



FEED THE FUTURE

The U.S. Government's Global Hunger & Food Security Initiative



A snapshot of Leang Leng's factory in Cambodia where workers are producing tomato and chili sauce. Leang Leng is one of MSP's five private sector partners in Cambodia.

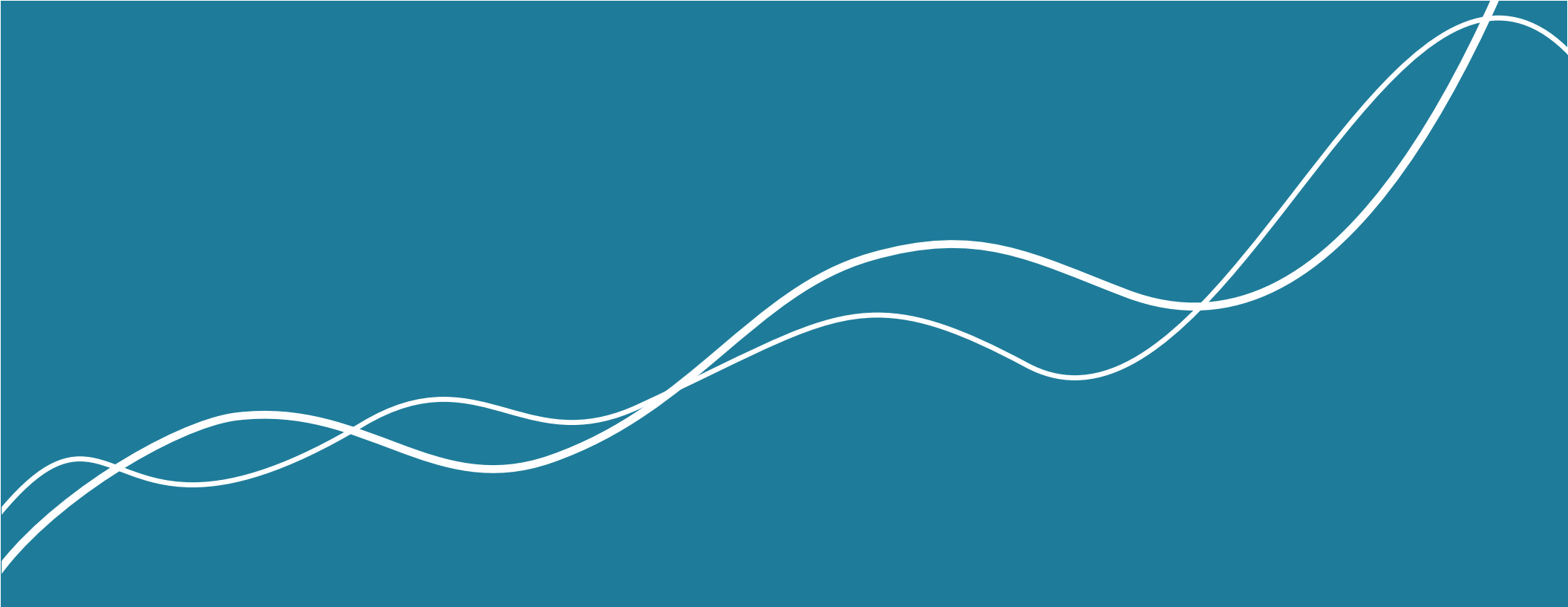
A LOOKBOOK OF PRIVATE SECTOR PARTNERSHIPS

Market Systems and Partnerships Activity

CURRENT AS OF MARCH 2023



USAID
FROM THE AMERICAN PEOPLE



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This program is made possible with support by the American people through the United States Agency for International Development (USAID), under the terms of Contract No. 7200AA20C00054 and managed by DAI. The opinions expressed herein are those of DAI and do not necessarily reflect the views of the United States government.

Graphic and visual design of the Lookbook by Keilah Niyomutabazi of MSP.

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MSP'S APPROACH TO PARTNERSHIPS

The USAID-funded Feed the Future Market Systems and Partnerships (MSP) Activity is advancing learning and good practice on market systems development (MSD) and private sector engagement (PSE) within USAID, USAID's implementers, and market actors.

