouring Guinea. Most corporate and open market imports come from Europe, primarily Belgium, and Morocco while Government imports include sourcing from Iran and China. Nearly 85% of all Urea fertilizer imported in 2018, for example, was purchased by the government from Iran, which offers Urea fertilizer at heavily discounted prices due to pressure from international sanctions. Most fertilizer is imported directly by corporate farms that transport the fertilizer to their own warehouses and apply it directly on their own farms. Government imports are transported to district level warehouses, mostly in the district capitals, and then transported to smaller warehouses at Agricultural Business Centres (ABCs) owned by Farmer Based Organizations (FBOs).

3.3 Essential machinery access challenges

Cassava processed into gari has become a marketable product in west Africa and diaspora markets. In Sierra Leone, a small number of industrial gari plants have emerged using imported machinery. However, most farmers use traditional fabricated machinery for processing cassava into gari. Smallholders typically cannot afford the imported machinery, which comes from China, due to high importation costs.

The machinery ring fence scheme (outlined in section 2.2.3) has faced challenges. For small and large players, maintenance and the identification and training of skilled operators is difficult. At times, operators fail to deliver the services owing to the unavailability of spare parts or the availability of technicians. Machinery is often unavailable at required times or subject to lengthy delays.

There are limited oil palm processing facilities in the districts, particularly for smallholder farmers, some of whom are still using the pit method to process the palm oil; a method that is unhygienic with an extraction wastage of up to about 50%. The introduction of fabricated processing machines manufactured locally within the districts, and by Finnic Company in Freetown, has significantly increased the extraction rate of oil palm production, improved the quality of production, and reduced the production time, as compared to the pit method, according to testimonies by some farmers. However, the high cost of machines and frequent breakdowns is limiting the availability of these services to farmers. Most local fabricators in the districts are producing processing machines under challenging conditions such as a lack of high-quality metal materials, the high cost of electricity, and the unavailability of training on innovative and improved technologies. Most of them use recycled materials from scrap yards to produce such milling machines which are usually not durable. Local fabricators are calling for support through capacity building and study tours to help improve their skills.
4.0 POSITION AND PERSPECTIVE OF STAKEHOLDERS

Stakeholder consultations and interviews were held in 2022 to gather perspectives on key actions needed to support access to agricultural inputs, with a particular focus on the cocoa, cassava and oil palm value chains. The interviews revealed that access to inputs (seedling, fertilizers and essential machineries) remains a critical constraint to these sectors. Summarized minutes of the stakeholder interviews are included below.

4.1 Challenges identified from stakeholder perspectives

4.1.1 Cassava sector perspectives

Constraints in the cassava sector are wide-ranging. Farmers have limited access to improved and adapted cassava varieties, fail to use sound crop management practices and underuse crop protection chemicals.

Farmers are unaware of the benefits of fertilizers and Insecticides. This includes in tackling challenges such as rodent pests (specifically the grasscutter) and insect pests (particularly the variegated grasshopper). Farmers rely on inadequate cultural control measures (incl. limiting the production to disease resistant varieties).

Agro-dealers/traders face considerable constraints. They must deal with high transportation costs in reaching farmers, face frequent price fluctuations and poor quality goods by suppliers, and have a lack of convenient storage facilities for fresh products.

Available fertilizer quality is of inconsistent quality. Some dealers don’t have certification or experience. There is adulteration of fertilizer, bags can be underweight, and there is a large knowledge gap.

Poor coordination among value chain actors and limited efforts to improve knowledge and the application of Good Agricultural Practices act as bottlenecks. Farmers have limited access to inputs, technical services and more profitable markets. This leads to average yields that are as much as 50% lower (in 2019 estimates) than commercially viable yields under good agricultural practices.

Quality enforcement reduces supply. Efforts by government to improve the quality of fertilizer through the certification of fertilizer standards has reportedly reduced supply in the short-term while the private sector responds with licensing and certification.

High quality machinery for processing cassava to gari is costly. Accessibility is constrained by the high cost of capital for initial machinery investments, ongoing fuel costs during operation, and a limited market for replacement parts. Imported machinery is of better quality and consistency than locally fabricated machinery, but involves capital investments that are too costly for small and medium-sized businesses.

