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Roots of Peace

# AGRICULTURE MARKETING PROGRAM (AMP)

## FY 2020 Annual Report



*Workers sort raisins at the Ghazal General Trading Co., an AMP client. During FY2020, AMP initiated training and incentives aimed at building the income and capacity of Afghan agribusinesses. Despite challenges related to the COVID-19 pandemic, AMP clients facilitated the export of \$23 million in agricultural products to overseas markets.*

# AGRICULTURE MARKETING PROGRAM (AMP)

## FY 2020 Annual Report

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This report is intended to provide USAID and other stakeholders with an annual progress report on the Agriculture Marketing Program (AMP). Produced to meet the requirements of the AMP Cooperative Agreement, the report lists achieved results and describes the context of operations, implementation processes, and program and environmental changes during the first year of program implementation.



### DISCLAIMER:

The views expressed in this publication do not necessarily reflect the views of the United States Agency for International Development (USAID) or the United States Government.

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## Abbreviations

ACCI	Afghanistan Chamber of Commerce and Industries
ACD	Afghanistan Customs Department
ADF	Agriculture Development Fund
AGE	Anti-Government Elements
ANNGO	Afghan National Nursery Growers' Organization
AUAF	American University of Afghanistan
AVC-HVC	Afghanistan Value Chains - High Value Crops
B2B	Business-to-business
CBARD-AIM	Community-Based Agriculture and Rural Development - Access to International Markets
CHAMP	Commercial Horticulture and Agriculture Marketing Program
CSO	Central Statistics Office
DAIL	Directorate of Agriculture, Irrigation and Livestock
EPAA	Export Promotion Agency of Afghanistan
FFS	Farmer Field School
FSSAI	Food Safety and Standards Authority
FTE	Full Time Equivalent
GAP	Good Agricultural Practices
GIRoA	Government of the Islamic Republic of Afghanistan
GMP	Good Manufacturing Practices
GST	Goods and Services Tax
HA	Hectare
HACCP	Hazard Analysis and Critical Control Points
HKIA	Hamid Karzai International Airport
HMIS	Horticulture Management Information System
HR	Human Resources
IP	Implementing Partner
IPM	Integrated Pest Management
MAIL	Ministry of Agriculture, Irrigation and Livestock
MEL	Monitoring, Evaluation and Learning
MIS	Management Information System
MOIC	Ministry of Industry and Commerce
MOU	Memorandum of Understanding
MS	Microsoft
MT	Metric ton
PAIL	Provincial Agriculture Irrigation and Livestock
PSD	Public Sector Directorate
RADP-E	Regional Agriculture Development Program-East
ROP	Roots of Peace
SPS	Sanitary and Phytosanitary
STTA	Short-Term Technical Assistance
TOT	Training of Trainers
UAE	United Arab Emirates
USAID	United States Agency for International Development
WTO	World Trade Organization

## Program Background

The Agriculture Marketing Program (AMP) is a three-year program that builds on the successes of the ten-year Commercial Horticulture and Agricultural Marketing Program (CHAMP). The program works with leading Afghan processing and export firms to increase export volumes and values, introduce new agricultural products to the market, diversify export markets and increase value-added processing. The program's market-based, demand-driven approach focuses on supporting private sector growth and sustainability, thereby creating demand for agricultural products that will drive job growth in rural areas. These efforts will stimulate the growth of Afghan exports to regional wholesale markets and supermarkets by up to \$450 million, increase domestic sales by \$50 million and add 4,500 jobs to the Afghan economy. AMP supports traders through its trade offices to boost Afghan agricultural exports in these and other major regional markets.

AMP utilizes five specific strategies:

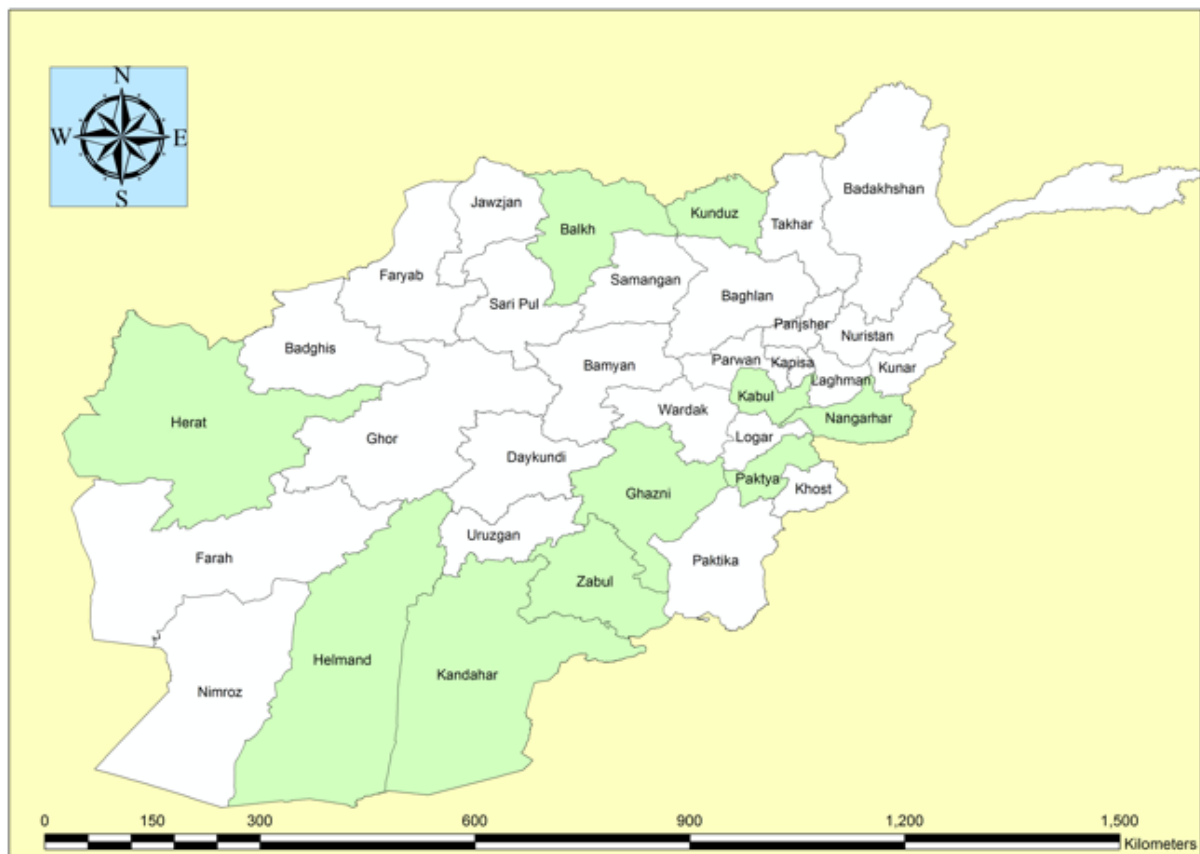
- Strategy #1: Increase bulk agriculture exports to existing markets
- Strategy #2: Expand the number of export products
- Strategy #3: Develop new markets for Afghan exports
- Strategy #4: Increase value-add of agriculture exports
- Strategy #5: Develop remote rural areas to support the peace effort.

Activities include: researching new market opportunities for Afghan products; operating trade offices in key markets; organizing or participating in international business-to-business (B2B) events, trade missions and trade shows; organizing promotional activities in key markets; providing incentives for businesses exporting new products or to new markets; exporter training; facilitating access to trade credit; and mitigating trade impediments.

AMP works primarily with private sector agribusinesses, but also engages the Ministry of Agriculture, Irrigation and Livestock (MAIL), the Afghan Chamber of Commerce and Industries (ACCI), the Export Promotion Agency of Afghanistan (EPAA) and other USAID-funded agricultural programs. Specific attention is given to support the participation of women and youth in AMP activities.

## AMP Area of Operations

AMP supports all Afghan provinces, but emphasizes exports in the major production areas of the country as shown in the map below.



## Preface

The first fiscal year of operations for AMP was overshadowed by the COVID-19 pandemic, which affected all areas of program implementation. After beginning operations on February 1, we were forced to evacuate in mid-March as the pandemic began sweeping through Afghanistan. Expat and local staff worked from home until September, when the office began a phased reopening. Though it was a continual learning lesson, the entire team—from the administrative and operational staff to the field offices and expatriate leadership—proved highly successful in working remotely and communicating in a less than conducive work environment.

Throughout the year AMP took a leadership role working in collaboration with USAID and other implementing partners in addressing the ongoing Afghan-Pakistan transit issues and challenges. The collateral impacts of the pandemic and these trade disputes resulted in a growing concern for food security. AMP worked with producers and traders to focus on supplying local markets, providing a short-term alternative to shuttered export markets.

While COVID-19 resulted in the cancellation of business-related training, it enabled us to rethink the development and delivery of business development and market initiatives through e-learning platforms. Not only were AMP clients able to take advantage of these innovations, they are now reaching a broader audience within the overall agribusiness sector.

As with the business development and training challenges, the global pandemic forced the cancelation of scheduled trade shows during the year. To help overcome this obstacle we began putting together an air cargo program with pilot flights to the UAE. AMP is also pioneering a business marketing program in Turkey with a representative traveling to urban markets to promote Afghan agricultural products. The initial interest and potential demands are beyond expectations. I fully expect this initiative to open new avenues for both producers and exports.

With a greater emphasis being put on women and youth enterprises, we finalized the development of a Gender and Youth Empowerment Unit. The unit acts as a support resource helping weave this important target group into all programmatic activities. It is also designed to reach beyond AMP to create synergies through collaboration with other USAID programs, as well as other donors and the Afghan government.

Overall, the transition from start-up to implementation was successful, despite significant bumps in the road. Despite an operational environment dominated by COVID-19 issues and the socioeconomic balance being challenged by political disorder and increasing violence, accomplishments are evident throughout this first-year report.

My deepest appreciation to the entire AMP team and USAID for working together in partnership on behalf of our common objectives - to help grow the agribusiness sector and enable Afghans to compete in a global marketplace. It is often said, from adversity come the challenges of seeking innovative solutions. I want to credit AMP's entire team for rising to the challenge and remaining dedicated to excellence.

*Reid*

Reid B. Lohr  
Chief of Party

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***"Sustainability is always at the forefront of our work, knowing that the real impact of what we do is going to be found in what we leave behind."***

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# Annual Highlights

## Strategy 1

During the first two months of the project, AMP's marketing team undertook a comprehensive **survey** among previous CHAMP-supported agribusinesses and new agribusinesses to select AMP clients and better understand the needs of Afghan agribusinesses. AMP signed MOUs with 78 partner agribusinesses.

Participation at **international trade shows** is critical for reaching overseas buyers and generating deals. AMP assisted in organizing the Afghanistan Pavilion at Gulfood 2020, where 26 Afghan agribusinesses exhibited. AMP-supported businesses signed a total of \$13,206,433 in deals. All other trade events during the year were canceled because of the COVID-19 pandemic.

AMP developed **Market Guides** for India and Kazakhstan to provide greater access to market information by Afghan agribusinesses. To complement these guides, AMP developed **Import Guides** for India and the UAE to help agribusinesses understand general and product-specific regulations and standards for those countries. Drafts of the guides were completed, with more guides expected in FY2021.

AMP began work on an **Afghan Horticultural Catalog** to promote the wide variety of products available from Afghan traders. During the fiscal year, the list of Afghan products was reduced and finalized based on anticipated commercial and export viability.

AMP records the **exports facilitated** to Afghanistan's traditional export markets of India, the UAE and Kazakhstan. AMP recorded 2,826 MT of exports valued at \$12.4 million to India and the UAE during FY2020.

In responding to the pandemic, AMP organized an **air cargo initiative** that would provide subsidized cargo flights to India and the UAE. The first cargo flight consisted of a shipment of 37 MT of horticultural products from Kabul to Sharjah, UAE.

At the outset of the program, AMP undertook activities in preparation for the re-establishment of former CHAMP **trade offices**. Ultimately, due to the outbreak of the COVID-19 pandemic, groundwork was laid but the offices were not opened during FY2020.



*Balkh raisins are shown being loaded for shipment to Izmir, Turkey under the previous CHAMP program. Turkey has been identified as a prime emerging market for Afghan agricultural products.*

## Strategy 2

Early in the year, AMP began an analysis of current exports to identify **new products for export**. A Business and SPS Training Needs Assessment was conducted to identify the training needs of our Afghan agribusiness clients, with questions on products currently being traded and processed. Site assessments were completed on all Kabul-based AMP client agribusinesses.

A **market report** was conducted on Afghan horticultural exports to Turkey. By the end of the year, a detailed market analysis on the Chinese market was underway, with future reports anticipated to focus on Kyrgyzstan, Tajikistan, Turkmenistan and Uzbekistan.

## Strategy 3

Similar to the Market Guides being developed for India, the UAE and Kazakhstan, mentioned under Strategy 1, AMP developed **Market Guides for new and emerging markets**. The Market Guide for

Russia was completed, and the Market Guide for Saudi Arabia was under technical review at the end of the year.

AMP also developed **Import Guides for new and emerging markets** to help agribusinesses understand general and product-specific regulations and standards. Draft guides for Turkey, Russia and Saudi Arabia were completed.

AMP facilitates the **export of Afghan agricultural products** to markets that do not typically import from Afghanistan but are seen as promising new markets for Afghan exporters. During the year, AMP facilitated the export of 4,778 MT valued at \$10.6 million to 15 countries.

AMP plans to establish **trade offices in new and emerging markets** for Afghan agricultural exports. Groundwork was laid in FY2020 for establishment of a trade office in Turkey. This was postponed due to the COVID-19 pandemic.

## Strategy 4

AMP conducted a **needs assessment** of agribusinesses to document the training and business development priorities of 72 AMP clients in Balkh, Herat, Kabul, Kandahar and Nangarhar provinces.

AMP conducted preliminary **site visits** of its client agribusinesses in Kabul to verify that the information provided to AMP through an initial survey regarding the capacity and business development needs.

AMP produced two courses aimed at providing **specialty training** for exporters and processors in food safety, business, and marketing. The first online course in the food safety series, Managing Food Safety during COVID-19, was taken by 125 participants. The second online course, Food Safety and Personal Hygiene, was taken by 122 participants.

COVID-19 hindered implementation of AMP's **Business Incubators and Business Accelerators**. By the end of the year, AMP had identified three locations to set up a business incubation/acceleration center in Kabul. AMP finalized coursework that will serve as general training for the business incubator and more tailored training as part of the accelerator training.

AMP provided **branding assistance** to nine Kabul-based agribusinesses. This included rebranding, logo development, packaging design and other forms of branding.

## Strategy 5

The AMP extension team **surveyed** 435 farmers in 29 districts to guide AMP in determining the best type of activities to help its rural client farmers, the types of crops, and the training needed.



*AMP surveyed 64 nurseries in four provinces to determine their ability to deliver 1.8 million saplings and grape cuttings for the upcoming orchard establishment activity.*

AMP trained 80 farmers in **apricot sulfur drying**, a technology that helps farmers reduce losses of fresh produce and adds value to apricot crops.

To increase farmers' income, AMP will **trellis** existing and newly planted vineyards in the grape-producing areas of, Kandahar, Helmand, Kunduz, and Balkh provinces. Preparations were made for this activity, which will take place in FY2021.

AMP provides **technical assistance** in the areas of proper orchard management, pre harvest practices, integrated pest management, harvesting and post-harvest management; training 113 farmers in Balkh, Nangarhar, Ghazni, and Kunduz provinces.

AMP undertook a survey to determine the existing **cold storage capacity** in each Afghan province. The survey found that cold storage was available in only eight provinces: Kabul, Kandahar, Kunduz, Nangarhar, Herat, Balkh, Wardak and Laghman. This

AMP established 224 common interest groups for its upcoming **Farmer Field School** in Kandahar, Balkh, Kunduz, Ghazni and Zabul provinces, comprising 3,353 farmers.

For its orchard/vineyard establishment program, AMP surveyed 64 commercial nurseries in Helmand, Kunduz, Balkh, and Nangarhar provinces to determine the quality of the saplings produced. The 64 nurseries were found to be able to provide approximately 1.8 million quality saplings/rooted cuttings according to the standards set by AMP.

## **Cross-Cutting Activities**

AMP prepared a **COVID-19 Action Plan** to address many of the anticipated challenges and constraints related to the pandemic. AMP also took action on a number of new **trade impediments** relating to agricultural exports to India.

