Beyond Farming Collective

The roles and effectiveness of Agri-Food Industry Organizations in driving Inclusive Agricultural Transformation

Learning brief #1
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Implementation bop inc
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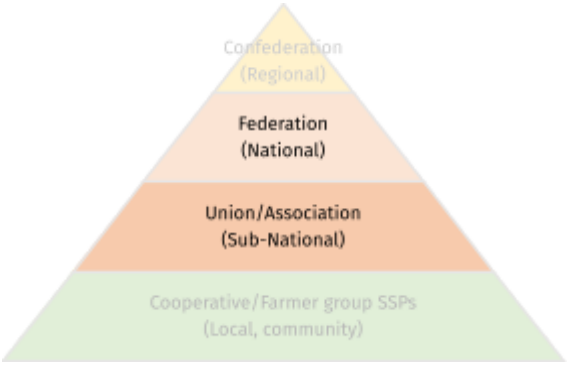
1. The Gates Foundation supports Inclusive Agricultural Transformation by partnering with AFIOs

The Gates Foundation is exploring partnerships with Agri-Food Industry Organizations (AFIOs) in Africa to promote Inclusive Agricultural Transformation (IAT)[1] through the Beyond Farming Collective (BFC). AFIOs are member-based organizations that convene farmers' groups, cooperatives, and small and medium-sized enterprises (SMEs) involved in production, value addition and trade within agri-food value chains.

AFIOs operate at national and sub-national levels. Importantly, membership in these AFIOs consists of organizations rather than individuals (see Figure 1). AFIOs are created to reduce collective vulnerability or to mobilize the collective action of their members. Compared to investor-owned firms, whose primary focus is on maximizing economic performance, AFIOs must also balance social cohesion amongst their members whilst also delivering economic performance.

Figure 1: AFIO levels



The Gates Foundation's initial hypothesis identified six core roles of AFIOs: (1) advocacy, (2) setting standards and norms, (3) markets and innovation information sharing, (4) service provision, (5) collaboration among members and peer AFIOs, and (6) sector and member promotion.

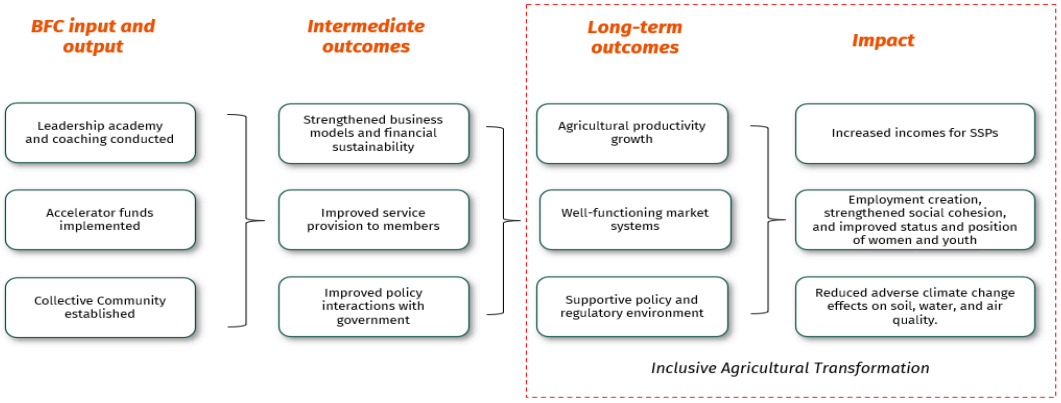
2. The Beyond Farming Collective aims to professionalize AFIOs and strengthen their contribution to IAT

The Beyond Farming Collective, a 5-year program running from 2022 to 2027, supports 32 AFIOs across Ethiopia, Nigeria, and Tanzania working in diverse value chains, including animal products, horticulture, cereals, legumes and oilseeds (see Annex 1). The program aims to professionalize these AFIOs, which are diverse in both their value propositions and organizational structures, through a leadership academy, investment grants, and network building.

The program's theory of change (ToC) (see Figure 2) assumes that professionally operated AFIOs will drive IAT through: (i) agricultural productivity growth, (ii) market systems development, and (iii) the promotion of a supportive policy and regulatory environment. This should contribute to increased incomes for SSPs, employment creation, strengthened social cohesion, improved status of women and youth and increased resiliency in the face of climate change.

[1]IAT refers to the transition of an agri-food system from one that is primarily farm-centered to one that is commercialized, productive, and includes off-farm activities (International Institute for Sustainable Development, 2019). This transformation enhances farm productivity, makes farming commercially viable and fosters greater inclusion of small-scale producers (SSPs), among others (Laborde et al., 2019; Blair et al., 2021).

