

Mozambique



REMOVING THE BARRIERS IN AGRICULTURE



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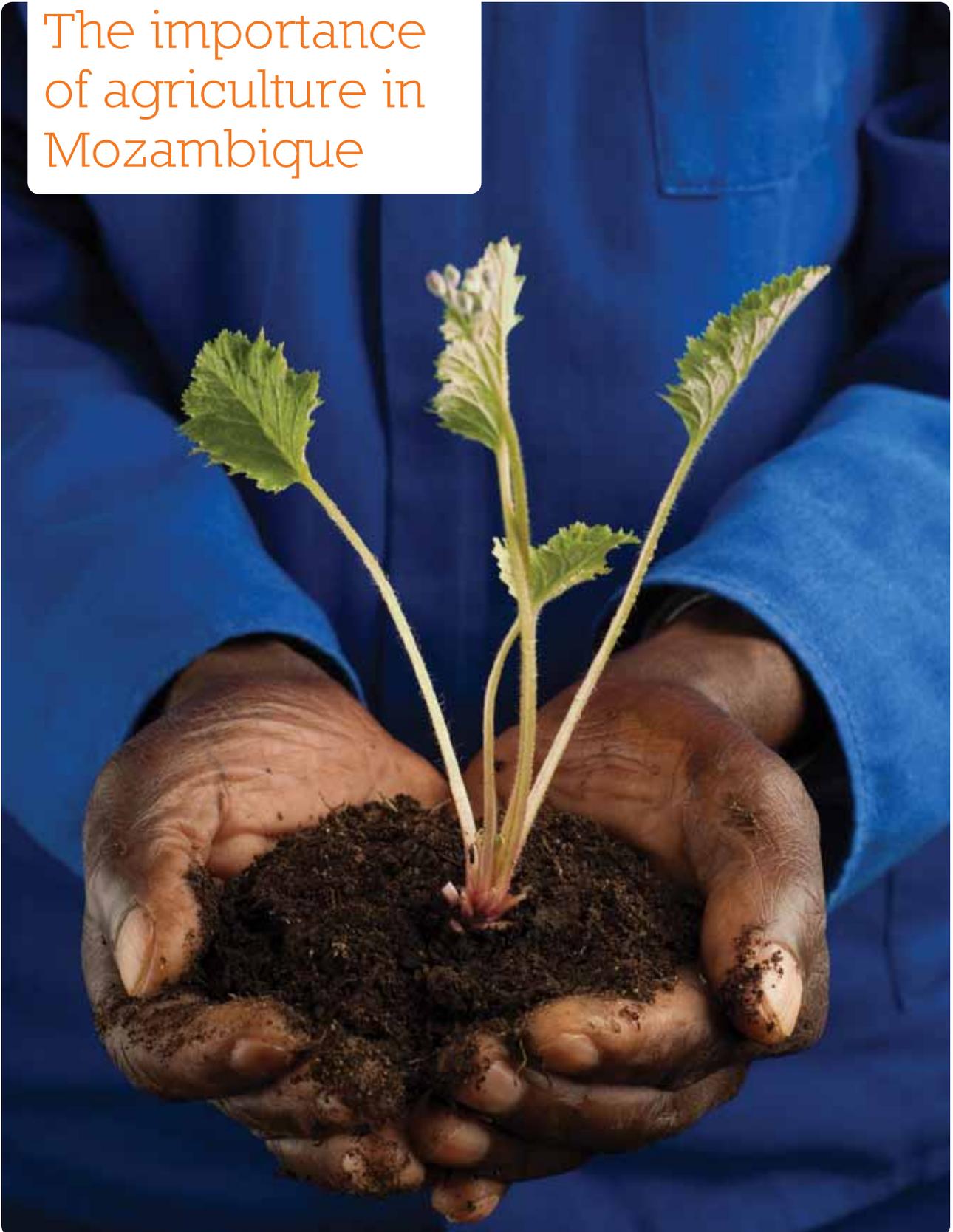
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Section 1

The importance
of agriculture in
Mozambique



Mozambique's economy has been one of the fastest growing in the world for more than a decade, achieving positive growth even during the 2008-2010 global recession.

