



Republic of The Gambia

Youth and Trade Roadmap of The Gambia 2018-2022

Nuts and Agro- processing Sector



YOUTH AND TRADE ROADMAP OF THE GAMBIA
NUTS AND AGROPROCESSING SECTOR
2018-2022



Republic of The Gambia

This Youth and Trade Roadmap for Nuts and Agroprocessing forms an integral part of The Gambia's Youth and Trade Roadmap. It was developed under the aegis of The Republic of The Gambia, and the leadership of the Ministry of Trade, Industry, Regional Integration and Employment (MOTIE) and in close collaboration with the Ministry of Agriculture. The strategy benefited from the contributions of sector stakeholders and youth associations, who played an important role in the consultative process. This roadmap was designed thanks to the technical assistance of the International Trade Centre (ITC) within the framework the Youth Empowerment Project (YEP) funded by the European Union (EU) Emergency Trust Fund for Africa.

This document reflects the ambitions of the public and private stakeholders who defined the enhancements and future orientations for the sector in view of developing economic opportunities for the youth in the nuts and agroprocessing sector.

Note to the reader about the Youth and Trade Roadmap:

The Youth and Trade Roadmap for The Gambia sets out how to realize the full potential of trade for The Gambia's youth. The document will serve as a guiding compass for the government to bolster competitiveness and thereby reduce migration flows.

The principal outputs of the Youth and Trade Roadmap for The Gambia design initiative are four endorsed, coherent and comprehensive documents with five-year detailed plans of action (PoA) and implementation management framework. These documents include:

1. The Youth and Trade Roadmap document, which identifies trade sectors' growth potential and economic opportunities for the youth. The roadmap defines in a comprehensive manner a prioritized development framework at the national level around four pillars: skills development, entrepreneurship and self-employment, market-led value chain development and sector coordination.

2. Three individual sector roadmaps packaged as separate documents in line with the main document's overarching strategic objectives. The priority sectors offering the most promising potential for economic opportunities for the youth are:

- Nuts and agroprocessing
- Information and communications technology (ICT)
- Tourism

Sector roadmaps present action plans with activities and priorities for building market-oriented skills and fostering value addition that will create employment opportunities and income generation for the youth. Specifically, each sector roadmap provides recommendations on improving productivity and quality, technical and vocational skills, market reach and diversification, and how to facilitate youth entrepreneurship.

The Youth Empowerment Project aims to reduce migration pressures in The Gambia. The four-year project takes a market-led approach and sets out to strengthen existing youth development systems, structures and services to create employment opportunities. It aims to scale up skills among youth in the workforce in response to market demands. The project offers possibilities for youths interested in moving into the commercial agriculture, service business or tourism sectors.

The EU Emergency Trust Fund for Africa addresses the root causes of irregular migration and displaced persons in Africa. More specifically, it helps address the root causes of destabilization, forced displacement and irregular migration by promoting equal opportunities, and strengthening security, development and resilience of vulnerable people.

ITC is the joint agency of the World Trade Organization and the United Nations. ITC helps businesses in developing countries to become more competitive in global markets, speeding economic development and contributing to the achievement of the United Nations Global Goals for sustainable development. As part of the ITC mandate of fostering sustainable development through increased trade opportunities, the Chief Economist and Export Strategy section offers a suite of trade-related strategy solutions to maximize the development pay-offs from trade. ITC-facilitated trade development strategies and roadmaps are oriented to the trade objectives of a country or region and can be tailored to high-level economic goals, specific development targets or particular sectors, allowing policymakers to choose their preferred level of engagement.

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ACKNOWLEDGMENTS

The Youth and Trade Roadmap for Nuts and Agroprocessing was developed under the aegis of the Ministry of Trade, Industry, Regional Integration and Employment (MOTIE) and Ministry of Youth and Sports (MOYS), with the financial support and technical assistance of The Gambia Youth Empowerment Project (YEP).

The document benefited particularly from the inputs and guidance provided by the members of the core team that steered the formulation of the sector strategy and YEP team, namely:

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Source: ITC

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FOREWORD

AGRO CORE TEAM

“ A Big Leap into value-addition and agropreneurship
in the Agricultural Sector in The Gambia ”

It is with a warm greeting of enthusiasm and gratitude that the nuts and agroprocessing core team endorses the Youth and Trade Roadmap. We are humbled to be part of this great opportunity for our sector and our youth.

The very essence of launching this roadmap as a team that includes stakeholders from youth, public agencies, private businesses, training institutions and rural communities is a source of confidence and support for the future implementation of the roadmap.

This Youth and Trade Roadmap for the nuts and agroprocessing sector is part of The Gambia Youth Empowerment Project (YEP), a four-year European Union-funded initiative to build skills, enable value addition and foster market connections.

Our goals and responsibilities to ensure that the interests of all our members are represented throughout the design and implementation of the roadmap is a great opportunity for us to work together and take a big leap into modernizing the agricultural sector with innovative practices in agro-processing, production, vocational training and agropreneurship.

For this, the core team is committed to the successful implementation of the plan of actions to carry the agriculture sector forward with quality Gambian products for the local and global markets, while also providing attractive jobs that meet the aspirations and needs of youth.

We would like to thank our partners, the International Trade Centre and the European Union, for the support provided at this important time to help us create and seize these opportunities for our young population.

Sincerely,

Bakary Sanneh
On behalf of the Agro Core Team

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ACRONYMS

ASPA	Agribusiness Services and Producers' Association
EU	European Union
FFS	Farmer field school
GDP	Gross domestic product
GSI	Gambia Songhai Initiative
HACCP	Hazard Analysis Critical Control Point
ICT	Information and communications technology
ITC	International Trade Centre
MoA	Ministry of Agriculture
MOTIE	Ministry of Trade, Industry, Regional Integration and Employment
MOYS	Ministry of Youth and Sports
NACOFAG	National Coordinating Organisation of Farmer Associations
NARI	The Gambia National Agricultural Research Institute
NATC	Njawara Agricultural Training Centre
PoA	Plan of action
SMEs	Small and medium-sized enterprises
UTG	University of The Gambia
YEP	Youth Empowerment Project



EXECUTIVE SUMMARY

Agriculture remains one of the best responses to the growing youth employment challenge and poverty in The Gambia. It employs nearly half of the working population and remains the leading employer for Gambian youth, particularly in the rural areas where approximately 47,500 young people are employed in agricultural activities. The Gambia's agriculture is relatively undiversified, mainly smallholder-based and characterized by rain-fed subsistence crops. Its production is stagnant and does not cover the country's needs.

Groundnuts and cashew are the only two exported cash crops offering the most promising export potential and product diversification opportunities. However, youth are mostly involved at the production level and less involved in the processing and export level. Higher processing of nuts, in addition to cereals, offers great potential for value addition and employment creation for youth in The Gambia.

Given the exciting domestic and international demand for these products and high potential for promoting youth empowerment, this roadmap aims to improve employment opportunities and generation of income for youth in the processing activities of groundnuts, cashew and cereals sectors to realize the full potential of trade for The Gambia's youth.

In summary, this document aims to serve three purposes: firstly, present the status of the sector and its challenges; secondly, inform stakeholders of the existing skills gaps and training institution deficit in agriculture; and thirdly, provide a realistic roadmap and a plan of action (PoA) geared at achieving the following overall vision:

“ Foster The Gambia agribusiness through modern agroprocessing technology and youth empowerment. ”

To achieve this vision, the roadmap focuses on three strategic objectives.

1. Develop and reinforce youth entrepreneurship in the agribusiness sector

Young people in rural areas are expected to support their community without receiving stable income. This tradition, associated with difficult working conditions, limited access to education, land ownership, financial services and the negative image of farming, is pushing youth out of family farms and thus restraining active participation in the sector and entrepreneurship. The Gambia needs to make agriculture more attractive by promoting agropreneurship among youth through an active promotion campaign and young agropreneur support programmes, especially in nursery and agroprocessing, and develop funding mechanisms to improve the financial literacy and access among young farmers.

2. Reinforce the production and processing capabilities of the agribusiness sector

Major constraints at the cultivation level pose serious limitations to realize the growth potential of groundnut and cashew nuts: in particular, the post-harvest losses originating from poor handling and inappropriate storage capacities. As a first step, this roadmap recommends improving the access to quality seeds and fertilizers while also training farmers in modern Good Agricultural Practices (GAPs) with a focus on water management, as well as establishing small-scale storage units. At the processing level, poor equipment and lack of knowledge limit the development of primary processing capable of supplying the local market. In parallel, the absence of packaging for small processors renders the product unappealing to consumers. The plan includes dissemination and training in the use of modern processing and packaging units, simultaneously reinforcing and supporting the capacities of sector associations and the integration of new communication technologies.

3. Strengthen youth skills through vocational training and upgrade training provider capacities

The access to training in farming is very limited in The Gambia and almost non-existent in agro-processing. The development of agriculture in general and especially of its main cash crops, as well as its capacity to add value through primary processing, depends on the sector's capacity to improve the access to agro-related and agroprocessing quality education to the youth in rural areas throughout the country. This roadmap provides the foundations to improve the quality and relevance of the skills development programmes offered by education providers in agriculture. In parallel, support has to be given to training institutions and sector associations to develop their capacities to train more youth in farming, agroprocessing and food quality compliance. Additionally, youth in rural areas motivated by farming and agroprocessing need to be supported to follow training in agribusiness, agro-marketing, nursery management, agro-mechanic, agroprocessing and food processing and packaging. This will enable young farmers to improve their technical knowledge, thereby increasing their chance to develop sustainable agribusinesses.

Local market opportunities for agroprocessed food abound: value addition through primary processing of agricultural products offers young farmers and other actors in the value chain the potential to capture a larger share of income, open new markets and enhance customers' appreciation for their product, while leading to youth employment opportunities. This roadmap is geared at developing small-scale processing activities of groundnuts, cashew and cereals to generate income and create employment for young rural smallholders: first, transformation of cereals and groundnuts for daily consumption and primary processing by local village decorticators, and, second, processing with a state-owned company or private exporters. Cashew and groundnuts can be processed in multiple forms, such as butter, roasted or cooking oil, and, with appropriate packaging, can be exported or distributed locally through tourism market channels, such as hotels and restaurants. Crop waste can be used for energy production, cooking or industrial fuel. Additionally, this roadmap envisions tapping into export markets for groundnuts and cashew that present high growth demand. Food companies worldwide are turning to marketing of nuts, since they have a longer shelf life compared to fresh fruits and vegetables, offer multiple forms of consumption, from snacks to cooking ingredients, and are classified as superfoods offering high nutritional value.



Source: ITC

Achieving the objectives of this roadmap requires a focused and coordinated effort around the detailed plan of action (PoA) that specifies a series of activities to be implemented during a five-year period. A great deal of consultation among public and private sector stakeholders has taken place to identify these priority actions. This is visible through the dialogue platform and the sector's core team that have been established. This collaboration among policymakers, technical agencies, enterprises, training institutions and development partners must continue during the implementation phase of the roadmap to ensure effectiveness and maximum impact. The implementation framework defines systematic management, monitoring and measurement mechanisms that are complementary to those identified in the National Development Plan. The establishment of this framework will determine the degree of success of this roadmap.

Implementation of this roadmap will not only bring value chain actors together to cooperate in increasing groundnuts and cashew production and quality, it will also provide economic opportunities and improve the well-being of rural youth and their capacity to contribute to the country's economic development.



BACKGROUND

The Youth and Trade Roadmap for Nuts and Agroprocessing is one of the three sector-specific roadmaps that stem from the Strategic Youth and Trade Development Roadmap (SYTDR), which was developed under The Gambia Youth Empowerment Project (YEP) and funded by the European Union (EU). The overall objective of the SYTDR and the sector roadmaps on nuts and agroprocessing, tourism and ICT is to tackle the economic root causes of irregular migration through increased job opportunities and income prospects for youth. The project will improve skills, foster entrepreneurship and create employment for youth along selected value chains.

Agriculture is a major driver of growth in The Gambia's economy. It accounts for approximately 70% of foreign exchange and contributes to a quarter of The Gambia's GDP.¹ The sector provides employment to 80% of the population² and it represents the first means of income for the majority of rural households.

The Gambia's agriculture consists essentially of traditional cash crops, such as groundnuts and cashew, as well as rain-fed subsistence crops. Cereals like rice, millet, maize and sorghum are major staple food crops consumed daily by most of the population. Cereal production is mainly for consumption, but surplus is sold on local grain/cereal markets. However, as domestic production covers only up to 60% of annual consumption requirements and the country depends extensively on food imports, the Government of The Gambia has embarked on several initiatives to improve the productivity of cereal production and meet the increasing demands. Vision 2016, for example, is the government's blueprint for addressing the low level of mechanization in the country and scaling up rice production to achieve a marketable surplus.

The government has adopted an open regime for investment and is promoting investment in priority sectors, including groundnuts and cashew. Some incentive schemes, like the special investment certificate (SIC) or the domestic investment certificate, seek to increase the attractiveness of priority sectors. SIC is available for domestic and foreign investors if they invest \$100,000 in a priority sector. The domestic investment certificate can be conceded to domestic investors who invest at least \$24,000 in agriculture or agribusiness and employ a minimum of five Gambians.

Groundnut is the principal export crop of The Gambia, representing 66% of the earnings from agricultural exports. On average, 45% of the agricultural land is allocated to this

crop annually. The main areas of production of groundnuts are concentrated along the Kerewan and Mansakonko areas.

The Gambian cashew sector has shown remarkable potential in the last 10 years as an alternative crop to diversify production and exports. According to the ITC Trade Map, cashew is the 13th most important product exported by The Gambia. The main areas of cashew production are in Brikama, Kanifing and Kerewan.³

There is high potential for the establishment of plants for the manufacture of threshing and milling machines for cereal grain processing (GIEPA, 2017). Principal subsistence cereal crops like rice, millet, sorghum and maize could benefit from the increasing interest of several agroprocessing and light manufacturing enterprises for serving the domestic and export markets (UNCTAD, 2017).

There are a few sector associations and support organizations active in the cashew value chain, mainly The Gambian Cashew Farmers Association, Cashew Alliance of The Gambia (CAG), cashew farmers' associations, Agribusiness Services and Producers' Association (ASPA) and others.

Most agriculture value chains in The Gambia, including cashew and groundnut, suffer problems of low productivity levels, and agroprocessing and quality issues. Particularly, the high levels of aflatoxin contamination have constrained The Gambia's capacity to comply with the European Union aflatoxin regulations for groundnuts and have reduced the contribution of groundnuts to the country's foreign exchange earnings. One of the main challenges facing The Gambia's groundnut and cashew sectors is the problem of youth migration. Youth in The Gambia are increasingly moving out of traditional industries in search of better income opportunities. Limited incentives are provided to maintain youth involvement in agriculture.⁴

The Youth Development Index (YDI) ranks The Gambia as 130 out of 183 countries measured in 2016, and gives a score of 0.36, where 1 represents the highest possible level of youth development attainable. The Gambia's population structure shows a 'youth bulge' that is broad: the United Nations Development Programme's (UNDP's) NHD Report (2014) identified that youth (aged 13–30 years) make up 36.7% of The Gambian population. The cities of Banjul, Brikama and Kanifing have a higher youthful population than

1.– Gambia cashew sector strategy.

2.– Gambia cashew sector strategy.

3.– The African cashew sector in 2015, RONGEAD for the African Cashew initiative (iCA).

4.– The Gambia UNDP's NHD Report (2014) available here: <http://www.gm.undp.org/content/dam/gambia/docs/NewDocs/NHDR%202014.pdf>.

the national average and have literacy levels that range between 69% and 75%. However, the literacy goes down to 23% and 28% in the rural districts of Kuntaur and Basse. Most of the employed youth (63%) are working in the informal sector, in which the participation of women is higher (74%) than that of men (55%).

A large proportion of The Gambia's youth is unemployed (38%), with unemployment higher among young women (45%) than young men (30%). Half of the population works in the services industry, with 70% in the agriculture sector. The country faces a major skills gap – 60% of the workforce has no formal education, while 50% is employed in very low wage and low productivity sectors. According to The Gambia Decent Work Country Programme (GDWCP), the most pressing issue is the current high unemployment rate among urban youths aged 15–34 years old. Compared to urban areas (28.4%), the unemployment rate is relatively higher in rural areas (31.1%). According to the National

Youth Profile Study 2010, although unemployment rates are generally high among the most educated, the highest are among youths with secondary education (about 15%) whilst the lowest are found in those without schooling (4%), who are mostly self-employed as farmers, labourers and petty traders.

This roadmap's main focus is to improve employment opportunities for youth in the groundnut, cashew and cereals sectors and realize the full potential of trade for The Gambia's youth. Agriculture remains the best response to the growing youth employment challenge and poverty in The Gambia, as in many African countries.⁵ It has the capacity to employ significant numbers of youth, and also provides valuable inputs for the development of industry and service activities improving employment opportunities in selected sectors.

⁵– UNDP's NHD Report (2014).



Source: ITC

YOUTH AND TRADE IN THE NUTS AND AGROPROCESSING SECTOR

Youth is defined as those aged 15–35 years in the national youth policy of The Gambia. Nevertheless, ‘youth’ is described in a flexible manner in the policy and also relates to young people aged 10–39 years. The United Nations defines youth as the age of 15–24 and the African Union of 15–35 years. Based on these definitions, youth represents the majority of the working age population in The Gambia.

Agriculture remains the leading employer for Gambian youth, particularly in rural areas. Approximately 47,500 young people are employed in agricultural activities. Cereal production is mainly for consumption, but surplus is sold on local grain/cereal markets. As groundnut and cashew are cash crops and labour-intensive sectors, they represent an opportunity for youth employment creation in The Gambia. Youth are mostly involved at the production level of the value chain and less involved at the processing and export level. Thus, processing of nuts and cereals offers great potential for value adding and employment creation for youth in The Gambia.

According to the National Development Plan 2018–2021, **youth employment in The Gambia is hindered by low and inadequate education.** This also hinders youth engagement in entrepreneurial ventures because of limited access to knowledge and information, such as business development services for the entrepreneurial youth. Limited land ownership and access to finance are another two main factors that constrain youth participation in the agricultural sector. Given their presumed inexperience and low levels of education, lack of collateral and financial literacy, it is difficult for youth to generate trust with commercial banks and obtain credit, savings and insurance services under the current credit facilitation schemes.

A number of constraints related to tradition and perceptions also hinder youth employment. The Gambia has a long tradition of youth working without pay on family farms. Young people are expected to support their family and community as part of their responsibilities, and asking for remuneration is perceived as negative. The tradition of youth working for free has taken its toll on youth employment and is pushing the youth out of family farms and in search of income-generation activities in other sectors. These traditions and perceptions restrain entrepreneurship behaviour among young people, as society does not necessarily instil in them the needed self-confidence and assurance.



Source: ITC

The National Youth Policy is the guiding instrument for the Ministry of Youth and Sports (MOYS). It focuses on sociocultural development, economic development and employment, and education, among others. The national development strategy emphasizes commitment to the National Youth Service Scheme and the National Youth Council.

According to the National Youth Policy 2009–2018, the low motivation towards agriculture and the lack of livelihood skills hinder the development of young people in The Gambia. The policy uses The Gambian President’s Back to the Land Initiative as the precursor to attract both the private and public sectors to invest in youth and agriculture. The document also highlights the importance of promoting investments in agriculture for youth in terms of training, inputs, access and ownership of land.

The Programme for Accelerated Growth and Employment (PAGE) (2012–2015) outlines policy initiatives designed to promote youth employment in the agriculture sector. The document put emphasis on developing youth and mobilizing young people for increasing agricultural productivity.

NUTS AND AGROPROCESSING VALUE CHAIN ANALYSIS

In this section, a comprehensive analysis of the nuts and agroprocessing value chain is conducted. This chapter is an integral part of the strategy development process, because the analysis results in the identification of all players, processes and linkages within the value chain. The process serves as the basis for analysing the current performance of the nuts and agroprocessing value chain in The Gambia and for identifying options to foster youth employment opportunities and the future development of the sector.



Source: Agro Roadmap, ITC

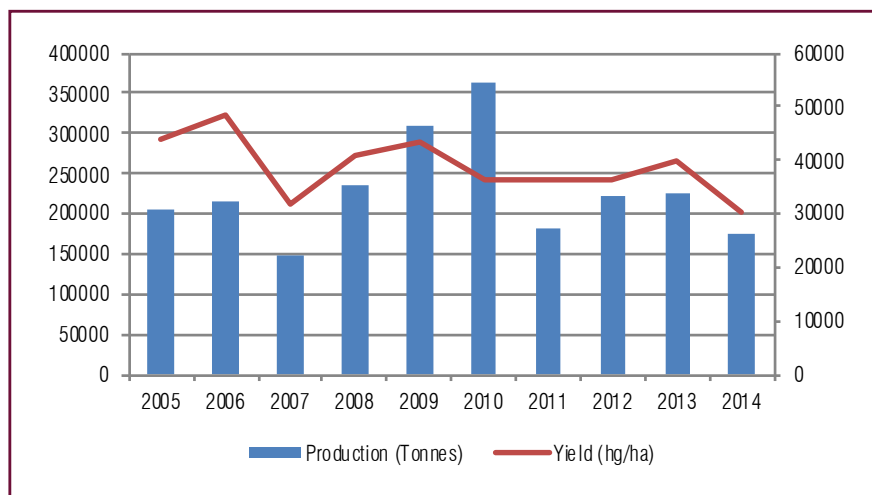
CEREAL AND NUTS PRODUCTION

CEREAL PRODUCTION

The main cereals produced in The Gambia are rice (*Oryza sativa*), millet (*Pennisetum typhoides*), sorghum (*Sorghum bicolor*) and maize (*Zea mays*). The performance of the cereal sector during the period 2005 to 2014 fluctuated in terms of production and yield (see Figure 1).

Given the role of cereals as major staple food crops, the Government of The Gambia has put into place different strategies to increase food security. These include stimulating local production through higher yield seed varieties provided by The Gambia National Agricultural Research Institute (NARI) and a Seed Technology Unit (STU), as well as regulating imports of cereals by imposing a maximum duty rate of 18% and a zero rate on rice.

Figure 1: Quantity of maize, millet, rice and sorghum selected cereals in The Gambia, 2005–2014



Source: FAOSTAT, 2017.

Millet accounted for nearly 44% of total cereal production in 2014, rice 27%, maize 17% and sorghum 12% (See Table 1). In terms of yields maize represent the highest performance followed by millet and sorghum. In comparison to other African countries like the Republic of Senegal, rice represented the highest percentage of cereal production (44%)

in the same year, succeeded by maize (14%), sorghum (8%) and millet (32%). Rice represented the crop with the highest yields, with 41,417 hg/ha, followed by maize (12,212 hg/ha), sorghum (8,182 hg/ha) and millet (5,712 hg/ha).

Table 1: Production, area harvested and yields of selected cereal crops in The Gambia in 2014

Cereal	Area harvested (ha)	Yield (hg/ha)	Production (tons)
Maize	36 703	8 252	30 289
Millet	100 829	7 618	76 816
Rice	66 286	7 041	46 674
Sorghum	27 235	7 450	20 289

Source: FAOSTAT, 2017.

GROUNDNUT AND CASHEW PRODUCTION

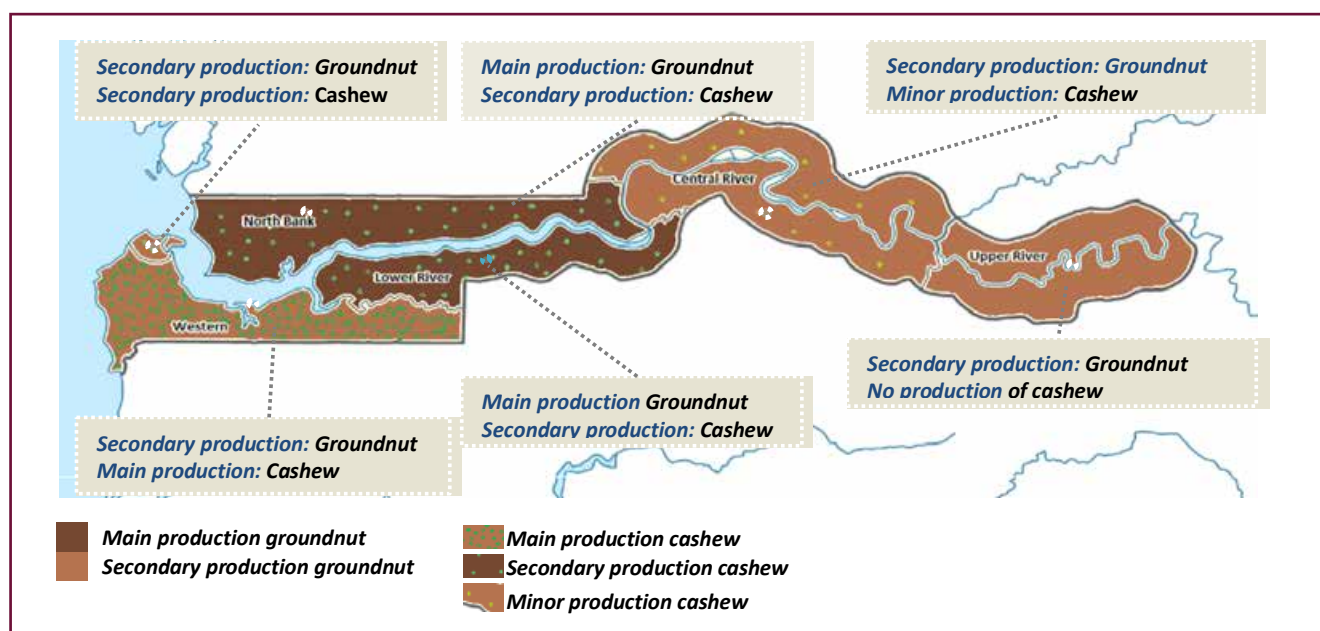
Groundnuts and cashew nuts can be grown everywhere in The Gambia, as shown on the map in Figure 2. The current production of groundnut is concentrated in the Kerewan (North Bank) and Mansakonko (Lower River) regions. These are usually grown in the upland areas for both subsistence and cash. Cashew production is concentrated along the Brikama and Kanifing areas and Kerewan. The productive acreage under cashew cultivation is estimated at between 20,000 and 23,000 hectares. These regions have the advantage of both offering easy access

to Banjul’s port and airport, and therefore also ensuring access to the rest of the country.

There is limited mechanization of smallholder agriculture in The Gambia and farmers face different land issues like decreasing fertility of the arable land, soil salinization and erosion. Hence, there are many opportunities for increasing productivity along the value chain by facilitating adoption of mechanization and strengthening the capacity to exploit bigger hectares of land.

The cashew sector is vulnerable to weather conditions and volatile prices. To improve the sector’s productivity, actions need to be implemented to address irrigation issues and improve transparency of the price mechanism.

Figure 2: Area of cashew and groundnut production in The Gambia



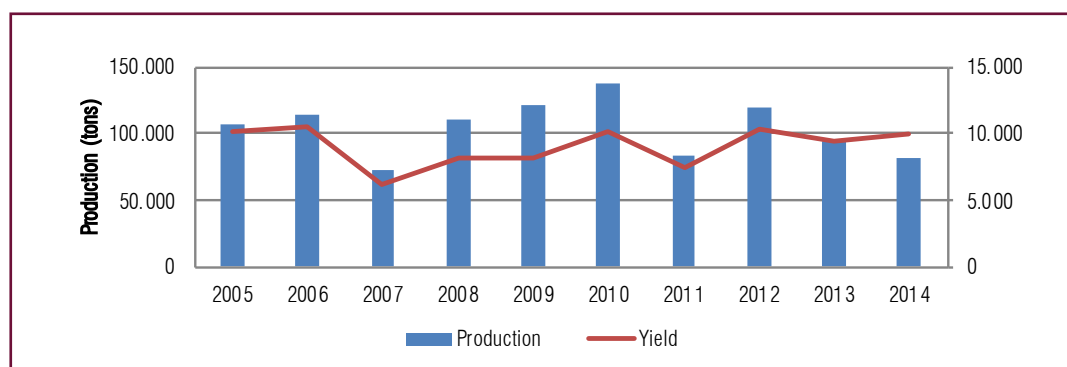
Source: Based on GIEPA and RONGEAD data.

GROUNDNUT PRODUCTION

Groundnuts are of paramount importance to The Gambia. Approximately 45% of the agricultural land is devoted to groundnut production and nearly 70% of the agricultural labour force works in groundnut farming, handling, processing and trade.

As shown in Figure 3, during the period 2005–2014, Gambian raw groundnut production decreased by 3.09%. While the production was steadily increasing during the period 2005–2009, it started dropping from 2010 onwards, even going below the amount produced initially. In the meantime, world raw groundnut output is estimated to have increased by approximately 1.45% CAGR over the past ten years – from 38.6 million tons in 2005 to 43.9 million tons in 2014.

Figure 3: Quantity of groundnuts in The Gambia, 2005–2014



Source: FAOSTAT, 2017.

Although geography puts The Gambia near the three top producers in the world –the Federal Republic of Nigeria, the Republic of the Sudan and the United Republic of Tanzania, The Gambian groundnut production is relatively small compared to global production, ranking only 38th.

approximately 6,503 households in the five regions of the country, representing 2.83% of the total number of households (estimated at 229,500 households according to the 2013 National Population Census).⁷ The Gambia are estimated at around 450 kg / ha, which is low considering the potential yield of 1,500 kg / ha if better cashew farming practices are adopted.

CASHEW PRODUCTION

The majority of cashew farmers are individual land owners with average holdings of 1 ha to 3 ha.⁶ The value chain's main actors include farmers, local traders, collectors, exporters and a few processors. Cashew farming occupies

Cashew nut production in The Gambia increased by more than 21% from an estimated 3,300 tons in 2008 to 4,000 tons in 2010. Production level has since increased to approximately 10,000–15,000 in 2015/2016.⁸ Figure 4 illustrates The Gambian cashew production records between 2008 and 2014.

6.– ITC Cashew Sector Strategy for the The Gambia.

7.– Source: IRD cashew censures report (2014–2015).

8.– Source: Cashew Sector Enhancement Project Report (2016).

Figure 4: Cashew production in The Gambia, 2008–2014



Source: FAO data.

Box 1: Main challenges of the cashew sector

Despite the growing levels of cashew production in The Gambia, the sector still faces some big challenges related to a wide range of supply-side issues such as the limited use of good plantation management techniques, insufficient business management skills across the value chain, the absence of improved varieties of cashew seedlings, and limited processing of raw cashew nuts (RCN). Furthermore, insufficient capacity to organize the sector's development, limited public support for the sector, the unstructured nature of public-private dialogue, low knowledge of buyer requirements and market trends, difficulty implementing and maintaining quality controls, and the limited promotion of cashew products have all been identified as challenges to be addressed by the sector.*

Another big challenge for improving cashew production in The Gambia is to improve the management of seasonal farming activities and cropping practices. There is unexploited potential for youth employment creation in value chain activities performed during the whole year, including shelling, roasting, peeling, grading, packaging and marketing of nuts. Some other activities that can generate jobs for the youth for at least five months are cashew apple juice and wine processing, cashew apple drying, beekeeping; and collection, drying and marketing of nuts.

All these production issues have an impact on the country's export performance. The next section provides more details about the current state of exports in the groundnut and cashew sector.

*Source: http://www.gambiatradinginfo.org/sites/default/files/Gambia-Cashew_Strategy.pdf.