Figure 2: BFC Theory of Change



The six core AFIO roles initially hypothesized by the Gates Foundation are linked to the three IAT areas. Advocacy, as well as setting standards and norms, are integral parts of a supportive regulatory environment, whereas market and innovation information sharing contribute to well-functioning market systems. The roles with a less explicit or direct contribution to IAT include service provision, collaboration among members and peer AFIOs, and sector and member promotion.

3. Reflecting on the first learnings three years into the program

The BFC is entering into its fourth year of implementation, with leadership training and coaching, and disbursement of investment grants well underway. Baseline MEL data, collected at AFIO and member level, and implementation experiences provide clues and pointers on the types of AFIOs and the roles they play in IAT, helping to sharpen the initial hypothesis. Moreover, these grounded insights shed light on the potential impact and scale of the AFIO types, which can help the Gates Foundation and other donors to engage with the right AFIOs for the right purposes.

This first learning brief summarizes the evidence and insights gathered during the first three years of the program regarding:

- The characteristics and types of AFIOs in the BFC program.
- The roles that different types of AFIOs play in the three IAT areas, notably in promoting productivity growth, ensuring well-functioning market systems, and fostering a supportive policy and regulatory environment.
- The potential impact and scale of the AFIO types in driving IAT.

4. Characteristics and types of AFIOs in BFC

The 32 AFIOs participating in BFC across Ethiopia, Nigeria, and Tanzania are listed in Annex 1. The cohort exhibits significant heterogeneity in their organization, activities, and interactions with their members in their institutional and business environments. To better understand the roles AFIOs play, as well as their potential impact and scale in IAT, an AFIO typology was developed based on four characteristics that differentiate AFIOs from one another: value proposition, value chain breadth, revenue generation, and member types (see Table 1).

It is important to note that none of the AFIOs strictly focus only on production improvements, aggregation, value addition, trade, or advocacy. While AFIOs have a main orientation, they also engage in other activities to some extent.

Table 1: Six types of AFIOs in BFC according to their characteristics

AFIO Type	Characteristic 1: Value proposition	Characteristic 2 Value chain breath	Characteristic 3: Revenue generation	Characteristic 4: Member types	AFIOs[2]
Production-oriented	Farmer production support	Multiple	Unpredictable	Informal farmer groups and primary cooperatives	ECMPA, EHBPEA, NAWIA, SWOFON, SUGECO
Aggregation-oriented	Farmer production and marketing support	Single	Predictable	Primary cooperatives	MBU, BMFCU, Bore Bako, KESEM, TDCU, TAHA
Value-addition-oriented	Marketing support for processors (technology)	Single	Unpredictable	Processors (small, medium, and large)	EAFIA, TAMPA, TAWFA, TASUPA, GGPMAN
Trade-oriented	Marketing and trade support	Single	Unpredictable	International Trade companies	TPN, ECA, EHPEA
Cross-value-chain	Production, marketing, and policy/regulatory support for all value chain actors	Single	Unpredictable	Producers in cooperatives and informal groups, processors, traders	EPPPA, NCAN, TOPAN, CBDA, NPPAN, CODARAN, NSA, PAT
Apex	Agricultural sector policy advocacy across value chains and value chain actors	Multiple	Unpredictable	Associations and unions	FACAN, ACT, ANSAF, TFC

Regarding characteristic 4 (member types), the MEL data provides insights into the tangible and intangible benefits that members perceive. For production-oriented and cross-value-chain AFIOs, the primary motivation for becoming an AFIO member is the expectation of gaining access to inputs and training. For members of aggregation-oriented, value-addition-oriented, and trade-oriented AFIOs their main motivation to join an AFIO is for linkages to market outlets and networking opportunities. Policy or regulatory frameworks are not mentioned by members as expected benefits.

However, AFIOs do not always meet members' expectations, as the provision of inputs, training, and marketing services is often irregular, depending on available funding. It is important to note that inputs and training are frequently subsidized or provided for free, as many activities are funded by projects and donors. Membership fees are low and, in some cases, not even collected. In this context, members may be less critical of the 'value for money' they receive and the tangible and intangible benefits provided.

AFIOs have SSPs in the network of their members, including primary cooperatives, informal farmer groups, or suppliers. Annex 2 presents the number of SSPs in each AFIO network. Regarding the SSPs' reach across the different AFIO types, Annex 2 presents a mixed picture. The apex AFIOs reach a relatively large number of SSPs, but the quality of interaction in terms of supporting productivity growth and facilitating market access remains loose and insignificant. In contrast, the aggregation-oriented AFIOs reach fewer SSPs, but their interactions are significantly more meaningful and reliable, ensuring continuous market access as well as access to inputs and training. The other AFIOs show considerable variation in the number of SSPs reached, along with fragmented and irregular impacts on productivity support and market access.