As one component of the Activity, MSP facilitates private sector partnerships through a global Partnership Facility that creates shared value from the alignment of core business objectives and development goals. MSP's Partnership Facility selects concepts based on the strength of **five core factors: business concept, development impact, sustainability, scale, and funding justification (additionality)**. MSP's approach focuses on:

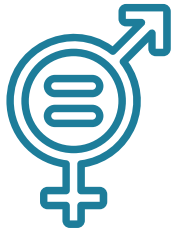
- **Prioritizing upfront strategic outreach** so that MSP can attract the most impactful partner or coalition of partners and on the most strategic activities that can drive systemic impact;
- **Deciding to engage only when MSP's additionality is projected**, where MSP's involvement is critical to unlocking market-based solutions;
- **Drawing on relationship management practices** to steward partnerships, foster relationship health, as well as prompt ongoing, partner-led learning that informs decision-making;
- **Creating connections between the partner firm and other USAID projects and resources in-country** to broker fair and productive relationships between market actors that will bring sustained benefit to target populations;
- **Using partnerships as live case studies to shine a light on barriers in the broader environment, constraining private sector involvement and investment in a sector**, so USAID, and its ecosystem of actors, can foster the conditions necessary for the focus investment or business practice—and others of its kind—to endure (and even scale) beyond the life of the MSP partnership;
- **Integrating gender** in partnership design and implementation to empower women as suppliers, business leaders, customers, and employees.



Co-development with private sector partner, Leang Leng, in Cambodia (left) and 260 Brands in Zambia (right).



GENDER LENS INVESTING



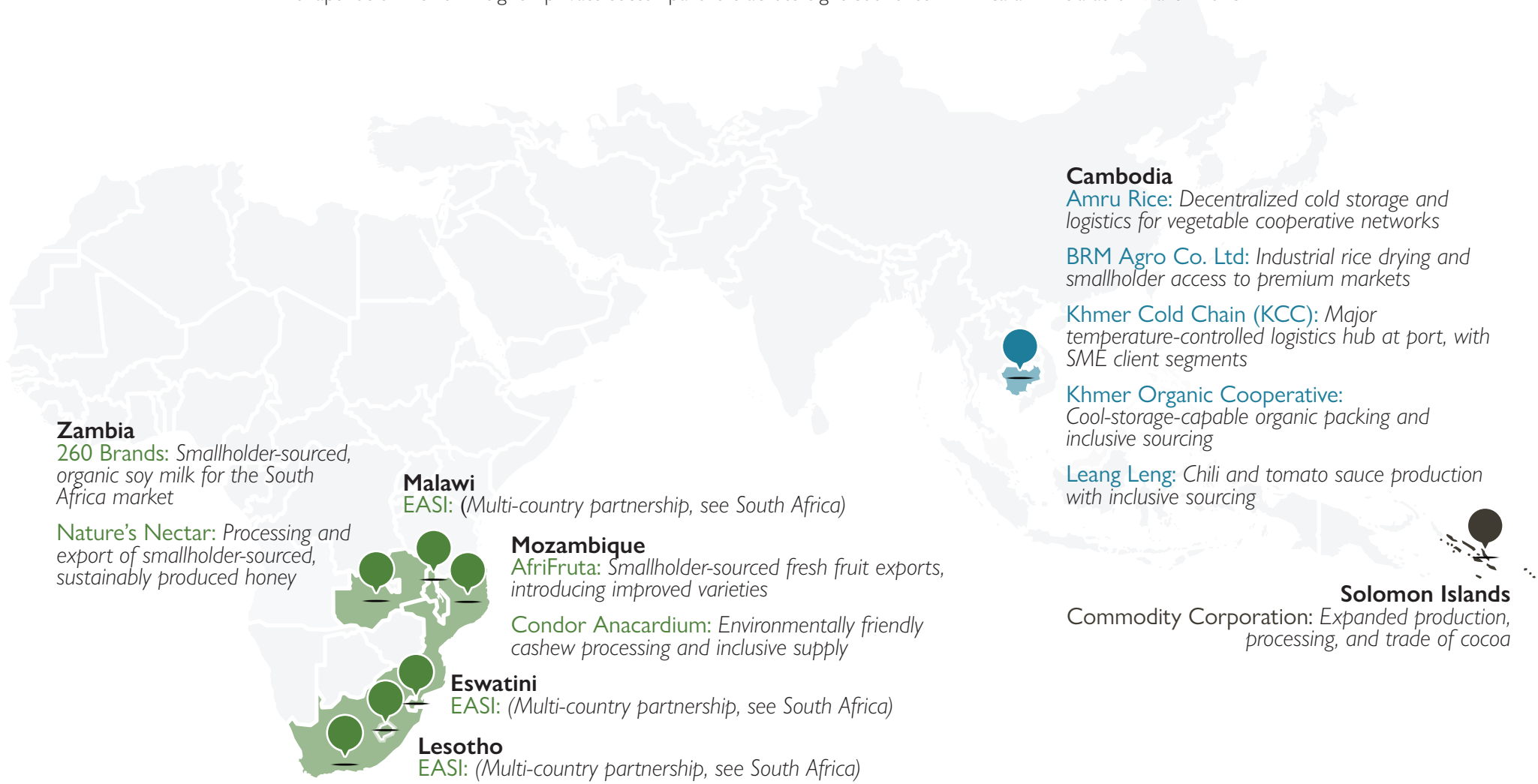
MSP's approach to gender lens investing focuses on working with partner firms to strengthen their positive impact on women as suppliers, customers, and employees.