The average economic growth rate between 2001 and 2011 was around 8.1% per annum, declining slightly to 6.2% in 2009 before bouncing back to 7.2% in 2011 (African Economic Outlook, 2012). The recent growth rates are driven by mega-projects that are being implemented in the country. Mozambique benefits from the diversification of its development and trading partners, notably China, Brazil and India. These emerging partners complement traditional donors' strong focus on social sectors with their interest in mineral resources and agriculture.

However, growth in the mineral and gas resources sectors has had limited socio-economic development impact, particularly for ordinary Mozambicans. Agriculture, the primary source of livelihood for the majority of the population, can be used as an effective means for spreading the benefits of economic growth to a wider cross-section of the Mozambican population.

Approximately 80% of the Mozambique's population depend on agriculture for food, employment or income. For the country, sustainable success within this sector could lead to more inclusive economic growth, which would have knock-on benefits to food security, employment and social stability.

Agriculture contributes about one third of Mozambique's gross domestic product and the sector employs about 80% of the labour force (World Bank, 2012). Furthermore, between 70% and 80% of Mozambique's population live in rural areas, with most of them dependent on agricultural activities for their livelihood. The role that agriculture can play in transforming Mozambique into a sustainably prosperous country cannot be over-emphasised.

In addition to the mineral and emerging energy sectors, agriculture is capable of attracting significant foreign investment to Mozambique. CEPAGRI, the government's agriculture investment promotion centre, reported that between 2007 and June 2011, the country registered more than 30 new agricultural investment projects. Investing in agriculture, small and large scale, has great potential.

Challenges to investing in agriculture in Mozambique

SMALLHOLDERS AND RURAL FARMERS	COMMERCIAL FARMERS
Low use of modern inputs	Low levels of capital investment in agriculture
Low levels of organisation among smallholder farmers, which reduces bargaining power	High operational costs
Lack of infrastructure	
Land ownership and title	High cost of finance
Limited access to finance	
Low levels of technical know-how in production methods.	
Lack of capacity holds state back from implementing policy improvements	

The role of government in realising the potential of the agricultural sector

The challenges experienced in the agricultural sector demand more effective state intervention and leadership. The private sector and smallholder farmers will not be able to address these macro-level issues unless they adopt a collective approach to engagement, discussion and resolution with government.

As observed in other countries, government's facilitation and regulatory role is very important for the growth of strategic economic sectors, especially agriculture. The challenge, however, is to determine the optimal level of government involvement, which must balance the need for regulation and protection of citizen interests without crowding out private sector capital flows.

Government's role is to create an environment that allows the private sector to participate in wealth creation activities within an optimal regulatory framework. Such an environment, if it is not restrictive, will allow more private sector investment to flow. A broad, long-term vision, particularly for primary agriculture and agribusiness promotion, will encourage competitive investments, which will in turn provide downstream economic benefits.

To help regional governments and the private sector to collaborate more effectively, the NEPAD Business Foundation is facilitating a regional platform to create dialogue among these two very important stakeholders in agriculture under the Removing the Barriers in Agriculture Programme (RtB).

Removing the Barriers in Agriculture Programme (RtB)



The NEPAD Business Foundation initiated the Removing the Barriers in Agriculture Programme (RtB) after receiving financial support from USAID along with a matching grant from the William and Flora Hewlett Foundation.

The RtB programme is structured to develop a methodology for the implementation of projects that address challenges identified in various studies on agriculture value chains in Southern Africa. Primarily, solutions are tailored to promote collaboration, co-operation, co-ordination and communication between private, public and development actors.

The mission of RtB is to advance the spread of sustainable and equitable commercial agriculture along Southern Africa's development corridors. This will measurably improve the income of small farmers and integrate them into a dynamic, internationally competitive agricultural sector.

The RtB's flagship key initiative is the Southern African Development Partnership Platform (SAADPP).

The RtB is a private sector-led demonstration programme which promotes modernisation of agriculture and encourages investment by advocating for policy change aimed at integrating farmers and agri-entrepreneurs into competitive regional supply chains.