During FY2020, AMP **collected data** on Afghanistan's horticultural imports and exports, analyzing the data and incorporating tables, charts and other graphics as appropriate.

AMP's **gender unit** supports AMP's five primary strategies to bring more women and youth into the agribusiness sector, enable more start-ups to succeed and to incentivize existing agribusinesses to employ more youth. AMP reconnected with female recipients of grants and technical support under CHAMP to see how their businesses are progressing. AMP will offer continuing support so they can maximize the impact of the grants they received and take advantage of the technical and business support AMP offers for developing exports.

AMP visited 21 women-owned agribusinesses in Kabul as part of its **site visit assessments**. Women farmers will be trained under AMP's **Farmer Field School program**. Recruitment is currently underway for staff who will facilitate women's participation in FFS. Beneficiary selection is expected to begin during early FY2021.

AMP is working to form **partnerships** with local public and private universities as well as agribusiness industries in AMP's target provinces. During the last quarter, AMP drafted MOUs with the American University of Afghanistan (AUAF) and the public universities of Balkh, Herat, Kandahar and Kabul.

## Strategy I: Increase Bulk Agriculture Exports to Existing Markets

AMP works toward increasing the growth of exports of raw, bulk agricultural products to India and the UAE. A combination of trade missions, trade shows, trade office services, removal of trade impediments, government subsidized export freight and incentives have proven successful in stimulating export activity. AMP builds on these efforts and focuses resources on the most effective combination of incentives and resources that fit each market and trade corridor.

### Agribusiness Survey and Client Selection

During the first two months of the project, AMP's marketing team undertook a comprehensive survey among previous CHAMP-supported agribusinesses and new agribusinesses in key production areas. The survey was used to select AMP clients and better understand the needs of Afghan agribusinesses. Businesses were surveyed in Kabul, Herat, Balkh, Kandahar, Nangahar and Ghazni. Although AMP had an ambitious target of increasing exports by \$150 million per year, the project anticipated providing more targeted assistance to a relatively small number of agribusinesses, rather than general assistance to a large number of businesses over the lifetime of the project.

The following selection criteria guided the selection of client agribusinesses:

- Long-term relationship with ROP and active in the past 2-3 years.
- New businesses that have aggressive goals.
- Businesses not currently working with other USAID agricultural programs.
- Businesses exporting large volumes or steadily increasing export volumes.
- Businesses focused on exporting new or specific products
- Businesses with in-house processing capacity, or intention to develop processing capacity.
- Businesses with clear objectives and expansion plans.
- Business owners with strong business and marketing acumen.
- Female owned businesses that are demonstrating growth domestically and/or internationally.
- Businesses willing to share export data and willing to start contributing to costs for services.

By the end of the fiscal year, AMP had signed Memoranda of Understanding (MOUs) with 78 partner agribusinesses, as shown in the table below.

**Table 1: AMP Agribusiness Clients**

Location	Number of Clients
Kabul	30
Ghazni	1
Kandahar	14
Balkh	11
Herat	16
Nangarhar	5
India	1
<b>Total</b>	<b>78</b>

### Trade Shows

#### *Gulfood 2020*

In the first quarter of program operation, AMP assisted in organizing the Afghanistan Pavilion at Gulfood 2020. The event, which took place February 16-20, is the world's largest food and beverage trade show, drawing nearly 100,000 visitors and some 5,000 participants. Event preparations were conducted by AMP in partnership with other USAID programs, including the Afghanistan Value Chains - High Value Crops (AVC-HVC) project, which took a lead role, the Regional Agricultural Development Program East (RADP-E), Afghanistan Value Chain - Livestock and the Community-



Based Agriculture and Rural Development - Access to International Markets (CBARD-AIM) project. A total of 26 Afghan agribusinesses exhibited at the event. A further 17 Afghan agribusinesses attended as observers.

AMP-supported businesses signed a total of \$13,206,433 in deals with buyers from India, Iraq, Indonesia, Kuwait, Italy, Saudi Arabia, Turkey, UAE, Kazakhstan, Egypt and Vietnam. Based on data received from businesses, figs, raisins, dried apricots, almonds and saffron were in highest demand, respectively. For a breakdown of sales by product and importing country, see Annex 1.

### **Trade Show Postponements, Cancellations and Online Platforms**

Shortly after program startup, AMP prepared a list of trade shows it anticipated supporting in existing and new markets during 2020, in conjunction with other USAID implement partners (IPs). AMP put together a proposal outlining the selection criteria and proposed level of support each IP would provide to participating agribusinesses at each trade show. AMP received concurrence with the other IPs and received approval from USAID on July 1. AMP prepared a Memorandum of Understanding (MOU) to be signed by each IP outlining the obligations, roles and responsibilities of each project. At the request of USAID, AMP also provided written feedback on USAID's Export Promotion Guidance and suggested a number of amendments relating to the selection of participants for US Government-funded trade events.

These preparations were derailed by the COVID-19 pandemic, which resulted in the cancellation or postponement of all planned trade shows for FY2020 after Gulfood. Although the events did not take place as planned, AMP personnel remained engaged in preparations until the last moment, following the selection criteria and agreed level of support. The marketing team also continued to prepare for events in the next fiscal year, such as Gulfood 2021. AMP had hoped to increase the size of the Afghanistan Pavilion at Gulfood to enable more participation from Afghan exporters. Despite numerous requests of the Dubai World Trade Center, however, the event organizers were only able to allocate the same amount of space (160 m<sup>2</sup>) as was provided for the 2020 event.

Fresh Produce India was moved to an online platform and took place on April 23 for a period of five hours (<https://www.youtube.com/watch?v=4LTDaszTDHQ>). AMP agribusiness partners, other IPs and AMP personnel were encouraged to register and participate in the free-of-charge event. No deals were generated at the event, which was designed more for information sharing. Other trade show organizers followed suit, developing online information sharing webinars. AMP agribusinesses, other IPs and AMP personnel participated in three other online webinars organized by Gulfood (<https://www.gulfood.com/Gulfood.Virtual>). The first webinar focused on the impact of the pandemic on supply chains, the second examined positive changes resulting in consumer and business behavior, and the third on future food security. The organizers of the Saudi International Agriculture, Aquaculture and Agro-Industry Show hosted a webinar on the Saudi Food Supply Chain post-COVID-19 ([https://www.youtube.com/watch?v=nxS\\_sPs1mOQ](https://www.youtube.com/watch?v=nxS_sPs1mOQ)). FruitNet Media International, publisher of international fresh fruit magazines and journals, organized a webinar on China's fresh fruit and vegetable market (<https://www.youtube.com/watch?v=IGAQ6BJJEVU>)

AMP agribusinesses and personnel were invited to participate in online training webinars organized by the RADP-E. Topics included export promotion tools, the EU, Middle East and North Africa and Southeast Asian markets, and preparations for trade shows. AMP agribusiness and personnel participation was high in each training session, typically comprising more than half of all participants.

Although the SIAL Middle East trade show was cancelled, a virtual trade show was planned for early FY2021 to take its place (<https://www.sialme.com/fnb-networkinghub/>). AMP will support the



*Keynote speakers for the are shown during the inauguration of the Afghanistan Pavilion at Gulfood 2020.*

participation of four businesses that have expressed an interest in participating. This will be the first major virtual trade show activity and will be a litmus test for other potential online events that may be designed as a result of the pandemic.

### **Trade Show Participation in FY2021**

At the end of FY2020, AMP was preparing for trade events due to take place during the first two quarters of FY2021, as well as Gulfood 2021. See table below.

**Table 2 - AMP Trade Show Calendar**

Event	Original Date	Revised Date
Fresh India Show, Delhi, India	June 11-12, 2020	December 18-19, 2020
India FoodEx, Bangalore, India	August 18-20, 2020	Cancelled
SIAL Middle East, Abu Dhabi, UAE	September 8-10, 2020	Cancelled
FoodExpo Qazaqstan, Almaty, Kazakhstan	November 4-6, 2020	Cancelled
Anufood, Mumbai, India	November 26-28, 2020	February 3-5, 2021
SIAL India, Delhi, India	December 3-5, 2020	February 11-13, 2021
Gulfood, Dubai, UAE	February 21-25, 2021	On schedule

### **Sustainability**

AMP acknowledges that a sustainable system for trade show management and preparation must be developed for the agriculture sector to take over from donor projects. As a first step, AMP encouraged MAIL and the Ministry of Industry and Commerce (MOIC) to work more collaboratively, particularly since MOIC has a department for international exhibitions. MAIL initiated the first step by signing an MOU with MOIC working jointly in processing and marketing of agriproducts through exhibitions. Both parties specified their roles and responsibilities in the MOU. Although this is only a small first step, it signals a willingness to collaborate. MAIL has also indicated that there is funding available for trade shows. AMP will engage MAIL and MOIC in organizing many of the trade shows in 2021.

### **Market Guides**

Afghan products are entering a greater number of export markets than was the case five or ten years ago. According to TradeMap.org, in 2016 India became the primary market for Afghan fruit and nuts. Similarly, in 2019, India imported 70% of Afghan spices (by value). AMP is developing Market Guides for India, the UAE and Kazakhstan to build on this growth by providing greater access to market information by Afghan agribusinesses. AMP recruited three student consultants from the University of Manchester in the UK to undertake research for the guides. The Market Guides include information on market size, market growth, import demand, domestic production (where information is readily available), market requirements, prices and competing export destinations for products that Afghanistan currently exports.



*Afghan raisins are shown at a wholesale market in Jeddah, Saudi Arabia, an emerging market for Afghan products but with specific import requirements.*

By the end of the fiscal year, AMP completed final drafts for the UAE and Kazakhstan guides, which were in final review at the end of the year. The India Market Guide will be completed in FY2021. The Executive Summaries of each Market Guide will be translated into Dari and Pashto.

An Analysis of Market Windows for Afghan Exports was also underway at the end of the year to compare Afghan and Indian harvest seasons. The objective of the study is to identify market

opportunities for Afghan products when prices are likely to be higher in the Indian market.

## Import Guides

Lack of knowledge on import regulations, policies and procedures is an obstacle for increasing exports to overseas markets. To complement its Market Guides, AMP is developing Import Guides for India, the UAE and Kazakhstan to help agribusinesses understand general and product-specific regulations and standards for those countries. Similar to the Market Guides, AMP recruited three student consultants from the University of Manchester in the UK to undertake the studies with inputs from AMP's Gulf Region Trade Office Specialist and Indian Marketing and Trade Facilitation Specialist. Drafts of the guides were completed and will be finalized in FY2021.

## Afghan Horticultural Catalog

Many potential buyers at overseas trade shows at which Afghan exporters participate are unfamiliar



*Abjosh raisins from Kandahar are unique in the region with a high potential export value, but actual awareness of these raisins in other countries is low.*

with the full range of agricultural products available from Afghanistan. AMP is working to create an Afghan Horticultural Catalog to promote the wide variety of products available from Afghan traders. The catalog will include photographs, physical descriptions, harvest periods, uses, nutritional value and reported medicinal qualities or health benefits of each product.

AMP's regional personnel contacted agribusinesses and academics to compile a preliminary list of more than 60 products available from Afghanistan (including fresh fruit, vegetables, dried fruit, nuts, spices, seeds and oil seeds, gums and resins, and medicinal plants). Lists included different varieties for each of these products, the provinces where they are grown, months of harvest and information on where they are currently being exported.

During the fiscal year, the list of Afghan products was reduced and finalized based on anticipated commercial and export viability (including fresh fruit, vegetables, dried fruit, nuts, spices, seeds and oil seeds, gums and resins, and medicinal plants). Draft profiles were also developed for three products, which will form the template for additional products.

## Export Facilitation

Under Strategy 1, AMP records the exports facilitated to Afghanistan's traditional export markets of India, the UAE and Kazakhstan (for exports facilitated to other international markets, see Strategy 3). In FY2020, AMP recorded 2,826 MT of exports valued at \$12.4 million to India and the UAE.<sup>1</sup> Goods included raisins, almonds, mulberries, cumin, watermelon seeds, figs, dried apricots, saffron, cherries, figs and other products. See table below. For a table showing total exports facilitated under both strategies, see Annex 2.

**Table 3: AMP Export Facilitation to Existing Markets**

Country	Q2		Q3		Q4		Total	
	MT	USD	MT	USD	MT	USD	MT	USD
India	8	61,902	660	6,058,273	844	1,973,136	1,512	8,093,311
UAE	124	524,040	1,029.13	3,155,339	161	585,207	1,314	4,264,586
<b>Total</b>	<b>132</b>	<b>585,942</b>	<b>1,689</b>	<b>9,213,612</b>	<b>1,005</b>	<b>2,558,343</b>	<b>2,826</b>	<b>12,357,897</b>

<sup>1</sup> No exports were facilitated to Kazakhstan.

AMP personnel gather market information on a regular basis for dissemination to client agribusiness partners and other USAID IPs. The market information includes weekly price information from Kabul, Kandahar, Balkh, Herat and Nangarhar for a wide range of horticultural products, and twice-monthly wholesale, retail and online price data from Dubai, Istanbul, and Delhi for products that Afghanistan exports. AMP also collects information on exports and domestic sales conducted by AMP agribusinesses, and exports made through the Afghan government’s air corridor program.

AMP assists its agribusiness partners with a variety of trade facilitation issues. In FY2020, such support included:

- Following up on trade and border issues between Afghanistan, Pakistan and India and preparing a weekly supply chain status report.
- Assisting businesses in reserving space on the Government of Afghanistan’s air corridor program
- Liaising with the Afghan Customs Dept (ACD), MAIL and ACCI on behalf of AMP businesses.
- Connecting Setara Dry Fruits Company with shipping companies to assist them in sending their products to Europe.
- Introducing AMP agribusiness partners to Kabul Packages Company and Baheer Packages for sourcing packaging materials.
- Gathering export data from ACD.
- Researching costs for shipping 20’, 40’ and reefer containers to India and the UAE through different routes (pre- and current COVID-19 costs).
- Participating in an open dialogue on export challenges and barriers organized and hosted by the Directorate of Balkh Industry and Commerce together with the Acting MOIC Minister, Balkh government officials and private sector companies.

Late in the year, AMP agribusinesses and personnel participated in online training webinars organized by RADP-E. AMP personnel and client agribusinesses participated in the three presentations outlined below.

**Table 4: RADP-E Online Training Webinars**

Topic	# AMP Personnel Participants	# AMP Agribusiness Participants
Trade Show Mission and General Marketing Preparations	13	16
Sorting and Packaging for Export Markets	12	20
Proper Crop Harvesting and Cold Storage for Export	7	14

## Air Export Program

Throughout the fiscal year, the coronavirus pandemic had a significant impact on the ability of Afghan agribusinesses to export high value and perishable products to existing and new markets. A reduction in air traffic (particularly passenger flights able to carry cargo), frequent border closures (for political and safety reasons) and increased demand on trucks has meant that agribusinesses have struggled to find ways of getting their products out of the country.

In responding to these challenges, during the fourth quarter AMP organized an air cargo initiative that would subsidize cargo flights to India and the UAE. The first cargo flight consisted of a shipment of 37 MT of horticultural products from Kabul to Sharjah, UAE, on September 27. Products from three agribusinesses included grapes, coriander, okra, bitter gourd, dried figs, dried apricots, white mulberries, pistachios, raisins and almonds. The air charter operator, Airglow Aviation Services, was selected through an open competitive bidding process.



Although the Government of Afghanistan's air corridor program is currently operating, it mainly uses belly space on a reduced number of passenger flights and therefore limits agribusinesses to exporting small volumes of their products. Using space on passenger flights is often unreliable because payload depends on the volume of passenger baggage, which takes priority. While the AMP air charter to Sharjah supported only a smaller number of agribusinesses, it enabled them to transport single-shipment commercial volumes demanded by well-established importers, and therefore prevented the need to separate out shipments among multiple flights that would potentially delay the collection of goods at destination. Agribusinesses were required to contribute a nominal cost for the shipment in line with the government's air cargo program so as to not be seen as a competing program.