GROUNDNUT AND CASHEW EXPORT PERFORMANCE

EXPORT PERFORMANCE – GROUNDNUT

Groundnut exports account for 66% of the total exports of agricultural products in The Gambia.⁹ There are three types of groundnuts under the HS classification system that The Gambia exports: 1) 'shelled groundnuts' (HS-120242); 2) 'groundnuts in shell' (HS-120241); and 3) 'groundnut seed' (HS-120230). They respectively accounted for 30%, 20%, and 50% of total groundnut exports (See Figure 5).

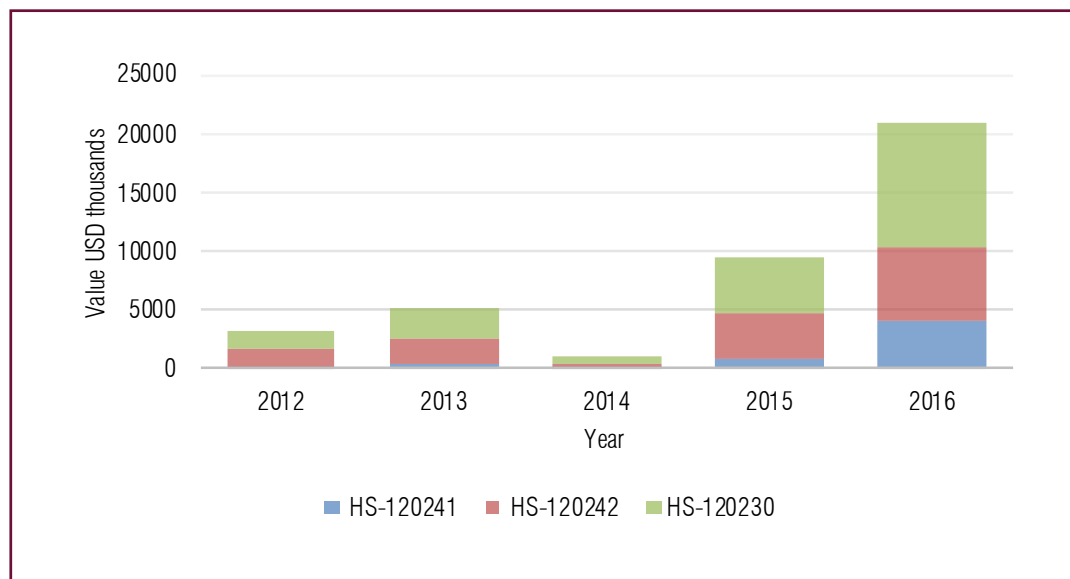
The country's export of groundnuts has been growing constantly, going from \$1.6 million in 2012 to \$10.4 million in 2015 with a significant increase between 2015 and 2016 as export values doubled to reach 20 million. The significant drop of exports was caused by the drought in 2014 which caused general agricultural production to decline by around 22%. The Gambia has also gained market share in the world market, increasing from 0.06% in 2012 to 0.41% in 2016



Source: ITC

9. – http://www.intracen.org/uploadedFiles/intracen.org/Content/Exporters/Market_Data_and_Information/Market_information/Market_Insider/Edible_Nuts/Groundnut%20Quarterly%20Bulletin%20June%202015.pdf.

Figure 5: The Gambia's export of groundnuts (HS-1202), 2012–2016, in USD thousands



Source: Estimates based on ITC Trade Map.

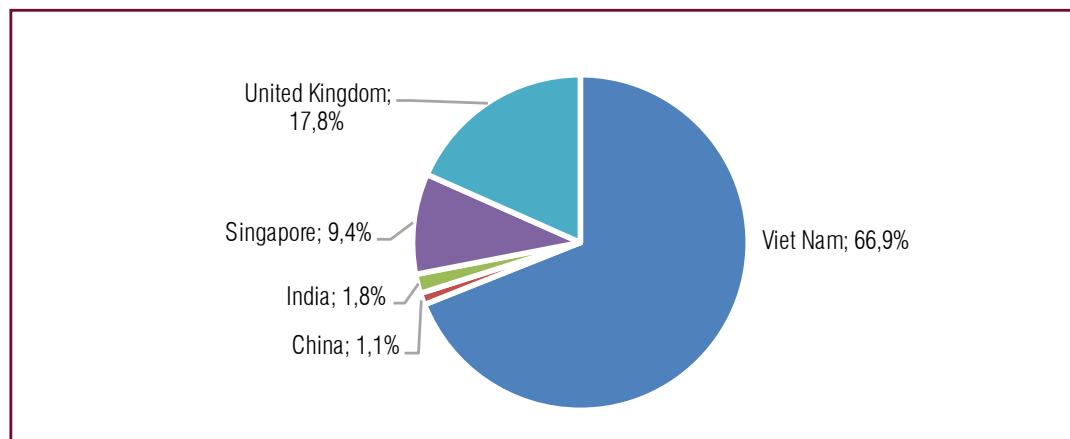
Export destinations

During the period 2012–2016, The Gambia's main export destinations for groundnuts were the Socialist Republic of Viet Nam, the United Kingdom of Great Britain and Northern Ireland and the Republic of Singapore, which accounted for 97% of The Gambia's total groundnut exports. The United States of America and the Republic of India followed the list with imports of almost 2% of The Gambia's groundnuts (Figure 6).



Source: ITC

Figure 6: The Gambia's export destination of groundnuts (HS-1202) (2012–2016)



Source: Estimates based on ITC Trade Map.

EXPORT PERFORMANCE – CASHEW¹⁰

The Gambia's cashew exports are mostly concentrated in fresh or dried cashew nuts in shell (HS-080131). The Gambia does not export cashew nuts without shell, which means that there is potential for primary processing and untapped market opportunities.

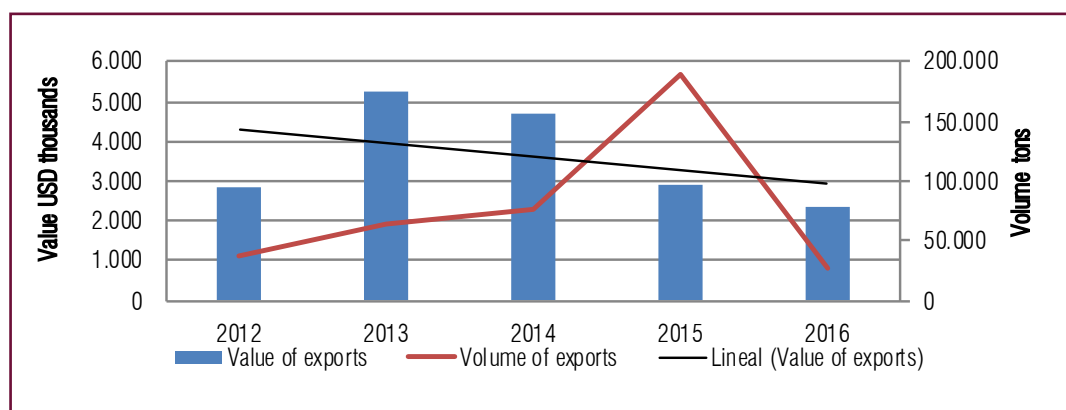
In the last few years, The Gambia's cashew sector has grown steadily thanks to the increasing global demand for

10.– An important part of cashew produce in The Gambia is traded with neighbouring countries. As most of the trade is unofficial, no reliable data is available.

cashew. Change sentence to: Gambia's exports represent only 0.2% of world exports for raw cashew nut (RCN), ranking 15th in world exports.

The total export value of cashew of The Gambia was around \$5.3 million in 2013. Between 2012 and 2015, the volume of exports rose steeply while the value plummeted causing a sharp decline of the unit value. As a consequence of declining prices, exports volume fall significantly in 2016 with a reduction of 86% (Figure 7) but with a limited decrease of the total export value going down to \$2.3 million. However, this is the lowest export value over the last five years.

Figure 7: Exports of cashew, in shell (HS-08131) from The Gambia, 2012–2016, in USD thousands



Source: Estimates based on ITC Trade Map.

Export destinations

India is the most important destination market for The Gambia, importing approximately 62.8% of its cashew exports. The following export markets are Senegal (9.7%), the Kingdom of the Netherlands (8.8%), Viet Nam (5.7%) and the Kingdom of Denmark (4.9%). The French Republic and the Kingdom of Sweden represent approximately 3% of shares in The Gambia's exports. These figures display

an evident concentration in The Gambia's export markets. According to Table 2, between 2012 and 2016, new markets made their entrance to the top five Gambian destination markets. These include Senegal and the Netherlands, whereas others went out of the top five importing markets, in particular, the People's Republic of China and the United Kingdom. An important amount of the cashew produced in The Gambia is exported informally and there is no reliable data available to capture the actual trade.

Table 2: The Gambia's main export destination markets for cashew (HS-08013), 2011–2016, in USD thousands

	Value exported in 2012 (USD thousand)	Value exported in 2016 (USD thousand)	Share in The Gambia's exports (%)	Ranking of partner countries in world imports
World	3 000	2 347	100	
India	2 809	1 473	62.8	2
Senegal	0	228	9.7	93
Netherlands	0	207	8.8	4
Viet Nam	86	133	5.7	10
Denmark	0	114	4.9	42

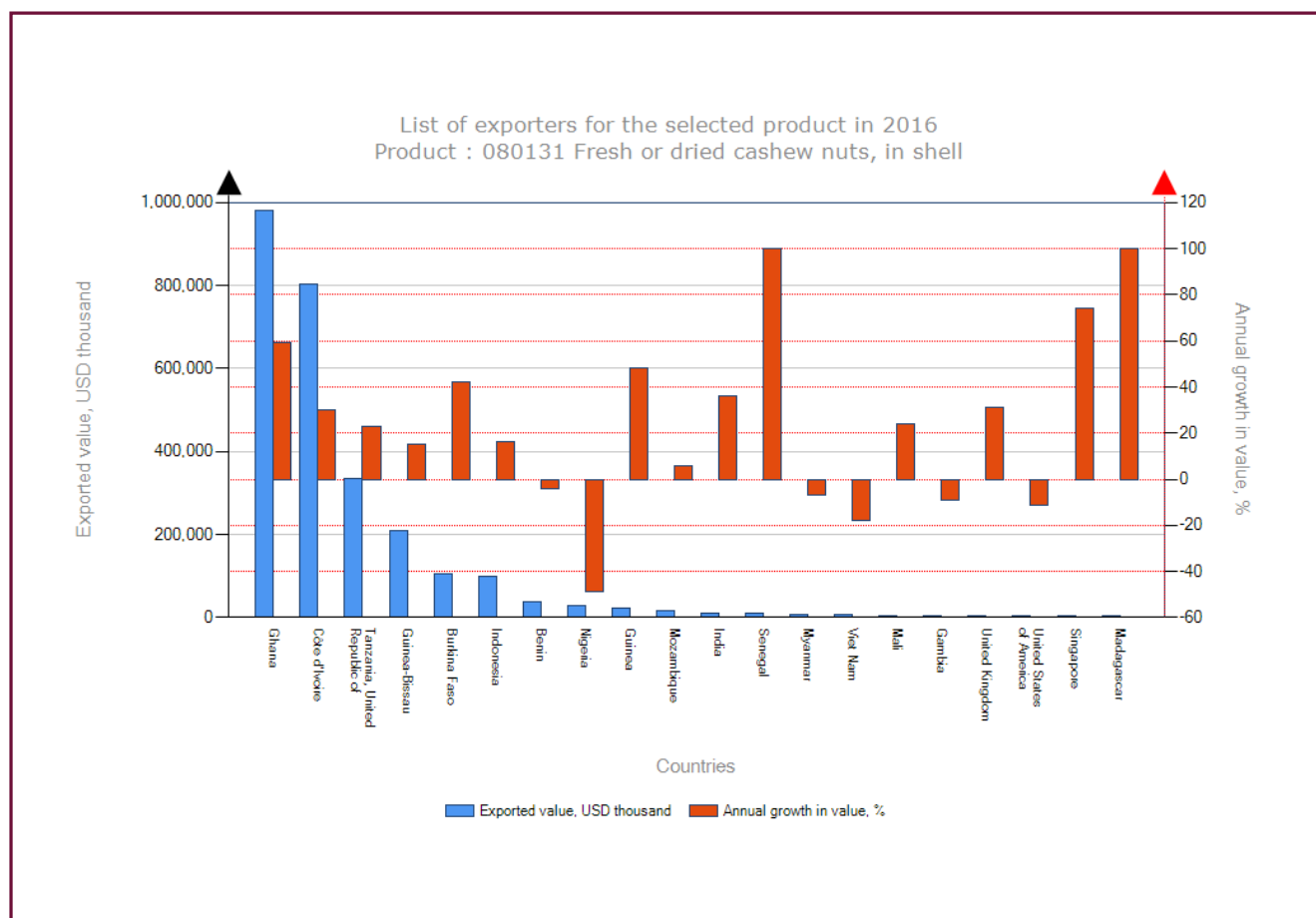
Source: ITC calculations based on UN Comtrade statistics.

Main competitors in the world market

The Gambia is the 16th exporter of cashew in shell in the world and faces intense competition, especially at the regional level (see Figure 8). The cashew export market is dominated by African countries; the top five exporters include the Republic of Ghana, the Republic of Côte d'Ivoire, the United Republic of Tanzania, Republic of Guinea-Bissau and Burkina Faso. Altogether, they represent a total share of

90.4% of the world supply. Most of the export markets have a positive annual growth in value, including Senegal, which is the closest competitor to The Gambia's RCN, with 100% annual growth in value in 2016. The African countries export mainly to Vietnam and India where the cashew is shelled and processed then exported to the European countries and United States. The value addition is captured by the two Asian countries.

Figure 8: List of exporters of cashew (HS-08131) in 2016



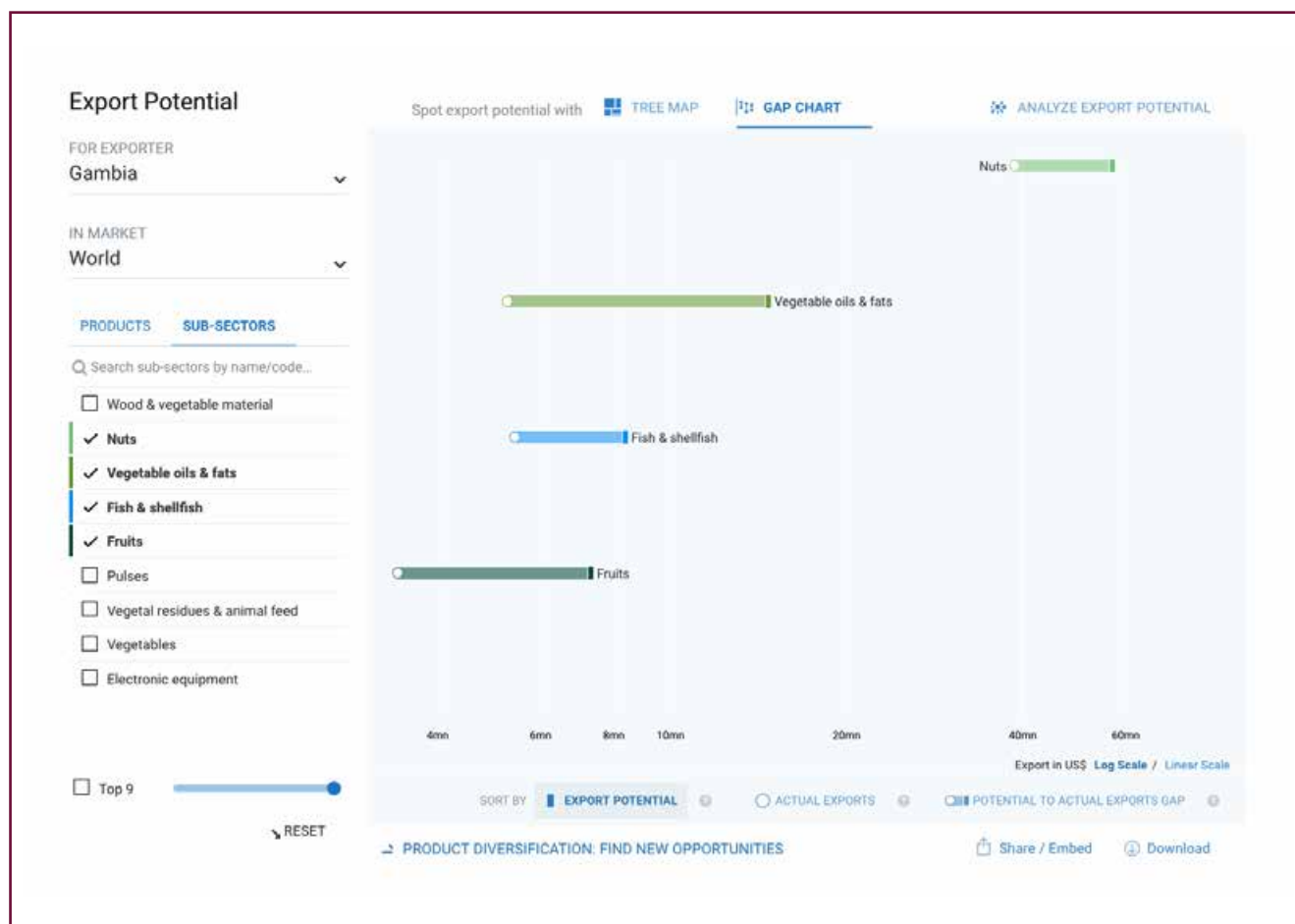
Source: ITC Trade Map.

EXPORT POTENTIAL MAP FOR AGRO PRODUCTS IN THE GAMBIA

The export potential map was used to conduct an economic analysis for the identification of priority sectors in The Gambia. Figure 9 shows the top four sectors with the current greatest export performance and also with potential for seizing untapped opportunities in the future. The top four sectors are: 1) nuts; 2) vegetable oils and fats; 3) fish and

shellfish; and 4) fruits. The nuts sector shows the largest absolute difference between potential and actual exports in value terms, leaving room to realize additional exports worth more than \$38 million. Particularly, cashew and groundnuts are driving the nuts sector trade performance in the country. Future opportunities in crude groundnut and cashew oil have also been identified.

Figure 9: Sectors with greatest export potential for The Gambia



Source: ITC Export Potential Map, 2017.

MARKET ACCESS CONDITIONS FOR GAMBIAN EXPORT OF AGRO PRODUCTS

The Gambia, like most least developed countries (LDCs), benefits from preferential tariff market access conditions in most importing markets. The country is eligible for all GSP schemes maintained by developed countries and all its major exports to main importing markets are covered by preferences. As a member of the World Trade Organization (WTO), The Gambia applies MFN treatment to all trading partners.¹¹ The Gambia is a member of ECOWAS and applies the ECOWAS Common Customs Tariff, which is based on the original tariffs applied by WAEMU/UEOMA. The tariff currently comprises four rates: zero, 0%, 10% and 20%.¹²

11.– WTO (2010) Trade policy review.

12.– Gambia Ministry of Trade, Industry, Regional Integration and Employment, <http://www.gambiatradinginfo.org/market-access/barriers/tariffs-and-quotas>.

The Gambia is a member of the ACP Group of States. It benefits from preferential duty-free access to the EU under the Everything But Arms scheme for LDCs, and, as a member of the Economic Community of West African States (ECOWAS), is involved in ongoing negotiations with the EU for the establishment of an economic partnership agreement (EPA).

Non-tariff market access conditions represent the biggest trade constraint for The Gambia. Gambian exporters need to comply with SPS requirements from importing countries, which usually tend to be too demanding for The Gambia to meet. A particular quality issue in the country relates to aflatoxin, a human carcinogen produced by fungi that can affect crops like groundnuts while in the field or during improper post-harvest handling and storage. Domestically, aflatoxin is not only a major health concern, but also has an impact on the sector's performance because groundnut exports from The Gambia are limited by the EU's stringent aflatoxin standards.

As it has been noted in this section, The Gambia's export performance in the groundnut and cashew sector faces some main challenges. First, although groundnuts represent the main exports of the country's agricultural products, exports are mostly concentrated in one export destination (Viet Nam). Secondly, The Gambia faces intense regional competition for the world market. In fact, much of what is exported from The Gambia through Banjul's port is sourced from countries of the subregion. Third, potential for seizing untapped export opportunities for the nuts sector is not being exploited due to lack of capacity to supply international markets with adequate volumes and regular consistency. Fourth, non-tariff market access conditions, particularly aflatoxin control in nuts, continues to be an issue to be tackled.

In order to have a better understanding of the sector, a value chain analysis is conducted in the next section.

VALUE CHAIN ANALYSIS

Figure 10 and Figure 11 present a value chain map of the cashew and groundnut sectors in The Gambia. Both figures provide an overview of the principal activities in the respective industries, starting from research and development and up to export. Both maps identify trade support services along the value chains, main export markets and key players.

Input supply

In The Gambia, both the public and private sector are involved in the development and improvement of cashew varieties. The Gambia National Agricultural Research Institute (NARI) focuses on identifying and defining the characteristics of the varieties available in the country and their genetic potential.¹³ NARI efforts are on introducing high-yielding varieties and on increasing processing and products' variety for value addition.

The principal inputs used by producers are seed and plant, sourced locally or imported from neighbouring countries. Fertilizer is only used by a small number of commercial farmers. Most of the materials used for production and processing are imported and retailed locally.

For cashew, the seed selection is the first step towards improving quality. This is usually done through the collection of seed from the previous season, which is then used for planting. The young trees' seedlings are locally produced and imported from the region.

In the groundnut sector, The Gambia used to have a seed multiplication programme implemented by NARI in collaboration with ASPA. Through this programme, NARI supported the supply of quality improved seeds and ASPA oversaw the distribution of the seeds through loan facilitation

to farmers. After the end of the project, the programme was not sustained. Today, there is no seed distribution system and the seed council is still not operational. Thus, farmers are selecting and collecting seeds during the harvest season and using them for the next planting period.

Farm production

Mainly two actors are involved in cashew and groundnut production: smallholders and commercial farmers and producers' associations. Farmers' role is to supply the demanded high-quality nuts for the export market and for local processors. Farmers face many constraints, such as market price volatility, lack of market, low yields due to disease, pests, theft, drop in quality of nuts, lack of information on determinants of nut quality and limited production capacities.

Producers' associations facilitate dissemination of information and serve as an entry point for potential buyers. They also serve as mediators between buyers and members.

As in most West African countries, the harvest season starts in February and ends in June. Farm activities are labour-intensive and include planting, weed management, pruning, grafting, cleaning, collection of nuts, drying of nuts and storage. The average Gambian farmer collects roughly 180 kg of raw cashew nuts per year.

Groundnut production is labour-intensive and involves land preparation, seed sourcing, sowing, weeding, stripping, threshing, winnowing, drying and cleaning. After the cleaning and grading process, the dried groundnuts are stored in bags and stacked in up to 10 bags, carefully separated to allow air circulation among them. The bags are piled on wooden planks to avoid damage from dampness.

Conducting the above activities in line with best handling practices can have a positive impact and increase productivity and quality of the nuts. The use of good planting material and seeds also impacts yield performance.

13.– Discussions with the programme leader, Agroforestry Programme and NARI, October 2012.



Source: ITC

Collectors, traders and wholesalers

Collectors, traders and wholesalers remained one of the most competitive nodes of both the cashew and groundnut value chains. The process involves community-level collectors or traders buying small quantities from farmers and bulking for temporary storage.

Cashew collectors/buyers, also called middlemen or intermediaries (retailers play an important role in the production phase, as they pre-finance nut collection, inspect and control the quality and buy the nuts. In addition, they are in charge of transporting the nuts to the collector/buyers' stores and of further drying processes and transit storage.

Traders from Senegal buy directly from farmers, who prefer to sell to them due to their strong currency, compared to the dalasi. It is important to highlight that these traders usually buy through informal channels.

On the one hand, market channels for groundnuts include traders, operators and industrialists as well as agents who work mostly for Senegalese buyers. On the other hand, there is the informal export market dominated by Senegal.

Storage capacities

Farmers suffer from lack of sufficient facilities and knowledge of proper nuts storage and drying methods. These deficiencies impact the quality of nuts, increase risk of pest infection and impact the product value, since the middlemen pay less for such products. The storage and drying issues can be addressed through the following actions: (1) training of farmers on best practices and quality standards issues, and (2) by providing adequate facilities that could be managed by youth. These actions would help to increase the quality of nuts, generate employment and increase the competitiveness of both sectors.

Small and large-scale processors

Many African countries do not process agricultural products to their full potential. Currently, 700,000 tons of raw cashew nuts are produced in Africa, but only approximately 20% is processed and the rest are exported as raw cashew nuts.¹⁴

14.– <https://www.cma-cgm.com/static/es/attachments/com-watch%20-%20issue%2065-%20october%202016.pdf>.

The Gambia is not an exception and most cashews are exported in the form of raw product. The main reasons for this are lack of finance for processing, undeveloped export markets and weak local demand.

Little value addition in the form of processing of raw cashew nuts is done by local processors. They only process the nuts (roasted and salted) for local consumption or export the kernels in raw form. The cashew apple is transformed into juice or dried.

The level of cashew processing remains extremely low in The Gambia (only 0.2%) and it is estimated that only between 5 MT and 10 MT are processed annually. The industry includes only one processing unit, with a capacity of above 1,000 MT/year, and a few other small-scale factories.¹⁵ In 2015, local processing was approximately 200 MT, while local processing capacities were approximately 3,000 MT/year.¹⁶ There is an enormous potential for further processing activities given that 10,000 MT of raw cashew nut are produced locally, and more than 100,000 MT of RCN are produced in Guinea Bissau and Senegal, but exported from Banjul's port.¹⁷ There are also sector organizations supporting the development of cashew processing capabilities.

Regarding the groundnut sector, The Gambia Groundnut Corporation (GGC), along with small-scale processors, operators and manufacturers, are the main actors present along the whole value chain. Operators buy groundnut from traders and decorticate them, then they sell them to manufacturers that oversee the quality of kernels for raw export as well as for processing into crude oil and peanut butter. One of the major constraints faced by processors is the inability to sell product in the Hand Picked Selected (HPS) market, due to strict aflatoxin content limitations. The Gambia's groundnuts are instead sold in the less lucrative bird feed market.¹⁸

Despite these quality issues, the cashew and groundnut industry in The Gambia have great potential that remains largely untapped. Increasing processing activities would create employment opportunities for youth in different areas, for instance, in sorting, clearing, shelling, peeling, and grading and packing the nuts. This will also generate additional revenue for the country. According to the African Cashew Alliance, a small-scale factory with a production capacity of 4 MT per day could employ no less than 200 workers.¹⁹

15.– There are three main microprocessors of cashew kernels: Gambia Horticultural Enterprises, Jawneh & Family Cashew Processing Enterprise, and Group Juboo. Two larger plants became operational in 2013 with a processing capacity of 2,500 tons per year and 7,000 tons per year.

16.– Rongead, 2015.

17.– Gambia National Export Strategy.

18.– The Gambia National Development Plan, PAGE II, 2017–2022.

19.– African Cashew Alliance (2015), Growing the African cashew industry!

Exporters

Exporters of raw nut pre-finance the collection and packaging of nuts into jute bags. Exporters of processed nuts provide quality inspection and control before shipping the product to the export markets.

Cashew nuts from The Gambia, as well as those from Senegal and Guinea-Bissau, are gathered at Banjul's port and shipped to export markets. The Gambia's main export markets are India, Senegal, the Netherlands, Viet Nam and Denmark.

The Gambian groundnut is mostly exported to Viet Nam; however, its final destination is China, which is the main market. This indirect export is mainly due to lack of bilateral agreements between The Gambia and China. Exports to traditional markets, like the UK or EU markets, are constrained by the strict regulations on phytosanitary measures (aflatoxin issues). Marketing of groundnuts is difficult due to these quality issues, as well as irregular supply of appropriate quantities.²⁰

In order to address these quality and volume issues in the groundnut value chain, it is important to strengthen the capacities of NARI and farmer associations by providing certified seeds and developing appropriate credit schemes for the provision of farm inputs. This will determine the quality and the quantity of the products. In addition to the implementation of the EU Quality Assurance Framework, it is important to tailor 'contract grower schemes' between industrialists and producers to ensure the production of quality produce that meets international standards when processed.²¹

Support services

The competitiveness of the nuts and agroprocessing sector in The Gambia has been hindered by the very limited support services. Although there are some commercial banks, financial services are not easily accessible to small and medium-scale producers for purchase of raw nuts. Shippers (maritime transporters) are responsible for timely packing and shipping raw nuts and processed kernels destined for international buyers, in line with contracts. However, most of them lack of appropriate skills for packaging and labelling. Basic maintenance services and irrigation technology is limiting the sector's productivity.

There is a need to strengthen public and private institutions responsible for providing services and ensuring that the exported products are responding to the international buyer requirements. Quality, safety and traceability are still issues that the Food Safety and Quality Authority of The Gambia needs to tackle. The trade support services will be discussed in the section related to trade support institutions.

20.– /National%20Development%20Plan-%202017-2020%20(1).pdf.

21.– The Gambia National Development Plan, PAGE II, 2017–2022.