4.1.2 Palm oil sector perspectives

Improved seed varieties are in low supply and expensive. SLARI is under-resourced and unable to cater to demand for improve palm oil varieties and so businesses rely on imported seeds, which are more expensive.

Fertilizer is difficult to find. Many dealers do not have certification or experience. There is a large knowledge gap among distributors and traders of fertilizer and farmers, who are often unsure of the quality of fertilizer purchases.

Reliance on low quality fabricated processing machinery reduces palm oil quality. Processing represents a key challenge for the palm oil sector. Large-scale plantations have their own high quality processing machinery. Medium-sized plantations are present in the marketplace, but often use low quality fabricated machinery that reduces quality. Small-holders cannot afford the capital investment required to import processing machinery and often rely on less hygienic and productive traditional methods, such as the pit method.
Private sector participation in seedling sourcing is in its nascent stage. Most seeds are still being accessed through Government programmes and projects like the Agricultural Value Chain Development project and INGOs, such as Solidaridad and FAO. Large private estates like Gold Tree, Planting Naturals, and Natural Habitat source and provide their seedlings or pre-finance planting materials to smallholder farmers.

There is an absence of a local market of service suppliers for extension services, seedlings and fertilizer application, and machinery maintenance and operation. Local service providers for the provision of these inputs appears to be completely absent in the palm oil sector across the oil palm belt districts.

The productivity of oil palm farms is low. Smallholder farmers' yields are generally low at an average of 2.5 mts/ha. This may be because of the prevalence of unclassified planting materials, old age trees, and a lack of farm maintenance. Average yields for large scale producers like Socfin, Planting Naturals, Gold Tree, Natural Habitats are much higher, at around 11-12 mts/ha. This is mainly due to good farm management practices and the use of improved variety of planting materials.

Weak Processing facilities. The introduction of fabricated processing machines manufactured locally improves palm oil processing compared to traditional pit methods. However, the high cost of these machines and their frequent breakdowns limits their attractiveness to farmers. Most local fabricators in the districts are producing processing machines under challenging conditions such as lack of high-quality metal materials, a high cost of electricity, and limited training on innovative and improved technologies. Most of them are using recycled materials from scrap yards to produce these milling machines which are often not durable. Local fabricators are calling for support through capacity building and study tours to help improve their skills.

Quality challenges. A lack of information on quality practices is a major challenge within the districts, as farmers do not see their traditional practices of oil palm processing as inimical to the low quality of their produce. Awareness raising programs relating to good processing practices such as the high concentration of Free Fatty Acids (FFA), water quality, waste management are lacking in the districts and farmers therefore, continue to use old traditional methods which are unhygienic. Large scale oil palm industries, especially those that are producing for export, are concerned about the cost of doing business in Sierra Leone. The absence of a one-stop-shop for trade facilitation and having to deal with too many players in the chain is seen as leading to high costs.

4.1.3 Cocoa sector perspectives

Agrifluids’ nutrient solutions for cocoa production; foliar feeding – a liquid fertilizer spray – the right way forward: organic foliar fertilizer; leaf application spray is currently promoted but is in low supply. Supply should be private sector led, but the private sector has not yet participated much in the sector creating a big challenge for smallholders. Private sector supply remains in its infancy. D.I Grow and Super Grow are the only two private companies importing this type on a low scale and its potential is considered to be “A nutrient solution for African Cocoa”

Regulatory systems are not yet fully operational. Fertilizer regulator agency is still in the process of recruitment and training, which is causing delays in developing a well-functioning and regulated private sector supply system.

Processing is less relevant for the cocoa sector. There is one larger processing plant that has recently been installed. Otherwise, as a cash crop, cocoa can be exported without much processing.

Market value attraction: post-harvesting fermentation of the cocoa attracts high market value through fermentation by drying, brownish colour, appropriate moisture content weight will normally attracts high market value for exporters, hence the need for value-addition and processing machines are very low in the sector.

Access to high yields seedlings it is believed by the public and private sector players that increased access to hybrid first generation cocoa seedlings are crucially essential to the success and sustained development of the value chain. Hybrid first generation 2 years varieties are sourced from Ghana approximately $400/50kg box (content of 14,000 – 16,000 seeds)
4.2 Solutions and recommendations identified from stakeholder perspectives

Establish a seed multiplication (hub or bank) by engaging agricultural research experts and institutions and by partnering with private sector leaders to improve the commercial availability seedlings and cuttings.