[2] There is some overlap among AFIOs in reality; some AFIOs have characteristics that also align with other types of AFIOs.

Figure 1: Examples of the six types of AFIOs participating in the BFC

Improving production	Aggregation	Value addition	Trade promotion	Policy advocacy
Type 1: Production-oriented *The Nigerian Association of Women in Agriculture (NAWIA) supports smallholder rural women farmer groups by providing training in Good Agricultural Practices (GAP) and facilitating access to inputs such as fertilizer and improved seeds to enhance productivity. Additionally, NAWIA organizes Village Savings and Loan Associations (VSLAs) for these groups.*	**Type 2: Aggregation-oriented** *Bench Maji Forest Coffee Farmers' Cooperative Union (BMFCU) primary role is aggregating coffee, spices, and honey from its member primary cooperatives and linking members with international buyers in high-end and niche markets. It acts as an aggregator for the primary cooperatives, conducting marketing activities on their behalf.*	**Type 3: Value addition-oriented** *The Tanzania Sunflower Processors Association (TASUPA) supports its members, who are processing companies, by introducing sunflower oil processing technology, ensuring compliance with quality standards, supplying farmers with inputs, and acting as an intermediary between financial institutions and sunflower oil processors.*	**Type 4: Trade-oriented AFIO** *The Tanzania Pulses Network (TPN) brings together pulses' producers, farmer groups, and primary cooperatives. It also connects members to domestic and international markets through digital platforms, in-person events, and networking. Additionally, TPN engages with cooperative groups, exporting companies, and logistics firms.*	**Type 5: Apex organizations** *As an umbrella (apex) organization, the Nigerian Federation of Agricultural Commodity Associations of Nigeria (FACAN) aims to promote its member commodity associations by lobbying the government. FACAN works closely with the Ministry of Agriculture and the Ministry of Industry, Trade, and Investment to address requests from commodity associations seeking policy or regulatory issue support.*
Type 6: Cross-value chain *The National Cashew Association of Nigeria (NCAN) promotes the cashew subsector for the benefit of all stakeholders in the value chain. The members include producers (farmers), traders/aggregators, processors, merchants, licensed buying agents, exporters, and service providers (logistics companies and warehouse operators). NCAN provides good agricultural practices (GAP) training to farmers and good manufacturing practices (GMP) to processors. They also create linkages between processors, exporters and financial institutions and support marketing and transport from farm gate to export zones.*				

5. Roles that the types of AFIOs play in driving IAT

The AFIO typology outlined in the previous section enables an exploration of the roles that AFIOs play. These roles have been structured according to the three IAT areas and include:

- **Promoting productivity growth**
  - **Improving production** - These AFIOs operate close to farmers and focus on increasing agricultural productivity primarily through training on topics such as Good Agricultural Practices (GAP) and innovative production techniques, access to inputs, such as seeds, fertilizer and equipment, credit, mechanization services and entrepreneurship development. A few AFIOs also provide seed quality testing and mechanization services.
- **Well-functioning market systems**
  - **Aggregation** - AFIOs purchase from their members, often primary cooperatives of SSPs, aggregating and storing products for resale to national and international markets.
  - **Value addition** - AFIOs offer member training in processing techniques, management, and entrepreneurship training, as well as credit facilitation for processing. They also provide access to processing infrastructure, packaging facilities, quality control, and certification.
  - **Trade promotion** - AFIOs broker market linkages between their members and national and international markets through marketing and promotional activities, such as trade fairs. Some AFIOs manage physical marketplaces (infrastructure) as well as digital marketing platforms that provide market information. Lastly, AFIOs facilitate credit for exporting and negotiate prices on behalf of their members.
- **Supportive policy and regulatory environment**
  - **Policy advocacy** - AFIOs serve as national umbrella bodies for associations and unions across multiple value chains. They work closely with the national government to address tax, pricing, and other regulatory

issues. They also provide input on national policy proposals, and push for the formalization of the value chain and the establishment of standards. Some AFIOs contribute to policy development by providing sector and value chain data to the government and partnering with research institutes. Additionally, some interact with local governments on matters related to local operations, taxation, and land issues.

In addition, the MEL surveys quantitatively investigated the number of activities carried out by different types of AFIOs. These activities reflect the roles that AFIOs play in the three IAT areas. A detailed table of the activities is presented in Annex 2, and a summary of Annex 2 is provided in Table 2.