- For each partnership, MSP integrates **a gender lens investment approach to inform co-development**, while identifying the firm's status on enhancing women's empowerment through MSP's initial partner survey.
- MSP co-develops **tailored strategies** with partners aligned with the core partnership activity to support firms to incrementally move along a continuum from 'no awareness' of women's empowerment to 'transformational impact,' with the **aim of enhancing firm performance and women's empowerment impacts**.
- For more, see [MSP's Gender Lens Investing Brief](#).



GLOBAL PARTNERSHIPS SNAPSHOT

Snapshot of MSP's 11 signed private sector partners across eight countries in Africa and Asia as of March 2023.



Zambia

260 Brands: Smallholder-sourced, organic soy milk for the South Africa market

Nature's Nectar: Processing and export of smallholder-sourced, sustainably produced honey

Malawi

EASI: (Multi-country partnership, see South Africa)

Mozambique

AfriFruta: Smallholder-sourced fresh fruit exports, introducing improved varieties

Condor Anacardium: Environmentally friendly cashew processing and inclusive supply

Eswatini

EASI: (Multi-country partnership, see South Africa)

Lesotho

EASI: (Multi-country partnership, see South Africa)

South Africa

European African Seed Initiative (EASI): Last mile extension, smallholder seed production, and distribution of micro-packaged seeds

Cambodia

Amru Rice: Decentralized cold storage and logistics for vegetable cooperative networks

BRM Agro Co. Ltd: Industrial rice drying and smallholder access to premium markets

Khmer Cold Chain (KCC): Major temperature-controlled logistics hub at port, with SME client segments

Khmer Organic Cooperative: Cool-storage-capable organic packing and inclusive sourcing

Leang Leng: Chili and tomato sauce production with inclusive sourcing

Solomon Islands

Commodity Corporation: Expanded production, processing, and trade of cocoa

Partnership Facilities

- USAID/Southern Africa Regional: Agricultural Trade and Investment Activity
- USAID/Cambodia: Agricultural Investment Activity
- USAID/Solomon Islands: MSP Solomon Islands Partnership Facility

ANTICIPATED RESULTS

29



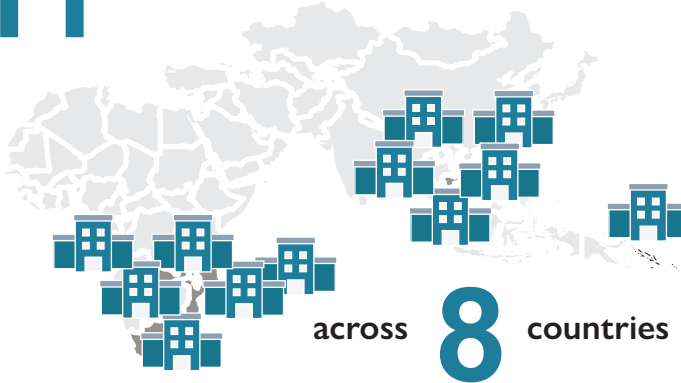
technologies, practices, and business models co-invested in



to drive innovation

11

private sector partners



across 8 countries

\$10



million USD leveraged from the private sector

towards partnership goals



136,280



smallholder farmers benefitting directly and indirectly from



increased access to:



markets



information



goods



and services

1.4:1



average ratio of private sector: USAID funding

\$19.2



million USD in sales by firms and smallholders, advancing trade and inclusive growth



Many partners set sales value targets based on market research and business model refinement early in the partnership implementation. Thus, the numbers above reflect anticipated sales results for a subset of MSP's current portfolio. Similarly, the number of technologies, practices, and approaches reflects a subset of the total anticipated number.