Further strengthen the policy shift to private sector supply chain delivery. The replacement of the previous centralized-procurement system with the introduction of private sector-led operators to lease and manage fourteen Machine Rings across the country in agricultural inputs (essential machineries) marks a new approach to promoting agriculture mechanization.

Leverage international trade policy commitments to bring about necessary changes in the domestic business environment. This can include reducing tariffs on imported inputs from regional and continental suppliers, but also efforts to streamline importing processing and licensing and certification, to reduce non-tariff barriers to access.

Create producer-supplier networks for agricultural inputs (seedlings, fertilizers and essential machineries) to strengthen private sector supply and foster the improvement of prices of inputs, quality of inputs, availability of inputs and the choice of inputs in relation to the MAF proposed subsidization scheme.

Tax and subsidy schemes. Larger businesses express interest in tax facilitation schemes to support them in developing the nascent supply sectors for fertilizers and seedlings, similar to the government pre-financing schemes provided for essential machineries. Smallholder farmers, express interest in directly subsidised government provision of seedlings.

Streamline certification processing. The private sector argues that collaboration and streamlining in the certification process could improve the development of the seeds and fertilizer marketplace. Improved interaction between importers and the Seed Certification Agency and National Fertilizer Agency could reduce delays in testing and certifying.

Encourage value chain actors who are engaged in quality and certification extension services like Welthungerhilfe INGO (WHH) and Solidaridad in Sierra Leone in the Cocoa and Oil Palm sectors and other food and cash crops value chains.
5.0 NEXT STEPS: ADVOCACY AND POLICY ENGAGEMENT

In the context of Sierra Leone’s agri-sector, several organizations are already actively pursuing advocacy and policy influencing efforts and services to represent their members’ interests. The Sierra Leone Chamber for Agribusiness Development (SLeCAD) maintains continuous and frequent relations with several Government institutions and entities and engages through targeted advocacy efforts. The Sierra Leone Opportunities for Business Action (SOBA), a UK Aid funded private sector development programme, engages with government to partner, test and advocate for policy changes and projects to improve the business environment.

Priority topics for dialogue and advocacy between Government and private sector in the agri-sector are wide-ranging and relate to both domestic and foreign issues of concern. Based on available country studies as well as dialogues and workshops held under the ITC-led components of the WACOMP Sierra Leone Program, valuable insights were gained that allow a preliminary mapping of priority issues for advocacy and dialogue. Inter alia, strategy advice and training sessions were held with and for staff and management at Sierra Leone Chamber for Agribusiness Development (SLeCAD) as well as with selected cooperatives in the country, with a view to better capture the private sector perspective on key objectives for advocacy action and priority policy issues. In addition to that, meetings were held with representatives of the Ministry of Trade and Industry, PMB, SMEDA, MAF and SLCCIA.

It must be ensured that the private sector voice continues to be heard, and Government stakeholders are open to advocacy consultations, in order to strengthen constructive dialogue around trade and business environment in Sierra Leone. Key stakeholders, including SLeCAD, can take up a constructive role in advocacy and dialogue on key areas of interest for the private sector where policy change and reforms are demanded, or improved implementation of existing policies is needed.

In the absence of a dedicated and institutionalized public private dialogue platform in Sierra Leone (since the Sierra Leone Business Forum was terminated in 2015), the continued and constructive engagement between public and private sector is of crucial importance to sound policy-making towards an improved domestic business environment and enhanced trade competitiveness within the regional, Pan-African and global trading environment.

Policy engagement and next steps for improving access to agricultural inputs

- **Review Position Paper**: Invite public sector agencies and private sector representatives to review and provide comments on this Position Paper on access to agricultural inputs.

- **Host a public private dialogue**: Collect further perspectives and visions on improving access to agricultural inputs.

- **Support policy re-designs, where applicable**. Follow up with policy makers to ensure policy refinements; redesign or issues with implementation are addressed.

- **Monitoring & evaluation**: Sierra Leone lacks an advanced trade monitoring system. If trade threats materialize, or if opportunities are frustrated by obstacles, PPDs can flag these.
6.0 CONCLUSIONS

A supportive use of quality seeds and fertilizers, as well as essential production machinery, has been proven to be a key factor in realizing agricultural competitiveness. Good quality seeds, fertilizers and essential machineries can contribute to better quality agriculture produce, climate resistance and better resilience to disease threats. Overall, improved inputs and service costs for seedlings, fertilizers, and essential machinery, will improve agricultural outputs and ultimately farmers’ incomes.