Table 2: Share of activities in three IAT areas by AFIO type

	Agricultural productivity growth	Market systems development	Supportive policy and regulatory context
1. Production-oriented	44.8%	20.7%	34.5%
2. Aggregation-oriented	44.8%	34.5%	20.7%
3. Value-addition-oriented AFIOs	0.0%	52.6%	47.4%
4. Trade-oriented AFIOs	0.0%	40.0%	60.0%
5. Cross-value chain AFIOs	32.1%	28.6%	39.3%
6. Apex	6.3%	18.8%	75.0%

The table suggests that AFIOs have unique strengths and contributions across the different IAT areas, and these should be considered when identifying which AFIOs to partner with:

- To enhance *agricultural productivity,* key partners are production- and aggregation-oriented AFIOs. These AFIOs have direct smallholder farmer reach and can improve farming practices, input distribution, and collective aggregation efforts.
- Strong partners in *market systems developmen*t are the value-addition- and trade-oriented AFIOs who facilitate value chain integration, processing, storage, and improved market access for farmers.
- Critical allies in shaping a *supportive policy and regulatory environment* are the apex AFIOs who advocate for policies that benefit smallholders and the broader agricultural sector.

The MEL data highlights the wide range of roles that the 32 AFIOs play. They actively fulfill and aspire to expand their roles in response to the varied needs of their members. In some cases, AFIOs assume responsibilities typically associated with private sector actors. While these roles may not naturally align with member-owned organizations, AFIOs step in to bridge gaps left by the private sector or the government. This is particularly evident in areas where private sector actors are absent, such as input provision. Additionally, AFIOs occasionally fulfill roles traditionally managed by the public sector, such as providing subsidies and credit or social safety and emergency support during times of crisis (e.g., drought, pest infestations).

In addition to AFIO roles in the three IAT areas, some AFIOs play broader social roles revealed by the MEL data. The social roles revolve around the idea of collectivism. Members benefit from gathering during meetings to connect, share concerns, and exchange solutions, assisting one another and generating trust. The AFIO provides a platform for these interactions, strengthening the sense of community. In turn, some wealthier members contribute extra resources, as an acknowledgement of this social role AFIO. As member-owned organizations, AFIOs are established and owned by their members, fostering this trust and social cohesion. This trust often exceeds that found in government or private sector entities, leading to reduced transaction costs in marketing and other value chain engagements. AFIOs also have direct access to SSPs through their membership, serving as an essential interface to connect SSPs with inputs, training, and markets.

6. Potential impact and scale of the AFIO types in driving IAT

MEL surveys confirm that many AFIOs face organizational challenges fulfilling their roles, inhibiting impact and their ability to scale. The most pressing challenge is achieving financial sustainability and their dependency on irregular

donor/NGO funding (though this is not the case for aggregation-oriented AFIOs). The second most frequently mentioned challenge is weak internal systems and governance, including financial management and membership administration. Thirdly, AFIOs struggle to deliver quality services, which results in members being unwilling to commit to paying membership fees.

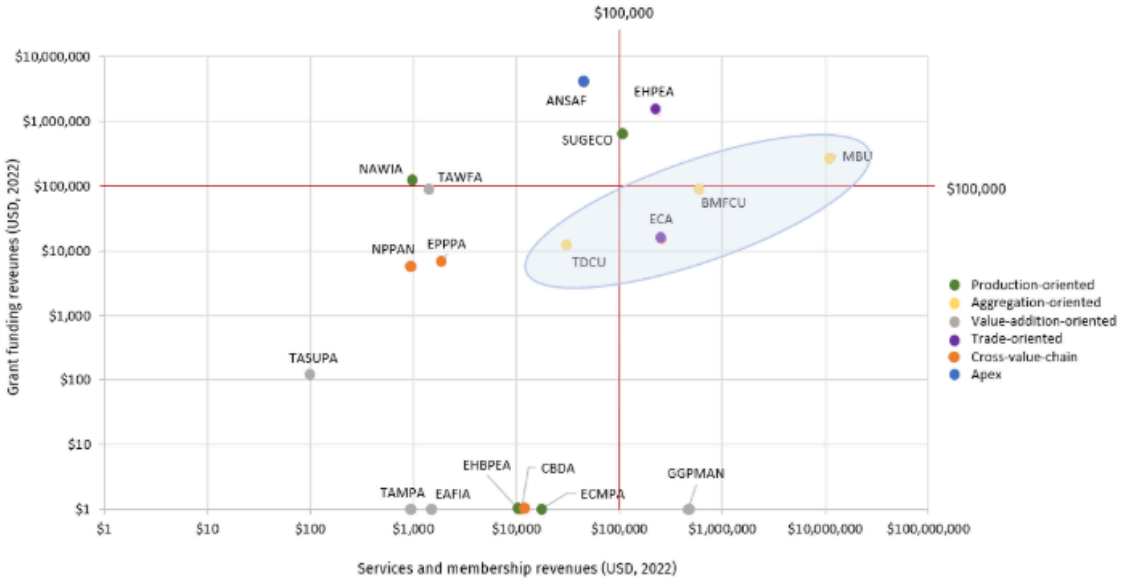
Although a full assessment can only be made toward the end of the BFC program, MEL data on the financial capacity of AFIOs can be used as a proxy for potential impact and scale. Financial capacity is assessed in terms of revenue volume and revenue stability.