Southern African Agricultural Development Partnership Platform (SAADPP)

The Southern African Agricultural Development Partnership Platform (SAADPP) was launched by the NEPAD Business Foundation the 14 February 2012 in Midrand, South Africa.

The SAADPP is a private sector-led partnership platform aimed at identifying and removing barriers to agricultural development, investments and trade in Southern Africa. The objective of SAADPP is to mobilise, institutionalise and increase the voice of the private sector in addressing agricultural development, trade and investment policy and non-policy constraints in Southern Africa.

Championed by the private sector, the SAADPP is facilitating collaborative and co-ordinated dialogue and practical project development, planning and implementation with active partnership between regional governments, development partners and civil society.

Specifically, the platform seeks to unlock investment and trade bottlenecks in the region, as well as to remove barriers to increased private sector involvement in agricultural development.

Engaging private sector to achieve CAADP goals

In recent years, African governments have demonstrated renewed commitment to increased and sustainable agricultural growth. The AU/ NEPAD Co-ordinating Agency's Comprehensive Africa Agriculture Development Programme (CAADP) is a clear demonstration of Africa's resolve to achieve food security and wealth creation objectives through growth in the agriculture sector. To date, more than 30 countries have signed CAADP compacts, thus committing to allocate 10% or more of their annual national budgets in pursuit of 6% average growth in agriculture.

Under CAADP, governments have also committed to implement the policy and institutional reforms necessary to create an enabling environment for agricultural development investment plans. Challenging and multi-faceted, these targets cannot be achieved independently by governments, the private sector or development organisations. Separately, these actors lack the resources and/or incentives to fully develop the agricultural sector or tackle food insecurity.

The transformation of African agriculture requires innovative forms of collaboration, co-ordination,

co-operation and communication between the key agricultural development actors. The SAADPP serves as a platform that brings together the private sector's appetite for quick, decisive and economically sound action and the public sector's need for food security and inclusive economic development.

Creating an enabling trade and investment environment

The private sector is generally more efficient in making investment decisions, implementing economically viable projects and establishing sustainable agribusinesses. Despite this, policy and non-policy-related constraints continue to undermine private sector efforts to invest and trade in African agriculture. In Southern Africa, the role of business ought to be leveraged through the development of enabling policies and targeted regulatory reforms.

SAADPP has mobilised a regional private sector voice clustered into three stakeholder-identified, thematic working areas. These are Regional Market Integration, Alternative Funding Streams and Capacity Building. Although these working areas are interconnected, their grouping is based on operational practicality rather than distinction. Within these working groups, collaboration of state and non-state actors is creating interventions designed to address policy and non-policy constraints. Additionally, actionable investment opportunities are being developed via an evolving Agriculture Project Preparation Facility hosted at the SAADPP secretariat within NBF.

SAADPP in Mozambique

What private sector and government in Mozambique can do together

Mozambican private sector companies face challenges such as market access and logistics, accessing low-cost finance, low yield and quality of

agricultural output, erratic and costly energy, lack of skills, ambiguous policy and regulatory systems, and cross-border trading delays.

Effects of these constraints trickle down the production pyramid to adversely affect smallholder farmers, particularly disenfranchising women, who do most of the farm work in rural Mozambique. There are 3 million smallholder farmers, 52 000 medium-scale farmers and approximately 500 large-scale farmers in Mozambique (CEPAGRI, 2011). The agriculture sector of the country is composed primarily of small-scale farmers and any agricultural supply strategy would have to integrate these farmers into the value chain.

Additionally, infrastructure challenges are huge – particularly rail, roads and power – and cannot adequately serve agriculture as well as other sectors.

The private sector and government could consolidate technical skills and resources, and discuss policies that could:

1. Integrate smallholder and rural farmers into the agricultural value chain
2. Improve the technical skills of agri-entrepreneurs, including farmers
3. Improve use of modern inputs and suitable equipment
4. Allow quicker and streamlined access to land for those interested in expanding production
5. Improve infrastructure access, particularly piggy-backing on resource extraction industries' infrastructure in the north and north-east.
6. Design and test various new and innovative agriculture funding models.
7. Promote investment information access and dissemination amongst stakeholders.