*Dried fruits are shown being prepared for loading and shipment via air AMP's air cargo initiative.*

In executing this pilot shipment, AMP liaised with the Deputy Minister of Policy at the Afghanistan Civil Aviation Authority, Director General of Customs, Director of Private Sector Development at MAIL, Hamid Karzai International Airport (HKIA) Customs Head and the Director of Export Promotion and Investment at ACCI. AMP also supported exporters with the customs clearance process.

AMP has arranged additional flights from Kabul to Mumbai and Sharjah early in the next fiscal year. Mumbai is a relatively new market for Afghan agribusinesses that have traditionally directed their products to Delhi and northern India. AMP will produce a comprehensive report at the end of the pilot program to establish whether it may be possible to operate cargo flights on a regular basis to key target markets in the future.

## **Trade Offices**

AMP was tasked with re-establishing and maintaining trade offices set up under CHAMP in India, the UAE and Kazakhstan (as well as establishing trade office in new markets, as discussed in Strategy 3). Trade offices ensure that Afghan traders are able to engage in those markets with the best possible commercial terms. This provides a sustainable basis for growth in the value of exports by facilitating linkages between traders and buyers, promoting Afghan exports at exhibitions and seeking new buyers for Afghan products.

### **India Trade Office**

At the outset of the program, AMP undertook activities in preparation for the re-establishment of the India Trade Office and anticipated establishing it in Mumbai. The Consul General and Commercial Attaché expressed interest in hosting the trade office at the consulate building in Mumbai, if permission were obtained by the Ministry of Foreign Affairs in Kabul. AMP hired a Marketing and Trade Facilitation Specialist during the second quarter to assist with information gathering on the status of the India market during the pandemic.

Ultimately, due to the outbreak of the COVID-19 pandemic in India, re-establishment of the India Trade Office did not take place during FY2020. However, interviews for the India Trade Office Specialist position took place during the fourth quarter, with recruitment of the selected candidate to occur in early FY2021.

Despite the lack of a functioning trade office, the Marketing and Trade Facilitation Specialist was able to provide critical project support. These activities included:

- Updating AMP on the status of the supply chain to Delhi and Mumbai on a weekly basis, including information on diplomatic missions, border crossings, transport networks, import procedures, warehouses and cold stores, wholesale and retail markets, and the impact of the

pandemic on the economy. The consultant maintained regular contact with customs representatives, clearing agents, diplomatic representatives, traders, and market associations.

- Maintaining close watch on Wagah/Atari border activities, including issues related to operations and procedural changes, and obtaining daily data on vehicles crossing with Afghan products
- Keeping AMP colleagues informed of new or updated legislation, such as the requirement for bank guarantees for certain products where mis-declaration of origin may be suspected.
- Collecting wholesale, retail and online horticultural prices every two weeks.
- Reconnecting with Delhi and Mumbai traders to promote Afghan horticultural products.
- Re-establishing relationships with Afghan exporters based in India.
- Undertaking reference checks on Indian buyers.
- Providing information for the India Market and Import Guides.
- Facilitating imports of Afghan products and providing troubleshooting support, as required, for Afghan agribusinesses—for example, assisting one juice manufacturer in verifying that his labels were in compliance with FSSAI legislation prior to product testing.
- Proactive engagement in specific trade impediments relating to saffron and asafetida.
- Engaging with Indian supermarket chains related to promotion of Afghan products.
- Examining two issues concerning the Wagah/Atari border raised by Afghan agribusinesses – excessive scanning of products by Indian customs and delays on apple shipments – both of which were explained by increased security concerns and/or regulation. Guidance was provided on how to mitigate these two issues.

### **Gulf Region Trade Office**

Unlike CHAMP's Dubai Trade Office, AMP envisioned a UAE-based trade office based that would extend the reach of Afghan exports into the entire Gulf region. Early on, AMP recruited a Trade Office Specialist for the Gulf Region who previously worked in a similar role on CHAMP. In his first two weeks of employment, the specialist met with the Consul General of Afghanistan to Dubai, started working on the UAE Import Guide and met with representatives of two air cargo companies with the resources to export Afghan products from Kabul and Kandahar.

Establishment of the Gulf Trade Office was anticipated for the third fiscal quarter of 2020. This was delayed during the pandemic, during which time the specialist continued to provide the following services:

- Liaising regularly with representatives of airlines (Fly Dubai, Ariana and Air Arabia) on cargo space for Afghan exports.
- Gathering information on air cargo companies operational in the UAE.
- Coordinating with the Commercial Attaché and Consul General in Dubai.
- Collecting wholesale, retail and online horticultural prices every two weeks.
- Identifying UAE and Saudi Arabian buyers for a wide range of horticultural products.
- Providing information for the UAE Market and Import Guides.

The Gulf Trade Office had not been established by the end of FY2020. Setup of the office and staff recruitment were projected to take place during the second quarter of FY2021.

## Strategy 2: Expand the Number of Export Products

AMP works with farmers and businesses to introduce new products to domestic and international markets. AMP will survey available products in Afghanistan and cross-reference them with products being purchased by current markets and explore new markets for these products. Traders and processors will be introduced to these new opportunities by the Business Development Team and



*AMP is currently analyzing the full range of Afghan agricultural products for potential export.*

trained on the market demands, phytosanitary requirements and packaging/labeling requirements. Traders and processors will then be introduced to farmer groups to begin sourcing the new products.

### Product Inventory

Early in the year, AMP began an analysis of current exports to identify new products for export. This began with conducting a national inventory of current production. The purpose was to identify products not being exported to target markets and determining their feasibility for export.

Late in the year, a Business and SPS Training Needs Assessment was conducted to identify the training needs of our Afghan agribusiness clients, with questions on products currently being traded and processed. These products were added to the product catalog. The survey showed that a number of agribusiness are interested in developing new products, particularly seasoned nuts in retail-ready packages.

AMP developed an export product portfolio matrix of Afghan products, with price points and available volumes, that are cross-referenced and scored with current and potential markets based on growth and market prices. AMP also documented the sourcing of these products and mapped the supply chains of these products.

Site assessments were completed on all Kabul-based AMP client agribusinesses (see Strategy 4). A critical aspect of the assessments was to identify all products being traded (raw, processed and value-added) and add them to the product inventory and product catalog. Professional photographs were taken of all products and price points determined. The product catalog and inventory were updated with new products identified and cross-referenced in the export product portfolio matrix.

By the end of the fiscal year, AMP had completed its inventory of products to be included in the product catalog. This information was shared with other IPs for review and input.

### New Market Identification

In June, a market report was conducted on Afghan horticultural exports to Turkey. This report provided key information on high value horticulture products, market demands and fluctuations, growth rates, key market actors, and specific Afghan products exported to Turkey. The research utilized data from 2015-2019 and included fresh fruits, dried fruits, nuts and spices. Turkish import volumes and prices were cross-referenced with Afghan Product inventory. This market research report will help AMP stakeholders in planning potential exports of new products to Turkey. This information will be utilized for drafting of the Turkish Market Guide.

By the end of the year, a detailed market analysis on the Chinese market was underway, with future reports anticipated to focus on Kyrgyzstan, Tajikistan, Turkmenistan and Uzbekistan.

### Upcoming Activities

- Hiring of Senior Market Research Specialist.
- Site Assessments of AMP agribusiness clients in the provinces.
- Completion of Chinese Market Guide.

- Completion of Market Guides on Turkmenistan and Uzbekistan.
- Completion of product inventory after site assessments are completed.
- Completion of Product Cross Referencing in current Markets
- A value chain analysis will be conducted on Afghan products that show high potential for low-cost value addition. Products identified for this analysis include nuts, hing, licorice, and black cumin.
- Market research will be conducted on the essential oil products in Afghanistan and potential markets including North America, the EU and the UK.

## Strategy 3: Develop New Markets for Afghan Exports

While India and the UAE are a main focus of AMP activities under Strategy 1, AMP works to push the geographic ring outward from Afghanistan to include new markets. AMP considers the opportunities, competition, government regulations, food safety requirements and trade corridors for these markets. New markets targeted initially under Strategy 3 include Saudi Arabia, Turkey and Russia.

### Market Guides

Similar to the Market Guides being developed for India, the UAE and Kazakhstan, mentioned under Strategy 1, AMP developed Market Guides for Turkey, Saudi Arabia, and Russia. As indicated earlier, the guides will include information on market size, market growth, import demand, domestic production, market requirements, prices and competing export destinations for products that Afghanistan currently exports.

The Market Guides for Russia and Saudi Arabia were completed and were under technical review by the end of FY2020. The Turkish Market Guide was underway, with expected completion in early FY2021. The Executive Summaries of each Market Guide will be translated into Dari and Pashto.

### Import Guides

AMP also developed Import Guides for Turkey, Russia and Saudi Arabia to help agribusinesses understand general and product-specific regulations and standards. The Import Guides were completed in draft form, with finalization expected in FY2021, as they require significant technical editing to check for accuracy.

### Trade Shows

As indicated under Strategy 1, all trade events to new markets were cancelled or postponed through the end of the fiscal year because of the coronavirus pandemic. These included trade events in new markets, as shown in the table below.

**Table 5 - Trade Show Participation in New Markets**

Event	Original Date	Revised Date
World Food Istanbul, Istanbul, Turkey	2-5 September 2020	November 26-28, 2020
World Food Moscow, Moscow, Russia	22-25 September 2020	n.a.
FoodEx Saudi, Jeddah, Saudi Arabia	9-12 November 2020	Cancelled

World Food Moscow took place as planned but AMP was unable to support the participation of Afghan agribusinesses as the Russian Embassy was not issuing visas for Afghan citizens. AMP had reserved a space of 136 m<sup>2</sup> to be shared with AVC-HVC. Together, both projects had shortlisted 26 businesses for participation, completed vetting for trade show organizers and coordinated activities including preliminary preparations for visas with the Afghan Commercial Attaché based in Moscow.

World Food Istanbul was scheduled to take place in early FY2021, although flights were cancelled between Kabul and Turkey, as well as the UAE and Turkey, making it extremely difficult for Afghan citizens to get to Turkey even with valid visas. AMP's marketing team worked collaboratively with colleagues from AVC-HVC crops to prepare businesses for the event. Visas were applied for and all

necessary registration procedures took place. Contracting with the organizers was left to the last possible moment in case of changes to travel or visa requirements.

## Trade Facilitation

Under Strategy 3, AMP facilitates the export of Afghan agricultural products to markets that do not typically import from Afghanistan but are seen as promising new markets for Afghan exporters. During the year, AMP facilitated the export of 4,778 MT valued at \$10.6 million to 15 countries in this category. See table below. For a table showing total exports facilitated under both strategies, see Annex 2.

**Table 6: AMP Export Facilitation to New Markets**

Country	Q2		Q3		Q4		Total	
	MT	USD	MT	USD	MT	USD	MT	USD
Turkey	-	-	528	949,428	1,158	2,699,855	1,686	3,649,283
Iraq	72	62,500	1,064	1,210,654	787	1,343,230	1,923	2,616,384
Saudi Arabia	-	-	2	1,746,500	-	-	2	1,746,500
Germany	88	234,080	107	273,289	85	204,450	280	711,819
Jordan	-	-	100	242,500	75	183,750	175	426,250
The Netherlands	107	342,000	21	33,940	-	-	128	375,940
Australia	-	-	150	224,569	21	32,063	171	256,632
Egypt	-	-	25	62,500	94	242,600	119	305,100
Russia	-	-	-	-	183	237,900	183	237,900
Bangladesh	-	-	25	87,500	25	86,250	50	173,750
Kuwait	-	-	0.2	24,600	0	24,000	0	48,600
China	-	-	-	-	39	33,292	39	33,292
Lithuania	-	-	21	32,063	-	-	21	32,063
Indonesia	1	15,534	-	-	-	-	1	15,534
U.S.	-	8,400	-	-	-	6,750	0	15,150
<b>Total</b>	<b>268</b>	<b>662,514</b>	<b>2,043</b>	<b>4,887,543</b>	<b>2,467</b>	<b>5,094,140</b>	<b>4,778</b>	<b>10,644,197</b>

## Trade Offices in New Markets

### Turkey

As shown in the export facilitation table above, Turkey represents a strong opportunity for Afghan horticultural exports. Preliminary results from the Turkish Market Guide and a road trip undertaken to major cities within the country further reinforced the need to open an AMP trade office in Istanbul. However, final conclusions awaited initial results from the World Food Istanbul trade fair, which was postponed until after the fiscal year. The Passage to Prosperity Trade & Investment Show, scheduled for March, was cancelled, which further delayed the decision on opening a trade office in Istanbul.

AMP retained a short-term consultant in Istanbul beginning at the start of the project. The consultant was initially hired to assist primarily with trade events, but his role expanded to address issues related to the pandemic. The consultant's activities included:

- Updating AMP on the status of the supply chain to Turkey on a weekly basis, including information on diplomatic missions, border crossings, transport networks, import procedures, warehouses and cold stores, wholesale and retail markets, and the impact of the pandemic on the economy.
- Collecting wholesale, retail and online horticultural prices every two weeks.
- Engaging with MUSIAD (a large agricultural sector association in Turkey with 11,000 members) introducing representative to AMP and Afghan products, inviting association members to World Food Istanbul and requesting support as a technical seminar speaker on



the sidelines of trade event.

- Traveling to five major cities of Turkey (Bursa, Izmir, Eskisehir, Konya and Mersin), visiting more than 50 dried fruit, nut and spice businesses, and promoting Afghan horticultural products and agribusinesses at World Food Istanbul.
- Compiling a list of potential buyers of dried fruit, nuts and spices from Istanbul, Bursa, Izmir, Eskisehir, Konya and Mersin to whom promotional information on Afghan products and businesses will be sent.
- Providing support and advice to Afghan exporters seeking to export, store and/or sell their products in Turkey or through Turkey to Europe.
- Assisting with research for the Turkish Market and Import Guides.

AMP will continue to follow developments in Turkey and assess the feasibility of opening a Turkish Trade Office in FY2021.

### **Upcoming Activities**

- Meet with businesses in Adana, Gaziantep, Kayseri and Ankara
- World Food Istanbul Trade Show, Istanbul, Turkey – November 25-28, 2020
- Completion of Market Guides for Turkey and Saudi Arabia
- Preparations for 2021 Trade Shows
- Continued collection of market information and prices

## **Strategy 4: Increased Value-Add of Agriculture Exports**

A majority of Afghan exports are commodities with no processing. AMP works with exporters to increase value-add production, which increases the value of exports (such as roasting nuts rather than selling them raw, or selling in retail-ready packaging rather than bulk). To meet the sophisticated needs of value-added processing, AMP will establish Business Incubators to nurture new businesses and Business Accelerators to take small successful ventures to become larger exporters.

### **Exporter Survey**

During the first operational quarter, AMP surveyed agribusinesses on their training needs and plans for value addition. A total of 67 AMP clients had responded to the survey by the end of the quarter, with 62 expressing interest in value-addition. Most were interested in making upgrades into automation in processing and packaging, with others showing interest in branding activities such as improved design and print for their packaging/labeling. A total of 16 companies asked AMP to organize study tours of food processing equipment manufacturers and 49 companies expressed a need for better packaging.

The training needs expressed by the respondents varied widely, from management to food production and processing. To meet these needs, AMP began channeling efforts into end market research (i.e. the Market and Import Guides mentioned above), improved agility in the business incubation/acceleration programming, and assessing additional program support to agribusinesses.

### **Agribusiness Training Needs Assessment**

AMP conducted an assessment of agribusinesses in June to document the training and business development needs of 72 AMP clients in Balkh, Herat, Kabul, Kandahar and Nangarhar provinces. AMP conducted this study to understand priority training areas for agribusinesses and design customized course materials based on the survey findings. The study will help AMP better understand the products being developed by the clients so that AMP can create trainings that dovetail with their needs.

This study was commissioned as a follow-on to the business survey AMP conducted in the first quarter of the program. Due to the ongoing pandemic and the ensuing movement restrictions in the country, AMP conducted the interviews by phone. Survey findings will be used to design a three-year

training and business development plan to support AMP clients. Some parts of this survey were designed to serve as a baseline for evaluation of AMP business development efforts. Key findings included:

- Respondents indicated a strong demand for capacity building programs on packaging, labeling, food safety and quality certifications, and marketing and promotion (particularly branding) as well as business management (especially accounting, finance and project management).
- Most agribusinesses demonstrated interest in a Food Safety and Personal Hygiene training. Additional interest was noted in the areas of food safety management during COVID-19, product testing and analyzing product technical specifications, fumigation and food preservation, enhancing the shelf life of fresh fruits and Sanitary and Phytosanitary (SPS) trainings.
- Some agribusinesses intended to purchase new processing and packaging machinery over the next three years and to develop new products, which will require one-on-one technical advice. Some agribusinesses requested that AMP help put them in contact with the Agriculture Development Fund (ADF) for long-term Islamic loans or grant-marking projects.