Some AFIOs participating in BFC have developed business models that enable them to generate predictable, recurring revenue supporting organizational growth, rather than relying on unpredictable grant funding. As a result, there are AFIOs with steady annual revenues based on recurring services as high as 10 million USD, while others depend on project-based funding and may experience years with revenues as low as 1,000 USD, with financial stability fluctuating significantly. Figure 2 presents a diagram where AFIOs participating in the BFC are plotted according to their recurring service and membership revenues (x-axis) and grant revenues (y-axis)[3].

Figure 2 below shows the BFC AFIOs that generate a high amount of revenue from service fees and membership dues (to the right of the red vertical line) and the AFIOs that generate a high amount of grant funding (above the horizontal red line). Notably, many of the AFIOs that generate a high amount of their revenue from service fees and membership dues are aggregation-oriented AFIOs (highlighted in the blue area). Most revenue for aggregation-oriented AFIOs, such as the Bench Maji Forest Coffee Farmers Cooperative Union and Meki Batu Union comes from fee-based marketing services, including sales. ECA and EHPEA, both trade-oriented AFIOs, earn revenue through facilitating exports, membership dues and/or fee-based training and other member services. Some AFIOs have additional income sources, such as managing a large farm (GGPMAN), operating a gas station (MBU), or operating a marketplace (CBDA).

Interestingly aggregation-oriented and trade-oriented AFIOs are only found in Ethiopia and Tanzania (see Figure 1), due to the presence of a well-organized union-primary cooperative sector in these countries. This is less common in Nigeria, where AFIO members tend to be informal farmer groups. The AFIOs to which these informal farmer groups belong do not aggregate on their behalf, nor do the informal farmer groups pay membership dues. These Nigerian AFIOs, with informally organized member groups, could benefit from the more formalized group models in Ethiopia and Tanzania, which aim to become and register as cooperatives.

Figure 2: Log-Plot of grant revenues (unpredictable) vs. services and membership revenues (predictable)



[3] Only AFIOs in BFC that generated reliable financial statements for 2022 are included.

The horizontal line in Figure 2 indicates AFIOs which operate mostly with project-based grant funding. These AFIOs vary in type, including production-oriented (NAWIA, SUGECO), value addition–oriented (TAWFA), cross–value chain (EPPPA, NPPAN, CBDA), and apex AFIOs (ANSAF).

A number of AFIOs are at the lower end of revenue generation from both grant funding and service and membership dues and face financial challenges (TAMPA, EAFIA, EHBPEA, ECMPA, TASUPA).

In sum, AFIOs with large revenue volumes that are predictable are more likely to have sustainable impact and scale activities that drive IAT. There are best practices from high-revenue AFIOs that others can replicate. In the cohort of 32 BFC AFIOs, high-revenue AFIOs are primarily aggregation-oriented. However, other successful examples include AFIOs that operate commercial, revenue-generating units, such as a farm (GGPMAN), real estate (TFC), or a gas station (MBU) — demonstrating a viable business model with predictable income streams. Another well-established best practice is maintaining diversified income streams, including grants, service-based revenue, partnerships, and value-added offerings. This approach enhances resilience against fluctuations in membership fees, ensuring sustained operations and continued support for members.

7. In conclusion: learning brief findings

In this learning brief, the roles and effectiveness of AFIOs in IAT are assessed based on insights from the Beyond Farming Collective. The learning brief concludes with four key findings that are informative for the further development of the BFC and other activities of the Gates Foundation and other organizations working with AFIOs.

- ***Key finding 1**: AFIOs vary in their contribution to IAT, based on their type.*

Based on the AFIO typology created for the BFC, a key finding is that different types of AFIOs play different roles. Production- and aggregation-oriented AFIOs are most active in agricultural productivity growth. Value-addition- and trade-oriented AFIOs focus more on marketing, while apex AFIOs are primarily engaged in policy and regulatory support. All AFIOs contribute to promoting a supportive policy and regulatory environment, though apex and trade-oriented AFIOs play the most significant roles. In market systems development, value-addition- and trade-oriented AFIOs are more active than apex and production-oriented AFIOs. The cross-value-chain AFIO shows the most balanced engagement across agricultural productivity, marketing, and policy support.