CURRENT PARTNERSHIP FACILITIES

Southern Africa

Technical Focus

Increase agricultural trade, investment, and exports



Details

Current Fund: \$5.1 million over 2 years; Awarded to Date: \$3 million

USAID Buy-In Mission, Bureau, or Independent Office (MBIO)

USAID/Southern Africa

Cambodia

Technical Focus

Cold chain, logistics, transport, and expanding agribusiness trade



Details

Current Fund: \$3.5 million over 2 years; Awarded to Date: \$3.5 million

USAID Buy-In MBIO

USAID/Cambodia

Solomon Islands

Technical Focus

Increase product quality, improved value addition of agricultural products

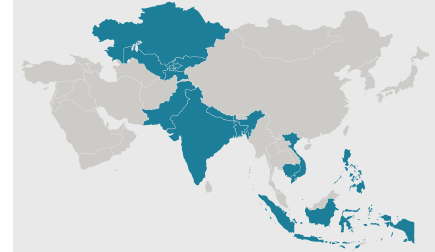
Details

Current Fund: Up to \$2 million over 2 years; Awarded to Date: \$500,000

USAID Buy-In MBIO

USAID/Philippines

Asia Care Economy



Technical Focus

Support the care economy through technologies or services that reduce the burden of care

Details

Current Fund: \$400k over 2 years

USAID Buy-In MBIO

USAID/Bureau for Asia

DRC Access

Technical Focus

Support agricultural-led economic growth within the agricultural, financial, or renewable energy sectors



Details

Current Fund: \$3 million over 2 years

USAID Buy-In MBIO

USAID/Democratic Republic of the Congo (DRC)

Mozambique

Technical Focus

Increase the uptake and scale of solution and innovations to improve the resiliency of the Mozambican agriculture sector



Details

Current Fund: \$1.17 million over 2 years

USAID Buy-In MBIO

USAID/Mozambique

Food Loss and Waste

Technical Focus

Increase uptake and scale of FLW solutions; build food and nutrition security

Details

Current Fund: \$1 million

USAID Buy-In MBIO

USAID/Bureau for Resilience and Food Security/Center for Nutrition

MSP has signed partnerships with 11 firms in the Southern Africa, Cambodia, and Solomon Islands facilities. MSP is developing partnerships with partners in the other facilities.

PRIVATE SECTOR PARTNERS BY COUNTRY

The background is a solid teal color. In the lower half, there are several white, wavy, overlapping lines that flow from the left side towards the right, creating a sense of movement and modern design.

CAMBODIA



Amru Rice

About the firm: Amru Rice Cambodia Co., Ltd is a rice miller and exporter that is now expanding into horticulture, building on its track record in building smallholder capacity, improving farming practices, and strengthening organization in the rice sector.

Partnership objective: Cambodian farmers currently lack consistent access to cold storage and transportation, resulting in product loss and diminished product quality. Consequently, locally grown horticulture products are of unreliable quality and cannot meet the requirements of export markets, with domestic consumers also relying on imported vegetables for everyday needs. The partnership with Amru Rice is establishing on-site cold storage rooms for vegetables near its headquarters and at its agricultural cooperatives' sites, creating a decentralized cold storage and logistics network for its smallholder suppliers.

Long-term impact: Disaggregated cold storage of vegetables and linkage to a guaranteed buyer will incentivize farmers to use best farming practices and allow them to aggregate yields for improved prices instead of selling to the first and most accessible buyer. This will ultimately improve crop yield, quality, and safety as well as farmer incomes. Cold storage aggregation will also allow for a buyer like Amru Rice to source sufficient supplies of quality vegetables to sell consistent volumes to higher value domestic and export markets.