Stakeholder interviews indicate that access to inputs (seedling, fertilizers and essential machineries) remains a critical bottleneck in the domestic business environment for agriculture in Sierra Leone. The domestic marketplace for these inputs is underdeveloped. Affordable agricultural inputs are often completely unavailable. When they are available, quality standards over these inputs are poorly enforced, leaving farmers with adulterated, mislabeled, and defective products.

The findings of this Position Paper, drawing from desk literature and stakeholder interviews, can be summarized in the following five key recommendations and options:

A. **Provide targeted public sector interventions**

   **Recommendation A.1**: Invest in SLARI and Njala University to help improve the availability of seedlings / cuttings

B. **Strengthen private-sector provision of agricultural inputs**

   **Recommendation B.1**: Streamline certification, licensing and importation processes to help reduce the constraints that businesses face in obtaining licenses and supplies in the agricultural input sectors, including for seedlings, fertilizers and agricultural machinery.

   **Recommendation B.2**: Create producer-supplier networks to create marketplaces for agricultural inputs and to strengthen private sector supply connections.

   **Recommendation B.3**: Establishing tax or subsidy schemes to support the attraction of private sector players to the agricultural inputs sector.

   **Recommendation B.4**: Expedite the establishment and functioning of the new regulatory bodies governing the private sector-led agricultural inputs sectors, including the Seed Certification Agency and National Fertilizer Agency.
REFERENCES


ITC (2020) WACOMP Sierra Leone - Report on the consultative workshop on policy and regulatory framework for cocoa, cassava and oil palm


World Bank (2021). Sierra Leone Public Expenditure Review 2021: Sierra Leone Agriculture Sector Review


National Revenue Authority: https://www.nra.gov.sl/import-and-export/customs-duty

### ANNEXES

#### A. Stakeholders interviewed

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<tr>
<th>Organizations</th>
<th>Name</th>
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B. Interview questionnaire

A. Importance of topic

- What is your knowledge of the current policy framework in relation to access to inputs (i.e. seeds, fertilizers and essential equipment), in particular in the cassava, cocoa and palm oil value chains)?
- To what extent is the topic of access to inputs (seeds, fertilizers and essential equipment) important to your organization?
- How is your organization (and or its members) impacted by the current Government policy with regards to access to inputs, specifically related to seeds, fertilizers and essential equipment (incl. machinery)?

B. Challenges

- For your organization, what are the major challenges with the current set-up and scope of the access to inputs (seeds, fertilizers and essential equipment) for Sierra Leone agriculture sector?
- How relevant are the below challenges in respect to access for the private sector to seeds, fertilizers and essential equipment (incl. machinery):
  - Centralised (government) procurement vs decentralized procurement in relation to:
    - higher / non-competitive prices for farmers to buy seeds and fertilizers
    - Delays in the availability and purchasing process
    - having less choice/options, or reduced quality of seeds and fertilizers available
  - High import tariffs on seeds, fertilizers and agriculture equipment
  - Limited understanding of the opportunities offered by regional, continental and international trade agreements to import these inputs from other markets.
  - Other
- Can you provide specific examples of the challenges encountered (possibly in relation to the Cocoa, Cassava, Oil palm value chains)?
- What is the negative impact of these challenges on your members / organization?

C. Solutions

- Would you agree that a push towards private sector-led procurement of seeds, fertilizers and essential equipment may benefit agriculture competitiveness in Sierra Leone?
- What role would you see for the Government in addressing the challenges raised by this topic?
- For your organization, what are the key areas where the current subsidization scheme proposed by the MAF needs improving:

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1 Ministry of Agriculture – Policy Shifts
- Prices of inputs
- Quality of inputs
- Availability of inputs
- Choice of inputs
  - Have you or your members identified specific improvements that you wish to see?
  - What would be the impact if these changes would be implemented?

D. Next steps: Advocacy and policy engagement

- What kind of lobby and/or policy influencing would be most efficient in your perspective to advocate for reforms and/or policy change on this topic?
  Is your organization aware of any upcoming events, meetings or workshops in which the findings of this position paper can be presented?