- ***Key finding 2**: AFIOs are versatile, filling gaps across the value chain*

Annex 2 highlights the wide range of roles that the 32 AFIOs play despite operating with limited resources. They provide critical services (e.g., input supply, credit facilitation, and market linkages) that neither private sector nor government fully address. They actively fulfill and aspire to expand their roles in response to the varied needs of their members. In some cases, AFIOs assume responsibilities typically associated with private sector actors. While these roles may not naturally align with member-owned organizations, AFIOs step in to bridge gaps left by the private sector or the government. This is particularly evident in areas where private sector actors are absent, such as input provision or processing. Additionally, AFIOs occasionally fulfill roles traditionally managed by the public sector, such as providing subsidies and credit or social safety and emergency support during times of crisis (e.g., drought, pest infestations). The diversity of AFIO roles and types suggests that there is no single "best" type or one-size-fits-all AFIO model. The needs of the different actors within the agricultural sectors and value chains are highly varied.

- ***Key finding 3**: Production-oriented AFIOs could be more active in promoting marketing system*

There is an opportunity for production-oriented AFIOs to expand their role in the market (see Table 2). Several AFIOs in the BFC program have expressed interest in adopting digital solutions for marketing. However, despite their ambitions, the reality is that implementing these solutions is both technically and financially challenging. Currently, only the aggregation-oriented TAHA has a fully operational digital platform, while the trade-oriented AFIO TPN is close to launching one with BFC support. Further exploration is needed for production-oriented AFIOs, which could involve linking up with existing systems, starting with social media, or exploring other lean digital marketing solutions.

- ***Key finding 4:*** *AFIOs play broader social roles than the government or private sector*

In addition to AFIO roles in the three IAT areas, detailed in Annex 2, some AFIOs play broader social roles. As member-based organizations, AFIOs are established and owned by their members, fostering trust and social cohesion. This trust often exceeds that found in government or private sector entities, leading to reduced transaction costs in marketing and other value chain engagements. AFIOs also have direct access to SSPs through their membership, serving as an essential interface to connect SSPs with inputs, training, and markets. The stability of the member structure, in contrast to the volatility of government policy and project-based NGOs, provides AFIOs with the potential for sustained, long-term impact.

- ***Key finding 5****: AFIOs ideally play a facilitator role and do not permanently take over roles that belong to private sector actors*

Although AFIOs play distinct roles based on their type, ideally, they act as coordinators, facilitators, and overseers of the value chain, actively engaging in all three IAT areas; the cross-value-chain AFIO plays the most balanced role in this regard.

The 32 AFIOs demonstrate flexibility in their roles, allowing them to respond to sectoral needs and act as a 'jack-of-all-trades' or utility players when necessary. Table 2 outlines a broad menu of potential roles that AFIOs can play, but their activities should align with the interests and needs of their members. AFIOs should not permanently take over roles that belong to private sector actors. Instead, they should engage in these roles temporarily, stepping in only when there is a clear gap. Lastly, it is important to acknowledge that AFIOs cannot address every need; prioritization of activities within their role is inevitable.

- ***Key finding 6:*** *AFIOs need viable business models with fee-based services to remain operational and effective*

Financial stability is essential; AFIOs must maintain a steady revenue stream by collecting membership fees and developing revenue-generating service offerings. Organizing farmer groups and setting up a membership administration system to ensure the systematic collection of membership dues is crucial in this respect.

The MEL shows that key sources of revenue are marketing-related activities within the BFC AFIOs, rather than training and advice to members. Several aggregation, value-addition and trade-oriented AFIOs are already engaged in marketing-related activities that generate predictable revenue, such as organizing trade fairs, providing market information through digital platforms, and offering processing, storage, and packaging infrastructure. Production-oriented AFIOs aspire to assist their members with marketing by creating linkages and eventually moving into aggregation. However, transitioning into an aggregation-oriented AFIO requires shifting from a donor- and grant-funded financial model to a commercial business model. This transformation demands infrastructure, strong marketing and sales skills, and solid administrative capacity.

8. Next steps: Assessing the effectiveness of AFIO roles

The BFC monitoring, evaluation, and learning (MEL) workstream will continue to measure the effectiveness of AFIOs in driving IAT and will examine how BFC investments strengthen AFIOs' roles in agricultural productivity growth, market systems development, and the promotion of a supportive policy and regulatory environment.

MEL endline surveys, at both the AFIO and member level, will be conducted within 3-5 months of the completion of each AFIOs accelerator fund activities, beginning in Q4 2025. The second yearly learning brief, delivered by 31 March 2026, will include insights and learnings from the first batch of endline surveys.