Figure 10: Value chain mapping of cashew sector

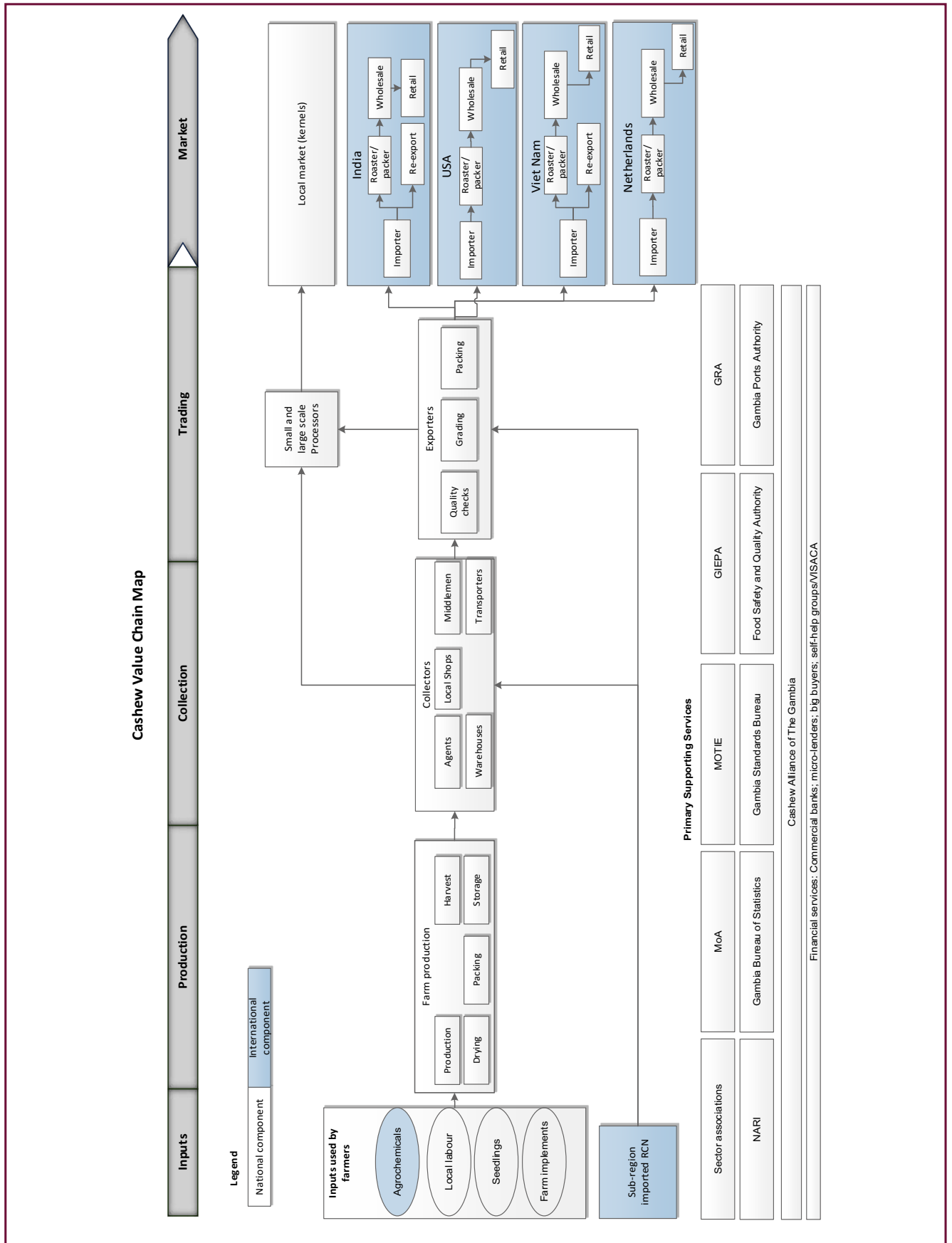
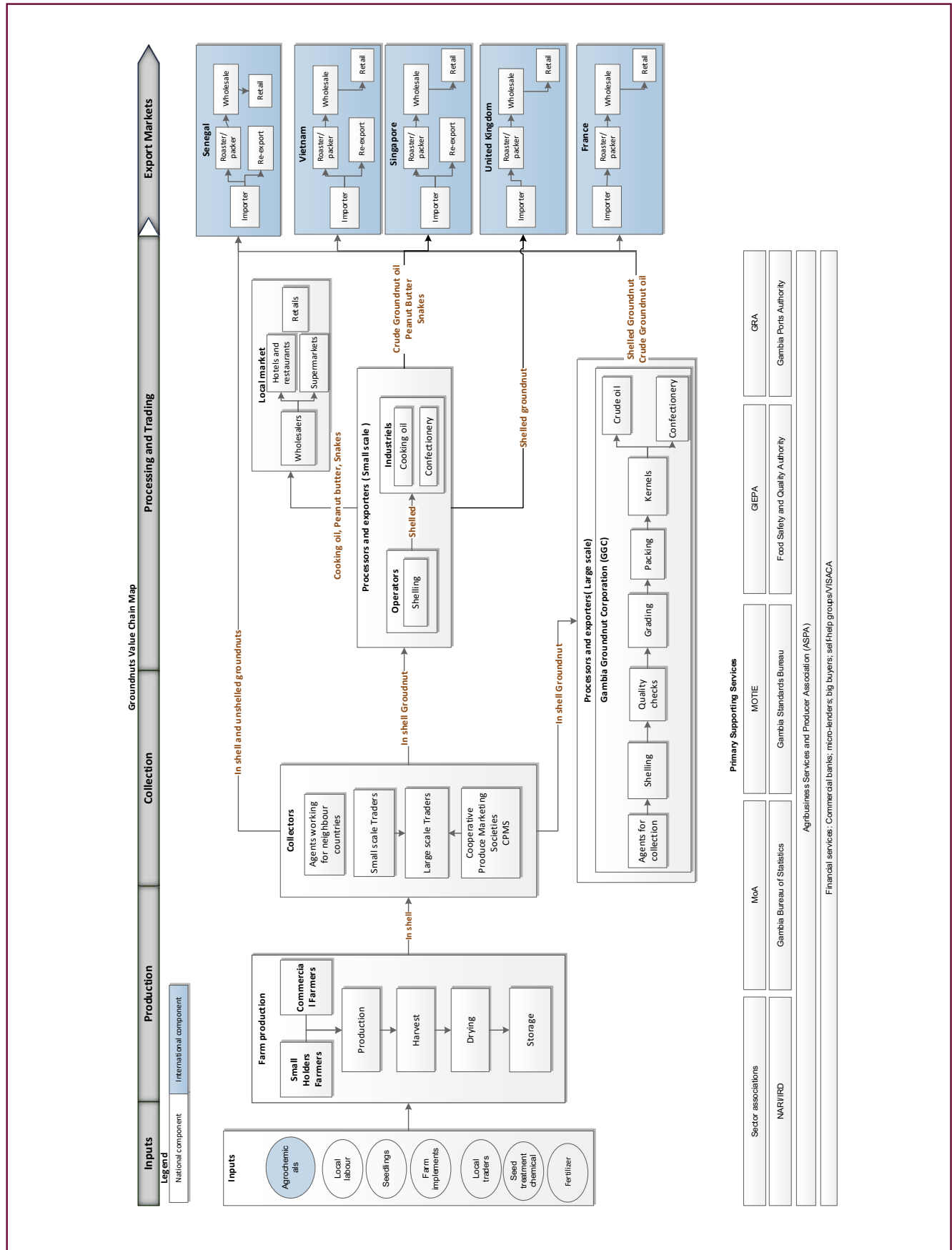


Figure 11: Value chain mapping of groundnut sector





Source: ITC

SEASONAL FARMING CALENDAR AND YOUTH EMPLOYMENT OPPORTUNITIES

Cashew and groundnut farming calendars provide information about cropping practices and management of both products and processing as well as climatic conditions in The Gambia. The calendars below also provide indication of the employment opportunities for the youth.

Data is organized according to the stages of plant production (preparation – planting – pruning – cleaning – harvesting – drying – storage). Activities related to processing are also included, highlighting the major step of processing groundnut and cashew (processed nut market research, capitalization for processing, identification of raw nut suppliers, stocking of raw input (raw nuts), shelling of nuts, roasting of nuts, peeling, grading of nuts, packaging of nuts, marketing of processed nuts).

Understanding the activities that are conducted during the year by value chains actors will help in planning field activities and also illustrate youth employment opportunities

along the value chains. The categorization of information also contributes to improve the management of agribusiness activities.

In the cashew sector, the activities that have the greatest potential for youth employment creation during the whole year are mostly linked to the primary processing including shelling, roasting, peeling, grading, packaging and marketing of nuts. Some other activities that can generate jobs for the youth for at least five months are cashew apple juice/wine processing; cashew apple drying; beekeeping; and collection, drying and marketing of nuts (See Table 3).

The greatest employability for youth in the groundnut sector is found in processing activities related to roasted shelled peanut and salted peanut that can create jobs during the 12 months of the year. Other processing activities that have potential for providing employment during at least half of the year are grading and packaging; peeling and grading of nuts; packaging of nuts; and marketing of processed nuts. The two production activities with the highest employment potential are shelling and marketing of raw nuts.

Table 3: Calendar of cashew activities and youth employment opportunities

Sector activities	J	F	M	A	M	J	J	A	S	O	N	D	Youth opportunities	
Season	Dry					Rainy						Dry		
CASHEW PRODUCTION														
Seed selection														
Nursery preparation														
Seedling transplant/direct planting														
Weed management														
Pruning														
Grafting														
Land clearing/cleaning														
Tree flowering														
Identification of potential seed														
Fire belting														
Beekeeping														
Preparation for marketing of nuts														
Collection of nuts														
Drying of nuts														
Marketing of nuts														
CASHEW NUT PROCESSING														
Processed cashew market research														
Capitalization for processing														
Identification of raw nut suppliers														
Stocking of raw input (raw nuts)														
Shelling of nuts														
Roasting of nuts														
Peeling, grading of nuts														
Packaging of nuts														
Marketing of processed nuts														
CASHEW APPLE PROCESSING														
Cashew apple juice/wine processing														
Cashew apple drying														

Table 4: Calendar of groundnut activities and youth employment opportunities

Sector activities	J	F	M	A	M	J	J	A	S	O	N	D	Youth opportunities	
Season	Dry					Rainy						Dry	Youth opportunities	
GROUNDNUT PRODUCTION														
Land preparation														
Seed source														
Sowing														
Weeding														
Harvesting														
Stripping														
Threshing														
Winnowing														
Drying														
Cleaning														
Shelling														
Marketing of raw nuts														
GROUNDNUT NUT PROCESSING														
Processed groundnut market research														
Capitalization for processing														
Identification of raw groundnut suppliers														
Stocking of raw input (raw nuts)														
Grading and packaging														
Roasted shelled peanut/salted peanut														
Peeling, grading of nuts														
Packaging of nuts														
Marketing of processed nuts														

The value chain analysis conducted in the above section gives an overview of the main challenges that the sector is facing. Among the main supply-side issues, the following were noted: inadequate volume of Gambian cashew constrains sector growth; limited use of adequate plantation management techniques limits increases in production volumes; limited support to the sector from extension services; insufficient business management skills at various levels of the value chain; insufficient promotion of the sector limits investment and support to the sector; limited improved varieties of cashew seedlings are available; limited processing of RCN into kernels or other cashew products or sub-products. The business environment is not favourable for the sector's development due to insufficient organizational capacity; challenging infrastructure increases the costs of doing business; and insufficient public support for the sector and unstructured public-private dialogue; and limited access to finance limits investment in the sector. Additionally, the sector faces some market entry constraints like little knowledge of buyer requirements and market trends; difficulty to implement and maintain quality controls on RCN and processed products; limited adequate packaging available for processed products; and promotion of cashew products in local and foreign markets is limited.

The seasonal farming calendar presented above shows that there is unexploited potential for youth employment creation in value chain activities performed during the whole year, including shelling, roasting, peeling, grading, packaging and marketing of nuts. Some other activities that can generate jobs for the youth for at least five months are cashew, apple juice and wine processing; cashew and apple drying; beekeeping; and collection, drying and marketing of nuts.

In the next section, the institutional support network and policies in agriculture is presented to explore how it influences the nuts and cashew sector performance.

INSTITUTIONAL SUPPORT NETWORK AND POLICIES IN AGRICULTURE

Trade support institutions (TSIs) provide a wide range of services to businesses and investors to help develop, promote and facilitate trade. In The Gambia, the Trade support institutions (TSIs) include government ministries and agencies and private sector associations support trade development by providing business facilitation, promotion and capacity development including trade and business information. The table below enumerate the main institutions involved in the agriculture sector.



Source: ITC

POLICY SUPPORT NETWORK

Below is the list of the policy support network institutions of The Gambia:

Policy support network	Institutions
	Ministry of Agriculture (MoA)
	Ministry of Trade, Regional Integration & Employment (MOTIE)
	Ministry of Finance & Economic Affairs (MOFEA)
	Ministry of Basic and Secondary Education (MOBSE)
	National Accreditation and Quality Assurance Authority (NAQAA)

MOTIE is responsible for trade policy, industrial development; employment creation; export development and overall private sector development. MoA is in charge of driving government agenda in respect of agriculture and all related activities. It oversees the activities of national agencies involved in agricultural development such as NARI and DoA for the implementation of agricultural-based policies and programmes. MoA collects agricultural data on area, yield and production and trains farmers.

MoA and MOTIE are seen as critical in providing extension services, training, trade developing capacity-building, improving the business environment and providing regulation where appropriate, but they do not have sufficient resources, both financial and human, to cover the all sector needs.

MOBSE has a main role in education of children and youth in Gambia. As part of their work they have 200 farms of ½ ha that can be used as training grounds. Furthermore, MOBSE can act as transmission channel for information. MOBSE is perceived as having available land and training facilities that could be used to support demonstrations and training programmes²². It¹ is also considered to have the potential of advancing dissemination of sector-relevant trade information through its facilities.

The National Accreditation and Quality Assurance Authority (NAQAA) regulates, supervises and monitors all public and private training institutions including skills centres, vocational centre, and technical institute and in-plant training. NAQAA also conducts training needs assessments in order to ensure swift readjustment of the TVET system to the economic reality.

22.– Based on stakeholder perception.



Source: ITC

TRADE SUPPORT NETWORK

The trade support network in The Gambia is constituted of the following institutions:

Trade services network	Institutions
	The Gambia Chamber of Commerce and Industry (GCCI)
	Gambia Investment and Export Promotion Agency (GIEPA)
	Gambia Standards Bureau (GSB)
	Food Safety and Quality Authority (FSQA)
	Gambia Bureau of Statistics (GBOS)
	National Agriculture Research Institute (NARI)
	Gambia Ports Authority (GPA)
	Gambia Revenue Authority (GRA)

According to the cashew sector strategy, only few institutions are perceived as efficient in terms of delivering capacities and financial and human resources availability, particularly The Gambia Ports Authority.

Food safety issues like aflatoxin prevail today in The Gambia. The responsibility for tackling the aflatoxin issue and contribute to Gambia's efforts to regain its markets, people's health and food security, is shared among two main institutions: The Gambia Standards Bureau (GSB) and the Food Safety and Quality Authority (FSQA).

If control of aflatoxin-laden raw materials is to be reduced, The Gambia Standards Bureau (GSB) should play a more active role in promoting standardization, conformity assessment and metrology for aflatoxin control. GSB should establish national standards for aflatoxin in the sector and testing of raw materials for aflatoxin content should become a regular practice in the sector.

Last year FSQA in partnership with Aflatoxin Control in Africa (PACA) held a forum on aflatoxin mitigation. However, FSQA remains weak in its activities for developing and piloting aflatoxin control measures. FSQA needs to strengthen its national performance and provide with guidelines for conducting safety assessments.

GIEPA and GCCI are key institutions in export promotion, entrepreneurship development, lobbying and advocacy, nevertheless they lack resources. Similar, GSB is lacking resources to deliver on its mandate.

Business services network

The business services network in The Gambia is constituted of the following institutions:

Business support network	Sector association
	CAG
	Cashew Farmer's Federation
	Cashew traders' associations
	Cashew farmers' Associations
	Gambia Groundnut Corporation (GGC)
	Agribusiness Services and Producers Association (ASP)
	SANDIKA
	NACOFAG
	National Food Processors Association

FSQA and CAG for cashew as well as GGC and ASPA for groundnut are crucial but are lacking capacities to support farmers.

POLICIES AND DEVELOPMENT ACTIVITIES IN AGRICULTURE

In addition to the youth-specific policy instruments, there are other key development and trade policy frameworks which directly or indirectly affect youth in The Gambia. Below are highlights some of the initiatives through which The Gambia government, national and international partners support to the agribusiness sector. These youth-specific policy instruments are integrated into the overall long-term development plan Vision 2020 and under four main economic policies : growth and employment plans ; Agriculture policy ; trade and investment policies; and MSME's and entrepreneurship.

Long-term strategy

National Development Vision 2020: The Gambia's Vision 2020, is "to transform The Gambia into a financial centre, a tourism paradise, a trading, export-oriented agriculture and manufacturing nation, thriving on free market policies and vibrant private sector, sustained by well-educated, trained, skilled, healthy, self-reliant and enterprising population and guaranteeing a well-balanced ecosystem and a decent standard of living for one and all, under a system of government based on the consent of the citizenry".

Growth and employment plans

National Development Plan (NDP) 2018–2021: The Government of The Gambia launched the new NDP in February 2018 to build on the moderate results of the Programme for Accelerated Growth and Employment (PAGE). Two of the eight strategic objectives of the NDP are reaping the demographic dividend through an empowered youth and modernizing agriculture and fisheries for sustained economic growth, food and nutritional security and poverty reduction. An important aspect is the government's willingness to review the agriculture policy framework, prioritize value chain development and promote agri-business and agro processing, including access to finance and the formation of cooperatives countrywide.

The **Economic Partnership Agreement Development Program (EPADP)**: is the EU initiative for West Africa providing a framework for the implementation of activities related to the Economic Partnership Agreement (EPA). Through the EPADP the EU supports capacity building of West African companies and exporters to overcome constraints related to production capacities, access to international markets and weaknesses of trade related infrastructure.

The Gambia Decent Work Country Programme (GDWCP): Implemented by ILO and will have strong links with the GDWCP priority area on employment for sustainable growth and poverty reduction which focuses on youth and women employment and skills development in the MSME sector.

Agriculture policy

Agriculture and Natural Resource Policy (ANRP) 2006–2015: The Gambia Agricultural and Natural Resources Policy 2006–2015 had a short-term vision of a strengthened sector support, attaining sustainable increased levels of self-sufficiency in food production, as well as increased incomes of smallholders, and increased food security at household level.²³

Trade and investment policies

Gambia National Agricultural Investment Plan (GNAIP) 2011–2015: The GNAIP is the medium-term (2011-2015) strategic plan of the Government of The Gambia (GOTG) The GNAIP aims to achieve an increased contribution of the ANR sector to the national economy by improving productivity through commercialization and active private sector participation predicated on a sound national macroeconomic framework aimed at enhanced growth and poverty reduction.

Investment Policy Review (2017): The Government of The Gambia has adopted an open regime for investment and plays a key role in promoting an enabling business environment in the country. The document targets four priority sectors for promoting investment: fisheries, groundnuts, cashew manufacturing as well as ICT.

The Gambia's Trade Policy (2011) placed emphasis of policy thrusts on the creation of employment and reduction of poverty, through the use of trade potential, to enhance The Gambia's integration in to the world economy. The Trade Policy addresses the broad goals for import and export policy, and focuses on addressing the challenges of trade imbalance and rendering The Gambia a net export nation.

Within this framework, **The Gambia Export Strategy (NES) 2013–2017** provided the goals for export development and promotion. **The NES have identified the following priority sectors and cross-cutting sectors:**

- **Priority sectors:** Groundnuts, Cashew, Fisheries, Horticulture, Tourism, Manufacturing and Re-exports.
- **Priority cross-cutting areas:** Transportation and Trade Facilitation, Telecommunication, Financial Services, Human Resource Development and Research and Development.

The Gambia also has an updated Diagnostic Trade Integration Study (DTIS) that seeks to strengthen The Gambia's participation in regional and global markets by creating the foundation for improved value addition and processing in key sectors of the economy to stimulate growth and employment for sustained poverty reduction. The focus is to improve the competitiveness of The Gambia, the promotion of youth and women in key sectors, and the promotion of MSMEs development.

The Gambia cashew sector development and export strategy 2014–2019: Cashew sector development and export strategy provides a realistic roadmap to strengthen the growing potential of Gambian cashews. With less than 5% of total raw cashew nuts (RCN) processed in 2012, there is a clear opportunity to increase in-country value added and take advantage of demand from hotels and restaurants catering to the growing Gambian tourism industry.

The National Aflatoxin Control and Investment Plan (NCAIP): Aims to enhance the development of agriculture and food security with primary focus on aflatoxin sensitive commodities along their entire value chains, to ensure food safety and consumer protection, safeguard human, animal and plant health, and the facilitation of trade in commodities meeting aflatoxin maximum limits in the local, regional

23. – <http://www.resakss.org/sites/default/files/pdfs/gambia-caadp-brochure-1-review-of-ongoing-agricult-42617.pdf>.

and international markets. Awareness creation, communication and advocacy activities of this project will be closely coordinated.

MSMEs and entrepreneurship

The **Employment policy (2010–2014)**, is to promote a well-educated, trained, skilled versatile, self-reliant and enterprising labour force with a view to increasing employment. It further promotes the development of relevant manpower and human resources that will continually meet the needs of the nation.

The **Empretec Gambia entrepreneurship programme**: is funded by UNDP and the Government of The Gambia and run by The Gambia Investment and Export Promotion Agency GIEPA since 2014. Empretec aims at training entrepreneurs including farmers and preparing them to establish a successful enterprise. It also trains trainers certified by UNCTAD. The programme will end in 2017.

ITC is currently working with The Gambia to implement a Youth Empowerment Project (YEP), which seeks to improve employability and self-employment opportunities for youth as well as increase employment opportunities along selected value chains. A number of other partners have also initiated contacts with the new government to see possible areas for co-operation and support. The objective of the round table is to enhance cooperation, especially in the areas of trade capacity development.

Figure 12: Summary of The Gambia's main economic policies

Vision 2020	Growth and employment	
		PSDS 2015–2019
	PAGE 2012–2015	NEP/NEAP 2010–2014
	Trade	
		The Gambia's Trade Policy 2011
		National Export Strategy 2013–2017
	MSME and entrepreneurship	
		National MSMEs Policy 2008
	NEPS 2014–2018	NEP 2016–2020

Source: Formulating National Entrepreneurship Policy (UNCTAD, 2017).

The new government has engaged in a series of policies changes at the national level including a new Development Plan, the Investment Policy Review and currently formulates a National Entrepreneurship Policy. These policies set a new development plan where youth aspiration have been carefully integrated. The foremost challenges remain on the implementation side as institutions and sector association struggle with limited of financial and human resources. The Ministry of Agriculture and related technical agencies have also to be empowered to fully engage in the development of their sector in implementing the sector export strategies and support the development of agribusiness.

Additionally, domestic employment policies and labour regulations for the promotion of a well-educated, trained, skilled and enterprising labour force, especially amongst youths, do not enable a conducive legal and institutional framework for company's operations in the groundnut and agroprocessing value chain.*

* The Labor Act of 2007, The Companies Act of 2005, and The Business Registration Act of 2005, the National Employment Policy (NEP) of 2014, National Entrepreneurship Policy of 2017, and The Gambia Priority Employment Programme (GAMJOBS).

Box 2: Snapshot of the value chain analysis, policies and institutional support network in the nuts and agroprocessing sector

Agriculture is one of the major drivers of growth in The Gambian economy due to its employment generation, contribution to gross domestic product (GDP) and export potential. It accounts for approximately 70% of foreign exchange, contributes to a quarter of Gambia's GDP, and employs nearly half of the working population and 81% of the rural working population. In addition, the sector has a high potential for promoting youth empowerment. The sector remains the leading employer for Gambian youth, particularly in the rural areas. Approximately 47,500 young people are employed in agricultural activities.

During the last decade, real agricultural production expanded 3.4%–3.7% annually (barely one point percentage above the population growth rate). There is a relatively wide yield gap across major crops, and yields are lower than the West African average, except for groundnuts. The inability of SMEs to comply with the European Union aflatoxin regulations for groundnuts has effectively reduced the contribution of groundnuts to the country's foreign exchange earnings. The cashew sector has shown remarkable potential in the last 10 years as an alternative crop to diversify production and exports. Local cereals (maize, rice, millets, sorghum and fonio/fendi) are important food crops consumed daily. In addition, agribusinesses constitute 15% of GDP, which is a significant component of The Gambia's industries and another growth driver.

From a policy perspective, the Government of The Gambia has engaged in a series of policy changes at the national level, including a new development plan, the Investment Policy Review and a national entrepreneurship policy that is under development. One of the strategic objectives of these policies is reaping the demographic dividend through an empowered youth. Former challenges remain on the implementation side, as institutions and sector association struggle with limited financial and human resources. The Ministry of Agriculture and related technical agencies also have to be empowered to fully engage in the development of their sector in implementing the sector export strategies and supporting the development of agribusiness.

In the cashew sector, the activities that have the greatest potential for youth employment creation during the whole year are mostly linked to primary processing, including shelling, roasting, peeling, grading, packaging and marketing of nuts. Some other activities that can generate jobs for the youth for at least five months are cashew apple juice/wine processing, cashew apple drying, beekeeping, and collection, drying and marketing of nuts (Table 3).

The greatest employability for youth in the groundnut sector is found in processing activities related to roasted shelled peanut and salted peanut that can create jobs during the 12 months of the year. Other processing activities that have potential for providing employment during at least half of the year are grading and packaging, peeling and grading of nuts, packaging of nuts and marketing of processed nuts. The two production activities with the highest employment potential are shelling and marketing of raw nuts.



Source: ITC



Source: ITC

KEY COMPETITIVE CONSTRAINTS IN THE NUTS AND AGROPROCESSING SECTOR



Source: ITC

MSME COMPETITIVENESS ASSESSMENT

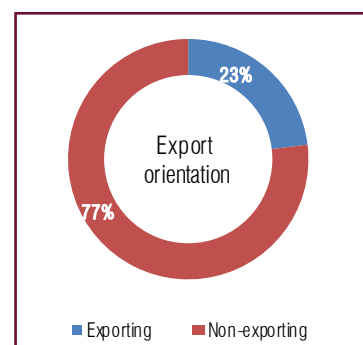
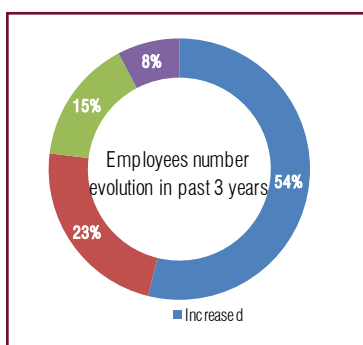
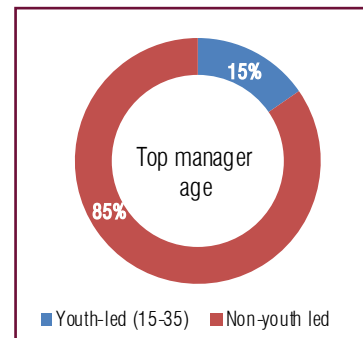
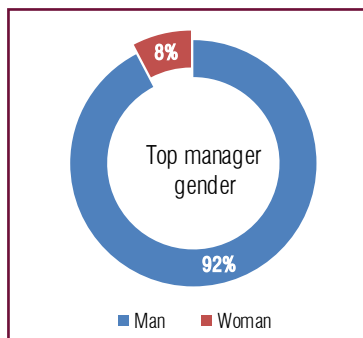
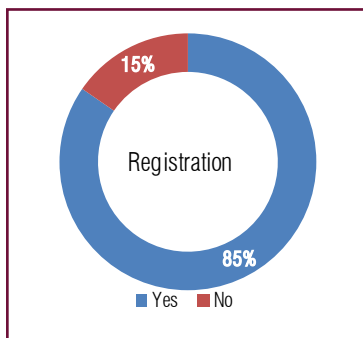
To support the competitiveness assessment of MSMEs in The Gambia, ITC carried out the SME Competitiveness Survey focusing on three sectors: agriculture, tourism and ICT. The data was collected with the help of Gambia Investment and Export Promotion Agency (GIEPA). The survey targeted 110 firms of different sizes, sectors, and export orientation. The survey sample related to agriculture was composed of 40 MSMEs, including 34 operating in the groundnuts and cashew sectors.

Small-sized firms (five to 19 employees) represent the largest share with 39% of the surveyed enterprises in the groundnut and cashew sample, while large firms (100 or

more employees) account for about 23% and medium-sized companies (20 to 99 employees) make up for 15% of the sample. Furthermore, 15% of firms in the sector are led by youth entrepreneurs between 15 and 35 years old (see Annex 1). Most of the surveyed firm operating in the groundnut and cashew sector are registered and led by male over 45 years old. Approximately 58% of surveyed firms registered an increased number of employees in the past three years. Besides, only three out of 13 firms are engaging in export activities, while others do not export, but have an interest in exporting.

Figure 13: Snapshot of groundnut and cashew SMEs profile

Formal registration	The majority of surveyed firms (85%) are formally registered.
Top manager gender	The majority of establishments' top managers (92%) are men. Only 8% of firms surveyed are led by women.
Top manager age	Only 15% of firms are led by young managers ranging from 15 to 35 years old.
Export orientation	Of the surveyed firms, 77% are not exporting, but some of them have an interest in exporting. Of the surveyed firms, 23% export either regularly or in an intermittent manner.
Employees' number evolution in past three years	In the last three years, 54% of the number of employees of the firms surveyed increased, 15% remained the same, 23% does not know if the number of employees changed and 8% did not reply.



ITC's SME Competitiveness Survey assesses the strengths and weaknesses of firms, the wider business ecosystem, and the national environment to help identify what bottlenecks to growth firms are currently facing. The survey is split into three key pillars:

- **Capacity to compete** is the static dimension of competitiveness. It assesses whether current production is efficient and meets market requirements.
- **Capacity to connect** is the connectivity dimension of competitiveness. To be competitive, firms must link to customers, businesses, institutions, and be literate in information and communications technology.
- **Capacity to change** is the dynamic dimension of competitiveness. It assesses whether firms have the capacity to make human and financial investments to adapt to fast-changing markets.

The pillars are further subdivided into two levels:

- **Firm capabilities** assesses whether firms can manage resources under their control.
- **The business ecosystem** is made up of support institutions that supply enterprises with the resources or competences they need to be competitive.

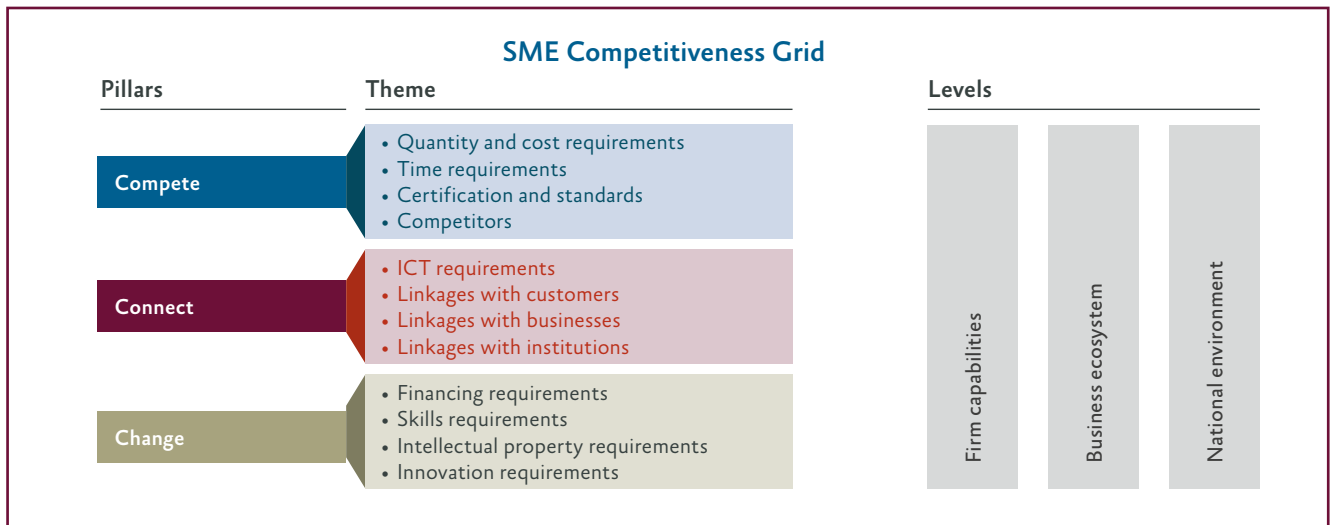
How the pillars and levels fit together is shown in Figure 14.

The following two sections will present an overview of the results on the two levels, the firm capabilities and the business ecosystem. Each level is then analysed focussing on the theme showing the lowest performance.



