2013 MONITORING AND EVALUATION EXERCISE OVERVIEW

Joint OECD-WTO Workshop

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Monitoring and evaluation exercise

Respondents

Private sector	Partner Country	LDCs	Donors	South-South	Total
697	80	36	43	10	830

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Private Sector questionnaire
Breakdown of companies and associations

Sector	COMPANY	ASSOCIATION	Response Percentage	Response Count
Agrifood	200	57	36.9%	257
Information and communication technologies	105	20	17.9%	125
Textiles and apparel	87	19	15.2%	106
Tourism	93	20	16.2%	113
Transport and logistics	76	20	13.8%	96
TOTAL				697

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Private Sector questionnaire
Regional breakdown - suppliers

REGIONAL BREAKDOWN					
Sector	Africa*	Asia*	America*	Oceania*	Europe*
Agrifood	64	25	107	8	4
ICT	26	21	39	2	2
Textiles and Apparel	18	24	42	0	3
Tourism	16	8	56	6	5
Transport and Logistics	16	8	50	1	1
Total	**140**	**87**	**294**	**17**	**15**
Percentage	**20%**	**12%**	**42%**	**2%**	**2%**

* Developing countries/territories

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AGRIFOOD SECTOR RESULTS

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Global Value Chain or Chicken Kiev?

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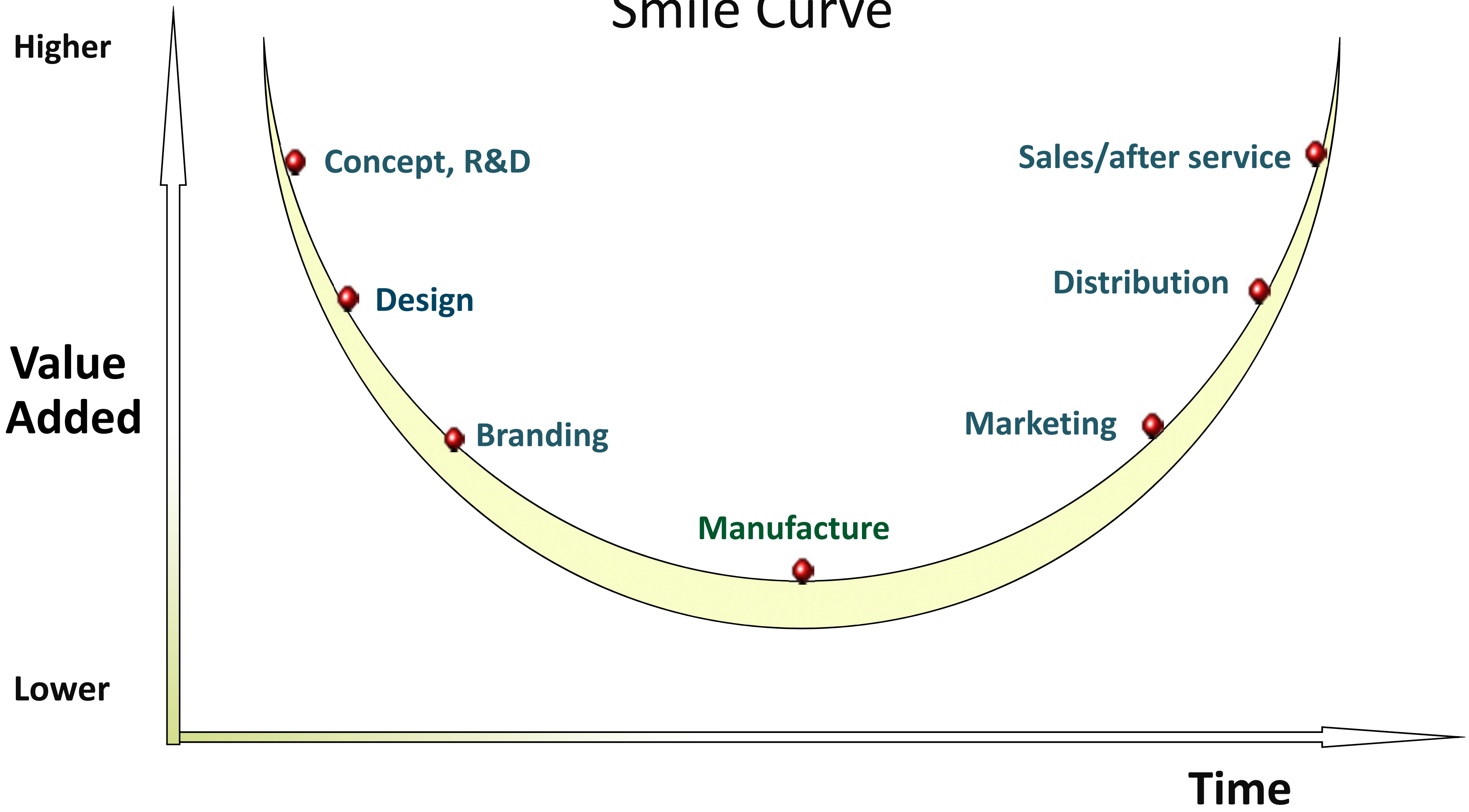
Food Safety Ireland