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Annex 1: AFIO participating in the BFC program

Focus countries and value chains

	Ethiopia	Nigeria	Tanzania
Animal products	• Ethiopian Commercial Milk Producers Association • Ethiopian Honey and Beeswax Producers and Exporters Association • Ethiopian Animal Feed Industry Association • Ethiopian Poultry Producers and Processors Association	• Commercial Dairy Ranchers Association of Nigeria • Cattle Breeders and Dealers Association of Nigeria	• Tanzanian Women Fish Workers Association • Poultry Association of Tanzania • Tanga Dairy Cooperative Union • Tanzania Milk Processors Association
Horticulture	• Ethiopian Horticulture Producer Exporters Association • Ethiopian Coffee Association • Meki Batu Fruit and Vegetables Growers Union	• Tomato and Orchard Producers Association of Nigeria • Ginger Growers, Processors and Marketers Association of Nigeria	• Tanzania Horticulture Association
Cereals, legumes and oilseeds	• Bore Bako Farmers Cooperative Union (maize) • Kesem Multipurpose Farmers' Cooperative Union (teff and wheat)	• National Palm Produce Association of Nigeria • Nigeria Soybeans Association • National Cashew Association of Nigeria	• Tanzania Pulses Network • Tanzania Sunflower Processors Association
Multi-sector	• Bench Maji Union (coffee, honey and spices)	• Federation of Agricultural Commodity Associations of Nigeria • Nigerian Association of Women in Agriculture • Small-scale Women Farmers Organization in Nigeria	• Agriculture Council of Tanzania • Agriculture Non State Actor Forum • Sokoine University Graduate Entrepreneurs Cooperative • Tanzania Seed Trade Association • Tanzania Federation of Cooperatives

Annex 2: Number of SSPs in the AFIO network (within primary cooperatives, informal farmer groups, or as suppliers)[4]

AFIO Type	AFIO (# members - officially registered)	# SSPs in the network
Production-oriented AFIOs	ECMPA (55 members)	800
	EHBPEA (61 members)	25,000
	NAWIA (1,500 members)	30,000
	SWOFON (6,000 members)	500,000
	SUGEGO (1,000 members)	150
Aggregation-oriented AFIOs	MBU (153 members)	8,410
	BMFCU (85 members	21,350
	Bore Bako (28 members)	14,818
	TDCU (28 members)	7,900
	TAHA (700 members	7,588
Value-addition-oriented AFIOs	EAFIA (40 members)	12,000
	TAMPA (82 members)	n.a.
	TAWFA (150 members)	3,000
	TASUPA (200 members)	4,000
	GGPMAN (42,000 members)	200,000
Trade-oriented AFIOs	TPN (27 members)	10,000
	ECA (512 members)	1,500,000
Cross value chain oriented AFIOs	EHPEA (126 members)	77,000
	EPPPA (140 members)	0
	NCAN (not officially registered)	1,000,000
	TOPAN (10,000 members)	80,000
	CBDA (500,000 members	1,000,000
	NPPAN (20,000 members)	n.a.
	CODARAN (30 members)	10,000
	NSA (30,000 members)	5,000
	PAT (20 members)	n.a.
Apex AFIOs	FACAN (60 members)	7,500,000
	ACT (235 Members)	5,000,000
	ANSAF (90 members;)	6,000,000
	TFC (69 members)	4,000,000

[4] The number of SPPS in the work are self-reported data

Annex 3: Roles that AFIOs play in (i) agricultural productivity growth, (ii) market systems development, and (iii) the promotion of a supportive policy and regulatory environment