Source: ITC

Figure 14: SME competitiveness grid

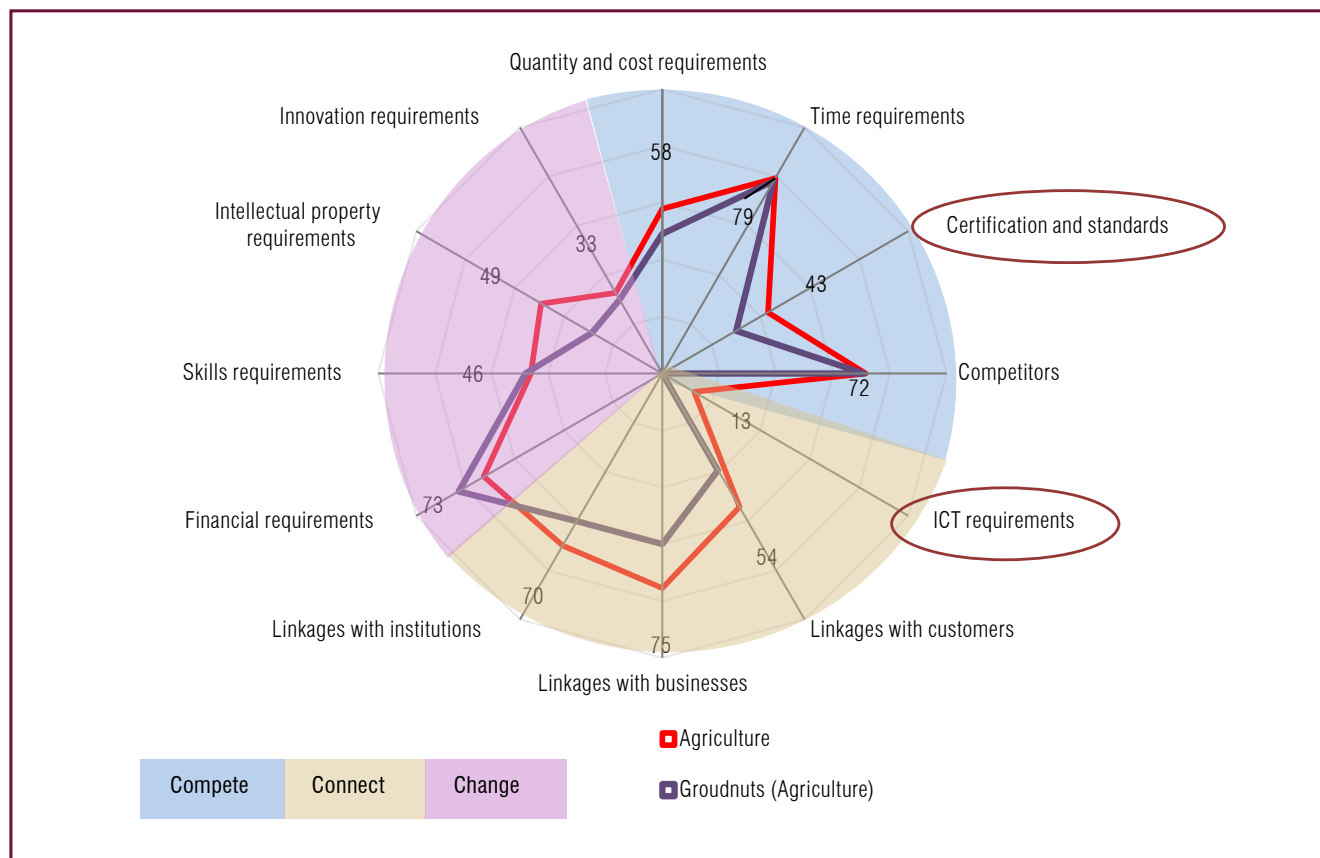


FIRM LEVEL CAPABILITIES AND COMPETITIVENESS ISSUES

This firm-level refers to determinants that are internal to the firm and thus in principle under its control. WEF (2008) views this layer in terms of the sophistication of companies' operations and strategies. This layer also reflects the strength of the firm's management.

Figure 15 presents the overall scores on each indicator at the firm capabilities level. The scores are presented -on a scale of 0 to 100, and categorized as follows: excellent

(100-80); good (80-60); satisfactory (60-40), poor (40-20) and very poor (20-0). When looking at the average results, it is visible that firms in the groundnuts sector in The Gambia face **more difficulties in their ability to change**, with indicators ranging below 50, like skills and innovation requirements. The results also shed light on some gaps on their capacity to compete and to connect, like ICT requirements and certification and standards.

Figure 15: Firm level competitiveness scores²⁴

24.– Source : ITC SMECS The Gambia, 2017.

Presented below is the analysis of areas with the lowest performances in the three categories (capacity to change, connect and connect).

Capacity to compete

Gambian firms in the groundnuts sector present the lowest performance in their capacity to compete in the following areas:

- Certification and standards:** The ability of firms to compete is mostly hindered by low levels of compliance with internationally recognized safety, quality or performance standards. One of the major constraints faced by groundnuts processors is the inability to sell product in the Hand Picked Selected (HPS) market, due to strict aflatoxin content limitations. Particularly, the high levels of aflatoxin contamination have constrained the sector's capacity to comply with the European Union aflatoxin regulations for groundnuts. The aflatoxin problem has also reduced the contribution of the sector to The Gambia's foreign exchange earnings. Another issue affecting the country's capacity to comply with international standards and certification is related to packaging. There is limited adequate packaging available for processed products.

Less than half of the packaging materials in the country are supplied locally. This impacts local firms' capacity to ensure controlled optimal storage conditions for their export products.

- Quantity and cost requirements:** Firms' capacity to compete is affected by high cost of imported production inputs, low fertility of soil, small size of plantation areas, poor plantation management techniques, limited use of fertilizers, and limited mechanization. Low soil fertility levels are further exacerbated by the overdependence on rainfall for agricultural production with low use of irrigation systems. All these issues result in low production yields and limited ability of Cooperative Produce Marketing Societies (CPMS) to meet cost requirements.

Additionally, multiple collection channels contribute to irregular supply capacities at the processing level. It is important to ensure that improved varieties of seedlings are available at the farm level and adequate plantation management techniques and machinery are used to increase production volumes.

According to the survey, positive signs in the capacity of firms to compete include:

- **Time requirements:** companies in the groundnuts sector report being capable of meeting deadlines imposed their buyers.
- **Competitors:** most Gambian competitors are in the region and some of them use Banjul port to export their products. The proximity and cultural similarities contribute to fact that Gambians firms are doing quite well regarding their knowledge of local competitors' offer (e.g. prices, quality, process, and design). Nevertheless, further efforts are needed to increase firm's knowledge of foreign competitors for firms to better position themselves in international markets.

Capacity to connect

Firms in the groundnuts sector in The Gambia present the lowest performance in their capacity to connect in the following areas:

- **ICT requirements:** The ability of firms to connect with suppliers and customers is mostly hindered by the absence of company' website from which suppliers and/or customers can learn about their products or services. It concerns mostly micro-level and non-exporting enterprises although it is surprising to see exporters scoring low. Agriculture companies are the most affected compared to the two other sectors. Youth-led companies tend to be more aware of the necessity to have a company website. In terms of regional distribution, Kerewan, Kuntaur and Mansakonko LGAs, the poorer regions with limited access to Internet are without surprise the most affected.
- **Linkages with Customers:** Most groundnut firms lack of information on markets and customers' expectations, which limits their capacity to respond to buyer requirements. Gambian products are also perceived to have lower quality compared to those coming from abroad including from Senegal, the closest importing market. Reinforcing promotion of cashew and groundnut products in local and foreign markets will improve Gambia position in international markets.

Good performance on the firm's capacity to connect include:

- **Linkages with businesses, sector association and institutions:** Surveyed groundnut firms report positive linkages with the business and sector associations along with institutions. However, there are a few sector associations and support organisations active in the cashew value



Source: ITC

chain, mainly The Gambian Cashew Farmers Association, Cashew Alliance of The Gambia (CAG), Cashew Farmers Associations, Agribusiness Services and Producers' Association (ASPA), National Coordinating Organisation for Farmer Associations (NACOFAG), as well as Gambia Groundnut Corporation (GGC) and Agribusiness Services and Producers Association (ASPA) for groundnut. The level of interaction and coordination among the members of the business services network is sporadic and linkages need to be strengthened.

Capacity to change

Firms' capacity to evolve according to their markets' needs is limited in the following areas:

- **Skills and innovation requirements:** The skills development and skills gaps negatively impacts the sector. Youth in rural areas have limited access to education with a low enrolment to primary and secondary education. The literacy level is also very low, for instance 23% and 28% in the rural districts of Kuntaur and Basse associated. Additional investing in the development of firm's employees' skills, knowledge and technical competence is not a common practice in the nuts and agroprocessing sector in The Gambia. Most firms in the sector do not invest in employees training, do not engage in R&D activities and have limited collaboration with research networks that promote innovation. Skills development issues are analysed in details in the following chapter.
- **Financial requirements:** Access to financial institutions is an obstacle to the firm's operations due CPMS limited knowledge of the process involved in getting a loan with banks, and micro-credit agencies. Medium and large firms particularly lack access to appropriate financial services to develop their operations further. This is particularly true for non-exporting companies that are not able to meet their capital contributions and provide collaterals financial services are limited in rural areas where most groundnut and cashew firms are located.

Table 5: Main competitiveness issues at the company level

		Firm capabilities in the groundnut and cashew sector		
		Stakeholders' constraints	Urgent action needed	Ease of resolution
Compete	Quantity and cost competitiveness	<ul style="list-style-type: none"> High cost of imported production inputs, low fertility of soil, small size of plantation areas, poor plantation management techniques, limited use of fertilizers and limited mechanization. Limited ability of cooperative produce marketing societies (CPMS) to meet cost requirements. Limited improved varieties of cashew seedlings are available. 		
	Certification and standards	<ul style="list-style-type: none"> No quality certification system allowing a minimal quality standard and compliance of agro-processing companies with international standards, which hampers clients' confidence. Inability to meet European Union aflatoxin regulations for groundnut. Lack of adequate packaging available for processed products. 		
Connect	ICT requirements	<ul style="list-style-type: none"> Absence of company website from which suppliers and/or customers can learn about their products or services. 		
	Linkages with customers	<ul style="list-style-type: none"> Most firms lack information on markets and customers' expectations, which limits their capacity to respond to buyer requirements. 		
Change	Innovation requirements	<ul style="list-style-type: none"> Most firms in the sector do not engage in R&D activities given their limited human and financial resources capacities. 		
	Skills requirements	<ul style="list-style-type: none"> On one side, lower level occupation or elementary occupations face competency level problems. On the other side, professionals involved in a higher level of task complexity are rated competent, but are quite difficult to find in the job market. 		
	Financial requirements	<ul style="list-style-type: none"> Financial services are limited in rural areas, where most groundnut and cashew firms are located. 		

BUSINESS ECOSYSTEM CONSTRAINTS

Business ecosystem, as used in this report, refers to factors that are external to the firm but within its micro-environment. While many external factors affecting firms' capacity to compete are determined at the national level and affect the overall economy, conventional wisdom is that a firm's level competitiveness is also shaped by its micro-environment. As Porter puts it: "It is hard to concoct a logic in which the nature of the arena in which firms compete would not be important to performance outcomes" (Porter, 1998).

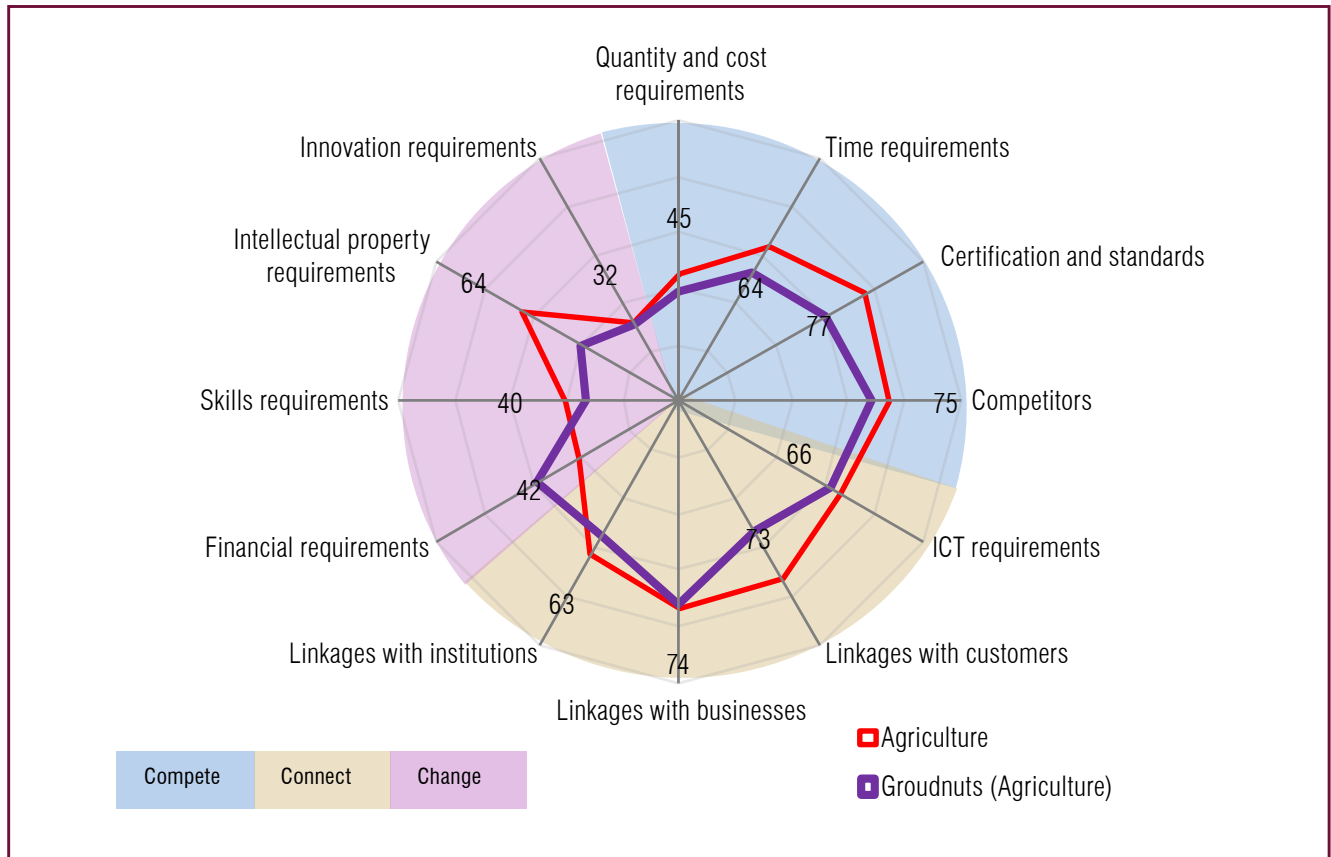
Figure 16 presents the competitiveness assessment results for the business ecosystem in which groundnuts and agro-processing firms operate. The overall results show that the **capacity to change is the most affected once again**. It is to be noted that intellectual property requirements represent a challenge for firms in the groundnuts sector more than any other agriculture sector. Innovation skills and financial requirements are areas that affect agribusinesses' competitiveness in general in their capacity to change. The results also show that there are areas where the business ecosystem tends to impede firms to compete and to connect (in a lesser extent), i.e. quantity and cost requirements.

Below is the analysis of areas with the lowest performance in the three categories (capacity to, compete, connect and change):



Source: ITC

Figure 16: Business ecosystem competitiveness scores



Source: ITC SMECS The Gambia, 2017.²⁵

25.– For more details on ITC SME Competitiveness Survey, visit: <http://www.intracen.org/SMECS/>.

Capacity to compete

The business ecosystem limits firms' capacity to compete in the following areas:

- Quantity and cost requirements:** The high tariffs and limited access to electricity (40% country-wide and 12% in rural areas access to electricity) impact negatively the processing capacities along the groundnut value chain. Electricity supply is insufficient and is among the most expensive in Sub-Saharan Africa (SSA). There is a wide gap between installed capacity and available electricity supply and electricity tariff rates are high (9.1 /kWh for agriculture)²⁶. Establishing a successful local cashew processing capacity will depend on trade policy measures to provide reliable provision of electricity at competitive cost²⁷.

Furthermore, lacking irrigation schemes impact the production volume of groundnuts during the dry season. Although the rainy season lasts for roughly 5 months in

the year, only 6% of the arable land is irrigated (ANR, 2016-2026). Additionally, the maximum threshold for pump irrigation using the River Gambia without over stretching the salinity front is at 6,000 ha (ANR, 2016-2026). Underdeveloped water management systems are not considering sustainable uses of the groundwater and innovative rainwater harvesting and utilization practises.²⁸

According to the survey, positive signs in the business ecosystem that are facilitating firm's capacity to compete include:

- Certification and standards:** The Gambia Standards Bureau (TGSB) plays an active role in promoting standardization, conformity assessment and metrology for aflatoxin control. Other services provided by TGSB to groundnut firms include: standards development and sales; inspection, testing and certification; standards Information Centre; calibration of measurement devices/equipment; training; and WTO TBT enquiry point²⁹.

26.– NDP, 2017.

27.– Investment Policy Review, 2017.

28.– NDP, 2017.

29.– <https://www.iso.org/member/576505.html>.

The quality of services should be further strengthened to facilitate agribusinesses' capacity to compete.

- **Competitors:** Domestic competition regulation represents an obstacle to operations of firms in the groundnuts sector. The price of fertilizer is subsidized by 35% and supplied by the government. Instead of the private sector.³⁰ There is also an absence of coherent cashew pricing mechanism and information flow on the international pricing markets. The Competition Authority should regulate the existence of collusive agreements and other types of anti-competitive practices that raise or lower prices for farmers.
- **Time requirements:** The timeliness of delivery of goods and services from suppliers in the groundnuts and agro-processing value chains are generally not respected. Enterprise registration procedures are time-consuming since there are only two physical single windows in the country and online access is not provided. Although the time for enforcing contracts is lower in The Gambia than the average for sub-Saharan countries, it still takes more than a year (407 days) to solve a commercial dispute, compared with the sub-Saharan average of 655.2 days (World Bank, 2016c). Furthermore, the average time for resolving land disputes before district tribunals is 30 days (Bensouda, 2013). (UNCTAD, 2017).

Capacity to connect

According to the survey, positive signs in the business ecosystem facilitating firm's capacity to connect include:

- **ICT requirements:** The Gambia has one of the highest mobile subscription rates in Africa, and access to internet has increased steadily in the past decade. However, the country lags behind African and LDC averages in access to broadband (18% penetration of fixed broadband compared to 0.8% in The Gambia). Reduced accessibility and affordability of broadband services results in poor and expensive connectivity options for agricultural firms (limited use of website hosting services, e-commerce, business process outsourcing activities, e-mail, security and data back-up, etc.). Most producers in rural areas use the radio as the main communication channel.
- **Linkages with customers, businesses and institutions:** Although domestic advertising and marketing regulation is not an obstacle to the sale's growth of firms, there is limited institutional coordination and a reduced degree of interaction between public institutions and the private sector. The cashew sector suffers from insufficient promotion which limits investment and support to the sector. It is important to note the lack of organization capacity

due partially to insufficient public support and unstructured public-private dialogue. Most of the actors involved in the cashew value chain reported limited support from extension services and lack of coherent cashew pricing mechanism and information flow on the international pricing market(s).

Capacity to change

The business ecosystem limits firms' capacity to evolve according to their markets' needs in the following areas:

- **Innovation requirements:** The absence of research and utilization of science, technology, and innovation has limited groundnuts firm's capacity to change. There are no capable research networks which can tackle the aflatoxin problem. Additionally, The Gambia National Agricultural Research Institute (NARI) has played a limited role in expanding the availability of high quality seeds to farmers. This is a key requirement to initiate further development of processing and exports.
- **Trade mark linked to intellectual property requirements:** Firms in the groundnuts and agroprocessing sector very seldom invest on IP because of the limited existence and enforcement of domestic intellectual property regulation. The Gambia has not subscribed to the Banjul Protocol on trademarks that was adopted in 1993 by the member countries of African Regional Intellectual Property Organization (ARIPO) and that regulates patents, utility models and industrial designs.³¹ The domestic guidelines are provided by The Gambian Industrial Property Regulations (2010) which comprises the Industrial Property Act (2007), a consolidated code for the grant or registration of patents, utility models, industrial designs and trademarks. Trademarks are important tools for SMEs to guarantee that the quality of export products meets international standards and quality determines price and value for money. The potential for farmers to take advantage of value added opportunities for agro products will highly depend on promoting a unified country brand.

The services offered by the Office of the Registrar General, the patent registrations institution in the country, are limited and need better quality to facilitate the procedures. The only companies appearing to invest more in IP are larger firms and exporters, which have superior financial capacity and are aware of the necessity to remain competitive in the international and regional markets.
- **Financial requirements:** Access to financial institutions is a major obstacle to the current operations of MSMEs negatively impacting their capacities to change. Through various consultations and during the Youth Employment

30. – http://www.cuts-ccier.org/7up4/pdf/PCP-The_Gambia.pdf.

31. – <https://www.spoor.com/en/africa-ip-expertise/gambia/trade-marks/>.

Forum organized in the context of the Youth and Trade Roadmap, it appears that commercial banks are unwilling to give up on their traditional lending instruments to accommodate the financing needs of low income groups. This is particularly true for the agricultural sector, where adequate financial instruments for the development of the sector are lacking, even when agriculture represents a main source of income for all Gambians. Although The Gambia Financial System has become more liberalised in the last years³², policy changes in the legislation and Financial Institutions Act (FIA) still need to target MSMEs and provide suitable services.

- **Skills requirements:** Skills mismatch is a major factor affecting capacity of firms to change and remain competitive. The overall results of the survey show a very high difficulty to find appropriate skills in the workforce and low level of preparedness of employees to integrate the work environment (which is linked to the previous experience

of the worker, in apprenticeships or internships for instance). This is especially the case for small, medium and large companies, both exporting and non-exporting. Basse, Janjanbureh, Kerewan, and Kuntaur LGAs are particularly affected by this skills mismatch.

The skills development issues and skills gaps related to the lack of access to quality training institutions negatively impacts the sector. The education services and constraints are analysed in detailed in the following chapter.

The National Accreditation and Quality Assurance Authority (NAQAA) should further promote a TVET reform process and expand The Gambia Skills Qualification Framework (GSQF) to develop more skills and standards, carry out assessment and certification, quality assurance processes, and improve training delivery³³. The Labour Act 2007, Factories Act and Injuries Compensation Act are currently being reviewed to ensure that national labour legislations are consistent with international standards³⁴ and framed in order to attract or retain investment.

32.– Most interest rates are freely determined, direct controls have been eliminated, exchange controls abolished and the country has moved to an indirect system of monetary controls using open market operations. These measures increased competition in the domestic financial system (http://www.cbg.gm/finance_systems/f_system.html).

33.– <http://gcc.gm/wp-content/uploads/2016/06/STRATEGIES2010-2014.pdf>.

34.– <http://thepoint.gm/africa/gambia/article/labour-factories-and-injuries-compensation-acts-earmarked-for-review>.

Table 6: Main competitiveness issues in the business ecosystem

External factors affecting firms' competitiveness in the groundnut and cashew sector				
		Stakeholders' constraints	Urgent action needed	Ease of resolution
Compete	Quality and cost requirements	<ul style="list-style-type: none"> • High tariffs and limited access to electricity (40% countrywide and 12% in rural areas access to electricity) impact negatively on the processing capacities along the groundnut value chain. • Lacking irrigation schemes impact the production volume of groundnuts during the dry season. 		
	Linkages with institutions	<ul style="list-style-type: none"> • Limited institutional coordination and a reduced degree of interaction between public institutions and the private sector. • Lack of organization capacity due partially to insufficient public support and unstructured public-private dialogue. 		
Connect	ICT requirements	<ul style="list-style-type: none"> • Reduced accessibility and affordability of broadband services. • Expensive connectivity options for agricultural firms. • Limited use of website hosting services, e-commerce, business process outsourcing activities, e-mail, security and data back-up, etc. 		
	Innovation requirements	<ul style="list-style-type: none"> • The absence of capable research networks to tackle the aflatoxin problem. • NARI has played a limited role in expanding the availability of high-quality seeds to farmers. 		
Change	Trademark and intellectual property requirements	<ul style="list-style-type: none"> • Lack of trademarks for Gambian SMEs to guarantee that the quality of export products meets international standards. • Need to promote a unified country brand. • The services offered by the Office of the Registrar General, the patent registrations institution in the country, are limited and need better quality to facilitate the procedures. 		
	Financial requirements	<ul style="list-style-type: none"> • Lack of adequate financial instruments from commercial banks that facilitate the development of the sector. 		
	Skills requirements	<ul style="list-style-type: none"> • Firms report difficulty in finding specific skills in the local workforce. Basse, Janjanbureh, Kerewan and Kuntaur LGAs are particularly affected by this skills mismatch. 		

In line with the sector performance and skills gap analysis, the SME competitiveness assessment shows that the major problems faced by firms in the nuts and agroprocessing sector are linked to their insufficient capacity to change and address market needs. This issue originates mostly due the existing skills gap in the workforce, absence of quality assurance for TVET and limited offer and access to advanced agriculture related courses. Youth in rural areas, like Basse, Janjanbureh, Kerewan, and Kuntaur, have limited access to education with a low enrolment to primary and secondary education. More so, investing in the development of employee skills, knowledge and technical competence is not a common practice by employers in the nuts and agroprocessing sector in The Gambia. The skill gap is particularly severe concerning occupations related to management position and skilled agro-technicians. Most firms in the sector do not invest in employees training, do not engage in R&D activities and have limited collaboration with research networks that promote innovation. This yields significant implications, whereby only few successful agribusiness exist and a limited development of primary or secondary agro-processing.

The business ecosystem in which groundnuts and agroprocessing firms operate is hampered by high tariffs and limited access to electricity, a lack of irrigation schemes and difficult access to finance. These competitiveness constraints are the root causes impeding the development of MSMEs in the nuts and agroprocessing sector despite favourable national disposition in terms of mobile and data network coverage. These factors prevent the creation of new jobs for the abundant young population.

SKILLS DEVELOPMENT ISSUES, SKILLS GAP ANALYSIS AND TVET MAPPING

SKILLS GAP ANALYSIS

Agriculture accounts for a quarter of The Gambia's GDP. This sector employs three-quarters of the workforce. In 2014, employment in agriculture in The Gambia was about 31.5% compared to 64.7% in 1993.³⁵ Average daily wages for unskilled labour hover between \$2 and \$4 a day.³⁶

According to the sector consultations, the availability of low-skilled labour doesn't represent a problem for Gambian farmers. It is actually the availability of qualified and skilled labour which is crucial for The Gambia agribusiness sector, especially in the perspective of processing, development of agri-business and youth empowerment. The vast majorities of employers (58%) surveyed reported that they were competent. However, 42% of employers reported skills gaps within their firms. Staffs are lacking ability in their current role.

35.– <http://www.gm.undp.org/content/dam/gambia/docs/NewDocs/NHDR%202014.pdf>.

36.– Accelerated Growth and Employment 2012–2015.

Occupational skills gap along the value chain³⁷

Subsistence crop farmers³⁸ represents the majority of the workforce in The Gambian agriculture sector. It refers to workers who perform a limited range of simple and routine tasks which may require the use of hand-held tools and considerable physical effort.

Nursery growers³⁹ include tasks such as preparing land by conditioning soil, planting trees, checking the health of plants and trees, identifying and treating weeds, pests and

37.– Occupations in this skills gap analysis are evaluated according to the International Standard Classification of Occupations (ISCO-88) (ILO, 2012). The sector's related occupations fall into four major groups: elementary occupations (ISCO Group 9), skilled agricultural workers (ISCO Group 6), agricultural technicians (ISCO Group 3) and food processing and related trades workers (ISCO Group 7),

38.– Belong to ISCO Group 9 and require skills at the first ISCO skill level (lowest skill level that may require physical strength and/or endurance. For competent performance in some occupations at skill level one, completion of primary education or the first stage of basic education (ISCED-97 Level 1) may be required).

39.– Are part of ISCO Group 6 and require skills at the second ISCO skill level. The knowledge and skills required for competent performance in occupations at Skill Level 2 are generally obtained through completion of the first stage of secondary education (ISCED-97 Level 2). In some cases, experience and on-the job training may substitute for the formal education.

diseases, and applying mulch and fertilizers. Nursery growers are crucial, especially for cashew farmers because the quality of the plant is directly correlated to the production yield. Half of nursery growers are perceived as competent. For the other half the skills deemed to be lacking are related to technical or hard skills in applicants and also limited working experience. There are clear market opportunities to develop nursery business of quality seedlings managed by young entrepreneurs.

Crop farm supervisors⁴⁰ are part of the skilled agricultural workers. In the nuts and agroprocessing sector 58% of crop farm supervisors are perceived as competent while 44% as not competent. Crop farm supervisors similarly to production manager are recruited to oversee the development of crops that can be sold or export. They manage the operations of commercial agricultural operations or they may look over farming operations for absentee landowners or farmers in need of management assistance. Although agribusiness and contract farming is not developed, few agribusiness companies are currently active in The Gambia.

Food processing operatives⁴¹ are involved in the production and packaging of the food products. In the value chain, 63% are perceived to be competent and 37% not competent. Only few companies are involved in the food processing. In order to ensure quality production and food safety, companies report organizing regular on-the-job trainings with trainers or experts. These include training on maintaining a clean production environment, checking and weighing raw material or running frequent quality checks, assembling, packaging and labelling. Operatives are also usually involved in simple machine maintenance. It is worth noting that companies have not reported any case of high incompetency.

40.– ISCO Group 6.

41.– Are classified into ISCO Group 7 and perform tasks that require second ISCO skill level for treating and processing grain-related materials into food stuffs.



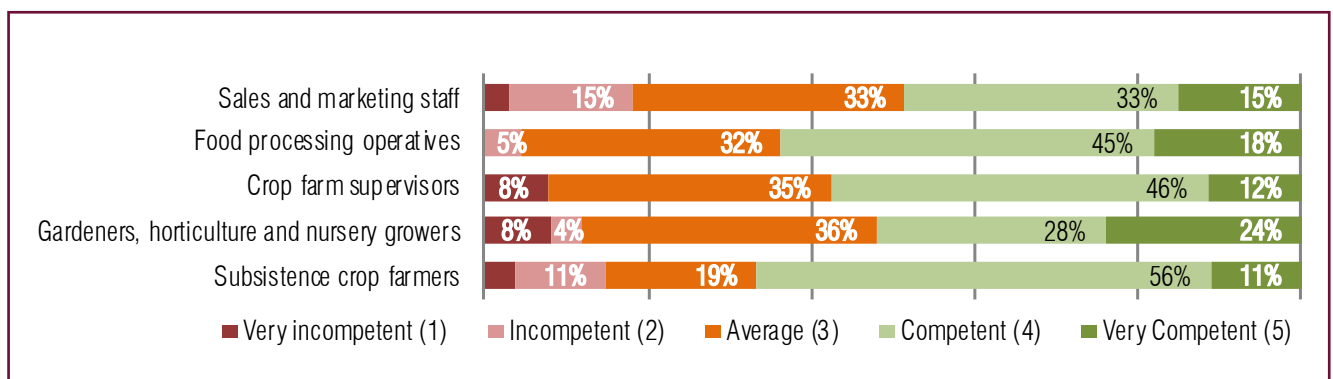
Source: ITC

Sales and marketing staff are responsible for planning and implementing sales, marketing and product development programmes. Less than a half are perceived competent in their occupation. This is particularly worrying as staff responsible for sales and marketing are in charge of establishing and maintaining relationships with strategic partners (buyers or inputs suppliers), ensure effective control of marketing results, perform market research and ultimately ensure the company performance and profitability.

Agronomists farming advisers.⁴² Tasks typically involve the performance of complex technical and practical tasks, such as performing tests and experiments, and providing technical and scientific support to agricultural scientists, farmers and farm managers. Agronomists often acts as a liaison between the farmer and the crop researchers. They review research findings and use this knowledge to help recommend solutions to farmers. Then, they suggest new solutions to the farmer regarding new scientific developments in order to help the growing operation.

42.– Are part of Group 3 and require skills at the third ISCO skill level. Occupations at this skill level generally require a high level of literacy and numeracy and well-developed interpersonal communication skills. Higher educational institution for a period of 1–3 years following completion of secondary education (ISCED-97 Level 5b).