These assessments were part of AMP's learning efforts that will evolve with the project.

## Site Assessments

In the fourth fiscal quarter, AMP conducted preliminary site visits of its client agribusinesses in Kabul to verify that the information provided to AMP through an initial survey regarding the capacity and business development needs of the business was reasonably accurate. AMP documented production, food safety, and business operation through photos and videos. AMP evaluated the facilities, staff, management and owners to determine whether the firm has the capacity and willingness to work with AMP to improve their business practices and brand. The survey identified potential areas in which AMP can provide technical support in adding additional new products and/or improve packaging, marketing, and branding of existing products.

AMP completed the site assessments of client businesses in Kabul and will conduct provincial visits in the upcoming fiscal year. During these site surveys, agribusinesses are evaluated and scored in the following categories:

- Business registration, profile, and management
- Finance and procurement
- Programs
- Human resources/managerial
- Branding
- Food safety and quality certification
- Operations
- Hygiene, food safety, and prevention of COVID-19 in the workplace
- Product information, the potential for new value-added products

Key findings in Kabul are summarized below:

- The COVID-19 pandemic has caused a significant reduction in production/processing as exports diminished due to border closures.
- An overwhelming majority of agribusinesses recognize a need for branding upgrade and contemporary promotional content for their marketing.
- Lack of stable and regular electricity is a common and persistent challenge to these businesses.
- While large-scale exporters applied COVID-19 mitigation and prevention plans in their workplaces, most medium and small-scale agribusiness did not practice wearing masks or social distancing.

- There is a sizeable demand for technical assistance in food safety certifications such as ISO 22000 and HACCP. Large-scale agribusiness requested support in renewals of their current certificates while medium and small-scale businesses asked for technical assistance and training in pre-audit for food safety certifications.
- Agribusinesses are usually understaffed or do not invest in human resource for marketing, research, and business development.
- Most training requested is in business management, packaging standards and design, QuickBooks, basic accounting, marketing and sales, proposal writing, branding and promotion, and one-on-one technical assistance on implementing HACCP and phytosanitary training.
- Agribusinesses take an interest in new markets, new product development, value addition but lack the capacity and skills for such endeavors.
- Most businesses lack proper filling, accounting, inventory, and asset registry systems.



*A site assessment is shown at Tak Dana Dry and Fresh Fruit Process Co. in Kabul.*

Site visits will take place to Herat, Kandahar, Balkh and Nangarhar in early FY2021. Upon completion of the provincial site visits, the data collected will be analyzed, and businesses will be scored based on their capacity. This will provide AMP with a more explicit picture of its clients' strengths and weaknesses and highlight areas where these businesses will need technical assistance. Once all site visits are completed, AMP will produce a narrative report that will detail findings and provide company-specific recommendations that will inform AMP programming.

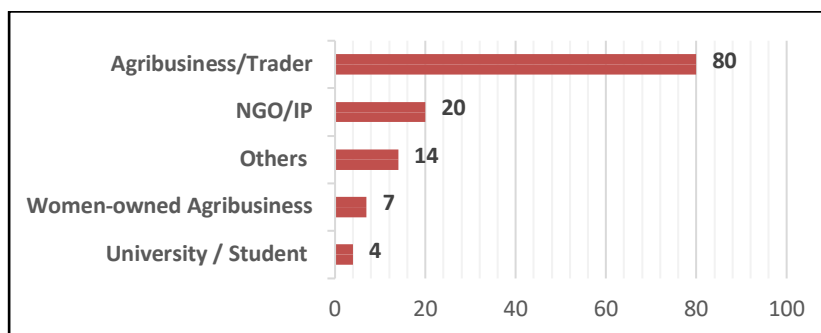
## Exporter Training

During the fourth fiscal quarter, AMP produced two courses aimed at providing specialty training for exporters and processors in food safety, business, and marketing. Due to the impact of COVID-19 and the country-wide lockdown, conducting in-class training was not feasible. AMP therefore developed an online platform to make training courses available to target traders and businesses.

### 1. Managing Food Safety During COVID-19

The first online course in the food safety series, Managing Food Safety during COVID-19, was released in July 2020. Traders found the course relevant and timely, with COVID-19 cases in Afghanistan peaking in July. The course was taken by 125 agribusinesses, traders, NGO workers and university students. The following chart provides an overview of the participants.

**Illus. 1: Participant Breakdown, Course 1**



This course was taken by traders and agribusinesses in 11 provinces: Balkh, Farah, Ghazni, Helmand, Herat, Kabul, Nangarhar, Kandahar, Kunduz, Paktika and Parwan.



The course received an overall 4.2 rating from participants:

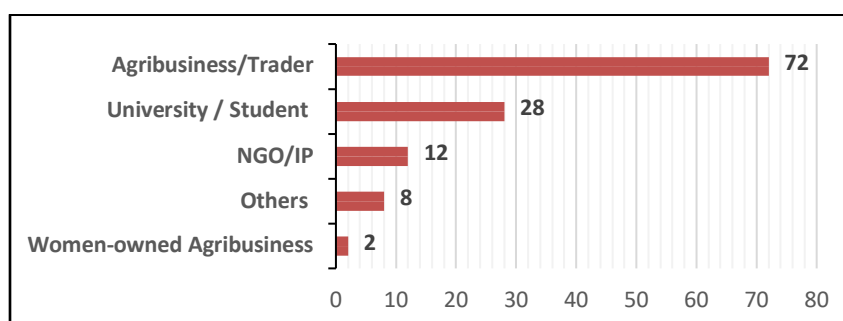
**Table 7: Course 1 - Rating by Participants (scale of 1 to 5)**

Topic	Avg. Score
Course duration	4.3
Increased knowledge	4.1
Trainer rating	4.2
<b>Total</b>	<b>4.3</b>

## 2. Food Safety and Personal Hygiene

The second online course in the food safety series, Food Safety and Personal Hygiene, was released in August 2020. The course objectives included an introduction to food safety, Good Agricultural Practices (GAP), Good Manufacturing Practices (GMP) and personal hygiene. This course was taken by 122 traders and entrepreneurs, including 22 females. The following chart provides an overview of the participants.

**Illus. 2: Participant Breakdown, Course 2**



**Table 8: Course 2 - Rating by Participants (scale of 1 to 5)**

Topic	Avg. Score
Course duration	4.3
Increased knowledge	4.3
Trainer rating	4.1
<b>Total</b>	<b>4.2</b>

The courses are available online at [www.amp-hub.com](http://www.amp-hub.com).

## Business Incubators and Accelerators

COVID-19 hindered implementation of AMP's Business Incubators and Business Accelerators. By the end of the year, AMP had identified three locations to set up a business incubation/acceleration center in Kabul. These options were under review for accessibility, security, and functionality. For the regions, AMP started preliminary talks with leading universities to host remote AMP incubation centers. These universities include Herat University, Balkh University, and Kandahar University. In the early FY2021, AMP will set up training spaces in Kabul and the regions for the incubation/acceleration program and start recruiting participants for the program.

AMP finalized coursework that will serve as general training for the business incubator and more tailored training as part of the accelerator training. These courses include the following:

- Human Resources Management – three modules – 120 minutes
- Introduction to Branding – two modules – 60 minutes

The chart below illustrates AMP's coursework development plan:

**Table 9: AMP Coursework Development Plan**

Course	Format	Sub-topics
<i>Food Safety Series</i>	Multiple companies/entrepreneurs	Food Safety overview
	Company-specific consulting for over two months	HACCP Plan Development
		Establishing a Food Safety Plan
		Food safety internal audit course
		Food safety audit
<i>Marketing Series</i>	Multiple companies/entrepreneurs	Marketing Overview
	Company-specific consulting over 2-month period	Target market/customer
		Branding
		Web Development
		Collateral
		Launch Plan
		Product launch
	Follow-up consultation	Sales analysis
<i>Business Management Series</i>	Multiple companies/entrepreneurs	Electronic accounting
		COGS accounting
		Forecasting cashflow
		Inventory management
		Product profitability
		Reporting
		Operations
		Leadership
		International Trade
		Human Resource Management

## Technical Assistance – Branding

A number of AMP exporters expressed an interest in developing new corporate logos and upgrading their corporate branding. AMP thus created a graphic communications unit to assist agribusiness firms in developing professional logos, websites, packaging designs and marketing materials.

During the fourth quarter, AMP provided branding assistance to nine Kabul-based agribusinesses. Of that number, seven companies were successfully rebranded or are in the process of rebranding, while the other two required only minor graphic assistance. AMP began by developing corporate emblems/logos, which is fundamental to brand identification. Most AMP clients had rudimentary logos but did not have branding guidelines to govern the full range of their graphic imaging, such as color usage, fonts and logo variations. AMP provided designs for business cards, letterhead, and packaging. Clients have the option of receiving a full range of graphic design media in the future, including brochures, product catalogues and other materials. The table below shows the logo designs created for the participating firms.

**Table 10: AMP Branding Assistance - Logos**

Company Name	Original Company Logo	AMP Developed Corporate Logo
Ahmad Tamim LTD		

Afghan Organic Trading Company		
Jabarkhail Ahmadi Trading Ltd.	None	
Haider Rafat LTD		
Kabul Saffron	None	
Afghanistan Red Gold Saffron Company		
Mumtaz Yousofzai		
Benazir Yakta Trading Company		
Queen Marjan Trading Co		

## Upcoming Activities

- Finalize and launch the following online courses:
  - Standards for labeling of Packaged Foods (October)
  - Fundamentals of Accounting (November)
  - Developing a HACCP Management Plan (December)
- Develop the following coursework for the business incubator and accelerator programs:
  - International Trade: Export Procedures – two modules – 60 minutes
  - Marketing Food Products – three modules – 120 minutes
  - Operations Management – three modules – 120 minutes
- Provide branding assistance to Afghan agribusinesses.

## Strategy 5: Develop Remote Rural Areas to Support Peace Effort

AMP will work in contested or recently peaceful areas that were formerly held by anti-government elements (AGEs) to provide immediate, visible impact and hope for Afghan farmers. As the livelihoods in these remote rural areas are dominated by agriculture, AMP support will be aimed at providing skills training and business opportunities to improve the lives of farmers in these areas.

### Crop and Market Connection Assessment

In preparation for AMP's activities under this strategy, the AMP extension team undertook a survey to identify crops/varieties currently grown, climate adaptation, current production methods, economic viability and potential for growth, and transport capability. The purpose of the survey was to guide the team in determining the best type of activities to help its rural client farmers, the types of crops, and the training needed. The survey was conducted in each district of the program and comprised all players of the chain including farmers, exporters, and extension team members. AMP interviewed 435 producers of different crops in 29 districts of AMP's target provinces. They also visited local markets and collected market price information from vendors. The surveys were sent to Kabul for analysis and further processing. These will be finalized in early FY2021.

### Improved Apricot Drying

The apricot is a perishable fruit that loses its quality within hours if not handled properly. Due to a lack of resources, cold storage facilities, and proper transportation, Afghan apricots often spoil and go to waste. During the peak season, there is an overabundance of apricots reaching the local markets, forcing farmers to sell their apricots at low prices. To help farmers avoid these losses, AMP is mainstreaming an improved technology of apricot drying that uses sulfur. Sulfur drying improves the shape, taste, and color of apricots, resulting in a higher value in the markets.



*Farmers in Kunduz Province are trained in apricot sulfur drying techniques.*

During the second operational quarter, AMP trained 80 farmers in apricot sulfur drying. As part of the training, farmers learned to sort, grade, and clean the apricots, arranging the apricots on wooden trays in a wooden structure called a sulfur-drying hut. The farmers then fumigated the apricots with sulfur for four to six hours. After removing the seeds and treating the apricots with paraffin oil, the

apricots are sun-dried until the fruits' moisture has been reduced to 20 percent. The dried apricots are then ready to be packaged and sold.

## Trellising

Trellising vineyards significantly improves the harvest yield of grapes, both in quality and in quantity. T-trellising systems consist of concrete poles running parallel to the vines and steel wires fixed over the poles.



*Vineyard trellising provides dramatic quality and output results for Afghan grape farmers, in some cases doubling yield.*

This system, capable of supporting the load of the grapes, places the vines at a manageable height for the average sized adult. With this technique grapes grow in greater quantities and reach a higher quality. Trellised vines are exposed to more sunlight, which encourages growth and increases yields and quality. Trellising also protects plants from the effects of flooding and hail. The net result is a doubling of yields and an increase in quality.

To increase farmers' income, AMP will trellis existing and newly planted vineyards in the grape-producing areas of, Kandahar, Helmand, Kunduz, and Balkh provinces.

COVID-19 restricted trellising activities during FY2021, so AMP focused instead on developing viticulture management training material and developing the specification for the trellising materials (i.e. trellis posts, end posts, wires, and T-bars). AMP finalized the translation of the grape Farm to Market Guide (developed under CHAMP) into Pashto, which will be printed for the use of farmers and exporters. AMP also finalized the design and specifications of the trellis inputs for publishing a Request for Quotations to procure inputs.

COVID-19 restricted trellising activities during

## Training of Trainers

AMP works to build the capacity of rural farmers and provide technical assistance in areas of proper orchard management, pre-harvest practices, integrated pest management (IPM), harvesting and post-harvest management. AMP achieves this through the training of trainers (AMP and Provincial Agriculture Irrigation and Livestock (PAIL) extension staff) who in turn train farmers. In these trainings, GAP is taught, improved methods explained, and new technologies are introduced.



*A training of trainers is held for AMP and PAIL members at the Jalalabad AMP office.*

During the fourth quarter, AMP trained 113 participants in in Balkh, Nangarhar, Ghazni, and Kunduz provinces. These consisted of 21 PAIL extension officers, 16 AMP horticulture extension officers and 76 lead farmers. The trainings focused on GAP, IPM and post-harvest management practices. The participants will use this training to assist fruit growers in generating higher yields from their orchards/vineyards and adding value to their products. For more details, see Annex 3.

## Cold Storage

Cold storage extends the shelf life of products and help producers avoid having to sell at peak production periods when prices are low. It then allows them to sell during the off at premium prices. With an eye to future interventions to upgrade cold storage facilities in Afghanistan, and thereby



increase farmer income through export marketing, during the second operational quarter, AMP undertook a survey to determine the existing cold storage capacity in each province. The survey found that cold storage was available in only eight provinces: Kabul, Kandahar, Kunduz, Nangarhar, Herat, Balkh, Wardak and Laghman. The survey found that 27 of the 35 existing facilities were fully active (with a storage capacity of 22,410 MT), with two partly active (4,000 MT) and six inactive (16,110 MT). The province of Balkh was found to have the highest cold storage capacity for fresh fruits and vegetables (19,000 MT), followed by Kandahar (11,830 MT), Kabul (4,100 MT) and Herat (4,020 MT). This information will help guide activities in key production areas for better utilization of existing cold storage by commercial farmers and exporters.

## Farmer Field Schools

A core principle of AMP methodology centers on building the capacity of individual farmers to sustainably improve their products for supply to regional and international markets. The Farmer Field



*Registration of farmers for formation of a CIG, Balkh Province.*

School (FFS) is a learning process whereby farmers are presented with new technologies, new ideas, new situations and new ways of responding to agricultural challenges. The knowledge acquired during the learning process builds on existing knowledge, enabling farmers to adapt existing technologies to become more productive, more profitable, and more responsive to changing conditions with the best use of limited resources. This knowledge has the potential to improve orchards/vineyards, boosting farmer income and thereby increasing Afghan exports to regional and international markets.

During FY2020, AMP established 224 common interest groups in Kandahar, Balkh, Kunduz, Ghazni and Zabul provinces, comprising 3,353 farmers. For detailed information please see Annex 4.

AMP facilitated a total of 70 FFS sessions for a total of 720 farmers in Ghazni, Kunduz, Kandahar and Zabul provinces. The topics focused on apricot drying methods, irrigation management, IPM, and post-harvest handling of grapes, apples, almonds, apricots and pomegranates.