Partnership
Timeline

FEB 2022 – JAN 2024



Projected
Sales*

\$772,000



Projected
Partner Leverage

\$427,380



Projected
Smallholder
Farmers Benefitting

1,200



Projected
Increase in
Cold Storage

143 m³



Technology
in R&D and
uptake

1

** Projected sales are still being confirmed, and this figure is subject to change.*



BRM Agro Co. Ltd

About the firm: BRM Agro is an integrated rice farm and rice milling company that grows, dries, and mills premium, fragrant rice varieties for export and domestic sale.

Partnership objective: Though Cambodia produces both a high quantity and quality of rice, systemic issues in the country's rice sector such as a lack of post-harvest infrastructure, have led to economic, food, and climate security challenges for Cambodian rice farmers. Through the MSP partnership, BRM Agro will increase its rice processing capacity to meet increased demand by expanding the drying capacity of its existing rice mill, hiring new staff, and recruiting and contracting new smallholder suppliers who will gain consistent access to premium markets.

Long-term impact: Improved rice processing infrastructure in Cambodia will allow rice farmers to reap the benefits associated with the high level of international demand for Cambodian-grown fragrant rice, including increased farmer incomes, improved farming practices, and a reduction in Cambodia's reliance on imported rice.

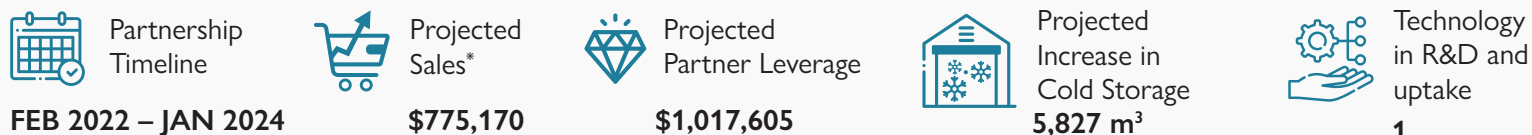


Khmer Cold Chain (KCC)

About the firm: KCC is a cold chain logistics company that offers temperature-controlled logistics (TCL).

Partnership objective: Currently, Cambodia suffers from a lack of centralized TCL facilities including, pre-cooling, packing, laboratory testing, and sanitary and phytosanitary inspection services to ensure products have not suffered from spoilage or other damage affecting food safety. The partnership with KCC is expediting the operationalization of Cambodia's first cross-docking facility—a system where products are delivered to a cold chain warehouse where they are sorted and prepped for immediate shipment—and the launch of a cold storage facility and distribution center.

Long-term impact: The partnership ultimately will 1) scale Cambodia's cold chain and logistics infrastructure, 2) enable farmers to get better prices for their goods and enter export markets, 3) ensure consumers have access to high-quality goods, 4) allow KCC to partner with SMEs and cooperatives rather than focusing exclusively on larger anchor customers, and 5) demonstrate the business case for the centralized TCL model to crowd-in additional investment.



Khmer Organic Cooperative

About the firm: KOC is a social agribusiness that produces and sells organic and good agricultural practice-certified horticultural and poultry products.

Partnership objective: Despite a rich agricultural capacity, Cambodia relies on imported produce due to several factors, including poor farm management and post-harvest practices; lack of access to logistics, especially temperature controlled; and inconsistent market access that leads farmers to sell at low prices. The partnership with KOC will catalyze the operationalization of a new, cold storage-enabled, energy efficient packing house for organic produce and the training and contracting of 21 new agricultural cooperatives and producer groups to meet increasing demand for organic produce.

Long-term impact: The partnership will improve market access for Cambodian smallholder farmers, promote food safety and quality standards, and grow both Cambodia's ability to reliably yield organic produce for domestic and export markets and the domestic appetite for responsibly sourced organic produce.



Partnership
Timeline

FEB 2023 – JAN 2025



Projected
Sales*

\$1,817,000



Projected
Partner Leverage

\$584,044



Projected
Smallholder
Farmers Benefitting

600



Projected
Increase in
Cold Storage

255 m³



Leang Leng

About the firm: Leang Leng is a family-owned sauce manufacturer that produces a variety of sauces, including chili and tomato sauces and targets sales to restaurants, supermarkets, and households.