- 53 separate ingredients
- Multiple ingredient suppliers
- And suppliers from many other developing countries

Connecting to Agrifood Value Chains

Smile Curve



Connecting to Agrifood Value Chains

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Obstacles to overcome

Connecting to Agrifood Value Chains – survey results

DEVELOPING-COUNTRY SUPPLIERS	
What difficulties do you face in entering, establishing or moving up agrifood value chains?.	
Access to business finance	55.2%
Transportation costs	54.1%
Certification costs	41.3%
Lack of transparency in regulatory environment	34.3%
Access to trade finance	33.7%

LEAD FIRMS	
Most typical difficulties bringing new suppliers from developing or LDCs into your supply chain(s)?	
Customs procedures	50.6%
Transportation costs and delays	40.7%
Export or import licensing requirements	37.0%
Inability to meet agrifood safety standards	32.1%
Import duties	30.9%
Inadequate airport, maritime or transport capacity or links	30.9%

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Connecting to Agrifood Value Chains – survey results

DEVELOPING-COUNTRY SUPPLIERS	
What factors most influence sourcing and investment decisions in agrifood value chains	
Top 5	%
Production cost	62.6%
Ability to meet quality and safety standards	60.2%
Ability to meet quantity requirements	55.0%
Business environment	43.9%
Quality of infrastructure	41.5%

LEAD FIRMS	
What factors most POSITIVELY influence sourcing and investment decisions in your supply chain(s)?	
Top 5	%
Ability to consistently meet product specifications	58.0%
Production cost	40.7%
Market size	38.3%
Labour cost	33.3%
Investment or tax incentives	30.9%

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Aid for trade support to agrifood sector has significantly grown

- Record-high in commitments $8.75billion in 2011, compared to an average of $3.2 billion in 2002-2005.

- Disbursements rose from an average of $2.4 billion in 2002-2005 to 6.3 billion in 2011.

- Least-developed countries represent one third of the Aid for Trade commitments in the agrifood sector.

- Africa receives the lion's share of support, with about 60 % of commitments, and Asia another 27 % of commitments (2011).

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Connecting to Agrifood Value Chains

GROW AFRICA: Companies announced **over $3.5 billion of planned investment** across the eight countries supported by Grow Africa. Aligned to Comprehensive Africa Agriculture Development Programme, and embraces inclusive business models, especially for smallholder farmers

3ADI

BCI Better Cotton Initiative

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Connecting to Agrifood Value Chains

- Value chains – not a new concept; new driver <u>in</u> developing countries for urban consumers
- Processing and services offers significant opportunities for value addition
- New export market opportunities in emerging markets
- Private sector increasingly in driving seat
- Scope for further collaboration – aid and investment

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