These few potential interventions could make a great contribution to increasing investment in the agriculture sector.

The role of partnership under a neutral collaboration platform – SAADPP

Removing barriers and constraints in agriculture will require objective and practical dialogue between stakeholders, especially the private sector and governments.

The establishment of a platform based on trust and mutual respect is crucial to allow productive negotiation and collective decision-making. Although it is important to consolidate and amplify the voice of the private sector in planning and implementing agricultural investments, it is equally important for policymakers to ensure full collaboration and active response to trade, investment and development needs identified through multi-stakeholder dialogue. This will enhance overall country development goals.

Southern African governments must take responsibility for facilitating the development and supply of public goods (e.g. transport and telecommunications infrastructure) and services that enable sustainable agricultural development and economic activities that contribute to citizens' well-being. The SAADPP presents a great opportunity for a private sector-led platform to facilitate direct dialogue between governments and the private sector, while also championing interventions that are based on collaboration, co-operation, co-ordination and communication between all actors.

Demonstrating the potential of public and private sector partnerships

Developing relevant training programmes



Supply Chain Entrepreneurship Development



We had a chat with Angela Manuel Manjichi about the supply chain entrepreneurship development programme recently added to the agriculture degree curriculum at the Instituto Superior Politécnico de Manica (ISPM). Angela, a lecturer at the ISPM, is teaching one of the modules at ISPM.

Q What is the Supply Chain Entrepreneurship Development programme?

A It is a four-year agri-business qualification that was formulated by the NBF and is currently being offered to learners at the ISPM. Its key focal points are agriculture-specific logistics and entrepreneurship.

Q Can you give us some background on this module?

A The programme came about when the ISPM and NBF came together to map out how to develop relevant and industry-responsive skills for learners at ISPM. Based on joint research, we found four major constraints to transformative agriculture:

1. Lack of business skills among people in the agriculture sectors, chief among them being a low entrepreneurial spirit.

2. Low literacy levels amongst small farmers, who constitute a larger portion of the industry.
3. Poor understanding of supply-chain management, and
4. The inability of small non-commercial farmers to meet contractual supply-side specifications of agro-processors.

So the NBF set out to formulate a 4-year programme that would produce graduates who are industry-ready.

Q Can you outline the importance of ISPM's training to the country's agricultural supply chains?

A ISPM is a public institution and offers higher vocational training in agriculture, tourism and economic fields. Our aim is to offer competent and relevant graduates whose training responds to market demands by either providing skills education or filling skills gaps.

For ISPM, the supply chain entrepreneurship development programme is extremely important for Mozambican agriculture. First, the programme ensures that we are providing the market with adequately equipped graduates and, secondly, our programme delivery is increasingly regarded as reliable and relevant.

We are the first institution in Mozambique to offer such an innovative programme.

In terms of national agricultural supply chains, the programme is going to make a remarkable difference. Mozambique is a link between the ocean and landlocked countries. We have three main ports that on a daily basis connect landlocked countries to the world. The existence

of these ports and international airports presents potential to export agricultural products. However, the rate of export is still very low. Additionally, agricultural production is concentrated in rural areas where access to markets is difficult.

This module, with its focus on supply chain management, will help learners understand how to identify and mitigate the bottlenecks in the agriculture supply chain. Given this knowledge, our learners will become qualified and skilled professionals who can overcome challenges while creating job opportunities along the value chain.

Q You talked about the values this training is imparting to learners. Can you tell me what their response has been to this programme and just how many students have taken up this module?

A Currently, 90 students are entering their second year with this module. The response is very positive, with learners asking to have Supply Chain Management as a degree, and not just part of a programme in agriculture.

Q You talked about a partnership that led to the creation of this programme. What was the value your institution's partnership with the NEPAD Business Foundation?

A The partnership with the NEPAD Business Foundation is extremely important. Through the Removing the Barriers in Agriculture programme, the NBF funded curriculum development and imparted their research and knowledge of Southern Africa's transport and logistics corridors into the supply chain modules. The value goes beyond curriculum development – the NBF is leveraging its private sector connections to link graduates to opportunities, while helping others to start their own business.