Figure 17: Level of competency of staff workforce



MOST-NEEDED OCCUPATIONS IN THE SECTOR AND YOUTH EMPLOYMENT OPPORTUNITIES

The following occupations in agriculture are sorted based on the magnitude of the skill gap which is measured by the frequency of that occupation appearing on the most needed list of respondents and the level of difficulty of finding a person with appropriate skills that match the job description.

The business survey shows that the top 5 occupations needed in agriculture are: food processing operatives, farm supervisors and growers, gardeners, horticulture and nursery growers, sales and marketing staff, and agronomist/farming adviser.

These occupations are most mid-level and management position which requires either specific education in agronomy or agribusiness. As described previously, the general education in agriculture is relatively low which explains the needs to fulfil for qualified positions with technical or business skills.



Source: ITC

Most needed occupations in agriculture	Score
Food processing operatives	26
Crop farm supervisors and growers, gardeners, horticulture and nursery growers	21
Sales and marketing staff	20
Agronomist/farming adviser	11
Subsistence crop farmers	6
Food and related products machine operators (packaging)	4
Agricultural technicians (production)	4
Administrative, clerical and accounting workers	3
Production manager	3
Agricultural labourers	1

Source: ITC SMECS The Gambia, 2017 (Partial results displayed. Complete list available upon request.)⁴³

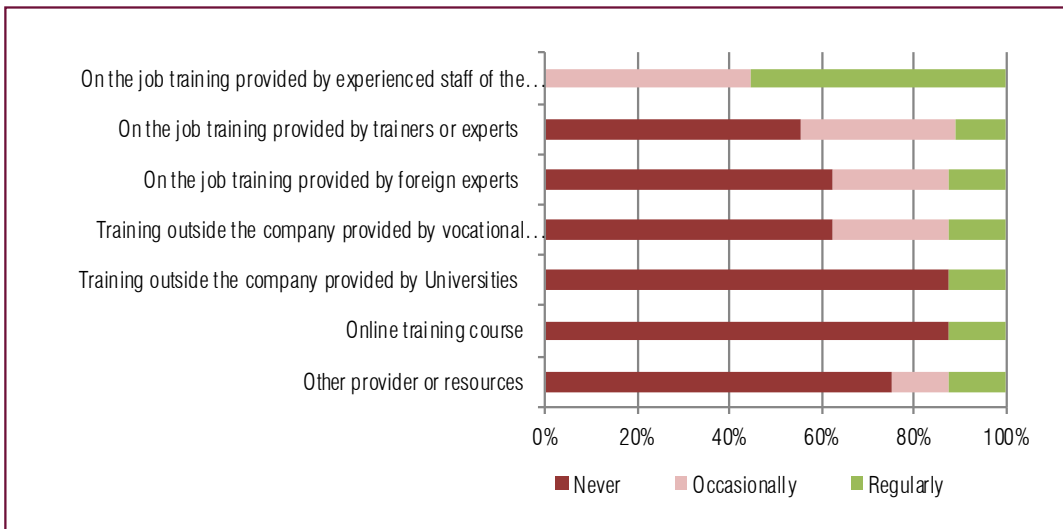
43.– Score is the sum of points accumulated by its occupations based on the number of occurrences and position given by the respondent for the three most-needed occupations (1s place: 3 points, 2nd place: 2 points and 3rd place: 1 point).

TYPES OF TRAINING, INTERNSHIP AND MENTORING PROVIDED BY MSMES TO OVERCOME THE CURRENT SKILLS GAP

The majority of the companies claim to provide on-the-job training occasionally and regularly to overcome the skills gap. Approximately 70% of the enterprises in agriculture provide on-the-job training by experienced staff of the company. Only few companies use trainers or experts to provide on

the -job training. Only 40% of the companies provide training through vocational schools. This share seems relatively low for the agricultural sector and also goes in line with the limited access to TVET in rural areas. The share of companies that never provide online learning is significant to the sector due to lack of access to internet in the rural areas. The types of training provided to employees is mostly done to carry out existing tasks. There is no access to different types of knowledge outside the company or farm limited the capacity to adopt more productive farming methods.

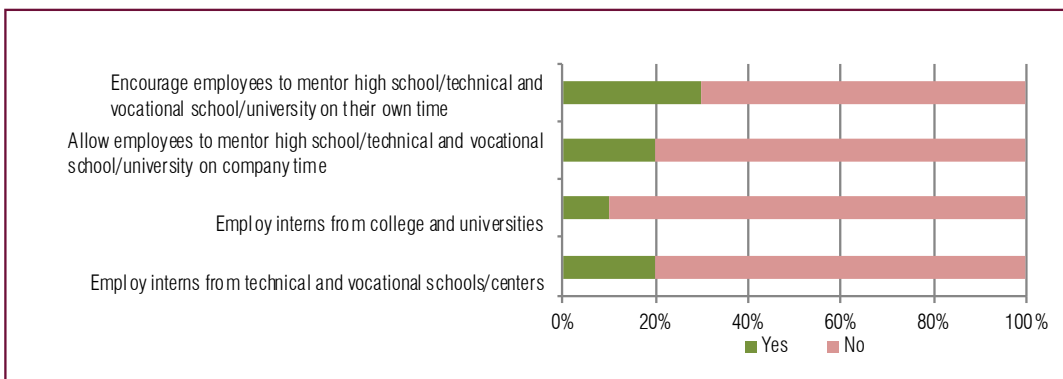
Figure 18: Types of training, internship and mentoring provided to overcome the current skills gap



Source: ITC SMECS The Gambia, 2017

Less than 10% of the companies employ interns and only a third of the companies facilitate mentorship. This is not surprising because enterprises in agriculture employ staff with lower level of education and access to TVET specialized in agriculture is very scarce in rural areas.

Figure 19: Intern employment and mentorship



SKILLS DEVELOPMENT ISSUES LINKED TO EDUCATION PROVIDERS

The importance of agriculture in The Gambian economy should be reflected in a wide range of training offer for agro-related training and education providers. The agro-related skills acquired among the young population (aged 15 and older, based on the 2012 LFS) including agriculture amount to less than 1% of all skills, with respectively 1'002 claiming having received these trainings through a TVET institution in 2012.

However, ITC TVET mapping has identified only three active TVET institutions providing specialized training on

agriculture in The Gambia: Gambia Songhai Initiative, Njawara Agricultural Training Centre and Future in Salikenni. Apart from TVET, it is important to mention the existence of a the **School of Agriculture and Environment Sciences of the University of The Gambia** offering a Bachelor in Agriculture and a new Bachelor in Environmental Science. These is the unique university degree available in agriculture in The Gambia. **The School of Agriculture of Gambia College** also offer a higher diploma in agriculture, a certificates in general agriculture, animal health and production and basic crop and livestock production. Most of the civil servants working at the ministry of agriculture and related technical agencies have received their education at UTG or Gambia

College. Given the limited access to education on agriculture, sector associations have developed their own Farmers Field Schools and capacity building programmes financially supported by different technical assistance programmes of the FAO or the Ministry of Agriculture.

The agriculture sector in The Gambia faces a serious issue concerning its skills development capacities. During the consultative process that led to the design of this Roadmap, ITC carried out a survey among TVET institutions in order to assess the overall performance of the TVET system and to identify bottlenecks. The survey covered a sample of 25 TVET providers and the University of The Gambia out of which only three are providing agro-related subject matters, representing approximately 2,300 students. The mapping of the training providers and results of the survey are presented below.

TVET Mapping

During the consultative process that led to the design of this roadmap, ITC carried out a survey among TVET institutions in order to assess the overall performance of the TVET system and to identify bottlenecks. The survey covered a sample of 25 TVET providers and the University of The Gambia out of which three are providing agro-related subject matters, representing approximately 2,300 students.

The main active TVET in the agriculture sector are:

- Gambia Songhai Initiative (GSI) has its origin from the parent NGO based in Benin that trains young entrepreneurs who are capable of training other young people willing to work in the field, and who thus contribute to the education of the youth of their village. The project has been replicated in The Gambia. The GSI Training Centre is based at Chamen in the North Bank Region. According to the National Development Plan (2018–2021) the government will expand The Gambia Songhai Initiative to another four regions of the country namely West Coast, Upper River, Central River and Lower River Regions and this will be managed by the National Youth Service Scheme. GSI reported on a TVET survey conducted by ITC⁴⁴ that as much as half of its staff members do not possess the appropriate qualifications and experience to teach the courses assigned to them. GSI is also one of the TVET institutions with the highest average fee charged per training course per year, charging D3,8400 (Gambian dalasi).
- Njawara Agricultural Training Centre (NATC) is a community initiated local NGO in Njawara Village that works in partnership with local and international institutions in training youths and adult farmers on sustainable farming systems. NATC vision is to reduce poverty and rural-urban migration by creating self-reliance and employment.

44.– For more details on ITC SME Competitiveness Survey, visit: <http://www.intracen.org/SMECS/>.



Source: ITC

- Future in Salikenni is registered as charity in Germany and as NGO in The Gambia. With the mission to support the village of Salikenni in Gambia, the NGO's main three projects are: 1) Nursery School (currently 7 teachers take care on 150 children that learn basic English, healthcare, etc.); 2) IT centre (computer skills and access to the internet); and 3) the Garden project (micro credit to women to build a permanent wall around their garden to keep animals out of the garden and increase their efficiency).

TVET analysis

There is currently a very limited offering in agro-related subject matters within Gambian TVET institutions compared to the actual size of the sector. Out of the three identified TVET, all are non-profit training institution; two operated by NGOs, **Gambia Songhai Initiative (GSI)** and **Future in Salikenni** and one is a community-based organisation, **Njawara Agricultural Training Centre (NATC)**. TVET do not charge admission or tuition fees and receive annual subvention of the ministry of agriculture beside NATC. The enrolment requirement is the completion of the primary or secondary school. The levels of training include certificates and diploma. Students obtain certificates after 1 year of training.

The TVET survey highlights major gaps in the access to Agro-related training and diversity of courses available described below:

- Limited geographical dispersion of agro-based training providers throughout the country: in term of geographic concentration, the three active TVET in the nuts and agro-processing sector are located in Kerewan (formerly North Bank) as shown in the map below. It is important to stress the absence of registered TVET institutions in the fields of agriculture in the LGAs upriver. There is a clear problem of shortage of quality education on agriculture delivered by accredited-TVET in various districts in The Gambia.

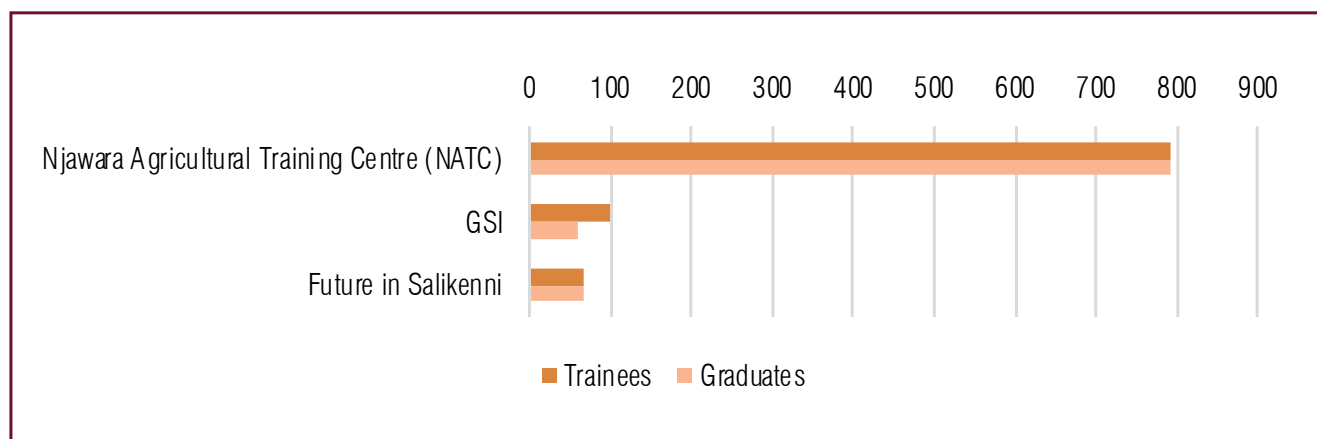
Figure 20: TVET institutions mapping in the agriculture sector



Source: Map based on the ITC TVET survey results.

- The scope of courses is very limited especially concerning agroprocessing. GSI and NATC provide courses on horticulture, aquaculture, animal husbandry, crop production, beekeeping, tree nursery planting and basic food processing (paste and jam processing).
 - TVET reports lacking the necessary equipment and material for teaching courses. For instance, GSI reports the need for more classrooms, standard furniture, Internet access and accommodation for trainees.
 - Most institutions have informal partnerships or other collaboration mechanisms with local TVET institutions (besides Future in Salikenni) to exchange knowledge and best practices but in ad-hoc. It does not seem to exist clear framework for the curriculum design involving NAQAA or other education provider such as the School of Agriculture and Environment Sciences of UTG. In the case of GSI, the institution only relies on its parents NGO in Benin for quality assurance and monitoring.
 - E-learning is not used by TVET: in terms of teaching methods, surveyed institutions report using various formats such as weekly classes, workshops, experiments and group discussions. It is important to highlight that none of them have initiated online teaching methods through e-learning or mobile-based platforms. Many African countries have now developed mobile training systems using smart phones (See the Way Forward: Youth Employment Opportunities in the Nuts and Agroprocessing Sector).
 - Ad-hoc training impact assessment and quality assurance: as TVET are most funded by development assistance project or good will, assessing impact is usually a requirement to report on the impact and outcome of providing scholarship. This way, all TVET report to conduct some sort of tracer studies in an ad-hoc manner. Efforts need to be done to support the introduction of systems-wide tracer studies that would be administered across training institutions under NAQAA's authorities.
 - Additionally, members of the agro sector core team involved in the design of the Roadmap have reported the absence of quality framework to certify the levels of diploma provided by TVETs.
 - The sector associations also involved in capacity building programmes (such as NACOFAG or CAG) could help channel the information back to NAQAA to take appropriate measures.
- The TVET survey also highlights few positive signs in a number of areas:
- The three agro training providers have reported a significant increase in total trainee enrolment over the past 5 years which demonstrates that a part of the young rural generation has still an interest for the sector. However, it is important to take into account that there are only three agro-TVET active in the entire country and fees are covered through scholarships.
 - Figure 21 reveals that in 2016, the main TVET providers in the agroprocessing sectors in The Gambia were NATC, GSI and Future in Salikenni. NATC had the largest number of graduates (those who have successfully completed a training program) with 790 graduates. Although GSI had 98 trainees enrolled, only 59 graduated, while 66 of the trainees at Future in Salikenni graduated.

Figure 21: Number of trainees and graduates in the agroprocessing sector (2016)



Source: Based on The Gambia TVET survey results.

- Links between TVET and the farmers is relatively well developed and effective, besides GSI which seems to operate in a vacuum. GSI does not provide internships/apprenticeships schemes.
- Access to education for girls and woman is fairly developed: girls represent a significant proportion (based on the TVET mapping, they would represent around 50%, up to 94% in the case of NATC). However, there is no specific measures undertaken to assist young woman, besides NATC which give priority to woman during the selection process.
- The majority of agro-related training institutions report that their staff members possess the appropriate qualifications and experience to teach the courses assigned to them, besides GSI which to face a problem on this aspect. Institutions also claim to provide capacity building courses to their staff. This is a very positive sign compared to the situation with other TVET.
- Local business enterprises contact TVET in The Gambia not only to find skilled trainees but also for technical guidance and find trainers. However, consultancy services and tailor-made training courses represent only respectively 5% of local enterprise's needs.

Capacity building projects through Farmer Field Schools and development of village gardens

Given the limited access to education on agriculture, sectors associations have developed their own training services and capacity building programmes supported financially by different technical assistance programmes of the FAO.

The **Cashew Alliance of The Gambia** (CAG) established 26 (twenty-six) **Farmer Field Schools (FFS)** in the regions of North Bank, West Coast and Lower River Regions during the period 2013-2015. The main objective of the FFSs was to strengthen the capacities of the **Cooperative Produce Marketing Societies** (CPMS) and those of the producers to

effectively implement and manage quality assurance and productivity frameworks. FFS programme included many activities, such as sensitization of selected communities by master trainers, facilitation and organisation of training for new core trainers, establishment of FFS, facilitation of refresher training course for core trainers, among others. Through the FFS many farmers could successfully market their produce in the international market standards thanks to the production of high quality groundnuts with minimal aflatoxin contamination as well as increased productivity through the applications of agricultural best practices.

The concept of FFS was also supported during the period 2012-2016 through the Millennium Development Goal 1c (MDG1c) Initiative Improving food security through crop production intensification and school feeding in targeted regions, implemented by the Food and Agriculture Organisation (FAO) and World Food Programme (WFP) and funded by the European Commission. In partnership with the technical services of the Ministry of Agriculture (MoA), FAO fostered the establishment of FFS to facilitate smallholder's crop production.

The component one of the MDG1c initiative "Crop production enhancement and marketing" also covered the creation of **smallholder horticultural gardens** (equipped with boreholes, solar pumps and fencing). In 2016 eight Gardens were established such as in Joben Village (Lower) and Fulladu (West District Central River Region). The objective was to help small holder farmers and small scale food processors in overcoming production constraints and also in adding value through improved production, processing and marketing techniques. Capacity building was provided to garden committees and user groups in organisational management, infrastructures maintenance, water control and fees collection. Subsidized starter kits, including fertilizers and improved commercial seeds, are also provided.

The project Technical Assistance Component of the Global Agriculture and Food Security Programme (GAFSP) in The Gambia (2013–2018), implemented by FAO, has

supported 30 FFS for the strengthening of farmer skills and capacity to improve sustainable production (covering issues of water management and irrigation, rice, food crops, horticulture production, and poultry small livestock production as well as post-harvest). The FFSs benefit around 300 farmers and are run jointly by trainer facilitators from government that provide expertise technical back-up support and by lead farmers.

Farmer Business Schools (FBS) in agroprocessing, agribusiness development and commercialization also promoted capacity development skills for Farmer-Based

Organizations (FBOs), with a large proportion comprising youth.

In the public sector, the Food Technology Services (FTS) of the Department of Agriculture (DOA, under the Ministry of Agriculture) delivers training to 50 males and 150 females in support of food formulation development and technology transfer in 2017. FTS has conducted product development using locally produced cereal and legume crops; these included millet, maize, rice, peanut and beans.

Table 7 presents a summary of the main agro-related training providers in The Gambia.

Table 7: Main agricultural education and training providers in The Gambia

Institutions	Level, duration, topics and staff	Description	Number of trainees (2016)
University			
University of The Gambia (UTG)	The School of Agriculture and Environment Sciences of the University of The Gambia offers a Bachelor in Agriculture and a new Bachelor in Environmental Science	UTG is a public institution of higher education founded in 1998 and located in Sere Kunda, the largest city in The Gambia. The UTG is composed of 11 schools (or faculties) providing training in agriculture, ICT, science and research, business and public administration, and technical skills. Twenty-two degrees can be attained ranging from certificate, diploma, advanced diploma, graduate and undergraduate. *From the total number of students: 1308 are males and 744 are females.	2 052*
Gambia College	The School of Agriculture offers a three-year higher diploma in agriculture and two-year certificates in general agriculture, animal health and production and basic crop and livestock production	The School of Agriculture primarily provides pre-service and in-service training for school leavers, staff from government and non-government departments and organizations, enterprising industries and small businesses. It delivers full-time training from the Brikama Campus. It also organizes workshops and seminars, all geared towards specialized training packages and current technologies. The General Agriculture certificate is designed for extension workers and farm hands. Certificate in Basic Crop and Livestock Production is designed for the Department of state for Youth, Sports and Culture. Trainees are sent in from the National Youth Service Scheme (NYSS). The overall objective is to develop and consolidate the skills and experience acquired through tutorials and practical exercises. These exercises would include fieldwork, farm visits, training in practical skills, demonstrations and short duration attachment to various departments or commercial enterprises.	160
TVET			
Gambia Songhai Initiative (GSI)	Level: Certificate and diploma Duration: 1 to 2 years Topics: Animal husbandry – cattle, sheep, poultry, crop production – horticulture, cereals Staff: 12 full-time trainers	GSI is a fee-based NGO located in Benin that trains 55 male and 43 female entrepreneurs who are capable of training other young people willing to work in the field, and who thus contribute to the education of the youth of their village. GSI provides certificates and diplomas at the end of its training programmes. According to the National Development Plan (2018–2021) the government will expand The Gambia Songhai Initiative to another four regions of the country, namely West Coast, Upper River, Central River and Lower River regions and this will be managed by the National Youth Service Scheme.	98
Njawara Agricultural Training Centre (NATC)	Level: Certificate Duration: 1 year Topic: Food processing, horticulture, paste and jam processing, tree nursery preparation Staff: 6 full-time instructors	NGO based in Njawara Village that works in partnership with local and international institutions in training 50 males and 740 females, and young and adult farmers on sustainable farming systems. NATC's vision is to reduce poverty and rural-urban migration by creating self-reliance and employment. NATC courses are fee charged and it provides certificates after completion of its programmes.	790
Future in Salikenni	Level: Certificate Duration: 1 year Topic: Horticulture production Staff: No full time	Registered as a community-based NGO in The Gambia that provides free courses in agriculture and ICT with the mission to support the village of Salikenni in The Gambia, the NGO's three main projects are: 1) Nursery school; 2) IT centre (computer skills and access to the Internet); and 3) The garden project (micro credit to women to build a permanent wall around their garden to keep animals out of the garden and increase their efficiency).	66

Institutions	Level, duration, topics and staff	Description	Number of trainees (2016)
Entrepreneurship programmes			
National Enterprise Development Initiative (NEDI)	Food processing and preservation and fishing	The National Enterprise Development Initiative (NEDI) was established in 2004 under the Office of the Vice President, but operationally supervised by the MOYS and receives funding from the Government of The Gambia, GAMJOBS and other private organizations such as the banks. NEDI is a public programme providing free training in agriculture and fisheries that operates in the seven regions of The Gambia (Banjul, Kanifing, Brikama (formerly Western), Mansa Konko (formerly Lower River), Kerewan (formerly North Bank), Kuntaur (formerly the western half of Central River Division), Janjanbureh (formerly the eastern half of Central River Division), and Basse (formerly Upper River). The main purpose of its establishment is to empower Gambian youth and women through the provision of training in business entrepreneurship, funding to operate businesses in the informal sector and business advice to ensure sustainability. Business advice provided is geared towards ensuring sustainability and expansion.	248
National Youth Service Scheme (NYSS)	Horticulture	The National Youth Service Scheme (NYSS) was established in 1996 with the aim to provide the youth who form the majority of the population with the required skills to address the acute problem of unemployment. It was supported by the National Youth Service Corps (NYSC) of Nigeria during its first eight years of establishment. Public Free Agriculture, fisheries 22 males and 11 females Certificate	33
Empretec	Entrepreneurship sensitization and coaching	The Empretec centre is located in Bakau and is funded by UNDP and the Government of The Gambia and anchored at GIEPA. Since September 2014 when the first training was commissioned, the Empretec centre has trained and given a certificate to more than 736 entrepreneurs, including 164 farmers. Public Free Agriculture, ICT and tourism	440
Sector associations			
National Coordinating Organisation of Farmer Associations (NACOFAG)	Horticulture, food processing 1–2 week workshop Trainers: 7 full-time trainers, 24 part-time trainers	NACOFAG is a non-governmental network of farmer organizations with national character based in Brikama and with the overall objective of addressing food insecurity and poverty reduction. This organization comprises 45 memberships actively involved in agricultural activities geared towards boosting agricultural production and productivity in the country. Training is free of charge and 600 males and 600 females achieved a certificate after completing a 2-week programme in agriculture and agroprocessing.	1 200
Cashew Alliance of The Gambia and Farmer Field Schools (FFS)	Cashew production and processing, training on agricultural best practices	Twenty-six FFS were established by the Cashew Alliance of The Gambia (CAG) in the regions of North Bank, West Coast and Lower River Regions during the period 2013–2015. The main objective of the FFS was to strengthen the capacities of the cooperative produce marketing societies (CPMS) and those of the producers to effectively implement and manage quality assurance and productivity frameworks.	-
Gambia National Women Farmers Association (NAWFA)	Topic: 1) Capacity building (organizational management skills training, women's rights advocacy, functional literacy and fundraising skills); 2) Cereals (rice and yellow maize) and oilseeds (sesame and groundnuts) production; 3) Small ruminants (sheep and goats) and poultry (broilers and layers) production, processing and marketing; 4) Value-added processing (transformation) of cereals and oilseeds; 5) Agricultural produce and inputs marketing and 5) Agricultural credit and savings mobilization.	National Women Farmers' Association (NAWFA), a membership-based association of 48,000 women farmers operating in 1,074 villages clustered in 74 smaller associations, is embarking on a five-year development programme on Integrated Crop and Livestock Production, Processing and Marketing. The purpose of the programme is to promote commercial agriculture among women farmers, which will encourage and support women to do farming as a business. It will use capacity building and commercial agriculture as a development tool for raising the status of women farmers from subsistence to economic independence.	-
Technical agencies of the Ministry of Agriculture			
Food Technology Service (FTS)	Agroprocessing for groundnuts (peanut butter), fruits and vegetable, cereals and their preservation techniques.	FTS of the Department of Agriculture (DOA) is under the Ministry of Agriculture and delivers training to 50 males and 150 females in support of food formulation development and technology transfer. FTS has conducted product development using locally produced cereal and legume crops; these included millet, maize, rice, peanut and beans.	200

Note: *the number of trainees was not provided by the institution

Source: Based on The Gambia TVET survey results.

AGRO-RELATED ENTREPRENEURSHIP SUPPORT

The entrepreneurship ecosystem in the context of this Roadmap relates to the services to young entrepreneur willing to develop an agribusiness. ITC has carried out a field assessment to understand the existing level of development of entrepreneurship support services in The Gambia.

Limited support to agri-business entrepreneurship: the TVET survey demonstrates that entrepreneurship support is mostly focused on sensitization which is provided by agro-related TVET and also national entrepreneurship programmes, namely Empretec, National Enterprise Development Initiative (NEDI) and the National Youth Service Scheme (NYSS).

Indeed among the three agro-TVET, GSI has reported that entrepreneurship sensitization is provided as a specific training programmes whereas NATC has integrated entrepreneurship within its curricular. Both NGOs report to provide coaching services to their graduated students. Additionally the NATC and Future in Salikenni facilitates access to microcredit and market promotion services targeting young entrepreneurs/exporters.

However, based on the sector consultations, the access to entrepreneurship sensitization and business incubations support in the agro sector is mainly provided by the national entrepreneurship programmes, namely Empretec, National Enterprise Development Initiative (NEDI) and the National Youth Service Scheme (NYSS). These programmes support focus on soft skills training, second chance education and financial support through training subsidies. They provide workshops to young people on the benefit of developing

your own business, motivational boot camps and basic business skills.

For instance, Empretec is a capacity building project for MSMEs, managed and implemented by GIEPA and supported by UNCTAD. Empretec mainly provides courses in the area of soft skills for entrepreneurship. However, this type of support is focusing mainly on business skills and are not specialized in agriculture. Empretec has been running for three years and has successfully graduated a large number of students (as much a 2,000 in 2016 alone, including 164 farmers) and 120 business development advisors, and provided business development services to 450 businesses.

There is a clear need to develop a sector-specific entrepreneurship programme, an agro-entrepreneurship programme.

Absence of agribusiness development centre (ADC) to foster agribusiness among farmer-based organisation: compared to other countries such as Uganda or South Africa, The Gambia does not have an agribusiness development centre to foster the development of agribusiness. The role of ADC is to support farmer based-organization (FBO) that have potential to contribute to the agricultural value chain but currently lack the organizational or technical or structural capacity to operate in a sustainable way. The ADC identifies the gaps within the FBO and sets out to fill them through specific training interventions related to agricultural practices and financial management to ensure they are bankable within a certain period of time. ADC usually also assists in managing price risk.

Such centres can also facilitate research programmes in agricultural transformation, competitiveness and food security management, and the linking of new farmers/smallholders to commercial agri-food value chains.

The agriculture sector in The Gambia faces serious issues concerning its skills development capacities with limited youth-specific training capacities. The TVET mapping done by the ITC has identified only five accredited education providers in the country concentrated in the North bank and West coast regions. This includes the bachelor degree delivered by School of Agriculture and Environment Sciences of the University of The Gambia; and certificates delivered by only three active TVET institutions providing specialized training on agriculture, namely The Gambia Songhai Initiative, Njawara Agricultural Training Centre and Future in Salikenni. TVET institutions also report a lack of the necessary equipment and material for teaching courses. Plus, the scope of courses available is very limited especially in primary agro-processing.

Given the limited access to education on agriculture, sectors associations have developed their own Farmers Field Schools (FFS) and capacity building programmes. However, FFS are entirely financially dependent on the support of technical assistance programmes from FAO or the Ministry of Agriculture.

The importance of the agriculture in The Gambian economy should be reflected in a wide offer of agro-related trainings and education providers. The development of the agriculture in general and specially of its main cash crops, as well as its capacity to add value through primary processing, depends on the capacity of the sector to improve the access to agro-related and agro-processing quality education to the youth in rural areas throughout the country. Furthermore, the objective of the TVET's involved in the sector is to make agriculture more attractive to youth by developing agropreneurship support programmes.

Box 3: Snapshot of the key competitiveness constraints impacting youth and trade in the nuts and agroprocessing sector

The Gambia's agriculture is mostly based on subsistence farming, which involves a wider and deeper range of competitiveness problems compared to more classic agribusiness in other African countries.

Firm level capabilities and competitiveness issues

The major issues for agriculture firms that participated in SMECS are cost of input, certifications and standards, ICT requirement, linkages with customers as well as skills requirements, trade mark requirements and investments in innovation.

Groundnut exporters also reported to have faced compliance issues with aflatoxin requirements in international markets. Farmers' capacity to compete is mainly affected by high cost of imported production inputs, low fertility of soil, small size of plantation areas, poor plantation management techniques, limited use of fertilizers and limited mechanization. Low soil fertility levels are further exacerbated by the overdependence on rainfall for agricultural production with low use of irrigation systems. All these issues result in low production yields and limited ability of cooperative produce marketing societies (CPMS) to meet cost requirements.

The capacity to connect also appeared to be a central issue for agriculture firms, which reported serious difficulties in linking to customers, especially with suppliers of inputs, business and institutions. Groundnuts and cashew firms have limited expertise in making use of Internet, conducting online marketing or accessing information such as market prices.

MSMEs in the nuts and agroprocessing sector also face major issues in their capacity to change due to low levels of financial investments

and human resources, which constrain the future development of the sector.

Business ecosystem constraints

The major business environment issues identified include skills gaps, frequent power cuts due to high tariffs and limited access to electricity, lacking irrigation schemes and difficult access to finance.

The absence of qualified and skilled labour is the biggest constraint negatively impacting the sector's competitiveness. The skill gap is particularly severe concerning occupations related to management positions and skilled agro-technicians. This bears significant implication in the existence of only a few successful agribusinesses and limited development of agroprocessing, either primary or secondary. The occupations most needed are mid-level management positions, which require either specific education in agronomy or agribusiness.

The agriculture sector faces serious skills gaps along the value chain, particularly for youths, as there is limited youth-specific training capacities. The ITC TVET mapping identified only four accredited education providers in the country, all of them concentrated in two regions, and some farmers field schools financially assisted by international development agencies. TVETs report a lack of the necessary equipment and material for teaching courses. The scope of courses available is very limited, especially in primary agroprocessing.