**Table 11: FFS Facilitation**

SN	Province	# of FFS	Number of Farmers	Topics
1	Ghazni	32	276	<ul style="list-style-type: none"> <li>▪ Sulfur apricot drying</li> <li>▪ Irrigation, IPM, harvest and post-harvest management of apricots and apples.</li> </ul>
2	Kunduz	20	220	<ul style="list-style-type: none"> <li>▪ Irrigation, IPM, harvest and post-harvest management of grapes and almonds.</li> </ul>
3	Kandahar	10	132	<ul style="list-style-type: none"> <li>▪ Irrigation, IPM, pomegranate sun scald and cracking</li> <li>▪ Pomegranate and fig harvest and post-harvest management.</li> </ul>
4	Zabul	8	92	<ul style="list-style-type: none"> <li>▪ Irrigation, IPM, pomegranate sun scald and cracking</li> <li>▪ Pomegranate, almond and fig harvest and post-harvest management.</li> </ul>
<b>Total</b>		<b>70</b>	<b>720</b>	

## Orchard/Vineyard Establishment

AMP works to establish new orchards and vineyards to generate job opportunities and reduce poverty among rural Afghan farmers by helping them shift from relatively low-value annual crops, such as wheat, to relatively high-value perennial crops, such as citrus, apples, pears, peaches, apricots, almonds, grapes and other fruits, depending on the local climate. Participants will receive saplings and cuttings, assistance with layout and planting and other incentives.

During FY2020, AMP registered farmers to participate in the program, with around 98% of activities being scheduled in former conflict areas recently cleansed of Taliban and ISIS elements, which have not previously participated in ROP activities. AMP has presented the program to local village leaders, shuras and DAIR offices, then organized meetings with interested farmers, individually and in groups. AMP provided technical information to interested farmers to help them make informed decisions in accordance with their circumstances.

A total of 1,166 new farmers holding 350 ha of land were registered to participate in the establishment of apple, apricot, almond, peach, plum, pomegranate, fig and citrus orchards, as well as grape vineyards, in the fall and spring seasons of FY2021.

### Nursery assessments

For its orchard/vineyard establishment program, AMP will procure certified saplings/rooted cuttings from member nurseries of the Afghanistan National Nursery Grower Organization (ANNGO) in key provinces. During the fourth quarter, AMP surveyed 64 commercial nurseries in Helmand, Kunduz, Balkh, and Nangarhar provinces to determine the quality of the saplings produced. The 64 nurseries were found to be able to provide approximately 1.8 million quality saplings/rooted cuttings according to the standards set by AMP for the establishment of fruit orchards/vineyards during the fall and spring season.



*AMP conducts a nursery assessment in Nangarhar Province.*

## Cross-Cutting Activities

### COVID-19 Impact and Mitigation Efforts

The impact of the COVID-19 pandemic was more prolonged and severe than many expected. Borders were closed for a period of time and even when officially opened, were closed temporarily for prolonged periods of time due to civil unrest or political reasons. By the end of the fiscal year there were still long delays at border crossings with Pakistan, resulting in large volumes of fresh fruit and vegetables being lost. Air routes were also affected, with some routes opening and then closing shortly thereafter, and flights cancelled for weeks at a time.

The pandemic situation in each of Afghanistan's major markets also impacted trade. India, the largest market, struggled to have control over the pandemic. Interstate transport was prohibited for a long period of time, flights were disrupted and market demand was significantly lower than usual.

The export data suggested that the negative predictions made by AMP's agribusinesses in April were likely to be accurate. AMP thus undertook an assessment among 53 of its partner agribusinesses on the potential impact of the pandemic on their businesses. One-third of all agribusinesses anticipated their export volumes decreasing by more than 75% this year, even if exports resume later in the year. The highest number of respondents (43%) anticipated a reduction of between 50-75%, 18% anticipated a reduction of 25-50% and 6% anticipated a reduction of less than 25%.

As a result of the assessment, AMP prepared a COVID-19 Action Plan in the final quarter of the fiscal year to address many of the anticipated challenges and constraints related to the pandemic. Activities undertaken in support of the Action Plan included:

- Preparation of a Supply Chain Status Report that examined all steps in the supply chain, updated on a weekly basis.
- Regular sharing of information relating to borders and trade routes.
- Organization of dedicated cargo flights to major markets.
- An assessment of transportation costs to ship 20' and 40' standard containers and reefers via different trade corridors.
- Frequent engagement with agribusiness partners to understand their challenges and concerns, and shared information relating to transport options.

## Trade Incentives

Due to other priorities resulting from the pandemic, and because of the constantly changing trade circumstances, AMP did not launch its trade incentive program in FY2020. This will become a priority in FY2021 as the program assimilates the trade constraints emerging from the pandemic. The focus will remain on increasing exports of new and existing products to new primary or secondary markets, adopting new management or processing technologies, improving packaging design, developing marketing materials and adopting food safety standards.

## Trade Impediment Mitigation

### *Kabul Packaging Companies*

During the first quarter, AMP's Senior Trade Facilitation Specialist visited Kabul Packages Company to assess progress in implementing recommendations made by CHAMP's packaging consultant at the end of last year. Many of the recommendations relating to new procedures in setting up the processing equipment have already been implemented. The short assessment was shared with the consultant to ascertain whether additional assistance is necessary to further improve product quality and production techniques. Unfortunately, due to COVID-19, a similar visit to Baheer Group, the other Kabul-based packaging company that received technical assistance, could not be undertaken. Further assistance will take place during FY2021.

### *Indian Export Impediments*

During the fourth quarter, AMP took action on a number of new trade impediments relating to agricultural exports to India.

**Saffron Re-evaluation.** Several Afghan agribusinesses informed AMP that upon arrival at Delhi airport, Indian customs officials were re-evaluating the value of Afghan saffron shipments. There is no clear understanding why the re-evaluation is taking place specifically on this product. AMP immediately raised the issue with the Delhi-based Afghan Commercial Attaché, Herat Saffron Association, Head of Customs Valuation Department, ACCI and colleagues at MAIL. The Afghanistan National Saffron Union sent a letter to ACCI, requesting them to send a letter to MOIC to formally raise the issue with the Indian Customs authorities and Indian Embassy in Kabul (via the Ministry of Foreign Affairs). The letter (which has been sent from MOIC to MOFA) requests an end to the re-evaluation. The impact of the re-evaluation and higher value placed on the product is an increase in GST paid to the Indian authorities. AMP is supporting all involved organizations in getting the procedure of re-evaluation overturned.

**GM Certification.** On August 21, 2020, the Government of India's Food Safety and Standards Authority (FSSAI) modified Section 22 of the Food Safety and Standards Act, 2006. Effective January 1, 2021, specific food product imports (fruits, vegetables and grains) into India must be accompanied by a certificate stating that the product is of non-GM origin, does not contain genetically modified organisms and is not genetically modified, to be issued by competent authority



from the exporting country. To prepare the certificate, AMP's trade facilitation team contacted Mr. Mahboobullah Nang, acting Deputy Minister Technical at MAIL, and shared the new order issued by FSSAI. He instructed MAIL to work on preparing such certificates. AMP's trade facilitation team is working closely with MAIL colleagues and anticipates providing them with technical assistance or training on GM policy making, as needed. AMP has suggested, based on feedback from India, requesting exemption from FSSAI until Afghanistan is able to test compliance and issue certificates. AMP also shared the new legislation with the MAIL Public Sector Directorate (PSD), which agreed to inform agribusinesses and the Afghanistan Fresh Fruit and Vegetable Union.

**Crop Contaminants.** On August 26, 2020, FSSAI proposed amendments in the Food Safety and Standards (Contaminants, Toxins and Residues) Regulations, 2011, to update tolerance limits for various crop contaminants, veterinary drugs and naturally occurring toxic substances. The draft regulation invites comments from World Trade Organization (WTO) member countries. The proposed amendments relate to various fresh fruit (grapes, watermelons, apples, pomegranates) and vegetables (okra, cabbages, cucumbers potatoes, cauliflowers, tomatoes, onions) and other horticultural products (pomegranate arils, bitter gourd, cumin). AMP shared the proposed legislation with MAIL.

**Food Standards.** On September 3, 2020, FSSAI proposed amendments to the Food Safety and Standards (Food Products Standards and Food Additives) Regulations, 2011, and invited WTO member countries to offer their comments on the amendments. Major amendments relate to new standards for certain food products and modified standards for others. The affected products include walnut kernels, oils (includes peanut, flaxseed, rapeseed, poppy seed, safflower seed, sesame, soybean, maize, watermelon seed, sunflower seed, avocado, grapeseed), and caffeinated and non-alcoholic beverages. Walnuts are given new guidelines relating to certain minimum requirements. AMP shared the proposed legislation with MAIL.

**Bank Guarantees.** On September 29, 2020, the Government of India's Ministry of Finance amended the Customs (Provisional Duty Assessment) Regulations 2011 to enable the Central Board of Excise and Customs to obtain bank guarantees equal to the total value of exempted duty from importers for goods imported into the country when there is suspicion that the origin of goods may have been mis-declared to avoid payment of duties. It is felt that this amended legislation specifically targets Afghanistan, which has been accused in the past of exporting apples, asafetida and saffron from neighboring countries but recording them as Afghan on the Country of Origin certificate. If the products are proved to be non-Afghanistan in origin, then the bank guarantee would be submitted to Indian Customs as a penalty. AMP shared this revised legislation with the Export Promotion and Investment Director at ACCI to disseminate among the trading community.

**Asafetida Documentation.** Earlier in the year, 38 MT of asafetida was held up at Delhi Customs due to incorrect documentation being submitted (the documentation needed to be for raw asafetida rather than processed). Following testing in Delhi, the shipments were gradually released. It is possible that the shipment was mis-declared as processed spice to avoid testing requirements.

At USAID's request, AMP presented several case studies relating to trade impediments during the last quarter. Three related specifically to charges being applied by the Taliban and government representatives.

AMP investigated the import charges being levied on an Afghan female-owned agribusiness by an Indian importer for 3 MT of dried fruit. The investigation found that some importers or clearing agents charge premium prices for their services, arguing that it's because of the pandemic but not giving further justification. In this case, the exporter was unaware that although there are no tariffs on dried fruit, GST still applies.

Importers and/or clearing agents rarely share the airport charges sheet with the Afghan exporters, unless asked. Not sharing the airport charges sheet enables various informal costs to be hidden. In some cases, legitimate charges are not receipted (such as loading/unloading, additional transportation, etc.) which also provide an opportunity for charges to be hidden. Importers and/or clearing agents also pay informal payments to avoid small regulatory infringements or administrative

bureaucracy. It is difficult to know to whom, and for what, these payments are made. Commission agents often add informal charges to an import when the commission they receive is too low.

In the end, AMP found that of the INR 360,237 paid to clear the shipment, INR 282,737 was for legitimate costs (GST, airport handling, delivery order, etc.), whereas INR 77,500 was informal payments where no receipt was given. Together, these informal costs represented approximately 20% of the total costs.

## **Horticulture Management Information System**

The Horticulture Management Information System (HMIS) is an online database embedded on the MAIL website. Created under CHAMP, it includes information on not only agricultural production and prices, but also critical additional information necessary for agricultural exporters. During FY2020, AMP collected data on Afghanistan's horticultural imports and exports, analyzing the data and incorporating tables, charts and other graphics as appropriate. AMP regularly updated the database and disseminated information related to agricultural markets and trade to the public.

AMP held a coordination meeting with MAIL's PSD in March to review and discuss updates to the HMIS. The directorate suggested that AMP create a new portal to portray aggregate figures on Afghanistan's annual horticulture production. AMP will work closely with the PSD and Management Information System (MIS) unit to transition this database to them.

In September, AMP had a follow-up meeting with the PSD on the HMIS. Because of the loss of revenue due to the pandemic, MAIL was not able to hire the database administrator and data analyst they had planned to support the HMIS. Instead they requested that AMP hire these two positions so support the HMIS. Upon communicating this request to USAID, this was found to be outside of the scope of the project. AMP will work to transition the HMIS instead to ACCI or perhaps a university going forward to ensure its sustainability.

## **Gender and Youth Integration**

AMP works to integrate women and youth into all areas of program implementation. AMP's gender unit supports AMP's five primary strategies to bring more women and youth into the agribusiness sector, enable more start-ups to succeed and to incentivize existing agribusinesses (both male and female) to employ more youth, particularly young female entrepreneurs. Activities include identifying trade credit programs for women, food quality and safety courses, FFS training, branding support, packaging improvements, and expanding domestic sales. By creating more opportunities for entrepreneurship and business growth, AMP works to make women and youth an integral part of this important economic sector. Current activities are concentrated in Kabul, Balkh, Herat and Kunduz provinces.

AMP's agribusiness survey conducted during the first program quarter made it clear that processed foods (jams, jellies, tomato paste, snack foods, etc.) offer opportunities for women processors to make significant market penetration in both domestic and international markets. In order to support women's entry in this market, AMP will increase its hands-on training in food processing and hire a female to the Business Development Team to focus on this activity.

AMP liaised with MAIL's Home Economic Development Directorate and the PSD to identify potential women and youth-owned agribusinesses, female and youth farm associations as well as other IPs, NGOs, and business organizations to ascertain the needs of women and youth-owned enterprises. As appropriate, they will be offered AMP support beneficial for long-term growth and sustainability.

Late in the fiscal year, AMP identified female producers, female-owned businesses, and young entrepreneurs in targeted areas for participation in AMP activities. The gender unit will work with the Business Development Support Teams to design training programs that include mentorships. It will also facilitate woman traders and young entrepreneurs to attend national agricultural events. As AMP moves forward there will be an increased effort to focus on female youth as well as expanding the coordination and collaboration with other programs and organizations. The details of this are described in the FY2021 Implementation Plan.

### **Small Grants**

AMP reconnected with female recipients of grants and technical support under CHAMP to see how their businesses are progressing. AMP will offer continuing support so they can maximize the impact of the grants they received and take advantage of the technical and business support AMP offers for developing exports.

### **Online Training**

During the fourth quarter, AMP produced two courses aimed at providing specialty training for exporters and processors in food safety, business, and marketing. Due to the impact of COVID-19 and the country-wide lockdown, conducting in-class training was not feasible. AMP therefore developed an online platform to make training courses available to target traders and businesses. A total of nine women from agribusiness firms completed the first two online training modules. Seven participated in Managing Food Safety During COVID-19 and two participated in Food Safety and Personal Hygiene. More participants are expected during the upcoming quarter.

### **Export Facilitation**

AMP facilitates the export of Afghan agricultural products to existing markets as well as countries that do not typically import from Afghanistan but are seen as promising new markets for Afghan exporters. During FY2020, women-owned export firms exported fresh/dried fruit and saffron valued at \$142,004. This total has been collated into the total export figures given in Annex 2.

### **Site Assessments**

During the fourth quarter, AMP conducted preliminary site visits of its client agribusinesses in Kabul. The assessment was based on a close inspection of the company's operations to verify that the information provided to AMP through an initial survey regarding the capacity and business development needs of the business was reasonably accurate. AMP documented production, food safety, and business operation and took pictures and videos as appropriate. AMP evaluated the facilities, staff, management and owners to determine whether the firm has the capacity and willingness to work with AMP to improve their business practices and brand. The survey identified potential areas in which AMP can provide technical support in adding additional new products and/or improve packaging, marketing, and branding of existing products.

AMP visited 21 women-owned agribusinesses in Kabul. During these site surveys, the agribusinesses were evaluated and scored in the following categories:

- Business registration, profile, and management
- Finance and procurement
- Programs
- Human resources/managerial
- Branding
- Food safety and quality certification
- Operations
- Hygiene, food safety, and prevention of COVID-19 in the workplace
- Product information, the potential for new value-added products







The findings revealed the following:

- Women-owned agribusinesses visited are small-scale processors and/or exporters with limited experience in international markets.
- Pakistan and India are common target markets for women-owned businesses, while other existing and emerging markets remain out of reach due to unfamiliarity.
- Lack of management skills and proper administrative systems.
- Lack of skills to research and development of new products.
- Lack of proper processing facilities and processing tools and equipment.
- Lack of access to finance/capital for expansion (i.e., establishing proper processing centers and cold storage).
- Lack of access to technology for value-add processing and packaging.