Q You pointed out that one constraint in the industry is lack of relevant skills. Can this programme be scaled up to train smallholder and rural farmers?

A Absolutely, a sub-objective of the programme is to design condensed material aimed at educating smallholder and rural farmers through short courses.

Q Is there a role for private sector to play in ensuring that the training programme delivers meaningful value to learners?

A The private sector is the backbone of the programme. They were involved during the needs assessment and the related module content is based on priorities they have identified. During the implementation there are three main areas in which the private sector can be involved:

- Student internship placement
- Field visits and provision of case studies for discussion and analysis, and
- As guest speakers to involve and attract students to start small businesses in supply chain management

Moreover, in order to improve the quality of material and programme, the private sector's feedback is very important.



MEETING A STUDENT AT ISPM



Julio Sabio Alquissone, 27, is studying agriculture engineering. Sabio, who comes from Mocuba in the Zambezia province, went to a technical vocational training workshop whilst in secondary school and from there decided to pursue agriculture at a higher level of education.

Q Briefly describe your learning experience on the supply chain programme and what you have learnt?

A The learning experience has been enlightening and transformative, to say the least. I have learnt how to identify business opportunities, coupled with how to purchase and transport inputs. I understand the value of efficiency in business.

Other essential concepts that I've just started to understand include the linking of multiple supply chains to obtain value and reduce logistics costs.

My perception of agriculture has been positively altered by this programme. I now see more pieces to the industry's puzzle, and how they fit in together. This understanding has renewed my acceptance of the need to identify

commodities that have a market and linking product quality to external markets.

Q What can you tell us about your peers on the programme?

A Most of the students are from rural areas and they have empirical agriculture knowledge, but still miss the practical and scientific knowledge. For most of us, the programme was a new concept.

We never thought that there was a supply chain, let alone the business opportunities that we are now exploring.

Q What challenges are you facing with this module and what are your suggestions?

A The main challenge is that the most of material is directly translated from English and some examples are not local.

As an additional component, visiting private companies to see how they work could extend our learning. Running a small project in logistics management and seeing first-hand how companies manage the process would be beneficial.

Q What do you see happening after you have finished this programme?

A I think that the supply chain concept has space to grow. In Mozambique, there is a skills gap in supply chain management. I have identified business opportunities that could be viable and sustainable. A challenge I foresee is accessing credit facilities to start a business, and getting banks to buy into the supply chain concept as a business.

In the future I would like to start a small business in agriculture and maybe consult for small farmers on supply chain management.

Collecting and distributing investment information

CEPAGRI INFORMATION and HELP DESK



Centro de Promoção da Agricultura (CEPAGRI) is a government body mandated by the state to attract investment to Mozambique's agriculture sector. With vast available arable land, good soils and climate along with large ports, Mozambique has great potential as an agriculture production hub in the SADC region. A major factor limiting agricultural development in Mozambique has always been poor availability of information about the agriculture investing landscape, including regulation, special economic zones and business registration processes. Generally, investors find it hard to find the information necessary to make informed investment decisions. This limits the growth of large agri-businesses in Mozambique.

The NEPAD Business Foundation (NBF) under the Removing the Barriers in Agriculture programme (RtB) was approached by CEPAGRI to assist in dealing with some of these challenges to proper documentation and dissemination of information for investment purposes.

The potential for increasing investment in agriculture

CEPAGRI and the NEPAD Business Foundation have found that despite many good investment opportunities in Mozambique's agriculture sector, investing levels for local and direct foreign investors (DFIs) have remained at a minimum, with marginal overall growth. Further research conducted by CEPAGRI showed that although there was interest, investors remained apprehensive about investing in Mozambique because of the lack of accurate and current information for decision-making. Local and foreign buyers of agricultural produce also faced challenges in accessing information about exact quantities and location of the sector's production areas. This has been one of the main causes of growth in the sector being below expectations.

Only 1% of current agricultural land is cultivated by medium to large-scale farmers, the other

99% being cultivated by rural and smallholder farmers. In this reality, poor quantity and quality of the information available are pertinent issues for buyers and investors. The NBF and CEPAGRI realised that there was a great need to gather, classify, consolidate and disseminate information about the sector.