The sector's competitiveness and future development depend on improving the access of youth in the country's rural areas to quality agro-related and agroprocessing education. Furthermore, TVETs have to make agriculture attractive again to youth by developing agropreneurship support programmes.

The roadmap identified youth employment opportunities in the groundnut and cashew sectors as well as cereals by realizing the full trade analysis of the sector. Agriculture, and more specifically the nuts and agroprocessing, provide interesting opportunities to response to the growing youth employment challenge and poverty in The Gambia. The sector has the capacity to employ youth in rural areas and also develop its competitiveness by strengthening in skills development capacities.

The analysis of the value chain and competitiveness constraints makes it clear that the sector's development will require an integrated set of interventions that address

challenges across the entire value chain. Roadblocks are not limited simply to enterprise capacities, government policy or TVET services, and many challenges are the result of a combination of factors that require wide-ranging remediation. It is for this reason that a comprehensive sector roadmap becomes all the more necessary: individual stakeholders, and indeed small groups of stakeholders, will not be able to deal with the constraints on their own.

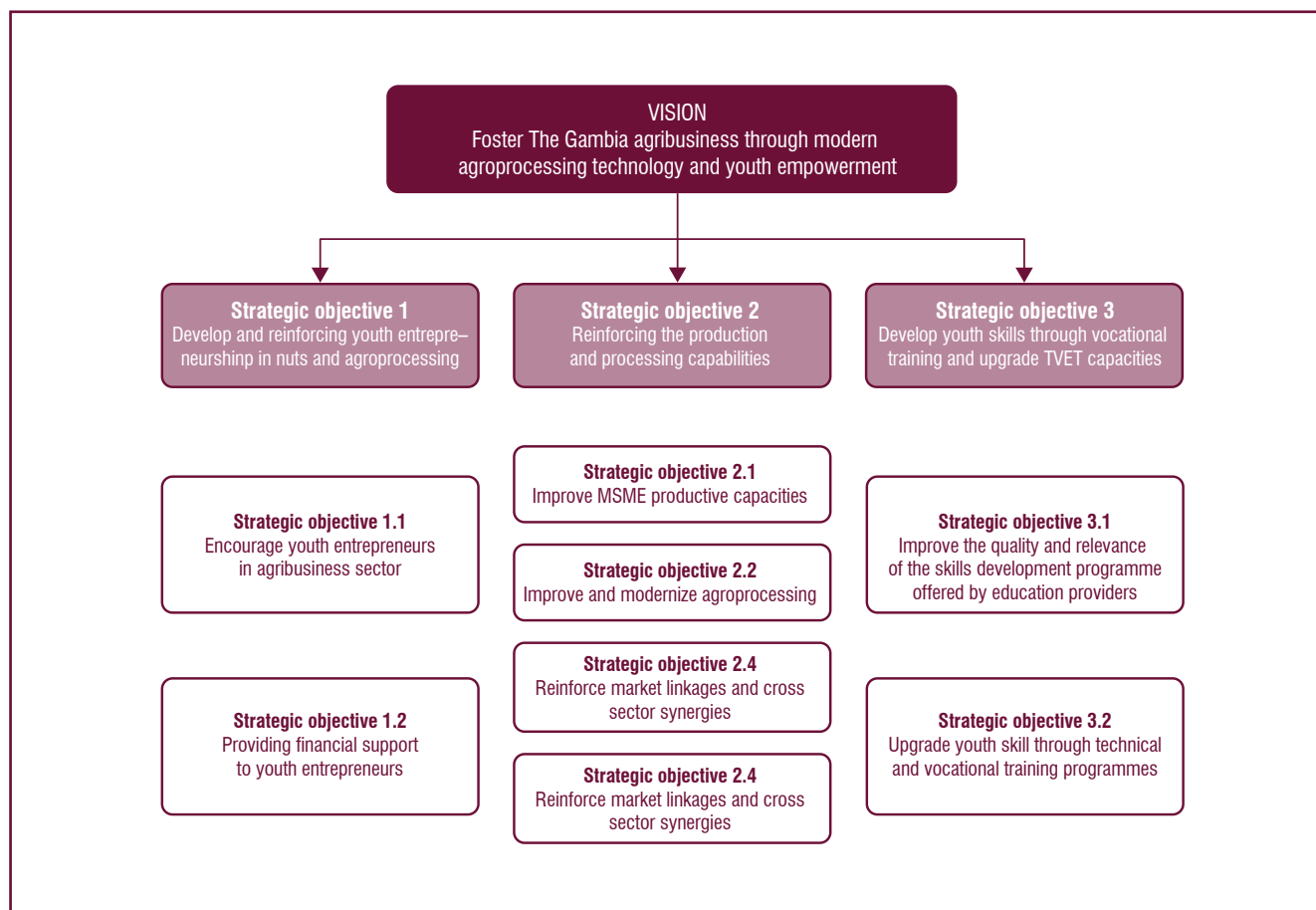
It is only through strategic cooperation that the most effective results will be achieved. The next chapter presents the way forward and how to get there.

THE WAY FORWARD: YOUTH EMPLOYMENT OPPORTUNITIES IN THE NUTS AND AGROPROCESSING SECTOR

VISION AND STRATEGIC OBJECTIVES FOR YOUTH EMPOWERMENT

The roadmap sets priorities to be implemented over the next five years. These priorities are articulated along three main axes: the first objective focuses on stimulating entrepreneurship among young people in The Gambia towards the agribusiness sector. The second objective focuses on

improving MSME productive and processing capacities through equipment modernization. The last objective concentrates on skills improvement, both through the reorientation of training to fill the skill gap and through support to the TVET institutions.



LEVERAGING MARKET OPPORTUNITIES FOR YOUTH IN THE DOMESTIC AND EXPORT MARKETS

The global market for nuts is growing at a fast rate as nuts become the dominant trend in healthy eating. Increasing numbers of consumers in the world are adopting healthy eating patterns and nuts align seamlessly with today's relevant health claims like clean label, free from GMO and gluten free. Other key claims aligned with this trend are high in fibre, high in protein, low in cholesterol, low in sodium and no trans fats. Rising interest in vegan and plant-based diets also drives new product development utilizing various nuts.⁴⁵ The 2016/17 global nut production is expected to increase to 4.02 million tons, rising by 5.77% over the previous year. In particular, the global production of peanuts is projected to rise by 34% (more than 700,000 tons). Companies worldwide are also turning to the production and marketing of nuts, since they have a longer shelf life compared to fresh fruits and vegetables, and can be used both as a snack and a cooking ingredient.⁴⁶

45.– http://newsroom.almonds.com/sites/default/files/pdf_file/Innova_Infographic_NA%20and%20Global.pdf.

46.– <https://www.dkconsultants.gr>; <https://www.cbi.eu>; <https://www.nutfruit.org>.

Domestic opportunities for groundnut and cashew nut

The tourism industry is directly linked to the domestic consumption of cashew kernel. According to the cashew stakeholders, cashew is sold in a number of supermarkets and a few hotels. Nevertheless, the common consumer perception is that imported cashews are better quality than Gambian cashews. It is important for Gambian producers to improve the marketing and packaging to gain market share in the domestic market. There is room for improvement in terms of packaging and labelling to satisfy local consumption.

Export opportunities for groundnuts

The Gambia ranks 10 in world export of groundnut in shell with an exported value of \$3,279,000 in 2016. Between 2012 and 2016, the value of exports grew 315%. The country already exports to top world importers like Viet Nam, Singapore and the United Kingdom.

Among its two export destinations, Viet Nam represents an attractive potential export market for The Gambia, since the demand for groundnuts in shell has increased at a rate of 48.64% CAGR during the period of 2011–2016 (Table 8). In contrast to Viet Nam, the demand from other importing countries has been decreasing, as shown in Table 8.

Table 8: World trade indicators for importing countries of The Gambia's groundnuts, 2012–2016

Importing countries of The Gambia's export	Value of imports from The Gambia USD thousand	Value of world imports USD thousand	World Import growth rate	Share in world imports	Share in world imports growth rate
Viet Nam	1 329	57 644	48.64%	6.76%	46.63%
United Kingdom	796	129 737	-5.72%	2.7%	-6.33%
Singapore	56	14 717	-4.16%	0.86%	-5.45%
USA	6	26 180	-16.88%	0.6%	-18%
India	52	59	-34.72%	0.00%	-35.60%

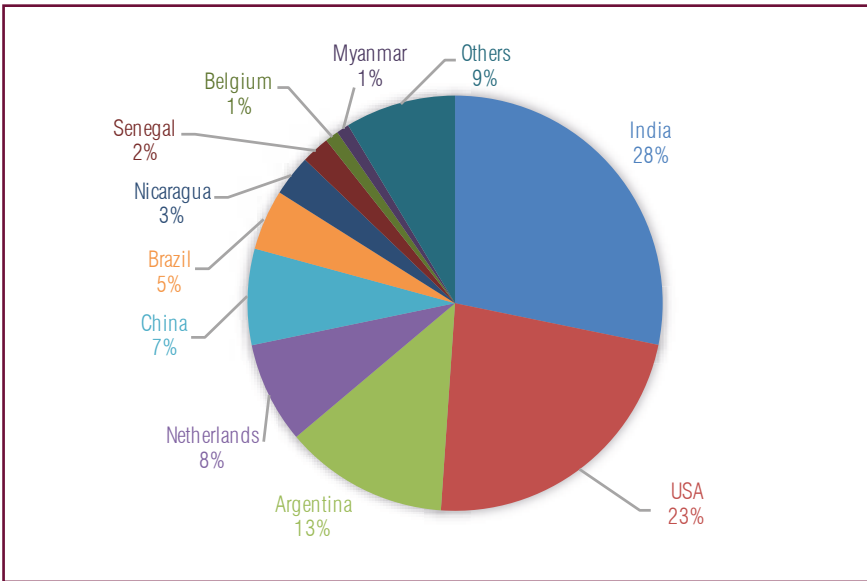
Source: Estimates based on ITC Trade Map.

Main competitors in the world market

The Gambia is facing intense competition in the world market. Gambia exports only represents only 1% of Indian exports, the world top exporter. The world groundnut export market is highly concentrated in four countries: India, the USA, the Argentine Republic and the Netherlands. India is the leading exporter of groundnuts, with 30% of its exports going to Indonesia and 16% to Viet Nam. The USA is the

second leading exporter with three main export destinations: China (25%), the United Mexican States (19%) and Canada (18%). Argentina is the third top exporter of groundnuts, exporting 41% to the Netherlands, who, aside from being the top importer of groundnuts, is also the fourth leading exporter of the product. In terms of export growth, during the five-year period 2012–2016, India and Argentina have decreased their exports by 5.31% and 3.30% respectively, while the USA increased its exports by 21.96%.

Figure 22: Top exporting countries of groundnuts (2016)



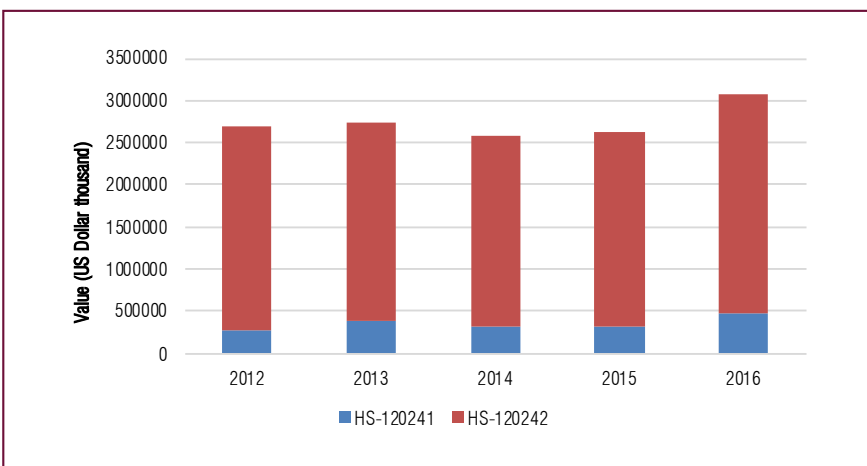
Source: Estimates based on ITC Trade Map.

Besides fierce world competition, there are interesting opportunities in the world market. As illustrated in Figure 23, the global market for groundnuts has been steadily increasing between 2012 and 2016. The world market for groundnuts grew from \$1.52 billion in 2007 to \$3.1 billion in 2016. Although the value of exports had a slight decline during the years 2014 and 2015, world imports have increased between 2015 and 2016 and reached their highest level in the

past 10 years. This clearly shows interesting export potential for the groundnuts in the world market.

Although during the period 2012–2016 shelled groundnuts (HS-120242) represented the highest share of world imports of groundnuts, world imports of groundnuts in shell (HS-120241) grew 170% while the former grew 108% (Figure 23).

Figure 23: World imports of groundnuts in shell (HS-120241) and shelled groundnuts (HS-120242) (2012–2016)



Source: Estimates based on ITC Trade Map.

The top five importers of groundnuts are the Netherlands (14%), China (10%), Viet Nam (8%), Indonesia (6%) and Germany (6%), which constitutes 44% of total imports. It is worth noting that China, the second largest importer, is also

the fifth largest exporter of groundnuts. Both Europe and Asia (including Central Asia, East Asia and the Pacific) are the main importing regions for groundnuts with the former accounting for 54% of world imports and the latter 40%.

Figure 24: Top importing countries of groundnuts, 2016 (HS-1202)

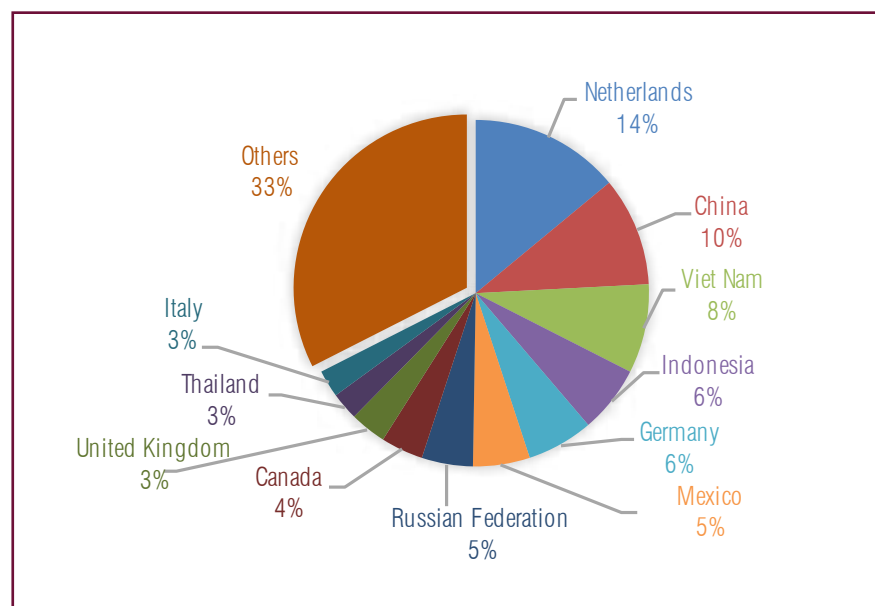


Table 9 presents a list of the top importing countries' interest potential given that their imports have significantly increased between 2012 and 2016 and also unit value above the world average in 2016. It is worthwhile indicating that the top importers are major exporters such as the Netherlands, China or Germany. Indeed, China is the fifth leading exporter of groundnuts and the second largest importer of groundnuts. Based on this analysis, we can identify Mexico, the People's Democratic Republic of Algeria and Malaysia as interesting new target markets for The Gambia.

Table 9: Potential export destinations for The Gambia's groundnuts (2016)

	Value of imports USD thousand (2016)	Unit value (USD/unit)*	Import growth rate (2012–2016)	Rank in world imports (share in 2016)	Share in world imports growth rate (2011–2015)
China	315 309	693	87.27%	10.0%	84.62%
Viet Nam	257 543	954	191.50%	8.2%	187.38%
Mexico	164 410	1 164	16.78%	5.2%	15.12%
Thailand	79 841	1 163	10.48%	2.5%	8.91%
Algeria	60 336	1 229	8.09%	2.4%	6.56%
Malaysia	60 033	1 353	16.91%	1.9%	15.26%
South Africa	56 147	1 058	27.93%	1.8%	26.12%
Belgium	46 675	1 429	14.20%	1.5%	12.59%
Hong Kong, China	28 520	972	41.82%	0.9%	39.81%
Australia	25 374	1 244	2.16%	0.8%	0.71%
Philippines	18 887	256	4.02%	0.6%	2.54%

Source: ITC Trade Map.

* The unit value is the quotient of the value by the quantity. It shows the average value per unit of quantity of the commercial transactions. It is not, however, a selling price of the goods.

Export opportunities for cashew

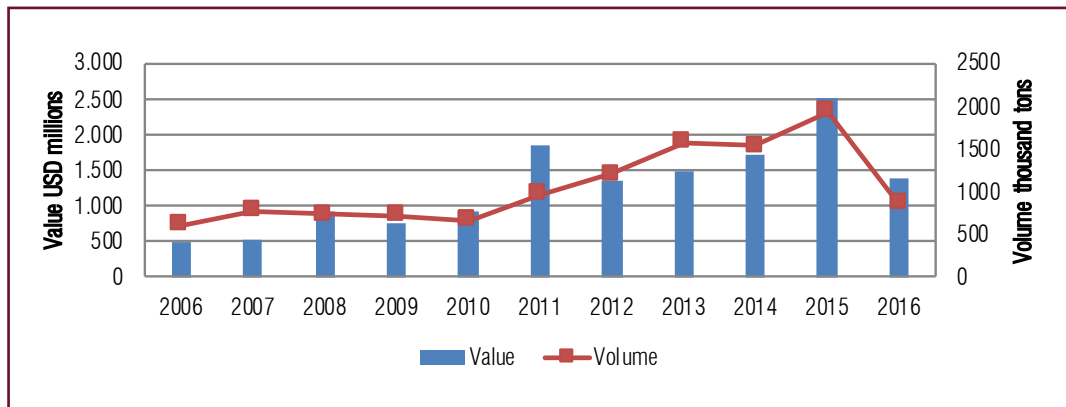
In 2016, The Gambia ranked 16th in world export of cashew nuts in shell (HS-080131) with an exported value of \$2.3 million. The country's main export destination is India, the world's top importer. The country does not export shelled nuts (HS-080132), which, in 2016, represented a value of \$3.7 billion in world imports. If The Gambia can further develop its processing capacities, meet market requirements for aflatoxin standards and fill skill gaps along the value chain, there is great potential for the country to tap into this market and generate further job opportunities for youth.

The global cashew nut industry is a fast-growing industry worth \$1.38 billion in 2016.⁴⁷ The world's raw cashew imports increased from \$1.35 million to \$1.38 million, which represented a growth of 10% CAGR between 2012 and 2016. As can be seen in Figure 25, the import quantities and value of RCN gradually increased over the years, with some fluctuation. It is worth noting that the raw cashew supply situation in 2015 was subjected to a highly speculative international market where world imports reached its highest peak⁴⁸ over the last years.

47.– ITC Trade Map.

48.– Gambian Cashew Market Bulletin, http://www.intracen.org/uploadedFiles/intracenorg/Blogs/Cashew_Nuts_-_Main/Gambia%20bulletin%2016%20of%2017%20September%202015.pdf.

Figure 25: World imports of cashew nuts, in shell (HS-080131)

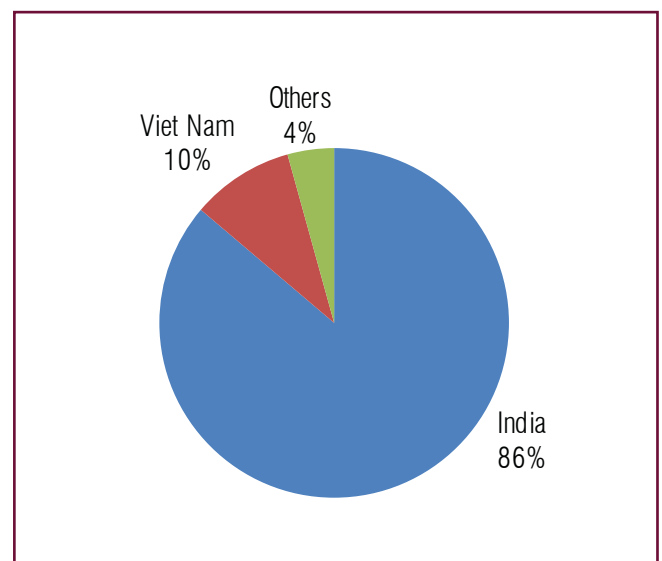


Source: ITC calculations based on UN Comtrade statistics.

World imports are concentrated in two major importers, India and Viet Nam, respectively covering 85% and 10% of the global import trade in 2016 (Figure 26). India remained the largest world importer of cashew with a total import of \$1.2 billion, representing 86% of total world import or RCN. Indian imports of RCN have grown about 10% between 2012 and 2016. Viet Nam is the second largest market of cashew, with imports of \$130.2 million with the share of 10% of the world imports. Compared to India, Viet Nam's imports have increased at a higher rate over the same period. The Federative Republic of Brazil, the Kingdom of Saudi Arabia, Togo, Ghana, the Kingdom of Belgium and the Republic of Belarus are small markets with only 1% world market share each.

The import market for RCN is highly concentrated, with limited opportunities for exporters to seek new clients. The two largest buyers of cashew are currently competing for nuts in order to keep their industries functioning. This situation increases the unit value of RCN and has created a global scarcity that is leading to the closure of smaller processing facilities incapable of acquiring RCN at a reasonable price.

Figure 26: Main world importing markets of cashew nuts in shell



Source: ITC calculations based on UN Comtrade statistics.

Table 10: Main importing countries of cashew in shell (HS-08131), 2012–2016, in USD thousands

World's top importing markets for cashew, in shell (HS-08131)				
Country	Value USD thousands 2012	Value USD thousands 2016	Compound growth of import 2012–2016	Share in Imports
World	1 353 374	1 383 155	0.55%	100.00%
India	924 079	1 180 914	6.32%	85.38%
Viet Nam	321 547	130 213	-20.23%	9.41%
Brazil	58 023	13 653	-30.35%	0.99%
Saudi Arabia	5 748	11 059	17.77%	0.80%
Togo	36	10 655	314.78%	0.77%
Ghana	296	10 402	143.48%	0.75%
Belgium	1 364	5 099	39.05%	0.37%
Belarus	0	4 596	N/A	0.33%
Kuwait	0	1 862	N/A	0.13%
Canada	434	1 603	38.63%	0.12%

Source: ITC Trade Map.

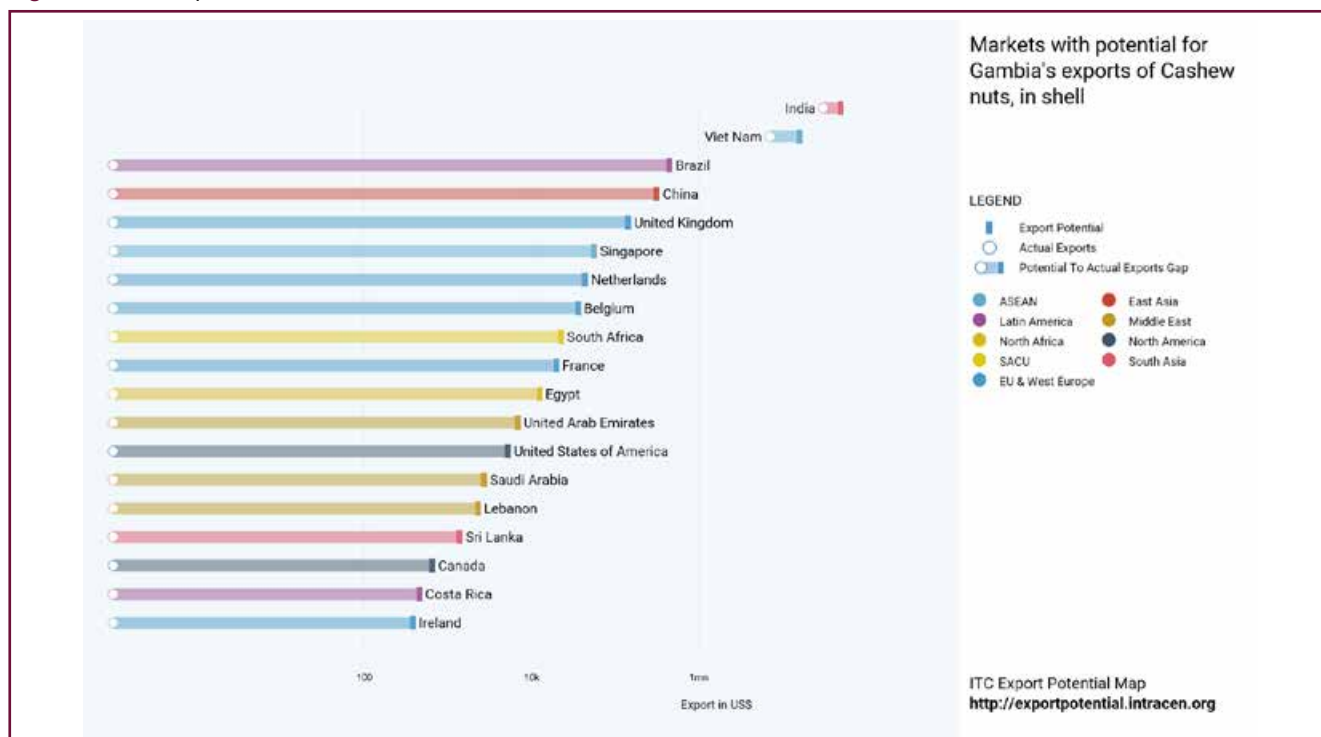
The world demand for cashew is increasing in terms of volume and value. Forecasts are that world demand for cashew will continue to increase rapidly. Main buyers such as India, Viet Nam and Brazil as well as the US and Europe will source from Africa. The Gambia needs to tap into markets that present high growth demand of raw cashew nut along with kernel.

There is potential to further develop markets like India and Viet Nam where the actual exports are below the real

export potential.⁴⁹ Prospects for market diversification for The Gambia show that there are considerable numbers of fast-growing potential export destinations such as Brazil, China, the UK, Singapore, the Netherlands and others (Figure 27).

49.– An important criterion taken into account during the review process has been the export potential of existing exported products by The Gambia. ITC has developed a tool, the Export Potential Map, which turns economic analysis into practical trade information to identify promising products.

Figure 27: List of potential markets for cashew nuts in shell



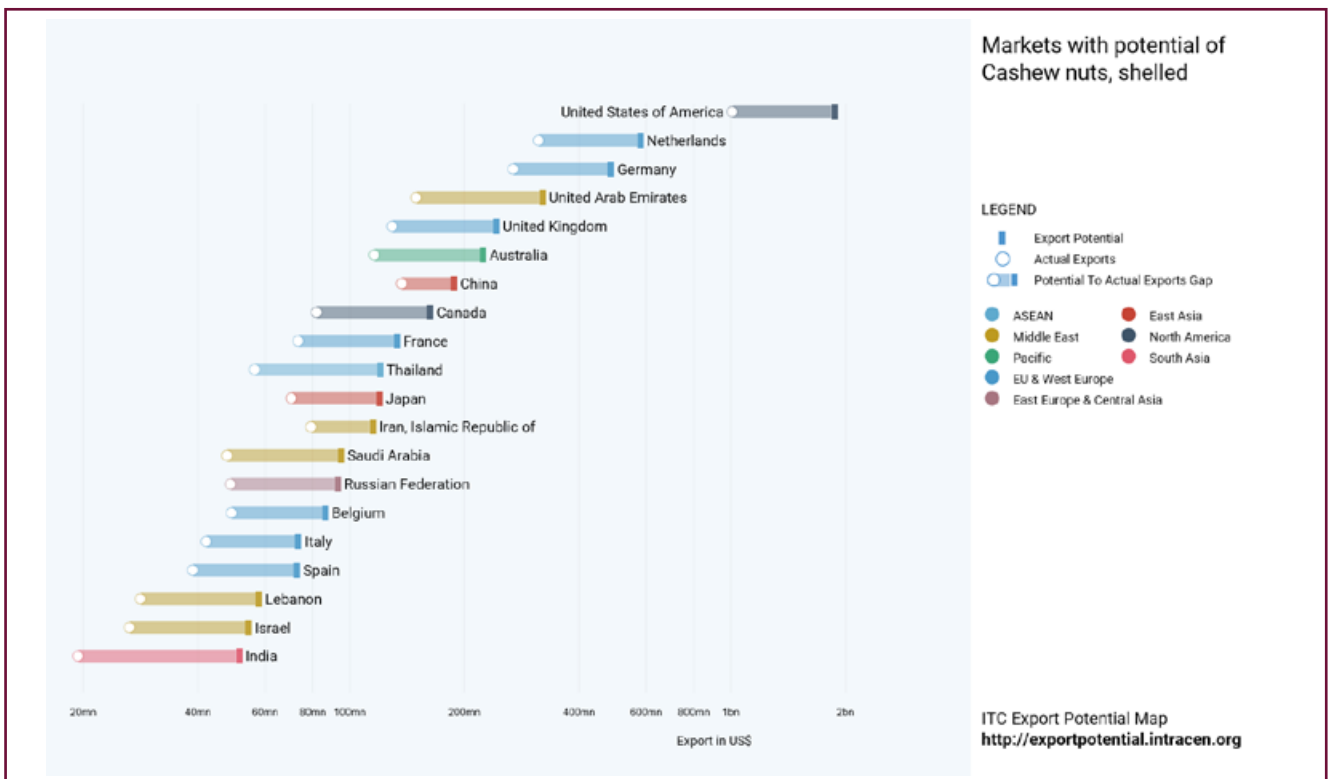
Source: ITC Export Potential Map, 2017.



Source: ITC

However, for most of the European market, what they really import and consume is cashew kernel. This shows a real potential in deshelled cashew. To enter these markets, Gambian exporters will need to invest more in processing and improvement of quality requirements.

Figure 28: Attractive markets for shelled cashew nuts



Source: ITC Export Potential Map, 2017.

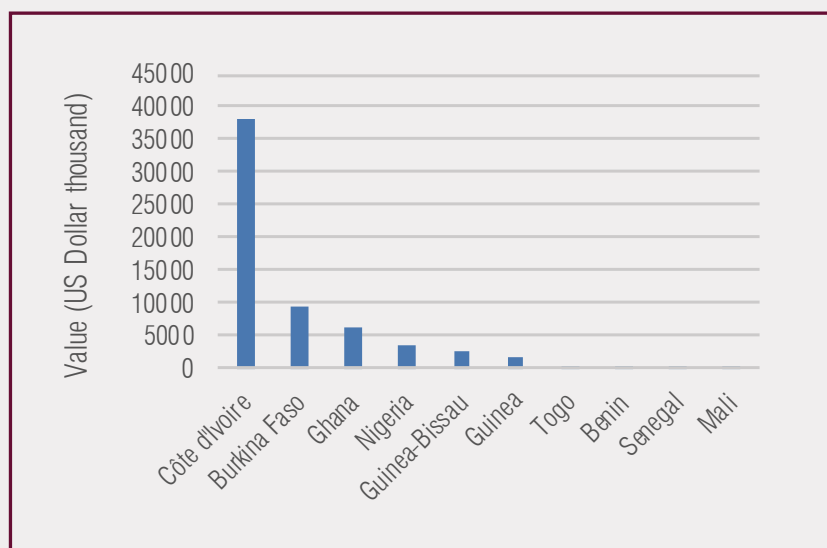
Box 4: West African countries exploiting the export potential of cashew kernel markets

West Africa is a major cashew producer. Since 2014, cashew has become the second main cash crop in West Africa in terms of export value behind cocoa and ahead of cotton, rubber, palm oil or banana. Cashew cultivation is spread all over the region, with three main producing areas: the central area (Côte d'Ivoire, Ghana, Burkina

Faso, Guinea, Mali and Togo), the eastern area (Nigeria and Benin) and the western area (Guinea Bissau, Senegal and The Gambia).^a

Nine countries in the region generate 35%–40% of global production, and Côte d'Ivoire, Burkina Faso and Ghana are among the world's top three exporters of shelled cashew nuts.^b

Figure 29: Main West African countries exporting shelled cashew nuts (HS-080132)



Source: Estimates based on ITC Trade Map.