## Branding Assistance

AMP supports the sustainable development of women-owned agribusinesses. As a step in this process, branding assistance was extended to three women-owned companies to improve their brand image. AMP provided logo and packaging designs. See below. In FY2021, AMP will design special packages for domestic markets as requested by some of the women-owned agribusinesses.

**Table 12: AMP Branding Assistance (Gender)**

Company Name	Original Company Logo	AMP Developed Corporate Logo
Mumtaz Yousofzai		
Benazir Yakta Trading Company		
Queen Marjan Trading Co		

## Farmer Field Schools

Women farmers will be trained under AMP's FFS program. The knowledge acquired during the FFS learning process builds on existing knowledge, enabling women to adapt existing technologies to become more productive, more profitable, and more responsive to changing conditions with the best use of limited resources. These vastly improve orchards/vineyards, boosting farmer income and significantly increasing Afghan exports to regional and international markets. Recruitment is currently underway for staff who will facilitate women's participation in FFS. Beneficiary selection is expected to begin during early FY2021.

## Sustainability

AMP is working to form relationships with local public and private universities as well as agribusiness industries in AMP's target provinces. The universities will support the Business Incubator and Accelerator by providing office space and know-how. AMP will provide support to the Food Technology Lab at Herat University to strengthen food safety and quality testing for up to 80 AMP-supported agribusinesses. AMP plans to organize a kick-off meeting with these universities to discuss the details of the collaboration and develop workplans with each. During the quarter, AMP drafted MOUs with AUAF and the public universities of Balkh, Herat, Kandahar and Kabul.

AMP will provide reagents to the Food Technology Lab at Herat University to support food safety and quality testing for up to 80 AMP-supported agribusinesses. AMP plans to organize a kick-off meeting with these universities to discuss potential partnerships once restrictions related to the pandemic have been lifted in FY2021.

# Monitoring, Evaluation and Learning

## Program Theory of Change

During the first implementation quarter, AMP's Monitoring, Evaluation and Learning (MEL) team developed the theory of change that will guide the three years of program activity. The paradigm, which was submitted to USAID, set forth the process by which AMP aims to achieve its overall impact: increased production and export of agricultural products to regional and global markets. This impact will be achieved through five outcomes, each of which is arrived at by a certain set of outputs and processes. These rely on a set of assumptions that must hold true for AMP to have a successful long-term impact:

- AMP clients show a willingness to engage with the project in its project activities.
- Relevant government authorities and institutions lend close cooperation and support to the AMP project team.
- Farmers, traders, communities and local stakeholders provide support to the project, enabling AMP to implement its activities to maximum effect.

Improving the marketability of Afghan products to domestic and international markets is critical to project success. To achieve this end, AMP depends on the following assumptions to hold true:

- The target area remains sufficiently secure to enable the project team to conduct the activities effectively and on time.
- Local stakeholders and communities cooperate with the project team to effectively roll out activities in the area.
- Stakeholders remain committed to support AMP both at the national and community level.

For more information, see Annex 5.

## Database Development


AMP is focused on having a solid and robust MEL system to ensure accountability and integrity in the data management and reporting system.

During the fourth quarter, the terms of reference for the database developer was finalized. The database will be utilized to collect quality data, store, process and report project data. The database will be supported with an online dashboard dissemination system. The system will collect quality data from the field through smart devices utilizing all essential steps to ensure quality data.

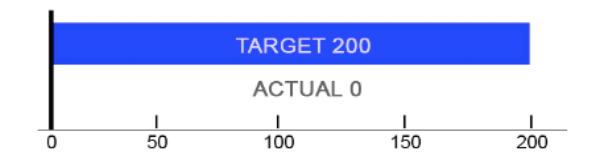
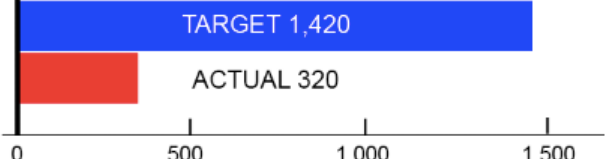
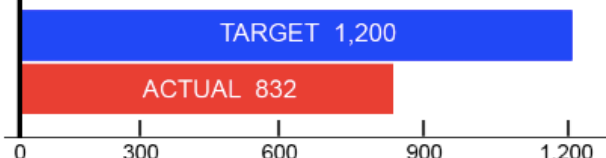


## Program Performance Indicators

AMP results are measured by 22 indicators as set forth in the Performance Management Plan. The following 15 indicators were utilized during FY2020, as shown in the table below. For complete AMP indicators, see Annex 6.

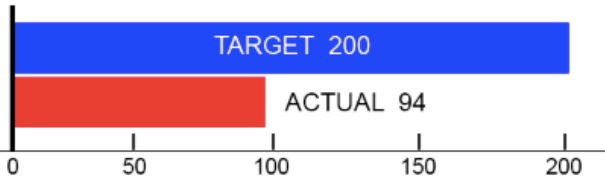
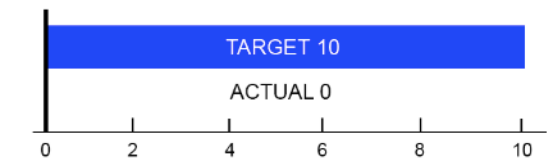
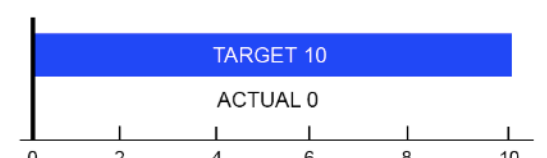
**Table 13: AMP Quarterly Indicator Achievement**

INDICATOR	TARGET VS. ACTUAL	% ACHIEVED
Total Value of sales (export + domestic) of targeted commodities as a result of USG assistance (USD)	 <p>TARGET \$30 mil ACTUAL \$23 mil</p>	75% of target

INDICATOR	TARGET VS. ACTUAL	% ACHIEVED						
<p>Exports throughout the year were short of projected targets due to the COVID19 pandemic. The eastern region recorded only domestic sales, as the Torkham border remained closed to imports and exports. Although the southern region reported exports, final sales had not been provided by traders by the end of the fiscal year, and will be documented in FY2021.</p>								
<p>EG.2.2-1 Number of firms receiving USG-funded technical assistance to export</p>	<table border="1"> <tr> <td>Indicator</td> <td>Target</td> <td>Actual</td> </tr> <tr> <td>EG.2.2-1 Number of firms receiving USG-funded technical assistance to export</td> <td>50</td> <td>78</td> </tr> </table>	Indicator	Target	Actual	EG.2.2-1 Number of firms receiving USG-funded technical assistance to export	50	78	<p>156% of target</p>
Indicator	Target	Actual						
EG.2.2-1 Number of firms receiving USG-funded technical assistance to export	50	78						
<p>During the year, 78 traders participated in AMP programs, exceeding the target of 50. This can be attributed to greater than expected interest in AMP activities and the technology platforms which made it easier for exporters to participate.</p>								
<p>EG.3-9 Number of full-time equivalent (FTE) jobs created with USG assistance</p>	<table border="1"> <tr> <td>Indicator</td> <td>Target</td> <td>Actual</td> </tr> <tr> <td>EG.3-9 Number of full-time equivalent (FTE) jobs created with USG assistance</td> <td>700</td> <td>476</td> </tr> </table>	Indicator	Target	Actual	EG.3-9 Number of full-time equivalent (FTE) jobs created with USG assistance	700	476	<p>68% of target</p>
Indicator	Target	Actual						
EG.3-9 Number of full-time equivalent (FTE) jobs created with USG assistance	700	476						
<p>Although this indicator fell short in achieving its target, more FTEs will be created in the coming period when post-pandemic export sales are expected to increase.</p>								
<p>Number of individuals who have received USG supported long term agricultural sector productivity or food security training</p>	<table border="1"> <tr> <td>Indicator</td> <td>Target</td> <td>Actual</td> </tr> <tr> <td>Number of individuals who have received USG supported long term agricultural sector productivity or food security training</td> <td>1,420</td> <td>1,160</td> </tr> </table>	Indicator	Target	Actual	Number of individuals who have received USG supported long term agricultural sector productivity or food security training	1,420	1,160	<p>82% of target</p>
Indicator	Target	Actual						
Number of individuals who have received USG supported long term agricultural sector productivity or food security training	1,420	1,160						
<p>Long-term agricultural training was hampered by COVID-19 movement restrictions and delays in activity roll-out. These targets will be met during FY2021.</p>								
<p>Percentage of participants in U.S. Government-assisted projects designed to increase access to productive economic resources who are youth (age 15–29)</p>	<table border="1"> <tr> <td>Indicator</td> <td>Target</td> <td>Actual</td> </tr> <tr> <td>Percentage of participants in U.S. Government-assisted projects designed to increase access to productive economic resources who are youth (age 15–29)</td> <td>30%</td> <td>18%</td> </tr> </table>	Indicator	Target	Actual	Percentage of participants in U.S. Government-assisted projects designed to increase access to productive economic resources who are youth (age 15–29)	30%	18%	<p>60% of target</p>
Indicator	Target	Actual						
Percentage of participants in U.S. Government-assisted projects designed to increase access to productive economic resources who are youth (age 15–29)	30%	18%						
<p>Activities for youth were delayed due to movement restrictions related to the COVID-19 pandemic. These targets will be met during FY2021.</p>								
<p>9.2e-1. Proportion of female participation in USG-assisted programs designed to increase access to productive economic resources (assets, credits, income or employment)</p>	<table border="1"> <tr> <td>Indicator</td> <td>Target</td> <td>Actual</td> </tr> <tr> <td>9.2e-1. Proportion of female participation in USG-assisted programs designed to increase access to productive economic resources (assets, credits, income or employment)</td> <td>20%</td> <td>6%</td> </tr> </table>	Indicator	Target	Actual	9.2e-1. Proportion of female participation in USG-assisted programs designed to increase access to productive economic resources (assets, credits, income or employment)	20%	6%	<p>33% of target</p>
Indicator	Target	Actual						
9.2e-1. Proportion of female participation in USG-assisted programs designed to increase access to productive economic resources (assets, credits, income or employment)	20%	6%						

INDICATOR	TARGET VS. ACTUAL	% ACHIEVED
<p>Activities for women were delayed due to movement restrictions related to the COVID-19 pandemic. These targets will be met during FY2021.</p>		
<p>Number of hectares with increased high value crop production as a result of USG programs</p>	 <p>A horizontal bar chart with a blue bar for 'TARGET 200' and a red bar for 'ACTUAL 0'. The x-axis is labeled from 0 to 200 in increments of 50.</p>	<p>0% of target</p>
<p>No data was recorded during the quarter for this indicator. AMP is currently selecting beneficiaries for its greenhouse, trellising and orchard establishment activities, which are expected to commence next quarter.</p>		
<p>5.1.1.c. Number of farmers growing high-value crops as a result of USG assistance</p>	 <p>A horizontal bar chart with a blue bar for 'TARGET 1,420' and a red bar for 'ACTUAL 320'. The x-axis is labeled from 0 to 1,500 in increments of 500.</p>	<p>23% of target</p>
<p>This indicator fell short of target owing to delays related to the COVID-19 pandemic, which impeded trainings and activities such as trellising and orchard establishment. This will be addressed in the upcoming fiscal year.</p>		
<p>EG.3.2-24 Number of individuals in the agriculture system who have applied improved management practices or technologies with USG assistance.</p>	 <p>A horizontal bar chart with a blue bar for 'TARGET 1,200' and a red bar for 'ACTUAL 832'. The x-axis is labeled from 0 to 1,200 in increments of 300.</p>	<p>69% of target</p>
<p>This indicator fell short of target owing to delays related to the COVID-19 pandemic. This will be addressed in the upcoming fiscal year.</p>		
<p>Value of agriculture-related financing accessed as a result of USG assistance</p>	 <p>A horizontal bar chart with a blue bar for 'TARGET \$1 MIL' and a red bar for 'ACTUAL 0'. The x-axis is labeled from 0 to \$1 MIL in increments of \$250,000.</p>	<p>0% of target</p>
<p>No data was recorded for this indicator owing to delays related to the COVID-19 pandemic. This will be addressed in the upcoming fiscal year.</p>		
<p>Number of households benefited by agriculture and alternative development interventions in targeted areas</p>	 <p>A horizontal bar chart with a blue bar for 'TARGET 1,420' and a red bar for 'ACTUAL 1,040'. The x-axis is labeled from 0 to 1,500 in increments of 500.</p>	<p>73% of target</p>
<p>This indicator fell short of target owing to delays related to the COVID-19 pandemic. This will be addressed in the upcoming fiscal year.</p>		



INDICATOR	TARGET VS. ACTUAL	% ACHIEVED
Volume of exports of targeted agriculture commodities as a result of USG assistance	N.A.	NA.
Total export tonnage for the year was 7,622 MT but during the fiscal year no targets had been set for this indicator.		
Number of Farmer Field Schools established as a result of USG assistance		47% of target
This indicator fell short of target owing to delays related to the COVID-19 pandemic, which impeded trainings. This will be addressed in the upcoming fiscal year.		
Number of Afghan and foreign businesses declaring to have received positive assistance from AMP overseas trade offices		0% of target
Establishment of AMP's trade offices has been delayed owing to COVID-19 restrictions.		
Number of Afghan agribusinesses paying a Trade Office directly for services or through a membership program		0% of target
Establishment of AMP's trade offices has been delayed owing to COVID-19 restrictions.		

## Financial Statement

Program spending in FY2020 (from program inception to September 30) totaled nearly \$3.3 million, or 39% of the \$8.7 million budget allocation for the year. Total program spending for this period was around \$3.3 million, or 11% of the approximately \$30 million budgeted for the three-year period. The COVID-19 pandemic dramatically altered AMP's budget forecasting, with cancellations and postponements of most international trade events and other program activities. For FY2020 expenditures, see table below. For the complete AMP Financial Statement, see Annex 7.



**Table 14: Statement of Expenditures, 2020**

Cost Category	FY 2020 Spending	Budget Allocation (2020)	FY2020 Attainment	Total Spending FY2020	Budget Allocation	Attainment
<b>Personnel</b>	\$1,886,184	\$3,078,665	61%	\$1,886,184	10,569,397	18%
<b>Travel and Per Diem</b>	\$43,853	\$154,022	28%	\$43,853	388,430	11%
<b>Direct Program Expenses</b>	\$778,595	\$3,791,588	21%	\$778,595	10,861,000	7%
<b>Overhead</b>	\$665,944	\$1,733,542	38%	\$665,944	8,181,173.00	8%
<b>Total</b>	<b>\$3,374,576</b>	<b>\$8,757,817</b>	<b>39%</b>	<b>\$3,374,576</b>	<b>\$30,000,000</b>	<b>11%</b>

**Personnel.** Expenses for salaries, fringe benefits and other employee allowances totaled \$1.8 million, or 61% of budget allocation for the fiscal year. Total project spending amounted to \$1.8 million, or 18% of budget for this category.

**Travel and Per Diem.** This category includes program-related travel expenses as well as R&R travel for expat personnel. 2020 spending through September totaled nearly \$43,853.28 (vs. \$154,022 budget for 2020), which translates to 72% under budget. Travel was lower than planned due to cancellation of most international trade events and/or visa refusals.

**Direct Program Expenses.** This category includes expenses for program inputs and supplies, equipment, vehicles and freight, fees to subcontractors and other direct costs. In 2020, the project spent \$770,837.73 vs. a budget of \$3.8 million, which resulted in underspending 79% of 2020 budget. Program expenses were low due to slower than expected grant program start-up and cancellation of international trade events and program activities due to the pandemic.

**Overhead.** This category included general administrative expenses accrued by ROP home office. During the fiscal year, overhead expenses totaled \$665,943.71 or 38% of totaled budget for the period.

**Non-Federal Funding (in-kind).** In-kind contributions will be incurred in Q1 of FY2021.

## Human Resources

During the AMP inception phase, AMP Human Resources (HR) was focused on hiring for all team positions. AMP updated the Organizational Chart to better support program strategies. Marketing positions were brought into the Trade Facilitation Team and the ME&L and Knowledge Management Team were brought under Business development. Other notable changes were to integrate the gender specialist positions into program delivery roles rather than stand-alone positions.