Removing the barriers to investment using technology

The NBF's RtB programme developed a simple, customised software solution, which was set up within CEPAGRI, as a Help Desk. The solution simplifies the collection and flow of information, thereby promoting investments in agriculture. With this system, CEPAGRI is able to gather data and produce relevant and up-to-date information for prospective investors.

“ Within the first year of initiation and assistance by the NBF, the speed at which work is completed has increased exponentially. It has been noted that the work done in this inception year would have taken about 5 years to complete had the NBF not come on board with resource provision. ”

Nelson Rodrigues Antonio - CEPAGRI

Making market access connections using technology

Agricultural land in Mozambique is state-owned and leased to farmers at a cost-equivalent of R3.75/ha per annum (if used for agriculture purposes only). The state leases out the land on 50-year lease agreements with an option to renew for the same period after expiry. The drawback is that the land cannot be used as collateral, which limits access to credit.

By collating information about location, crop and livestock distribution patterns and estimated quantity of production, the Help Desk has the



potential to identify and aggregate information for potential buyers particularly those willing to procure from small-scale farmers.

Directing investors to opportunities

The Help Desk is also able to disseminate statistical data on land availability and locations. Mozambique comprises 6.9 million hectares of land, of which 80% is suitable for agriculture. With large areas in such provinces as Niassa, Zambezia and Inhambane, each averaging over 1.2 million hectares fit for agriculture, the Help Desk can identify areas for specific crop or livestock production. This information will open the sector up to new entrants, who will bring resources to boost production levels and help develop infrastructure that facilitates and supports agriculture.

“ CEPAGRI is no longer the same after installation of the new information management system. We feel that we have moved to another level of providing agri-business information to investors. Though still in the initial phase, where gathering and uploading the information is the priority, we are already experiencing a remarkable difference in our interaction with potential investors. ”

Nelson Rodrigues Antonio - CEPAGRI



Quick and easy access to information for investors

CEPAGRI is now able to quickly respond to information requests from potential investors. Already, this is building confidence among investors in CEPAGRI's capacity to reliably carry out its mandate. With regular updates and knowledge management, investors can see the progress of policy and its implementation.

CEPAGRI is currently involving and partnering with other countries along the Beira Corridor to make the Investment Desk more efficient and comprehensive.

Promoting land ownership and market access

RURAL WOMEN IN MOZAMBIQUE BECOME LAND OWNERS



Meet New Farmer Celina Paula De Barros



“**T**his is the most precious possession that I've individually owned in my life,” said Celina Paula De Barros as she hugged her title deed and celebrated. Celina, a 42-year-old who lives in Magunde, which is about 90km from Chimoio, is married and has six children and grandchildren. Three of her children and their spouses and children live with her on a piece of land she shares with her husband.

Many rural women from the Manica district have no formal education and all the skills they acquire in life are either self-taught or learnt from observation. During the handover ceremony Celina was unable to contain her joy and close to tears. She said: “I finally have a piece of land that no one can take away from me or from my children and grandchildren”.

From rural farmer to entrepreneur

Rural land ownership in Mozambique, as in most parts of Southern Africa, is handled by chiefs in their administrative posts or villages. Chiefs can allocate pieces of land to households and determine the size, location and recipient. They can even take away the land under special circumstances. Traditionally, men receive these plots as custodians of families or heads of households and they are allowed live on the land, work it and pass it on to their children.

The major problem with the system is that the

land still belongs to the government and common rural farmers cannot use it as collateral. The land allocated to Celina's husband by their chief has no legal documentation; the only paper work that ties them to it is Mr De Barros' name in the chief's register book. For many rural women in sub-Saharan Africa, culture and tradition has marginalised them on land ownership and, for Celina, the hope that one day she could own farming land seemed impossible.