In general, West African cashews are processed in Viet Nam and India before reaching the European market through the Netherlands (via the Port of Rotterdam). Only roughly 10% of the cashew produced in West Africa is also processed in the region and exported directly to Europe.

The African Cashew Alliance (ACA) is improving productivity and processing capacity for firms in Benin, Burkina Faso, Côte d'Ivoire and Ghana to increase the value of exports and ensure that the region's nuts are increasingly branded by source.^c

Côte d'Ivoire's government, for example, stated a policy for 100% of cashew production to be processed in country by 2020. With

700,000 tons of cashew produced in 2015, the country has made significant progress. However, only 10% of this production was processed locally. In 2015, a scoping mission to the International Exhibition of Cashew Processing Equipment and Technologies (SIETTA) was conducted by cashew stakeholders, to meet with partners and increase the pipeline of export-ready Ivorian companies in the cashew processing sector.^d

While large roasters tend to import cashew directly from processors, smaller market players make use of importers. The European market for cashew nut kernels is highly focussed on the snack segment (whole white kernels), whereas the food industry offers some opportunities for pieces and broken kernels.^e

a. http://www.rongead.org/IMG/pdf/african_cashew_market_review_rongead_ica_2015.pdf.

b. <https://www.watradehub.com/en/sectors/international-trade/cashew/>.

c. <https://www.watradehub.com/en/sectors/international-trade/cashew/>.

d. <https://www.watradehub.com/en/hub-looks-build-links-cashew-exporters-cote-divoire-trade-fair/>.

e. https://www.cbi.eu/sites/default/files/market_information/researches/tailored-information-cashew-nut-west-africa-trade-channels-market-segments-west-africa-europe-processed-fruit-vegetables-edible-nuts-2014.pdf.



Source: ITC

LEVERAGING PROCESSING AND VALUE ADDITION OPPORTUNITIES FOR YOUTH IN THE DOMESTIC AND EXPORT MARKETS

'Value added' means adding value to a raw product by taking it to, at least, the next stage of production.⁵⁰ Product development may involve modification of an existing product or its presentation, or formulation of an entirely new product that satisfies a newly defined customer want or market niche. Value addition through primary processing of agricultural products offers farmers and other actors of the value chain, particularly youth, the potential to capture a larger share of income, open new markets, enhance customers' appreciation for the product, extend the market and create interesting youth employment opportunities.

Groundnuts are the base of a diverse set of products.

A report by the US Department of Agriculture's Foreign Agricultural Service stated it is possible to derive 63 derivative products from raw peanut – the kernels are used to make peanut butter, roasted snack peanuts, peanut

confections and peanut oil. Peanuts are passed through shelling machines resulting in peanut kernels and hulls, which are an abundant agricultural by-product in the world.

The cashew tree produces a soft and juicy fruit called cashew apple that bears a single-seeded nut in its bottom. The cashew apple's juice is mainly used to make drinks, both natural and fermented. Moreover, the fruit pulp can be made into jelly, syrup, candied fruit and jams. Cashew nuts are consumed as snacks raw, roasted, salted or flavoured. Cashew nuts are also used as an ingredient in sweets and cooking. The manufacturing industries are increasing the use of cashews as ingredients in new recipes.⁵¹

Table 11 shows the export product as well as additional products that should be taken into consideration for processing, providing potential youth economic opportunities through value addition.

50.– http://nacogdoches.agrilife.org/files/2011/06/value_added_ag_11.pdf.

51.– Cashew Alliance.

Table 11: Summary of potential products for diversification purposes

Time frame	Groundnut products	Targeted importing countries	Cashew products	Targeted importing countries
Short-term	<p>Groundnut</p>  <p>European market needs high-quality groundnut for:</p> <ul style="list-style-type: none"> • Food manufacturing • Oil crushing industry 		<p>Cashew</p>  <p>European market needs high-quality cashew for:</p> <ul style="list-style-type: none"> • Food manufacturing 	
Short-term	<p>Peanut butter</p>  <p>Domestic markets:</p> <ul style="list-style-type: none"> • Hotels • Restaurants • Supermarkets <p>Identify foreign investors linked to retailers in the region and in EU.</p>		<p>Cashew nut butter</p>  <p>Domestic markets:</p> <ul style="list-style-type: none"> • Hotels • Restaurants • Supermarkets <p>Identify foreign investors linked to retailers in the region and in EU.</p>	
Short-term	<p>Roasted/ salted groundnut snack</p>  <p>Domestic markets:</p> <ul style="list-style-type: none"> • Hotels • Restaurants • Supermarkets <p>Identify foreign investors linked to retailers in the region and in EU.</p>		<p>Roasted /salted cashew nuts</p>  <p>Domestic markets:</p> <ul style="list-style-type: none"> • Hotels • Restaurants • Supermarkets • Bakeries <p>Identify foreign investors linked to retailers in the region and in EU.</p>	
Short-term	<p>Groundnut confections</p>  <p>Domestic markets:</p> <ul style="list-style-type: none"> • Hotels • Restaurants • Supermarkets 		<p>Apple: Juice, jam, wine, distilled liquor, dried fruit</p>  <p>Domestic markets:</p> <ul style="list-style-type: none"> • Hotels • Restaurants • Supermarkets 	
Mid-term	<p>Groundnut cake</p>  <p>Domestic markets:</p> <ul style="list-style-type: none"> • Animal feed 		<p>Honey production from the plantation</p>  <p>Domestic markets:</p> <ul style="list-style-type: none"> • Hotels • Restaurants • Supermarkets <p>Identify foreign investors linked to retailers in the region and in EU.</p>	
Mid-term	<p>Crude oil/refined oil</p>  <p>Domestic markets targeting local retailers Regional and EU markets</p> <ul style="list-style-type: none"> • Oil crushing industry 		<p>Peel – animal feed</p>  <p>Link with poultry industry.</p>	
Mid-term	<p>Peanut hull</p>  <p>Domestic markets or regional markets as alternative for energy.</p>		<p>Shell – fuel source</p>  <p>Domestic markets or regional markets as alternative for energy.</p>	
Short-term			<p>Cashew seed/planting</p>  <p>Domestic and regional markets.</p>	

The Gambia will be able to successfully enter foreign markets, particularly the EU, if the country complies with market access requirements related to food safety mandatory compliance, as well as quality, labelling and packaging requirements. To export groundnuts or cashew to the EU market, product cannot contain harmful pathogens such as microbiological activity, aflatoxin and pesticide residues exceeding standardized tolerances levels. Moreover, agribusinesses have to put in place quality assurance processes, including

good agricultural practices⁵² (GAPs), good manufacturing practices⁵³ (GMPs) and Hazard Analysis Critical Control Point (HACCP) to ensure the best quality of groundnut and cashew. This set of controls is the most widely used method by developed markets in Europe to meet food safety and quality responsibilities in food value chains.

52.– Provide growers' guidelines and principles to apply for on-farm production and post-production processes, to provide safety and health, minimizing potential hazards, such as pathogens, contaminants and pest management materials.

53.– Define procedures to be used in the processing, packaging, storing and transport stages by handlers to ensure the quality of the product. GMPs are used by handlers to treat cashews under the best sanitary conditions.

EU requirements for groundnut imports

Legal	<ul style="list-style-type: none"> • Aflatoxin restrictions • Pesticide residues • Quality management system certification (food manufacturing) industry (HACCP, IFS or BRC) • Corporate responsibility and sustainability (the oilseed sector)
Quality	<ul style="list-style-type: none"> • Quality aspects such as size, uniformity, taste, colour, ease of skin removal, shelf life and oil content (food industry) • Groundnuts and cashew should be free from sand, stalk, plant debris, infestation or living pests, rotting, deterioration and other foreign materials
Labelling	<p>Labels in English (unless otherwise specified by your buyer). This should include:</p> <ul style="list-style-type: none"> • Product name and grade • Manufacturer's lot or batch code • A declaration that the product is destined for human consumption • Name and address of exporter • Product's country of origin • Shelf life: Best-before date/use-by date • Net weight/volume in metric units • Recommended storage conditions • <i>Organic (if relevant)</i>: Name/certificate number of the certifying body
Packaging	<p>Cashew kernels must be packed in hermetically sealed containers. The use of materials, particularly of paper or stamps bearing trade specifications, is allowed, provided the printing or labelling has been done with non-toxic ink or glue.</p> <ul style="list-style-type: none"> • Packaging options for shelled and in shell are available: • Unshelled peanuts are most commonly packaged in jute bags in quantities of 25 kg to 30 kg (50 kg to 60 kg when shelled) • Packaged in cartons • Big bags or bins • Packaged in sacks and cartons (in-shell groundnuts) • Packaged in vacuum packs for shelf life preservation (blanched peanut kernels)

Source: <https://www.cbi.eu/market-information/oilseeds/groundnuts-peanuts/> and Global Cashew Council.

PACKAGING

The Gambia needs to fill some existing gaps in packaging and labelling to meet international standards. Domestic production of good quality packaging materials is limited. Less than half of packaging material in the country is supplied locally. Most packaging materials are imported from various countries, such as Senegal, the Lebanese Republic, Germany, India, the Kingdom of Morocco, Nigeria, the Kingdom of Spain, Holland, the People's Republic of Bangladesh, the Republic of the Philippines, the Republic

of Sierra Leone, China, the UK, the USA and the Republic of Italy (Gambia Investment and Export Promotion Agency, 2013).

Gambian SMEs consider packaging important due to its role in the preservation, protection and containment of the product, while considering environmental protection and information transmission less important. The main factors influencing the choice of packages for products include marketing, quality assurance, regulatory requirements,

product's physical and structural design, weight and value, as well as user friendliness (i.e. ease of opening and reading labels). Other factors determining the choice of packages by manufacturers and distributors are the costs associated with package graphic design, logistics and product's shelf life (GIEPA, 2013).

There is a need for improving the packaging of established products to fulfil national retailers' and exporters' requirements. Some actions are being taken place to improve local packaging infrastructure and reinforce overall sector packaging and labelling designs capabilities.

Additionally, the policy introduced in July 2015 banning plastics bags has impacted several companies in the

country that used this type of packaging and that did not have the time to adapt to the environmental regulations.

In 2015, the Ministry of Trade, Industry, Regional Integration and Employment (MOTIE) provided three enterprises with packaging machines, namely Cashew Company Limited in Brikama, Gambia Horticulture Enterprises Limited (GHE) in Old Jeshwang and Jawneh and Family Cashew Processing Centre, also in Brikama.

Further relevant training on packaging and labelling needs to be provided to build SMEs' capacity in packaging and labelling to be able to meet international standards and be more competitive in the local market, especially to supply hotels and restaurants serving international tourists.

LEVERAGING ICT OPPORTUNITIES FOR YOUTH IN THE NUTS AND AGROPROCESSING SECTOR

Considering that ICT sector is appealing for many young people and that youth adapt more easily to it, ICT can play an important enabling role in developing opportunities for youth in the nuts and agroprocessing sector.

The economic impact of improving youth ICT skills will translate into improvements in efficiency and higher productivity of the farm. In particular, through the provision of information, ICT can enable agricultural innovation on new markets and also the adoption of new crop varieties, mechanization, pests and weed control and processing.

Some key ICT opportunities for youth in the nuts and agroprocessing sector are to:

- Promote improved farming practices through mobile access to online content and remote online mentoring services
- Facilitate market linkages and access to market information
- Improve transport logistics to develop joint transportation of goods (for cashew and groundnuts) and collective purchase of inputs
- Access to new financial services

In addition to production and market information, information on land records can facilitate youths' access to financial services. The absence of land records is a constraint that prevents young farmers from obtaining loans or support from governments.

ICT applications for youth in agriculture will facilitate access to land records, market prices and other useful data. Although the expansion of ICT facilities in The Gambia has been growing fast, with high penetration rates for mobile services (130%), fixed lines (2%) and Internet subscriptions (28%), the lack of electricity and high prices of computers

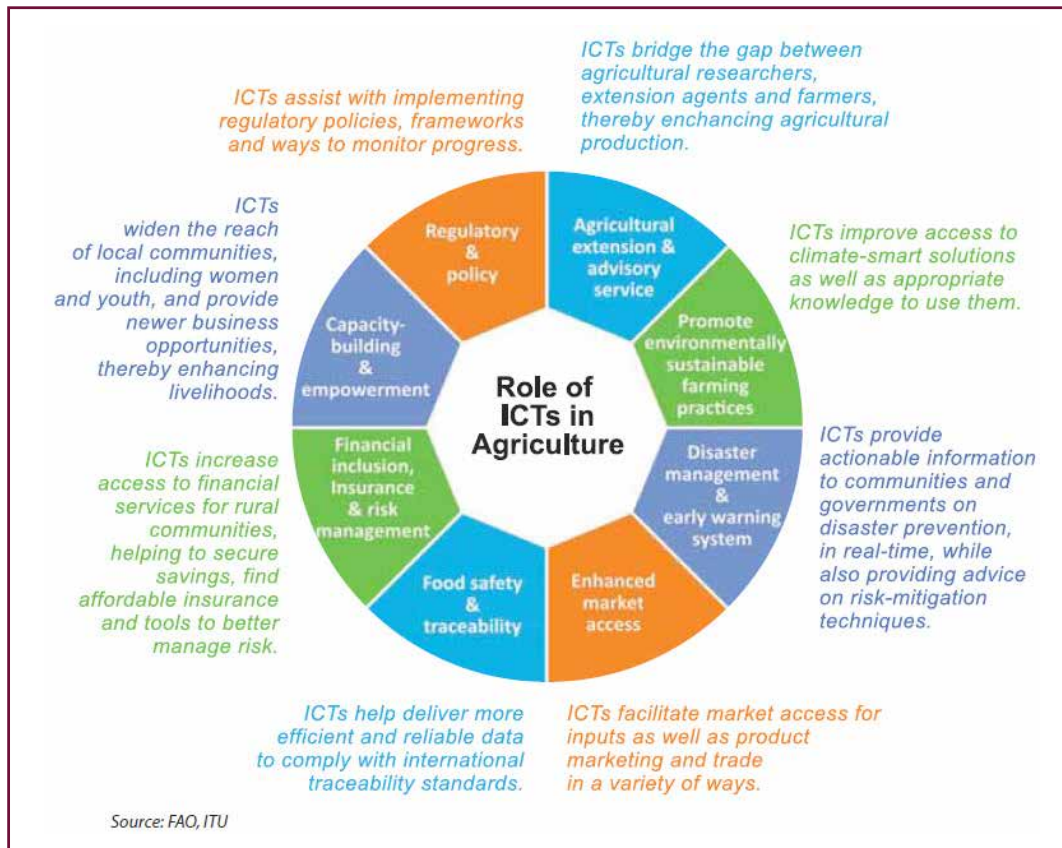


Source: ITC

and mobile data restrain the development of online ICT applications for agriculture.

This is why, according to the National Development Plan (2018–2021), the government will promote the use of offline mobile phone processes to connect the 'agripeneurs' with knowledge resources and connect value chain actors in an interactive manner. The government will also establish a one-stop shop (Youth Enterprise Palace) with the following objectives: a) connecting young innovators with mentors in a range of sectors, including ICT applications or agriculture; b) providing youth with Internet access and training to improve their ICT skills.

Figure 30: Role of ICT in agriculture



Box 5: Successful cases on leveraging ICT opportunities for youth in the agroprocessing sector

Online trading platform for African agriculture connecting farmers to buyers

Tesitoo is a mobile app and web-based platform that connects rural and smallholder farmers to buyers, eliminating barriers in the supply chain of agricultural products in The Gambia. The platform opens up new market opportunities for local farmers and increases their income level, while allowing urban buyers to pay less for their products. Tesitoo works with networks of rural farmers, agents and hand-picked drivers to facilitate the selling, buying and delivery of purchased products from rural to urban Gambia.^a

ICT applications in retail: e-commerce

Farm Fresh is a Gambian social enterprise that helps market smallholder farmers' local products through an e-commerce platform.

It was established in 2014 and is the first online food store and delivery service in The Gambia. The platform markets and sells online fresh and locally grown vegetables, fruits and processed food items in partnership with farmers across the country. By doing so, Farm Fresh ensures a regular source of income generation for farmers.^b

App development for the agro sector

Assutech is a software engineering company that builds apps for mobile, web and desktop for The Gambian market.^c It specializes in developing tailor-made cross-platform software solutions for multiple-level organizations. Assutech's DEKA app with virtual tours won the People's Choice Award at a pitching contest of the GCCI in collaboration with the Startup Incubator Gambia and the Youth Empowerment Project (YEP). The app also won the Most Innovative Business Concept Award 2017.^d

a. http://tesitoo.com/index.php?route=information/information&information_id=4.

b. <http://www.e-agriculture.org/news/farm-fresh-gambia-marketing-local-products-through-e-commerce-platform>.

c. <https://www.assutech.gm/>.

d. <https://www.insideview.biz/news/gambian-app-with-virtual-tours-won-most-innovative-business-concept-prize/>.

YOUTH EMPLOYMENT OPPORTUNITIES IN THE NUTS AND AGROPROCESSING SECTOR

Table 12: Summary of potential employment opportunities in the groundnuts and agroprocessing sectors

Sector	Equipment	No. machines	Capacity	Potential employment opportunities for youth	Price per unit in USD	Budgeting prices in USD
Cashew	Roasting machine	3	50 kg/hr	$3 * 1 = 3$	1 500	4 500
	Coating machine	3	50 kg/hr	$3 * 2 = 6$	1 500	4 500
	Packing machine (non-automatic)	3	10 kg/hr	$3 * 3 = 9$	1 500	4 500
	Weighing scales	3	100 kg		200	600
	Weighing scales	6	250 gr		30	1 800
	Packaging film					6 000
	Installation and training					10 000
	Total employment			18		
	Total investment					31 900
Sector	Equipment	No. machines	Capacity	Potential employment opportunities for youth	Price per unit in USD	Budgeting prices in USD
Groundnut	Decorticators	5	1 000 kg/hr	$5 * 38 = 175$		15 000
	Roasting machine	10	100 kg/hr	$10 * 3 = 30$		15 000
	Peanut paste grinding	10	100 kg/hr	$2 * 10 = 20$		15 000
	Peanut marketing (raw material)				100 (\$200/person)	
	Solar panels 10 kW + 10 kW = 20 kW		20 kW			40 000
	Briquette making machine		1 ton/hr	12		25 000
	Weighing scales	5	1 000 kg	-		5 000
	Weighing scales	5	1 000 kg/hr	-		2 500
	Installation and training					10 000
	Raw material					20 000
	Total employment			162		
	Total investment					147 500
Sector	Equipment	No. machines	Capacity	Potential employment opportunities for youth	Price per unit in USD	Budgeting prices in USD
Cereals	Millet/maize milling machine	10	200 kg/hr	20		23 400
	Rice, millet, maize milling	10	200 kg/hr	20		23 400
	Rice huller	10	300 kg/hr	20		31 910
	Millet cleaning, destoning and decorticating machine	10	200 kg/hr	20		31 910
	Weighing scales	10	500 kg			5 000
	Helpers				30	
	Total employment			110		
	Total investment					115 620

In October 2017, ITC conducted a survey in The Gambia to identify potential employment opportunities for youth in the groundnuts and agroprocessing sectors. The survey analyses how the introduction of processing equipment along the value chain can generate employment opportunities for youth. The study is based on interviews of local factories and processing plants in the groundnuts and agroprocessing sectors.

Cashew processing has high employment potential. As per ITC calculations, modernization of production equipment in The Gambia's cashew sector with an investment of \$31,900 can generate jobs for up to 18 young people and the industry can achieve total revenues of \$1,500 for each job created. In the groundnut sector, one job can create total revenues to the industry of approximately \$1,000 and an investment of \$14,500 in processing machines can employ up to 167 youth. Modernizing production equipment in the cereal sector can create 110 direct jobs and 20 indirect jobs for youth, with an investment of \$115,120.

YOUTH OPPORTUNITIES THROUGH VALUE ADDITION ALONG THE VALUE CHAIN

SKILLS NEEDED TO DEVELOP THE VALUE CHAIN

Unlocking the sector's latent potential will require transformations throughout the value chain. These adjustments will allow the sector to offer competitive levels of competencies as well as quality of produce. To this end, options for value retention, addition and creation have been identified.

A number of structural improvements of the value chain were suggested by the value chain stakeholders, who are grouped according to the following five value options:

- Retain more value in the sector
- Add value by improving existing products
- Create value by developing new products
- Contribution to development

The results of the different value options were then discussed in order to identify the required skills to develop these new activities, the type of occupations this entails along the value chain and which were presenting interesting youth employment opportunities. This was done in conjunction with the results of the skills gap assessment (see 'skills development issues, skills gap analysis and TVET mapping' in previous chapter). Additionally, stakeholders identified the education provider with the capacity to develop training programmes needed to reduce the skills gap for each occupation.

Table 13 presents a summary of the opportunities linked to value chain, youth employment opportunities and training programmes or curriculum to be carried out, strengthened or developed by TVET and the UTG. All occupations in the agribusiness sector represent relative job opportunities for the youth.



Source: ITC

As analysed in the previous chapter, the main occupations for which firms meet difficulties in filling positions are related to higher level of qualification, particularly for production managers, horticulture and nursery growers, agronomists/farm adviser and food processing operatives.

These occupations are mostly mid-level and management positions that require specific education in agronomy or agribusiness. As described previously, the general education in agriculture is relatively low, which explains the needs to fulfil qualified positions with technical or business skills.

Table 13: Value options for sector development and related skills development required

VALUE DISTRIBUTION: Develop economic and social development opportunities for the youth						
Value distribution	How to implement	Types of skills and knowledge required	Proposals for skill development	Occupations	Youth employment opportunities	Education provider
Promote the integration of youth in the value chain	<ul style="list-style-type: none"> Support pioneer youth group in processing and value addition Cluster youths among selected farming communities 	<ul style="list-style-type: none"> Soft skills on management and leadership, including farm worker management 	<ul style="list-style-type: none"> Short-term training in management and leadership for current farmers and long-term programme for youth who would like to be engaged in farm management 	Youth group leader	Limited opportunities to get a wage job	NYS Gambia College NATC
VALUE RETENTION: Minimize post-harvest losses and improve productivity and quality management						
Value retention	How to implement	Types of skills required	Proposals for skill development	Occupations	Youth employment Opportunities	Education provider
Develop seeds and seedling multiplication Develop nurseries	<ul style="list-style-type: none"> Develop and improve supply-driven extension system 	<ul style="list-style-type: none"> Extended skills on all levels on techniques and equipment for planting, growing and harvesting food products (both plant and animal) for consumption, including storage/handling techniques. Knowledge of business and management principles involved in planning, resource allocation and coordination of people and resources 	<ul style="list-style-type: none"> Demand-driven extension services in the use of right agriculture inputs Training on efficient production techniques Training on choice of crops, according to appropriate agroecological zones 	Gardeners, horticulture and nursery growers	Opportunities for agro-entrepreneurs	Gambia College and UTG NATC GSI
Improve post-harvest handling and storage	<ul style="list-style-type: none"> Enhance access to storage facilities for producers Build stronger linkages between private smallholders across the value chain to structure the sector and alleviate difficulties in post-harvest treatment Pilot a storage-based credit facilitation mechanism in collaboration with commercial banks. Roll out the pilot on the basis of results. 	<ul style="list-style-type: none"> Production and handling skills Skills in post-harvest handling and storage management (warehouse receipt systems) 	<ul style="list-style-type: none"> Training on post-harvest handling techniques through farmers' field schools Sensitize collectors/transporters on handling procedures to ensure adequate quality management of product during transport, temporary storage and transit storage 	Subsistence crop farmers Transport and storage workers	Yes, but not linked to a regular wage job Position is easy to fill, but very accessible to youth	NACOFAG
VALUE ADDITION: Develop the production of higher-value added products by developing local processing and improving export quality						
Value addition	How to implement	Types of skills required	Proposals for skill development	Occupations	Youth employment opportunities	Education provider
Improve quality and compliance with international standards	<ul style="list-style-type: none"> Enhance producers' access to storage facilities and packing centres to ensure high-quality grading Enhance the capacities of storage services to upgrade their facilities and storage equipment Introduction of efficient production/farming techniques with respect to quality standards 	<ul style="list-style-type: none"> Awareness of importance of strict compliance across all levels of operations from the fields to the shipment Skills in laboratory testing and analysis for biological, chemical, heavy metal and physical food hazards Skills in quality assurance (QA) management 	<ul style="list-style-type: none"> Reinforce the staff capacities of The Gambia Standards Bureau and agriculture extension services on quality assurance and control, and standards and compliance Training of youth in rural areas about quality assurance and control through farmers' field schools Develop bachelor's degree, diploma and certificate in quality management Create a lab technician diploma in UTG 	Subsistence crop farmers Food processing operatives	Yes, but not linked to a regular wage job	Food Technology Unit, GTI, FSQA, FTU, Gambia Standards Bureau
Promote processing mechanization at the cooperative level	<ul style="list-style-type: none"> Reinforce mechanization to reduce drudgery and labour costs 	<ul style="list-style-type: none"> Mechanical operation and mechanical skills, including electrical skills Operation of farm machinery, implements and equipment 	<ul style="list-style-type: none"> Develop mechanical training, on-farm repairs and proper on-farm routine maintenance, including on-the-job training Provide training on mechanical skills related to motor mechanics, engine maintenance, implement an irrigation system maintenance/repair, welding 	Food processing operatives Crop farm supervisors	Opportunities for seasonal jobs and agribusiness and management positions	Sector associations GTI

VALUE ADDITION: Develop the production of higher-value added products by developing local processing and improving export quality						
Value addition	How to implement	Types of skills required	Proposals for skill development	Occupations	Youth employment opportunities	Education provider
Improve packaging for processed products	<ul style="list-style-type: none"> Improve the packaging of established products to fulfil national retailers' and exporters' requirements 	<ul style="list-style-type: none"> Mechanical operation and mechanical skills, including electrical skills of packaging machine Packaging and labelling design skills 	<ul style="list-style-type: none"> Provide training on mechanical skills related to motor mechanics and engine maintenance Provide relevant training on packaging specification and labelling Create a certificate in packaging technology and specification at GTTI 	Food processing operatives	Opportunities in food processing	Food Technology Unit, GTTI, FSQA, FTU,
				Sales and marketing staff	Opportunities for agro-entrepreneurs	Gambia College, NEDI, UTG, MDI
VALUE CREATION: Expand production of current or new product/service lines, or enter the value chains of related sectors						
Value creation	How to implement	Types of skills required	Proposals for skill development	Occupations	Youth employment opportunities	Education provider
Develop secondary processing: cashew and groundnut butter roasted snack, peanut confections	<ul style="list-style-type: none"> Expand the range of cashew or groundnut that can be roasted or processed into innovative convenience foods Improve knowledge about market's requirement in terms of type of products, prices and quality Develop new ready-to-eat food for local retailers and institutional buyers 	<ul style="list-style-type: none"> Knowledge of foreign market requirements and compliance requirement for exporters Quality management and food technology, including cooking oil technology Knowledge of primary agri-food processing 	<ul style="list-style-type: none"> Develop new curriculum for certificate and diploma for food processing engineers and food cooking machine operators Provide on-the-job training for agri-food operator to improve production technique and food safety Build awareness of agri-food processing opportunities 	Food processing operatives	Opportunities for agro-entrepreneurs in food processing	Gambia College UTG NATC GSI
				Sales and marketing staff		
Develop secondary processing: peanut and cashew oil	<ul style="list-style-type: none"> Develop new quality oil for food market and local cuisine 	<ul style="list-style-type: none"> Knowledge about oil extraction and quality management 	<ul style="list-style-type: none"> Develop new curriculum for engineering and product mixing, especially for oil processing, and provide on-the-job training on quality management in existing oil producers 			
VALUE ACQUISITION: Acquire value by improving efficiency between actors in the value chain, especially concerning the increase of production, research and promotion (thereby enhancing the sector's competitiveness)						
Value acquisition	How to implement	Types of skills required	Proposals for skill development	Occupations	Youth employment opportunities	Education provider
Reinforce linkages and coordination between value chain actors: farmers and processors, and between CPMS and traders	<ul style="list-style-type: none"> Encourage cooperation and collaboration to: Improve access to markets Diminish the importance of middlemen in business transactions Improve their capacities to collectively satisfy buyer requirements Secure sustainable business relationships. 	<ul style="list-style-type: none"> Skills on management and leadership, including farm worker management Marketing skills, including market research, marketing, pricing and branding Farming-related record keeping, administration and legislation skills Financial skills and management, including purchasing and negotiation skills Business planning and entrepreneurial skills 	<ul style="list-style-type: none"> Short-term training in management and leadership for current farmers and long-term programme for youth who would like to be engaged in farm management Training/courses in agro-marketing Bachelor programme on agribusiness management in UTG Develop an agro-entrepreneur training programme 	Sales and marketing staff	Opportunities for agro-entrepreneurs in agribusiness	Gambia College NATC GSI

TVET STRENGTHENING AND AGRO-ENTREPRENEUR SUPPORT PROGRAMME

The agriculture sector in The Gambia faces serious issues concerning its skills development capacities with limited youth-specific training capacities. Only five accredited education providers in the country concentrated in the North bank and West coast regions are in charge of training the future generation of farmers. TVET have reported to lack the necessary equipment and material for teaching courses. The scope of courses available is very limited, especially in primary agroprocessing.

The development of agriculture in general and especially of its main cash crops, as well as its capacity to add value through primary processing, depends on the sector's capacity to improve the access to agro-related and agro-processing quality education to the youth in rural areas throughout the country. Furthermore, the objective of the TVET involved in the sector is to make agriculture attractive again to youth by developing agropreneurship support programmes.