	Agricultural productivity growth		*Market systems development*		*Promotion of a supportive policy and regulatory environment*	
1. Production oriented AFIOs (ECMPA, EHBPEA, NAWIA, SUGECO, SWOFON)	GAP training	3	Facilitating and brokering market linkages	2	Input on (national) policy proposals	3
	Training in (innovative) production techniques	3	Some aggregation by board members to avoid intermediaries	2	In person lobby and policy advocacy contacts/meetings	1
	Provision/assistance inputs and equipment	3	Post-harvesting training	1	Linking with research institutes to support policy development	1
	Entrepreneurship training	1	Provision of market information	1	Proposing a sector policy framework	1
	Provision/ production facility (incubator)	1	Packaging training	1	Calling on the government to invest in the sector	1
	Credit facilitation for production	1			Organization of sector (policy) meetings supported by government	1
	Training in production quality	1			Interaction with local government about local operations/prices/taxes/land	1
					Collaboration with the government in policy programs'	1
	Number of AFIOs engaged in productivity growth activities	**5/5**	**Number of AFIOs engaged in market systems**	**2/5**	**Number of AFIOs engaged in policy lobby and advocacy**	**5/5**
	Share of AFIOs activities in productivity growth	**44.8 %**	**Share of AFIOs activities in market systems**	**20.7 %**	**Share of AFIOs activities in policy lobby and advocacy**	**34.5%**
2. Aggregation oriented AFIOs (Unions) (BMFCU, Bore Bako, MBU, TAHA, TDCU)	Provision/assistance inputs and equipment	4	Aggregating (storage) and marketing	5	Approaching national government to address taxing and pricing issues	2
	GAP training	4	Post-harvest training	3	Input on (national) policy proposals	2
	Credit facilitation for production	3	Provision of market information	1	Interaction with local government about local operations/prices/taxes/land	1
	Training in (innovative) production techniques	1	Digital marketing platform	1	Providing data for policy	1
	Training in production quality	1				
	Number of AFIOs engaged in productivity growth activities	**5/5**	**Number of AFIOs engaged in market systems**	**5/5**	**Number of AFIOs engaged in policy lobby and advocacy**	**3/5**
	Share of AFIOs activities in productivity growth	**44.8 %**	**Share of AFIOs activities in market systems**	**34.5 %**	**Share of AFIOs activities in policy lobby and advocacy**	**20.7%**
3. Value addition oriented AFIOs (EAFIA, TAMPA, TASUPA, TAWFA) Share of production oriented AFIOs			Training in processing techniques	4	Approaching national government to address taxing and pricing issues	3
			Management and entrepreneurship training	3	Lobby to formalize the value chain and set standards	1
			Credit facilitation for processing	1	Proposing a sector policy framework	1
					Linking with research institutes to support policy development	1
					Input on (national) policy proposals	1
			Providing assistance in purchasing input	1	Collaboration with the government in policy programs'	1
			Providing processing and packaging facility	1	Providing sector/value chain data for policy	1
	Number of AFIOs engaged in productivity growth activities	**0/4**	**Number of AFIOs engaged in market systems**	**4/4**	**Number of AFIOs engaged in policy lobby and advocacy**	**4/4**
	Share of AFIOs activities in productivity growth	**0.0%**	**Share of AFIOs activities in market systems**	**52.6 %**	**Share of AFIOs activities in policy lobby and advocacy**	**47.4%**

	Agricultural productivity growth		*Market systems development*		*Promotion of a supportive policy and regulatory environment*	
4. Trade oriented AFIOs (TPN)			Facilitating and brokering market linkages	1	Providing sector/value chain data for policy	1
			Digital marketing platform	1	Approaching national government to address taxing and pricing issues	1
					Input on (national) policy proposals	1
	Number of AFIOs engaged in productivity growth activities	**0/1**	**Number of AFIOs engaged in market systems**	**1/1**	**Number of AFIOs engaged in policy lobby and advocacy**	**1/1**
	Share of AFIOs activities in productivity growth	**0.0%**	**Share of AFIOs activities in market systems**	**40.0%**	**Share of AFIOs activities in policy lobby and advocacy**	**60.0%**
5. Cross value chain (CBDA,CODARAN, ECA, EHPEA, EPPPA, GGPMAN,NCAN, NPPAN, NSA, PAT, TOPAN)	Training in (innovative) production techniques	7	Facilitating and brokering market linkages	6	Approaching national government to address taxing and pricing issues	4
	GAP training	5	In-country product promotion	2	Organization of policy meetings supported by government	3
	Working visits on production techniques	2	Quality control for marketing	1	Linking with research institutes to support policy development	3
	Provision/assistance inputs and equipment	1	Some aggregation of members to avoid intermediaries	1	Interaction with local government about local operations/prices/taxes/land	1
	Seed quality testing	1	Credit facilitation for exporting	1	Irregular meetings and lobby efforts	1
	Product quality training	1	Managing a marketplace (infrastructure)	1	Lobby to formalize the value chain and set standards	1
	Mechanization services	1	Providing processing and packaging facility	1	Provision of sector/value chain data to government	1
			Post-harvesting training	1		
			Market information	1		
			Price negotiation on behalf of members	1		
	Number of AFIOs engaged in productivity growth activities	**11/11**	**Number of AFIOs engaged in market systems**	**10/11**	**Number of AFIOs engaged in policy lobby and advocacy**	**10/11**
	Share of AFIOs activities in productivity growth	**32.1%**	**Share of AFIOs activities in market systems**	**28.6%**	**Share of AFIOs activities in policy lobby and advocacy**	**39.3%**
6. Apex (ACT, ANSAF, FACAN, TFC)	Provision/assistance input and equipment	1	Facilitating and brokering market linkages	3	Collaboration with national government to train members on policy	4
					Input on (national) policy proposals	3
					Establishment of policy networking platforms	2
					Approaching national government to address taxing and pricing issues	1
					Collaboration with the government in policy programs'	1
					Providing sector/value chain data for policy	1
	Number of AFIOs engaged in productivity growth activities	**1/4**	**Number of AFIOs engaged in market systems**	**3/4**	**Number of AFIOs engaged in policy lobby and advocacy**	**4/4**
	Share of AFIOs activities in productivity growth	**6.3%**	**Share of AFIOs activities in market systems**	**18.8%**	**Share of AFIOs activities in policy lobby and advocacy**	**75.0%**