“**Having a title to use of land for farming land has already been of great benefit. I have been able to employ workers to help on my new farm. My grandchildren have more time to focus more on their studies**”

Celina Paulo de Barros

Southern Africa's rural subsistence farming system has developed over time and more than 60% of the region still employs the system today. Rural subsistence farming is built on human labour, with all members of a household supplying labour. Urbanisation has increasingly led to men leaving rural areas in search of employment in the city. This situation has left rural women and children to do all the farm work. Rural farmers must till the land manually with simple farm tools, do all



the harvesting by hand and clear the land in preparation for the next planting season. After the harvest, rural farmers set aside a portion of the produce to be used as seed in the next planting season and food for the year. If there is a good harvest, rural farmers are able to sell the excess produce earning them an income.

Rural farming in the SADC region suffers numerous challenges, such as lack of certified seed and limited or no access to credit facilities. Many rural farmers have no collateral and, therefore, remain unable to acquire bank loans. These realities of rural land ownership are the reasons why women like Celina have been unable to secure funds from financial institutions in order to increase and improve their farming endeavours.

In essence, the Direito do uso e aproveitamento de terra (DUAT) can be presented to financial institutions to reflect ceded rights to use of land

by government. Celina has already decided to purchase a plough to increase efficiency. She will be able to farm larger pieces of land and, as an added benefit to the community; she can share the plough with her neighbours.

Training programmes, particularly on which crop varieties to produce, are now available to the entire community and, using her access to funds, Celina can now form co-operatives to purchase the best seed. The DUATs programme has made it possible for the farm land to become an asset for business purposes rather than just a resource for food and shelter. More work is required to make the lending process faster and easier for 'new farmers' like Celina but, so far, the programme has been a great success.

NBF and partners in action

Thanks to the financial support of the William and Flora Hewlett Foundation, the NEPAD Business Foundation (NBF), from its offices in Mozambique, co-ordinated and facilitated the granting of the DUATs for women in the Manica province working with the Foundation for Community Development (FDC) and government.

Accessed finance can be used for mechanising the farming process, installing irrigation systems and purchasing certified seed. For rural women in the Manica province, like Celina, who have been struggling to provide for their growing families, having access to credit facilities is going to improve not only their lives but those of their entire community.

The DUATs programme has empowered the marginalised and impoverished women of Magunde making them the first women in their district and administrative post to hold title to use of land.

In the near future, the NBF hopes to implement this programme on a larger scale in Mozambique. With the lessons learnt through this pilot programme, the NBF anticipates an accelerated turnaround time for the next batch of Celinas.

The NBF and FDC are continuing support by providing mentorship to these new farmers, networking them with private sector and creating linkages and access to markets. The NBF is already leveraging its membership and stakeholder base to secure supplier arrangements for the women who received DUATs.

Collaboration success

This project is of special interest to the NBF because it targets three of its five key focus areas (agriculture and food security, human development and capacity building, and Regional integration and Infrastructure). The project is another example of the continuing success of the Removing the Barriers (RtB) programme.

The continuing efforts and co-operation of the NBF and FDC are reasons why Celina can hope for a better life not only for her family but for her community. Such partnerships are the vehicles that allow Africans to matter in Africa's development. These initiatives are complementary to broader

programmes for agriculture in the region, such as the Southern Africa Agriculture Development Partnership Platform (SAADPP), supported by the public and the private sector. These interventions are intended to benefit families, communities and off-takers.

A new farmer's hopes and dreams

Gradually the mind-sets of the community in Manica have begun to shift, the social imbalance of handing over land to women to own in their own right is starting to set a precedent and is gaining acceptance from the people. Chiefs and husbands of recipients are in full support of the programme and they have already started to see the benefits of such initiatives in their everyday lives.

In a recent interview Celina chuckled about how the men in her village are now calling her 'landlord' and 'new farmer', nicknames which are sure to stick. Her husband has been insisting she put up a sign at the site of the new plot that reads 'Property of De Barros'.

Celina, still clinging to her DUAT, said in closing, "I am alive with new dreams for the future of my family and community. There is a lot I want to learn and so much I want to see. Thank you for giving my family and I a new path for our future."

“ The empowerment of women translates to better equipped children, efficient communities and better use and increase to the income of rural households. We believe that Manica province was a perfect choice for ground zero because here in Magunde our efforts had the highest potential to influence a greater positive transformation in the lives of people ”

Lynette Chen, CEO of the NEPAD Business Foundation (NBF) at the handover ceremony of the DUATs.





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