At the institutional level the following improvements can be made in addition to the integration of new training programmes:

Table 14: New training services required in agricultural education providers

Institutions	Areas to be addressed to improve the performance of education providers in the agricultural sector	New courses or training content to be developed to support value chain development
University		
UTG	<ul style="list-style-type: none"> Staff training (long term and short term), improvement of facilities (equipment and infrastructure) 	<ul style="list-style-type: none"> Develop bachelor degree, diploma and certificate in quality management Create a lab technician diploma in UTG
Gambia College	<ul style="list-style-type: none"> Improvement of facilities (equipment and infrastructure): fence to accommodate more student for vegetable gardening practice, borehole facilities to address shortage of water for vegetable production Develop more practical learning material for the core programmes and short-term training to attract more students 	<ul style="list-style-type: none"> Bachelor in agribusiness in collaboration with MDI Certificate on nursery development Certificate on food processing
TVET		
GSI	<ul style="list-style-type: none"> Support to increase capacity to train more youth in rural areas Development of other centres in regions upriver There is need for more classrooms, standard furniture, Internet and accommodation for trainees Support to improve the training centre to comply with Songhai Regional Centre standards in Benin Support to address the energy and water constraints 	<ul style="list-style-type: none"> Training of quality management and on post-harvest handling Training on primary food processing and food safety
NATC	<ul style="list-style-type: none"> Support capacity building for staff, sponsor training, support in providing training materials 	
Future in Salikenni	<ul style="list-style-type: none"> To provide technical support to strengthen the training in poultry, carpentry and gardening projects to be more sustainable. To support the ICT to offer more advanced levels of training. 	
GTTI	<ul style="list-style-type: none"> Need more training material on farm equipment and packaging machine maintenance 	<ul style="list-style-type: none"> Create a certificate for machine maintenance in farming and agroprocessing
Public technical agency		
FTS	<ul style="list-style-type: none"> There is need for additional capacity of staff trainers, support to expand training facility, and mobility to be able to train in rural areas 	<ul style="list-style-type: none"> Assist in training and demonstration on equipment for fruits and vegetable processing – paste and juice pressers; cereal processing (milling machine); legumes (peanut butter) processing; and food preservation
Entrepreneurship programmes		
NEDI	<ul style="list-style-type: none"> Need for equipment for food processing and preservation Support to expand coverage to regional level 	<ul style="list-style-type: none"> Facilitate demonstration of primary processing in villages
Empretec Gambia	<ul style="list-style-type: none"> Develop sensitization about agro-entrepreneurship and youth economic opportunities in agribusiness 	<ul style="list-style-type: none"> Develop a sensitization programme about agro-entrepreneurship

Institutions	Areas to be addressed to improve the performance of education providers in the agricultural sector	New courses or training content to be developed to support value chain development
Sector associations		
NACOFAG ASPA CAG NAWFA	<ul style="list-style-type: none"> • Training manuals, demonstration equipment in food processing, labelling and packaging equipment, video documentaries • Provision of equipment and inputs to deliver the trainings 	<ul style="list-style-type: none"> • Deliver training on post-harvest handling techniques • Deliver short-term training in management and leadership for current farmers and long-term programme for youth who would like to be engaged in farm management
Cooperative produce marketing societies (CPMS)	<ul style="list-style-type: none"> • To enable the effective and efficient implementation of a farmer field school (FFS) programme in the groundnut sector, there is need to: • Increase the number of schools in every CPMS circle for easy access to the schools by all members and renew contracts of master trainers • Provide orientation and refresher trainings to the core trainers • Create incentives to facilitate their movement among the schools in their areas and intensify monitoring visits • Provision of manuals to all schools for reference and related training materials (as flip charts, markers and measuring tapes, etc.) • Provide inputs (fertilizer and seeds) as part of the training • All trainings of facilitators should be done before the rainy season to avoid disruption of the FFS sessions 	<ul style="list-style-type: none"> • Carry out sensitization campaign to inform and increase farmer participation in the FFS programme • Collaborate with Dept. of Agriculture and Dept. of Community Development (DCD) to involve extension staff in the training and supervision/monitoring of FFS • Deliver training on post-harvest handling techniques and quality management • Deliver training on primary processing in groundnuts and cashew

AGRO-ENTREPRENEURSHIP SENSITIZATION AND SUPPORT PROGRAMME

There is an urgent need to develop agro-entrepreneurship in order to make agriculture more attractive among youth. Youth play an important role in the future development of agriculture in the country and realization of food security. Youths' negative perception of agriculture's prospects is influenced by poor working conditions, limited access to land

ownership and social pressure in the family to find a job in urban areas. Developing appropriate sensitization campaigns towards young farmers about agro-entrepreneurship and support programmes are important tools in influencing these factors and stimulates the genuine interest of young Gambians for agricultural production and agro-entrepreneurial activities. In parallel, it is important to also inform community leaders, elderly and producers' associations of the positives of having young farmers to whom to transfer knowledge and access to land for a future sustainable production.

Box 6: Examples of youth agro-entrepreneurship programmes in Africa

Various youth entrepreneurship programmes are carried out in Africa that could serve as examples for The Gambia:

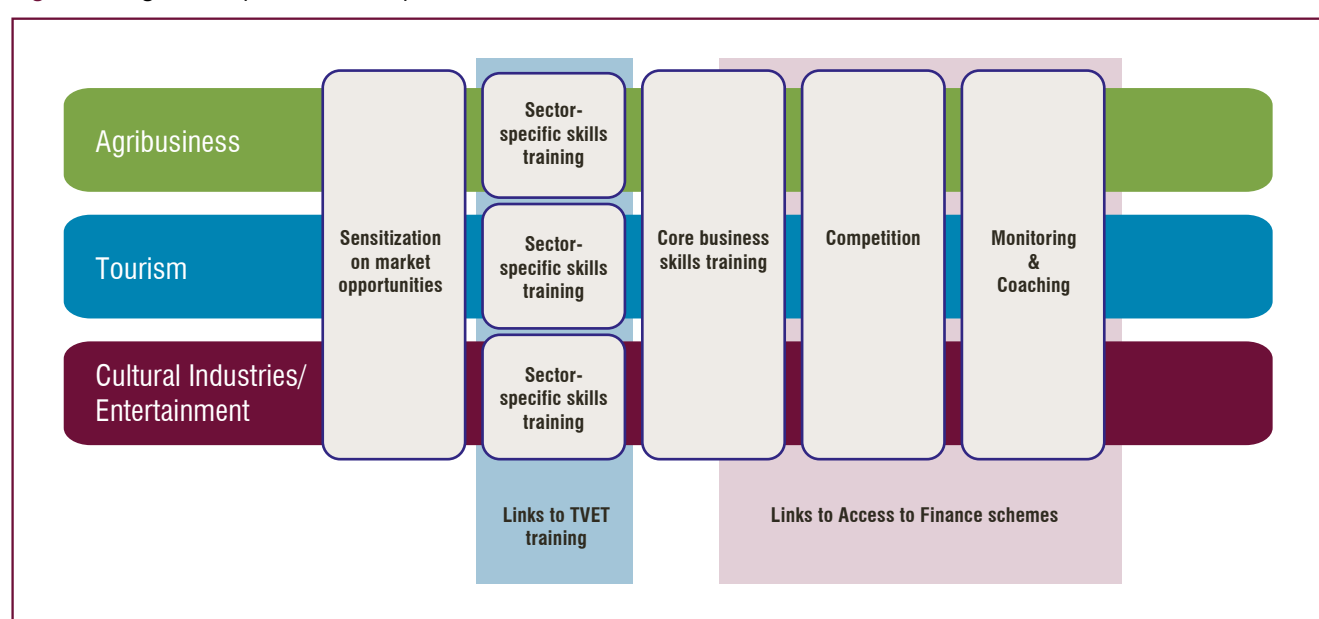
- **The International Institute of Tropical Agriculture (IITA) Youth Agripreneur programme**
The IITA Kalambo Youth Agripreneurs (IKYA, the Democratic Republic of the Congo) was started in November 2013 as a youth-led venture in South Kivu to explore opportunities for self-employment through agribusiness.
- **The Kibwezi Hortipreneurs Youth Group (KHYG) (Kenya)** was founded in March 2015 and conducts irrigated vegetable farming at the University of Nairobi dryland research station in semi-arid East Kenya.
- **The IITA Youth Agripreneurs (IYA) (Nigeria)** is the first youth agripreneur group formed by IITA in 2012. It runs a wide range of production, marketing and value-adding enterprises, notably maize and soybean seed production, fish and vegetable farming and the manufacture of protein-rich snacks and soymilk.
- **Uganda Youth Agripreneurs (UYA)** was formed on 24 June 2015. The group produces mixed vegetables and sweet potatoes and seeks to modernize production among themselves and affiliated youth groups in Uganda.

Source: https://www.afdb.org/fileadmin/uploads/afdb/Documents/Events/DakAgri2015/Youth_in_Agribusiness_within_an_African_Agricultural_Transformation_Agenda.pdf.

The concept of the agro-entrepreneurship programme would be composed of the following training stages:

- a. Awareness of opportunities in agriculture. This can be in the form of communication campaigns prepared in collaboration with sector associations and chambers of commerce on business opportunities.
- b. Trainings on how to make a business work in agriculture in collaboration with training institutions (among which are GSI, NATC and Gambia College). Possible partnership with successful agribusinesses could be developed to use the experience of exporters.
- c. Business skills training with entrepreneurs, including financial literacy, developing a business plan, and sales and marketing and soft skills.
- d. At the end of the business skills training, there will be a competition for entrepreneurs to pitch their plans and the winners will receive funding or maybe the opportunity to pitch at a particular event with investors.
- e. After the training and competition, the programme will further support the entrepreneurs through mentoring schemes.

Figure 31: Agro-entrepreneur concept for The Gambia



Source: ITC.

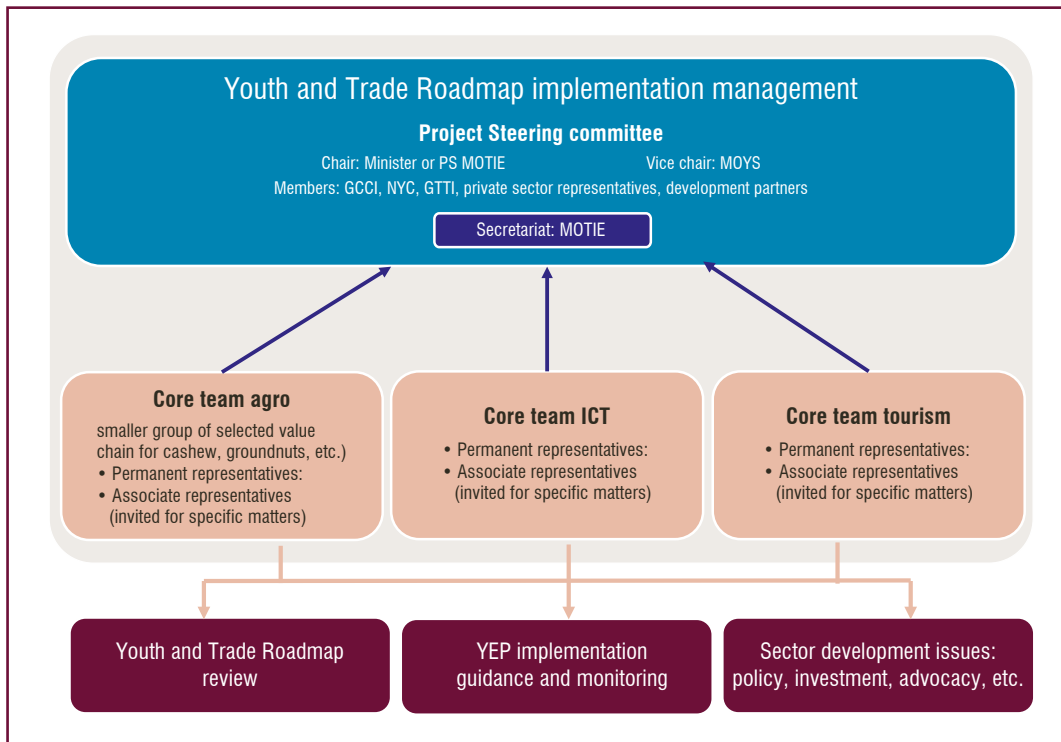
IMPORTANCE OF COORDINATED ACTION AND YOUTH REPRESENTATION

The roadmap endeavours to generate the conditions for a favourable expansion of youth economic opportunities in nuts and agroprocessing. Such development requires the elaboration and coordination of various activities. Success will depend on stakeholders' ability to plan and coordinate actions in a tactical manner. Activities must be synchronized across the public sector, private sector and education providers in order to create sustainable results and guarantee maximum impact.

Indeed, the roadmap is not the responsibility of any specific institution; rather, it is the implementation framework of The Gambia's National Development Plan and main economic policy and strategies have a bearing on youth economic empowerment, including the National Youth Policy, Gambia National Export Strategy, the new National Entrepreneurship Policy, and the Youth and Trade Roadmap.

It is recommended that the country establishes independent **sector core teams** for public-private deliberations that act in an advisory capacity to the government and the private sector over issues related to or affecting a specific sector and their related development plans.

Figure 32: Youth and Trade Roadmap implementation management framework



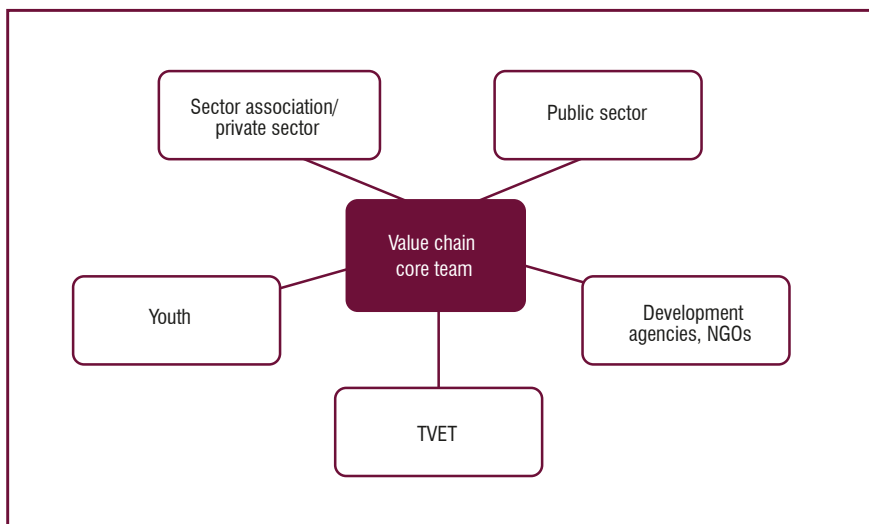
The core team' objectives are:

- To ensure that the interests of sector stakeholders are represented in the policy alignment, planning and road-map implementation;
- To act as a consultative and technical advisory body to the Youth and Trade Roadmap steering committee, Gambia Ministry of Trade, Industry and Employment, Ministry of Youth and Sports, Ministry of Agriculture and other national stakeholders;

- To convey the aspiration and ideas of the youth in the design and implementation of the sectors' development strategies, both in the public and private sectors.

The core teams are composed of representatives from the country's youth, public sector, sector associations and private sector, TVET and development agencies and civil society, and locally based NGOs, as described in Figure 33.

Figure 33: Youth and Trade Roadmap sector core team



Box 7: Snapshot of the way forward: youth employment opportunities in the nuts and agroprocessing sector

The main focus of the Youth and Trade Roadmap for Nuts and Agroprocessing is to provide a roadmap and a plan of action (PoA) geared at achieving the following overall vision: 'Foster The Gambia's agribusiness through modern agroprocessing technology and youth empowerment'.

To achieve this vision, the strategy focuses on three strategic objectives:

1. Developing and reinforcing youth entrepreneurship in nuts and agroprocessing;
2. Reinforcing the production and processing capabilities;
3. Develop youth skills through vocational training and upgrade TVET capacities.

The achievement of these strategic objectives will require continuous and coordinated efforts for the implementation of the plan of action (PoA). Extensive consultation with public and private sector stakeholders has already taken place during the design phase of the roadmap for the elaboration of a detailed PoA that specifies a series of activities to be implemented during the five-year lifetime. This collaboration among policymakers, support institutions, training institutions, enterprises, civil society organizations, education providers and development partners must continue during the roadmap's implementation phase to ensure effectiveness and maximum impact.



Source: ITC

**YOUTH AND TRADE ROADMAP
NUTS AND AGROPROCESSING
PLAN OF ACTION**

Activities	Priority ST=Short term MT=Medium term LT=Long term	Starting period				Beneficiaries	Leading institutions	Implementing partners
		2018	2019	2020	2021			
1. Develop and reinforce youth entrepreneurship in nuts and agroprocessing								
Operational objective 1.1 Encourage youth entrepreneurs in agribusiness sector								
1.1.1 Promote agropreneurship among youth								
Develop sensitization campaign towards young farmers about agro-entrepreneurship to increase potential income and agro-food processing. Inform community leaders and the elderly about the benefits to engage youth in farming to facilitate the access to land and provide technical support. Use radio broadcasts, social media, text messaging and workshops. Radio spots and workshops animated by traditional communicators and use of images recommended to communicate in the rural area (especially with illiterate youth).	ST	X	X	X	X	Young farmers	ASPA GIEPA NEDI ASPA CAG YEP	MOTIE GIEPA NEDI ASPA CAG YEP
1.1.2 Develop an agropreneurship support programme for youth in farming and nursery								
a. Identify and engage pioneer groups of smallholder farmers willing and able to access more remunerative markets (abroad and locally). b. Identify, assess and profile, engage and cluster youths among selected groundnut and cashew farming communities willing and able to develop new income-generating activities (i.e. backyard poultry farming for birds and eggs) and improve household food security and nutrition. c. Organize a study tour to Sedima in Senegal to visit an experienced poultry agribusiness.	MT	X	X			Youth in rural areas involved in farming	ASPA CAG	ASPA CAG GSI NACOFAG CPMS YEP
1.1.3 Develop an agropreneurship support programme for youth in agroprocessing								
a. Identify and engage pioneer youth groups willing and able to engage in primary agroprocessing. b. Provide customized training on processing techniques, food safety and packaging, oil extraction, food technology, including cooking oil technology, and quality management.	ST	X				Young agropreneurs	ASPA CAG GHE	ASPA NACOFAC GHE YEP
Operational objective 1.2 Provide financial support to youth entrepreneurs								
1.2.1. Develop funding mechanism for young agropreneurs								
• Provide financial support to 1) youth involved in priority sectors and 2) to those who participated in the agropreneurship training programme by developing access to low interest rates in commercial banks and microfinance institutions, and a mini-grant scheme with social collateral to ensure their integration in the work market by providing financial support through a grant. • Develop and disseminate clear terms and conditions for accessing funds for those grants.	ST	X				Trained youth in agro-preneurship programme	MACU NACCUG YEP	MOTIE NACCUG YEP
1.2.2 Build capacities in basic financial management of young agropreneurs								
Encourage youth participation in financial management trainings in order for them to be able to manage basic bookkeeping, financial planning and apply for loans. Training has to be delivered in local languages.	MT		X	X		Young entrepreneurs	MACU GSI YEP	MACU GSI YEP
2. Reinforce the production and processing capabilities								
Operational objective 2.1 Improve MSME productive capacities								
2.1.1 Improve access to quality seeds and fertilizers								
Develop access to a better variety of seeds and raise awareness on seeds quality issues through training and farmers field schools. • Carry out training of trainer programme on seed multiplication and selection, and plant propagation techniques.	ST	X	X			Producer	MoA NARI	ASPA Gambia College
2.1.2 Improve production and good farming practices								
Provide training on good agricultural practices to farmers and monitoring • Disseminate existing manuals (in local languages or through oral classes) on good production techniques and intercropping to farmers' associations and local communities. • Conduct regular monitoring of farmer associations' use of GAP. • Improve efficiency and enhance product quality, including aflatoxin reduction.	ST	X	X			Traders, operators and industrialists	MoA	ASPA TGSB FSQA TGOA GSI NATC Future in Salikenni

Activities	Priority ST=Short term MT=Medium term LT=Long term	Starting period				Beneficiaries	Leading institutions	Implementing partners
		2018	2019	2020	2021			
<p>2.1.3 Modernize farming system, especially in terms of irrigation and water management</p> <p>Plot one or two modernized farming systems in rural districts to demonstrate good practices with the support of extension officers.</p>	MT	X	X	X	X	Entire value chain	MoA	MoA Dept. of Community Development Sector associations
<p>2.1.4 Improve post-harvest handling and storage management</p> <ul style="list-style-type: none"> Develop adequate storage facilities by providing training on post-harvest handling of groundnut to ensure compliance with standards and storage management training. Pilot a storage-based credit facilitation mechanism in collaboration with commercial banks. Roll out the pilot on the basis of results. 	ST/MT	X	X	X	Farmers and cooperatives, traders, operators and industrials	MoA	DOA (KABA, TLA, SINCHU ALAGI) FSQA, TGSB TGQA	
<p>2.1.5 Support the development of small-scale storage for nuts and cereals</p> <p>In the light of 2.1.3, provide and build up small-scale storage for nuts and cereals and processing facilities.</p>	ST	X	X		Farmers and CPMS	MoA	DOA, ASPA, NACOFAC NAWFA, CAG National platform	
Operational objective 2.2 Improve and modernize agroprocessing								
<p>2.2.1 Disseminate new primary processing technologies for nuts and cereals</p> <p>Procure, deploy, transfer and showcase appropriate processing technologies and equipment aiming at strengthening productive capacities of local MSMEs involved in groundnut, cereals and cashew processing.</p> <p>Waste used as biomass briquettes made from groundnut shells to be deployed at village level.</p>	ST/MT	X	X		Farmers and CPMS Two pilot CPMS/demonstration centres to be fully equipped and supported by 2018	MoA	DOA/ASPA NAWFA Private institutions (KABA, TLA, SINCHU ALAGI), YEP	
<p>2.2.2 Develop small scale processing of groundnuts</p> <p>Develop smallland medium-scale processing units in order to improve food security and develop the national industrial base and increase the value of exports.</p>	LT		X	X	Farmers and CPMS	Regions equipped	DOA, GGC Processors' associations NAFP	
<p>2.2.3 Develop secondary processing</p> <p>Secondary processing of cashew and groundnut butter-roasted snacks and peanut confections</p> <ul style="list-style-type: none"> Expand the range of cashew or groundnut, which can be roasted or processed into innovative convenience foods. Improve knowledge of market requirements in terms of type of products, prices and quality. Develop new ready-to-eat food for local retailers and institutional buyers. <p>Secondary processing peanut and cashew oil</p> <ul style="list-style-type: none"> Develop new quality oil for food market and local cuisine. 	ST/MT	X	X	X	Small-scale processors	MoA (Food Technology Unit) GGC	Processors' associations NAFP GTTI	
<p>2.2.4 Modernize processing and packaging equipment</p> <ul style="list-style-type: none"> Develop or provide small-scale machinery for detoxification machinery. Develop prototype machinery to separate bad quality nuts from good ones and insure proper maintenance. Improve the packaging of established products to fulfill national retailers' and exporters' requirements. 	ST/MT	X	X	X	Industrials and small-scale processors	NARI	DOA, GGC Processors' associations NAFP GTTI	
Operational objective 2.3 Improve quality management and packaging								
<p>2.3.1 Conduct food safety and HACCP awareness training for cooperatives and SMEs</p> <ul style="list-style-type: none"> Raise awareness on quality issues through training and farmers field schools. Conduct a) HACCP implementation course and b) HACCP Lead Auditor Course through training in addition to direct support to selected enterprises. Assist selected exporters to become certified (ISO and HACCP etc.). Outreach initiatives and training aimed at reducing aflatoxin levels and improving food quality. 	ST	X	X		Farmers organizations Cooperatives Primary society of the village	FSQA TGSB	TGQA ASPA NAWFA CAG NACOFAG YEP	

Activities	Priority ST=Short term MT=Medium term LT=Long term	Starting period				Beneficiaries	Leading institutions	Implementing partners
		2018	2019	2020	2021			
2.3.2 Strengthen lab capacities and testing facilities <ul style="list-style-type: none"> Support lab staff training and purchase of testing equipment to improve pest and disease monitoring in line with nuts (cashew and groundnuts) standards. Develop skills in laboratory testing and analysis for biological, chemical, heavy metal and physical food hazards. 	MT	X				Non-exporting enterprises and exporters	TGSB FSQA GIEPA UTG	
2.3.3 Sensitize collectors, transporters and exporters about quality related requirements, process standards and the need to comply with SPS and TBT requirements <ul style="list-style-type: none"> Carry out training of trainers on quality issues. Develop a handbook on quality for youth entrepreneurs and short courses on quality enhancement, process improvement (basics of LEAN), 5S and quality culture. Carry out training of trainers (ToT) on quality issues and development of support services through local institutions. Sensitize collectors and transporters on handling procedures to ensure adequate quality management of product during transport, temporary storage and transit storage. 	ST	X	X	X	X	Exporters	FSQA TGSB TVETs Media	
2.3.4 Develop codes of conduct for value chain actors involved in exports for standard compliance and quality <p>Assist sector associations to develop codes of conduct to define good practices</p> <ul style="list-style-type: none"> For cashew: to reduce incidences of mixing different types cashews coming from different geographical locations. For groundnuts: for quality and standardization. 	MT	X	X			Sector stakeholders	FSQA TGSB CAG ASPA	
2.3.5 Improve packaging, labelling and coding of processed products <p>Improve the packaging of established products to fulfill national retailers' and exporters' requirements.</p>	ST	X				Sector stakeholders	FSQA TGSB Agribusines	
Operational objective 2.4 Reinforce market linkages and cross sector synergies								
2.4.1 Increase awareness of local and foreign market requirements of value chain stakeholders <ul style="list-style-type: none"> Identify and disseminate local buyers' needs and local market requirements among targeted youth entrepreneurs and farmers. Use existing and innovative ways to provide exporters and cooperatives with reliable and up-to-date market information pertaining to prices, produce and inputs availability and sources; cashew and groundnut trends in international and domestic markets; and updates on policy and regulations in the sector. Provide training to value chain stakeholders on how to best use market information for business development. 	ST	X				Entire value chain	ASPA CAG Agribusines	
2.4.2 Strengthen support capacities of sector associations to facilitate sector development coordination and youth agropreneurship <ul style="list-style-type: none"> Provide targeted training and specialized support to selected associations to improve their support and training services. Ensure full support to youth agropreneurship programme by assisting young farmers to access land and inputs, provide incentive to participate in sector association's decision-making process and access to management positions. Encourage cooperation and collaboration to improve market access, diminish the importance of middlemen in business transactions and secure sustainable business relationships. 	MT	X				Entire value chain	Sector associations NACOFAG	
2.4.3 Facilitate the imports of raw material for packaging and machinery and identification of sustainable practices <p>Building packaging capacities requires the importation of specific material to kick-start the activities. Research has to be carried out to identify eco-friendly material and best practices.</p>	ST	X	X	X		Agro and food processors	MOTIE Sector associations	
2.4.4 Improve the presentation and packaging of agroprocessed food locally produced <ul style="list-style-type: none"> Build capacities of processors and exporters with training on packaging and labelling, use of presentable packaging material and quality consistency. Support the development of a packaging centre. 	MT	X	X			Agro and food processors	MOTIE GIEPA	

Activities	Priority ST = Short term MT = Medium term LT = Long term	Starting period				Beneficiaries	Leading institutions	Implementing partners
		2018	2019	2020	2021			
<p>2.4.5 Promote locally produced agroprocessed food and nuts in local markets and abroad</p> <ul style="list-style-type: none"> Carry out a marketing campaign in collaboration with GIEPA, GCCI, GTB and Gambia Hotel Association to promote Gambian nuts and processed foods to hotels, tourists and local markets. Promote agritourism with visits to cashew farms to sensitize tourists about local production. Encourage Gambian embassies to promote Gambian nuts and participate in international trade fairs. 	MT	X	X	X	Agro and food processors	GIEPA	GCCI GTB Gambia Hotel Association Media YEP	
<p>2.4.6 Facilitate the integration of new ICT technologies in nuts and agroprocessing</p> <p>Develop linkages between sector associations in agriculture and new communication technologies to develop new services using mobile data.</p>	MT	X	X		Young farmers Agroprocessors IT developers	MOICI Gambia College	Gambia College GSI ITAG YEP	
3. Develop youth skills through vocational training and upgrade TVET capacities								
Operational objective 3.1 Improve the quality and relevance of the skills development programmes offered by education providers								
<p>3.1.1. Create a high-level skills development coordination group</p> <p>Support the development of inter-ministerial coordination arrangements for skills development for agriculture.</p>	ST	X			Value chain stakeholders TVET	MoA	MoHERST MOYS NAQAA NYC GIEPA GCCI NACOFAG Sector associations	
<p>3.1.2. Establish a skill development plan in nuts and agroprocessing</p> <p>Promote national development of skills standards, common curriculum, learning materials and teacher training programmes with the involvement of all TVET providers and sector associations.</p>	ST	X			Value chain stakeholders TVET	NAQAA	TVET providers NACOFAG	
<p>3.1.3. Improve capacity building capacities of TVET institutions and service providers</p> <ul style="list-style-type: none"> Develop and update technical and vocational training programmes on: <ul style="list-style-type: none"> Primary and secondary food processing and food safety Quality management and on post-harvest handling Certificate for machine maintenance in farming and agroprocessing Provide machinery and equipment to TVET Create a certificate in packaging technology and specification at GTTI. 	MT	X	X		Agribusiness TVET institutions	NAQAA	GSI NATC GTTI YEP	
<p>3.1.4. Develop and update university diploma on agriculture</p> <ul style="list-style-type: none"> Develop bachelor's degree diploma and certificate in quality management. Create a lab technician diploma in UTG. Bachelor in agribusiness in collaboration with MDI. Certificate on nursery development. Certificate on food processing focusing on food engineering and oil processing. 	MT		X	X	Agribusiness TVET institutions	NAQAA	UTG Gambia College FSQA RDI	
<p>3.1.5. Reinforce teaching capacities of TVET</p> <ul style="list-style-type: none"> Provide professional development activities for teachers in updated content, delivery techniques and managing on and off-the-job training. Develop mobile learning programmes for remote areas and train teachers to implement and monitor activities and results. 	MT		X	X	Teachers and trainers in TVET	NAQAA	UTG, Gambia College GSI, NATC, GTTI, WASDA ATC MMAP RDI YEP	

Activities	Priority ST=Short term MT=Medium term LT=Long term	Starting period				Beneficiaries	Leading institutions	Implementing partners
		2018	2019	2020	2021			
Operational objective 3.2 Upgrade youth skill through technical and vocational training programmes								
3.2.1 Develop skills of young farmers in agribusiness Provide short-term training in management and leadership for current farmers and long-term programme for youth who would like to be engaged in farm management.	ST	X				Youth involved in agribusiness sector	NYS GSI NATC WASDA ATC MMAP GYIN Gambia NACOFAG YEP	
3.2.2 Develop skills of young farmers in nursery management Train youth in nursery management (linked to agropreneurship programmes 1.1.2). <ul style="list-style-type: none"> Efficient production techniques. Choice of crops according to appropriate agro-ecological zones. 	ST	X			Youth involved in farming	GSI NACOFAG CAG ASPA NYC YEP		
3.2.3. Develop skills of youth in rural areas in mechanical repair <ul style="list-style-type: none"> Train youth in mechanical training in on-farm repairs and proper on-farm routine maintenance. Provide training in mechanical skills related to motor mechanics, engine maintenance, implement and irrigation system maintenance. 	ST-MT	X	X		Food processing operatives	GTTI NEDI NYSS PIA DOA YEP		
3.2.4. Develop skills of youth in food processing and packaging <ul style="list-style-type: none"> Enhance on-the-job learning programmes in food processing, including internships, traineeships and apprenticeships with certification schemes. Develop new ready-to-eat food for local retailers and institutional buyers. 	ST-MT	X	X		Food processing operatives	Private companies in food processing NACOFAG DOA (FTS) YEP		
3.2.5. Develop skills of youth in agro-marketing Train youth in marketing in agribusiness, including market research, pricing, branding, marketing channels and selling. <ul style="list-style-type: none"> Bachelor programme on administration and finance. Training in business planning and entrepreneurial skills. 	MT		X	X	Youth involved in agribusiness sector	NAQAA MDI GYIN Gambia GYCC NEDI YEP	Gambia College MDI GYIN Gambia GYCC NEDI YEP	



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This project is funded by
the European Union