A total of 66 former CHAMP employees were initially rehired (based on satisfactory performance and current need) while an additional six non-CHAMP employees were hired. All salaries adhered to the National Technical Assistance salary scale. By the end of the fiscal year, AMP employed 110 local staff members (100 males, 10 females). More local staff positions were expected to be filled during FY2021.

AMP also employed five expatriate staff members during FY2020: Chief of Party (U.S.), Deputy Chief of Party (U.S.), Export Facilitation Director (UK), Finance and Compliance Director (Germany) and Communications Director (U.S.). AMP also employed a Singapore-based Supply Chain Specialist on an ongoing short-term technical assistance (STTA) basis. Early in the next quarter AMP will employ a full-time India Trade Office Specialist and an Environmental Compliance Specialist on an ongoing STTA basis.

# Challenges, Opportunities and Lessons Learned

## Challenges

### **COVID-19**

As mentioned throughout this report, AMP activities were severely curtailed by the COVID-19 pandemic. AMP expatriate staff were evacuated in mid-March and the AMP offices were closed, with local staff working from their homes starting March 22. Security staff remained at the local offices.

The pandemic led to the postponement or cancellation of Afghan exports across the board, due to land border closures, reduced number of passenger flights and therefore belly cargo availability, wholesale market closures in end markets, cancelled orders, deterioration of stored products (color and taste of dried fruit), inability to store products in cooler temperatures as summer commenced and increased transportation costs (due to limited passenger flights and increased demand on trucks). The launch of AMP's Incubation and Acceleration Hubs, classroom trainings and equipment assessments were all put on hold due to the pandemic, and will lead to delays in the fulfillment of AMP's work plan. The impact of the pandemic on AMP's client agribusinesses has not yet been determined, but is expected to be severe.

AMP was slated to participate in multiple trade events during the fiscal year, all but one of which were either canceled or postponed. The participation of Afghan exporters at international trade shows is a critical activity for the promotion of Afghan agricultural products abroad and the forging of business linkages between Afghan traders and overseas buyers. These cancellations and postponements will have a lingering effect on the ability of AMP to meet its export sales targets. More significantly, however, the lack of trade events has impaired the ability of exporters to generate sales and new business linkages. AMP will work to mitigate these shortfalls, but the residual impact is expected to be lasting.

With the closure of the office, AMP encountered challenges in paying staff members and vendors, who in the past had been paid by paper check. AMP resolved this problem by setting up an online banking system to transfer salaries and vendor payments. For fraud prevention, the system requires two-step authentication, and a daily limit of \$25,000 was put in place (with the exception of payroll payments). Staff returned to the office in the final fiscal quarter. Personal protective equipment was made available, including facemasks, disposable gloves and eye protection. Alcohol-based sanitizers were placed throughout the office. Staff were informed on proper safety measures to avoid the spread of COVID-19 at the office, including the importance of hygiene (particularly hand washing). Daily cleaning protocols were established to ensure workstations, equipment and facilities remained sterile.

### **Lack of electrical power**

Kabul's electricity supply experienced frequent shutdowns owing to Taliban attacks on the main power lines and electricity cut-offs from outside the country. This hindered agribusinesses in conducting business and made it difficult for processors to fulfill orders at full capacity. Generators can provide some relief, but in order to run large processing machinery the generator must be large, expensive and costly to operate on a continuous basis, further reducing margins.

### **Pakistan-India Border Issues**

During the final quarter, Indian customs officials in Mumbai confiscated nearly \$135 million in Iranian heroin shipped via Afghanistan. The drugs were concealed in plastic pipes painted to look like bamboo and declared to be ayurvedic medicine. The seizure was one of the largest narcotics haul in the city's history and has resulted in increased scrutiny of Afghan products at the Wagah/Atari border and changes to legislation relating to country-of-origin declarations. This is expected to create considerable delays for Afghan agricultural products entering India.

### **Security**

Security was a challenge to efficient program implementation throughout the year, particularly escalating violence in AMP's target districts. AMP field employees were frequently subject to threats

and unable to visit certain villages to promote project activities and deliver training to AMP clients.

## **Opportunities**

Afghan products are making their way into a greater number of export markets than was the case five or ten years ago. According to TradeMap.org, in 2016 India became the primary market for Afghan fruit and nuts. Similarly, in 2019, India imported 70% of Afghan spices (by value). AMP is developing Market Guides for India, the UAE and Kazakhstan to build on this growth by providing greater access to market information by Afghan agribusinesses on which horticultural products have the greatest potential in these markets. Identifying new markets to build on this momentum will be a priority in the next quarter.

The initial findings from the Agribusiness Training Needs Assessment found a much higher demand for development of branding and logos. It was found that more than 70% of firms surveyed requested this service provision and the most common reason given was to be more competitive in international markets. In response to this demand the Business Development Team went forward with the recruiting process of the Creative Specialist, who will focus on branding, logos and packaging design along with product and process photography and development of videos for training.

Many potential buyers at overseas trade shows at which Afghan exporters participate are unfamiliar with the full range of agricultural products available from Afghanistan. AMP is working to create an Afghan Horticultural Catalog to create greater awareness of, and demand for, the wide selections of products available from Afghan traders.

The COVID-19 pandemic increased the demand for trainings and technical assistance on personal hygiene, phytosanitary processes and good manufacturing processes. This demand will reduce the need to provide other incentives to draw participants to the trainings. This is also being reflected by more demanding PHS requirements and certifications in international markets, especially Pakistan and India.

### ***Demand for food safety certification***

The Business Training and Food Safety Training Survey found that only nine out of 50 respondents had obtained any food safety certifications (such as ISO 22000, HACCP, BRC, FFC 22000, Halal, etc.). The veracity of these certifications was not determined because the survey was conducted by telephone. All but two of the firms said they either wanted support to renew their existing food safety certifications and/or obtain new ones. Most of these agribusinesses lack even a basic understanding of certification requirements.

In response, the Business Development Team conducted a simple Cost Benefit Analysis and determined the best way to address this effectively was to hire a full-time staff member to focus on this need, outsourcing only the pre-audit and audit for the certifications. This Food Safety Specialist will provide regular guidance and support to AMP agribusinesses in Kabul and target provinces by identifying their food safety, processing, and certification needs. He/she will also develop food safety training materials, food processing manuals for current and new value-added products and teach short courses online and in the Business Incubator and Accelerator Centers on food safety and certification topics. The Food Safety Specialist will also coordinate and consult with local food regulatory bodies to get updates on new food export and import regulations and disseminate that to traders and agribusinesses.

### ***Alternative marketing platforms***

With the lingering effects of the pandemic on traditional in-person marketing models, agribusiness firms surveyed during the quarter showed great interest in AMP assistance on the development of alternative virtual methods to reach new buyers, including:

- The use of social media as marketing tools
- Training on Zoom and other communication methods
- Creating websites and Facebook pages.

- Developing videos which showcase products and processing facilities and then sharing the links with buyers and posting them on their web sites and other social media platforms.

As a result, AMP is considering the hiring of a web designer/direct marketing position. AMP will apply the lessons learned from its online training course development to look into some options for best serving this need from an IT platform perspective.

### **Training on business skills**

The launch of the online training courses was well received by agribusinesses, which have requested more modules, especially focusing on business skills. AMP will accelerate the development of new online courses and secure a location for the Kabul-based Business Incubator and Accelerator Center.

### **New Markets**

In June, the KMU completed a market research study on Turkey's horticulture imports. This report provided key information on high value horticulture products, market demands and fluctuations, growth rates, key market actors, and Afghanistan exports to Turkey. Turkey was found to be an attractive market for Afghanistan high value horticulture commodities. Turkey should become an even more lucrative market for Afghan products if it proceeds with a plan to remove the current 30% tariff on Afghan saffron. Currently most of Turkey's imported horticulture products are being supplied by the U.S., Chile, Iran, Italy, Germany and Spain.

## **Lessons Learned**

### **COVID-19 Lessons**

**Trade events.** COVID-19 made it clear that not only was Afghan horticulture exports too reliant on trade shows and also on small number of specific trade corridors. The cancellation or postponement of trade shows during the year led directly to a lack of program effectiveness, as AMP had no marketing alternatives in place. More emphasis will be placed in the future on developing alternate marketing platforms and direct sales. At the same time AMP will continue research efforts on new markets and alternative trade corridors to new and existing markets.

**Technology.** Because of the requirement to work from home, AMP's marketing, trade facilitation and overseas colleagues developed effective online communication techniques using Microsoft Teams, Zoom or Skype. AMP's marketing and trade facilitation team in Kabul, Herat, Balkh, Kandahar, Nangarhar, Delhi, Istanbul and Dubai met online as a group every week to discuss the impact of the pandemic on their businesses, update each other on activities and share knowledge and ideas on how to mitigate the impact of the pandemic.

Online communications became a fixture of AMP operations during the pandemic, and will likely remain in place when the pandemic subsides. This included a greater reliance on Microsoft (MS) Teams. This platform was found to be effective for situations where many callers are participating in a call, as it requires less bandwidth. MS Teams allows access to the entire MS Office suite in real time to allow for easy editing and sharing of documents, as well as linking emails and calendars. Both the Business Development and Export Facilitation Teams have linked MS Teams to their workplans, as well as MS SharePoint, SWAY, and Forms as an effective suite for efficient teambuilding. This is a good example of how COVID-19 sped the adoption of new technologies and displaced less-effective ones. In addition, the inability to conduct live trainings led AMP to move some of its exporter training programs to online webinars.

**Value-added Processing.** With the sudden loss of international buyers and the closing of borders, many exporters found themselves with fresh export-grade product stock that could not be sold. This has raised awareness for the importance of incorporating value-added processing to their product lines. With many agribusinesses lacking ready capital to undertake such measures because of the loss of revenue over the past six months, AMP is exploring ways of providing these firms with low-cost solutions (such as drying, grinding, sorting, etc.) that will extend the product shelf life and yield a higher price.

**Domestic sales.** The pandemic also underscored the reliance of agribusinesses on international exports. In order to accommodate COVID and other market shocks in the future, agribusinesses will need to place greater emphasis on the domestic market, even though margins are lower. Agribusinesses will also need to incorporate more value addition into their product lines. Value added products bring higher margins, longer shelf life and less costly shipping options.

### ***Air Cargo***

With the COVID-19 pandemic leading to the periodic closure of land border crossings, AMP responded by implementing an air cargo initiative that provided a quick remedy for exporters seeking to enter the UAE market. The program enabled AMP to examine the commercial feasibility of operating charter cargo flights from a technical and financial perspective and assess lessons learned for future cargo flights. The per-kilo costs of such flights are high, particularly for perishable products, and the cold chain infrastructure is not in place to maintain fresh fruit and vegetable quality. However, as the pandemic eases, the demand for cargo flights is expected to decrease, lowering operating costs. As agribusinesses become familiar with using commercial cargo planes to transport horticultural products (which will likely be more reliable than passenger planes), they may be willing to contribute a higher per-kilo cost. Increased demand for and frequency of cargo flights from Afghanistan for horticultural products is also expected to reduce overall costs.



## Annexes

### Annex 1: Gulfood 2020 Signed Contracts by Product and Importing Country

Product	Total Sales
Dried Figs	\$5,214,880
Golden Raisins	\$2,266,080
Dried Apricots	\$1,302,880
Green Raisins	\$1,164,520
Almonds	\$801,800
Black Raisins	\$797,850
Saffron	\$634,900
Raisins (Shindulkhani)	\$432,918
Sesame	\$157,280
Walnuts	\$123,000
Raisins	\$111,375
Hulled Sesame	\$105,600
<b>Total</b>	<b>\$13,206,433</b>

Country	Total Sales
India	\$11,126,730
UAE	\$481,800
Saudi Arabia	\$400,950
Turkey	\$371,880
Iraq	\$294,560
Italy	\$165,000
Kuwait	\$112,250
Vietnam	\$89,700
Kazakhstan	\$74,813
Indonesia	\$68,750
Egypt	\$20,000
<b>Total</b>	<b>\$13,206,433</b>

## Annex 2: Total Export Facilitation

Country	Q2		Q3		Q4		Total	
	MT	USD	MT	USD	MT	USD	MT	USD
<b>Existing Markets</b>								
India	8	61,902	660	6,058,273	844	1,973,136	1,580	3,092
UAE	124	524,040	1,029	3,155,339	161	585,207	1,314	4,264,586
<b>Subtotal</b>	<b>132</b>	<b>585,942</b>	<b>1,689</b>	<b>9,213,612</b>	<b>1,005</b>	<b>2,558,343</b>	<b>2,894</b>	<b>12,357,897</b>
<b>New/Emerging Markets</b>								
Turkey	-	-	528	949,428	1,158	2,699,855	1,686	3,649,283
Iraq	72	62,500	1,064	1,210,654	787	1,343,230	1,923	2,616,384
Saudi Arabia	-	-	2	1,746,500	-	-	2	1,746,500
Germany	88	234,080	107	273,289	85	204,450	280	711,819
Jordan	-	-	100	242,500	75	183,750	175	426,250
The Netherlands	107	342,000	21	33,940	-	-	128	375,940
Australia	-	-	150	224,569	21	32,063	171	256,632
Egypt	-	-	25	62,500	94	242,600	119	305,100
Russia	-	-	-	-	183	237,900	183	237,900
Bangladesh	-	-	25	87,500	25	86,250	50	173,750
Kuwait	-	-	0	24,600	0	24,000	0	48,600
China	-	-	-	-	39	33,292	39	33,292
Lithuania	-	-	21	32,063	-	-	21	32,063
Indonesia	1	15,534	-	-	-	-	1	15,534
U.S.	0.01	8,400	-	-	-	6,750	0.02	15,150
<b>Subtotal</b>	<b>268</b>	<b>662,514</b>	<b>2,043</b>	<b>4,887,543</b>	<b>2,467</b>	<b>5,094,140</b>	<b>4,778</b>	<b>10,644,197</b>
<b>Total</b>	<b>276</b>	<b>724,416</b>	<b>3,732</b>	<b>14,101,155</b>	<b>3,311</b>	<b>7,067,276</b>	<b>7,672</b>	<b>23,002,094</b>

### Annex 3: Training of Trainers

Training Topics	Location of the Event held	Province	Gender		Trainees			Total
			M	F	AMP	PAIL	Farmer	
Orchard Establishment, Postharvest consideration, On farm water management, FFS strategy, Trellising Installation and IPM strategy.	DAIL Balkh Office	Balkh	14	1	5	10	0	15
Orchard Establishment, Postharvest Consideration, On farm water management, FFS strategy, IPM Strategy	AMP Nangarhar Office	Nangarhar	17	0	5	11	1	17
Apricot drying through use of sulfur	AMP Ghazni office	Ghazni	17		2	0	15	17
Post-harvest management of Almond and Grapes	PAIL Office Kunduz	Kunduz	64		4		60	64
<b>Total</b>			<b>112</b>	<b>1</b>	<b>16</b>	<b>21</b>	<b>76</b>	<b>113</b>

#### Annex 4: FFS Common Interest Groups Established

Location			Crops																
S/N	Province	District	Apricot		Apple		Grapes		Almond		Pomegranate		Fig		Peach		Total		
			No. of Groups	No of Farmers	No. of Groups	No of Farmers	No. of Groups	No of Farmers	No. of Groups	No of Farmers	No. of Groups	No of Farmers	No. of Groups	No of Farmers	No. of Groups	No of Farmers	No. of Groups	No of Farmers	
1	Kandahar	Arghistan									20	270					20	270	
2		Khakrez									5	69					5	69	
3		Nish					5	70										5	70
4		Shahwalikot										12	168	3	42			15	210
5	Zabul	Arghandab	1	14					13	182			1	14			15	210	
6		Shahrisafa					2	28			5	70	8	112			15	210	
7		Shahjoy	5	70			10	140										15	210
8	Balkh	Dawlatabad	0	0	0	0	5	75	7	105					0	0	12	180	
9		Shoulgar	5	61	1	15	1	11	2	23					1	10	10	120	
10		Marmol			4	64	3	45	1	15							8	124	
11	Kunduz	Imam Sahib	2	40	1	15			17	255							20	310	
12		Ali Abad					5	75	6	90					4	60	15	225	
13		Khan Abad	2	30			11	165	2	30							15	225	
14		Chardara	3	45	1	15	5	225	16	240					5	75	30	600	
	Ghazni	Qarabagh	5	53													5	53	
		Moqur	5	70													5	70	
		Ander	3	33													3	33	
		Dehyak	7	85			4	79									11	164	
<b>Total</b>			<b>38</b>	<b>501</b>	<b>7</b>	<b>109</b>	<b>51</b>	<b>913</b>	<b>64</b>	<b>940</b>	<b>42</b>	<b>577</b>	<b>12</b>	<b>168</b>	<b>10</b>	<b>145</b>	<b>224</b>	<b>3,353</b>	





## Annex 5: MEL Result Chain, TOC Diagram, and Logical Framework

Outcome	Outputs	Indicators	Baseline	Target	Means of verification
Impact: Increased production and export of agriculture products to regional and global markets		Volume of horticultural exports undertaken by AMP supported businesses, disaggregated by destination and product	0	0	Traders
		Value of horticultural exports undertaken by AMP supported businesses, disaggregated by destination and product	0	0	Traders
		Increase in average unit value of Afghan agricultural exports by AMP supported businesses	0	0	M&E record
		Volume of domestic sales undertaken by AMP supported businesses, disaggregated by product and province where business is located.	0	0	Farmers traders
		Value of domestic sales undertaken by AMP supported businesses, disaggregated by product and province where business is located.	0	0	Farmers traders
		Total # of FTEs created as a result of AMP activities, disaggregated by gender	0	0	Farmers traders
Outcome 1: Increased bulk agricultural exports to existing markets	Trade offices are established and functioning	# of Afghan and foreign businesses declaring to have received positive assistance from trade offices in India and UAE	0	3	Project

Outcome	Outputs	Indicators	Baseline	Target	Means of verification
		# of Afghan agribusinesses paying a Trade Office directly for services or through a membership program	0	0	Trade offices Traders
	Trade shows and marketing events are organized	# of sales agreements signed at trade events in existing markets, (India, UAE, Kazakhstan)	0	0	Traders
		Value of sales agreements signed at trade events in existing markets (India, UAE, Kazakhstan)	0	0	Traders
		Total volume on sales agreements signed at trade events in existing markets (India, UAE, Kazakhstan)	0	7	Trade office management
		Total value exports resulting from trade event participation in existing markets (India, UAE, Kazakhstan)	0	0	Trade office management
		Total volume of exports resulting from trade event participation in existing markets (India, UAE, Kazakhstan)	0	0	Traders
		# of agribusinesses that used AMP-published Market Guides for India, UAE & Kazakhstan, and which resulted in positive impacts for the business	0	0	Traders
	Trade facilitations	# of trade impediments affecting exports to existing and new markets mitigated.	0	0	Management

Outcome	Outputs	Indicators	Baseline	Target	Means of verification
		Total value of goods exported to existing markets through the trade incentive program	0	0	Traders
		Total volume of goods exported to existing markets through the trade incentive program	0	0	Traders
		# of trade incentive-assisted exports to existing markets that led to at least one follow-on export	0	0	Traders
		# of agribusinesses that used Import Guides for India and UAE, and which resulted in positive impacts for the business	0	0	Traders
		Value of finance issued to AMP-supported businesses through Trade Credit Program	0	0	Management
Outcome 2: Expanded the number of Export products	New agriculture products are identified for export	# of new agriculture products identified and selected for export promotion	0	0	Project
		# of Afghan companies, traders and exporters export new products	0	0	Traders
	Export of new product is promoted	Total volume of new products exported (disaggregated by product and market)	0	0	Trade office management
		Total value (USD) of new products exported (disaggregated by product and market)	0	0	Trade office management

Outcome	Outputs	Indicators	Baseline	Target	Means of verification
Outcome 3: New markets are explored for afghan products	Marketing events and trade shows	# of sales agreements signed at trade events in new markets (Turkey, Saudi Arabia, Russia, etc.)	0	0	Traders
		Value of sales agreements signed at trade events in new markets (Turkey, Saudi Arabia, Russia, etc.)	0	0	Traders
		Total volume on sales agreements signed at trade events in new markets (Turkey, Saudi Arabia, Russia, etc.)	0	0	Traders
		Total volume of exports resulting from trade event participation in new markets.	0	0	Traders
		Total value of exports resulting from trade event participation in new markets.	0	0	Traders
		# of agribusinesses that used AMP-published Market Guides for new markets, and which resulted in positive impacts for the business	0	0	Traders
	Trade Offices	# of Afghan and foreign businesses declaring to have received positive assistance from new trade offices	0	0	Traders
		# of Afghan agribusinesses paying a Trade Office directly for services or through a membership program	0	0	Traders

Outcome	Outputs	Indicators	Baseline	Target	Means of verification
	Trade facilitations	Total volume of goods exported to new markets through the trade incentive program	0	0	Traders
		Total value of goods exported to new markets through the trade incentive program	0	0	Traders
		Number of trade incentive-assisted exports to new markets that led to at least one follow-on export.	0	0	Traders
		# of agribusinesses that used Import Guides for new markets, and which resulted in positive impacts for the business	0	0	Traders
Outcome 4: Export of value added agriculture products increased	Agribusiness incubation and acceleration centers established and functioning	# of incubation and acceleration centers established	0	0	Project
		# of investors/traders attended business incubation centers	0	0	Project
		# of entrepreneurs reported an increase in their business knowledge and skills	0	0	Entrepreneurs
		# of Afghan universities engaged with AMP	0	0	Project



Outcome	Outputs	Indicators	Baseline	Target	Means of verification
	Potential value-added products identified & introduced for export	# of traders and investors invested on value added products, disaggregated by retail packaging, redesigned packaging, introduced new processing techniques/equipment, invested in additional equipment/technology	0	0	Traders entrepreneurs
		Total volume of value-added products exported, disaggregated by product and market	0	0	Traders entrepreneurs
		Total value of value-added products exported, disaggregated by product and market	0	0	Traders entrepreneurs
	Investment on value added products facilitated	Total value of investment on value addition of agriculture products stimulated	0	0	Traders entrepreneurs
Outcome 5: Development of rural areas to support peace process	Improved quality of products and value chain activities	# of Farmers field schools established	0	0	Project
		# of farmers reported an increase in their knowledge and skills related to farming	0	0	farmers
		# of B2B meeting/market linkage workshops held	0	0	Project
		Value of deals happened through B2B meetings	0	0	Farmers traders
	Farms are upgraded to boost quality production	# of farmers trained on apricot and raisin drying methods	0	0	Farmers

Outcome	Outputs	Indicators	Baseline	Target	Means of verification
		Total volume of fresh apricot and grapes dried	0	0	Farmers
		% of increase in farm gate/local price of raisin and dried apricot because of improved quality	0	0	Farmers traders
		# and coverage (m2) of Greenhouses established	0	0	Farmers
		Total volume of vegetables produced in greenhouses	0	0	Farmers
		# of Cool rooms established	0	0	Farmers
		Total capacity (m3) of cool rooms established	0	0	Farmers
		Total volume of products stored in cool rooms	0	0	Farmers
		Total coverage (m2) of new orchards	0	0	Farmers
		Total coverage (m2) of trellised vineyards	0	0	Farmers

## Annex 6: AMP Performance Indicators

SN#	Indicator Name and Number (and disaggregation by gender)	Q2 FY2020 (Jan-Mar)		Q3 FY2020 (Apr-Jun)		Q4 FY2020 (Jul-Sep)		TOTAL FY2020		TOTAL Life of Project	
		Target	Actual	Target	Actual	Target	Actual	Target	Actual	Target	Actual
1	Total Value of sales (export + domestic) of targeted commodities as a result of USG assistance (USD)	8,000,000	1,248,456	8,000,000	14,101,155	15,000,000	7,879,766	31,000,000	23,281,777	500,000,000	23,229,377
	Export sales	5,000,000	1,248,456	5,000,000	14,101,155	10,000,000	7,652,483	20,000,000	23,002,094	450,000,000	23,002,094
	Domestic sales	3,000,000	0	3,000,000	0	5,000,000	227,283	11,000,000	227,283	50,000,000	227,283
	Males	6,400,000	1,182,456	6,400,000	14,067,345	12,000,000	7,837,572	24,800,000	23,087,373	400,000,000	23,087,373
	Females	1,600,000	66,000	1,600,000	33,810	3,000,000	42,194	6,200,000	142,004	100,000,000	142,004
2	EG.2.2-1 Number of firms receiving USG-funded technical assistance to export	10	11	20	20	20	47	50	78	150	78
	Males	6	6	12	10	10	47	28	63	90	63
	Females	4	5	8	10	10	0	22	15	60	15
3	EG.3-9 Number of full-time equivalent (FTE) jobs created with USG assistance	100	22	200	89	400	365	700	476	30,000	476
	Males	0	12	0	51	0	314	0	377	0	377
	Females	0	10	0	38	0	51	0	99	0	99
4	EG.3.2-1 Number of individuals who have received USG-supported short-term agricultural sector productivity or food security training	0	0	0	0	0	0	0	0	0	0
	Males	0	0	0	0	0	0	0	0	0	0
	Females	0	0	0	0	0	0	0	0	0	0

SN#	Indicator Name and Number (and disaggregation by gender)	Q2 FY2020 (Jan-Mar)		Q3 FY2020 (Apr-Jun)		Q4 FY2020 (Jul-Sep)		TOTAL FY2020		TOTAL Life of Project	
		Target	Actual	Target	Actual	Target	Actual	Target	Actual	Target	Actual
5	Number of individuals who have received USG supported long term agricultural sector productivity or food security training	0	0	720	320	700	845	1,420	1,160	6,200	1,160
	Males	0	0	570	320	560	820	1,130	1,140	5,000	1,140
	Females	0	0	150	0	140	25	290	25	1,300	25
6	Percentage of participants in U.S. Government-assisted projects designed to increase access to productive economic resources who are youth (age 15–29)	0	0	30%	14.40%	30%	30%	30%	18%	30%	4%
	Males	0	0	24%	14.40%	24%	27%	24%	17%	24%	4.00%
	Females	0	0	6%	0%	6%	3%	6%	1%	6%	0%
7	9.2e-1. Proportion of female participation in USG-assisted programs designed to increase access to productive economic resources (assets, credits, income or employment)	0	0	21%	9%	20%	4%	20%	6%	19%	6%
8	Number of hectares with increased high value crop production as a result of USG programs	0	0	0	0	200	0	200	0	0	0
	Males	0	0	0	0	160	0	160	0	0	0
	Females	0	0	0	0	40	0	40	0	0	0
9	5.1.1c. Number of farmers growing high-value crops as a result of USG assistance	0	0	720	320	700	0	1420	320	6,200	320
	Males	0	0	570	320	560	0	1130	320	5,000	320

SN#	Indicator Name and Number (and disaggregation by gender)	Q2 FY2020 (Jan-Mar)		Q3 FY2020 (Apr-Jun)		Q4 FY2020 (Jul-Sep)		TOTAL FY2020		TOTAL Life of Project	
		Target	Actual	Target	Actual	Target	Actual	Target	Actual	Target	Actual
	Females	0	0	150	0	140	0	290	0	1,300	0
10	EG.3.2-24 Number of individuals in the agriculture system who have applied improved management practices or technologies with USG assistance.	0	0	600	256	600	576	1200	832	5,000	832
	Males	0	0	450	256	450	576	900	832	4,000	832
	Females	0	0	150	0	150	0	300	0	1,000	0
11	Value of agriculture-related financing accessed as a result of USG assistance	0	0	0	0	1,000,000	0	1,000,000	0	42,000,000	0
	Males	0	0	0	0	800,000	0	800000	0	33,600,000	0
	Females	0	0	0	0	200,000	0	200000	0	8,400,000	0
12	Number of households benefited by agriculture and alternative development interventions in targeted areas	0	0	720	320	700	720	1420	1040	6,200	1040
	Males	0	0	0	0	0	720	0	724	0	724
	Females	0	0	0	0	0	0	0	0	0	0
13	Volume of exports of targeted agriculture commodities as a result of USG assistance (MT)	0	400	0	3,732	0	3,472	0	7,622	0	7,622
	Males	0	377	0	3,726	0	3,462	0	7188	0	7188
	Females	0	23	0	5.41	0	10	0	15	0	15
14	Number of Farmers Field Schools established as a result of USG assistance	0	0	100	24	100	70	200	94	450	94
	Males	0	0	80	24	80	70	160	94	360	94
	Females	0	0	20	0	20	0	40	0	90	0

SN#	Indicator Name and Number (and disaggregation by gender)	Q2 FY2020 (Jan-Mar)		Q3 FY2020 (Apr-Jun)		Q4 FY2020 (Jul-Sep)		TOTAL FY2020		TOTAL Life of Project	
		Target	Actual	Target	Actual	Target	Actual	Target	Actual	Target	Actual
15	Number of Afghan firms or Afghan institutions attending international trade and investment events supported by USG	0	0	0	0	0	0	0	0	0	0
	Males	0	0	0	0	0	0	0	0	0	0
	Females	0	0	0	0	0	0	0	0	0	0
16	Value of deals made by Afghan firms or Afghan institutions at international trade and investment events promoted by USG.	0	0	0	0	0	0	0	0	0	0
	Males	0	0	0	0	0	0	0	0	0	0
	Females	0	0	0	0	0	0	0	0	0	0
17	Percentage of sales completed by the Afghan firms or Afghan institutions against the deals made at international trade and investment events promoted or supported by USG.	0	0	0	0	0	0	0	0	0	0
	Males	0	0	0	0	0	0	0	0	0	0
	Females	0	0	0	0	0	0	0	0	0	0
18	Number of Afghan and foreign businesses declaring to have received positive assistance from AMP overseas trade offices	0	0	0	0	10	0	10	0	150	0
	Males	0	0	0	0	0	0	0	0	120	0
	Females	0	0	0	0	0	0	0	0	30	0
19	Number of Afghan agribusinesses paying a Trade Office directly for	0	0	0	0	10	0	10	0	150	0



SN#	Indicator Name and Number (and disaggregation by gender)	Q2 FY2020 (Jan-Mar)		Q3 FY2020 (Apr-Jun)		Q4 FY2020 (Jul-Sep)		TOTAL FY2020		TOTAL Life of Project	
		Target	Actual	Target	Actual	Target	Actual	Target	Actual	Target	Actual
	services or through a membership program										
	Males	0	0	0	0	0	0	0	0	120	0
	Females	0	0	0	0	0	0	0	0	30	0
20	Number of agribusinesses invested in value added products	0	0	0	0	0	0	0	0	0	0
	Males	0	0	0	0	0	0	0	0	0	0
	Females	0	0	0	0	0	0	0	0	0	0
21	Value of new investment leveraged by the agribusinesses for value added products as a result of USG activities	0	0	0	0	0	0	0	0	0	0
	Males	0	0	0	0	0	0	0	0	0	0
	Females	0	0	0	0	0	0	0	0	0	0
22	Number of new agriculture products identified and selected for export promotion as a result of USG assistance	0	0	0	0	0	0	0	0	0	0
	Males	0	0	0	0	0	0	0	0	0	0
	Females	0	0	0	0	0	0	0	0	0	0

## Annex 7: AMP Financial Statement

Budget Line Items	Total AMP Budget 2020-2023	Total Expenditure Through FY2020	Budget Remaining	Budget vs Actual Spending
Personnel	7,795,401.00	1,510,925.16	6,284,475.84	19%
Fringe Benefits	765,645.00	215,500.18	550,144.82	28%
Allowances	2,008,351.00	159,758.48	1,848,592.52	8%
Travel	388,430.00	43,853.28	344,576.72	11%
Program Inputs	7,490,660.00	278,026.55	7,212,633.45	4%
Other Direct Costs	1,794,500.00	373,407.95	1,421,092.05	21%
Security	884,820.00	48,451.58	836,368.42	5%
Equipment	169,800.00	78,708.79	91,091.21	46%
Subcontractor	521,220.00	-	521,220.00	0%
<b>Total Direct Costs</b>	<b>21,818,827.00</b>	<b>2,708,631.96</b>	<b>19,110,195.04</b>	<b>12%</b>
Indirect Costs	8,181,173.00	665,943.71	7,515,229.29	8%
<b>Grand Total Costs</b>	<b>30,000,000.00</b>	<b>3,374,575.67</b>	<b>26,625,424.33</b>	<b>11%</b>
Non-Federal Funding (Cost Share)	3,828,000.00	-	3,828,000.00	0%