Partnership objective: Cambodia lacks domestically produced value-added products as well as consistent application of food safety standards, branding and marketing, and sourcing practices. Consequently, consumers have limited options, and farmers lack consistent markets for their products. The partnership with Leang Leng will expand sales of its sauces to five additional Cambodian provinces by modernizing its chili and tomato sauce production line and by sourcing increased volumes of chili and tomatoes from smallholder suppliers, piloting a contract farming approach.

Long-term impact: The partnership will further incentivize increased production of Cambodian-owned, value-added products in a way that provides consistent linkages to markets for Cambodian agricultural producers while also promoting adherence to food quality and safety standards among Cambodian food processors.



Partnership
Timeline

FEB 2023 – JAN 2025



Projected
Sales*

\$2,080,000



Projected
Partner Leverage

\$819,224



Projected
Smallholder
Farmers Benefitting

100



Projected
Increase in
Bottling Capacity:

19.7 million bottles/yr



ESWATINI, LESOTHO, MALAWI, SOUTH AFRICA

European African Seed Initiative

About the firm: European African Seed Initiative (EASI) is an input supply firm that sources seeds from European and African seed industries for distribution in southern and eastern Africa. EASI has an innovative last-mile business model in which it liaises with agropreneurs to serve as decentralized extension officers to provide ongoing coaching, oversight, and field support to producers who supply open pollinated seed varieties to EASI in target production zones.

Partnership objective: Under this partnership, EASI is addressing the early generation seed market shortfall by producing smallholder farmer-generated seed for distribution across southern Africa, particularly by contracting smallholder farmers for production of open pollinated groundnut and sugar bean. MSP's partnership is supporting EASI to expand and refine its agroprenur model to reach rural seed producers in Eswatini, Malawi, and Lesotho, and to introduce small packaged, improved seed varieties into rural markets.

Long-term impact: This partnership with EASI will result in a more inclusive and beneficial supply chain for smallholder farmers in the target areas and improve access to and competitiveness of high-quality seed products in the agro-input sector in southern Africa.



Partnership
Timeline

SEP 2021 – SEP 2023



Projected
Sales

\$2,361,600



Projected
Partner Leverage

\$964,0189



Projected
Smallholder
Farmers Benefitting

121,000



MOZAMBIQUE



AfriFruta

About the firm: AfriFruta is a mango and coconut processing company which exports dried mango and coconut primarily to Europe and the southern Africa region. AfriFruta operates in Mozambique where the primary mango variety (Reiner) accessible to smallholders has a limiting, six-week long harvest window.

Partnership objective: Through this partnership, AfriFruta is extending the harvest window by introducing a new variety (Brooks) to Mozambique and three new mango tree varieties (Tommy Atkins, Kent, and Keitt) to the region. By the end of the partnership, AfriFruta will contract 1,200 smallholder farming households, primarily headed by women, and increase the volume and variety of mango exports to South Africa and beyond.

Long-term impact: This partnership is a long-term investment by USAID into the health of the mango industry in Mozambique, expanding the population of productive mango trees and strengthening livelihoods and food security of participating communities for years to come.



Partnership
Timeline

SEP 2021 – SEP 2023



Projected
Sales

\$32,000 USD
(5-year target for tree
crop: \$376,000)



Projected
Partner Leverage

\$365,276



Projected
Smallholder
Farmers Benefitting

3,000





Condor Anacardium

About the firm: Condor Anacardium is a food processor of raw cashew nuts based in Macia, Mozambique. It sources cashew nuts from over 40,000 farmers—98% of whom are smallholder farmers—and processes the nuts for export.

Partnership objective: The partnership with Condor Anacardium aims to improve its environmental standards by modernizing its cashew nut handling and processing while reducing supply chain risk by strengthening its relationships with supplier smallholder farmers. By the end of the partnership, Condor Anacardium anticipates producing 620 tons of cashew nut shell liquid oil, in alignment with local environmental regulations.

Long-term impact: This partnership is a long-term investment by USAID into the environmental and economic health of the cashew nut industry in Mozambique, expanding the production of cashews, improving the environmental management of Condor Anacardium, and diversifying the company by adding a new business line of cashew nut shell liquid oil.



Partnership
Timeline

JAN 2023 – JAN 2025



Projected
Sales

117.5 MT



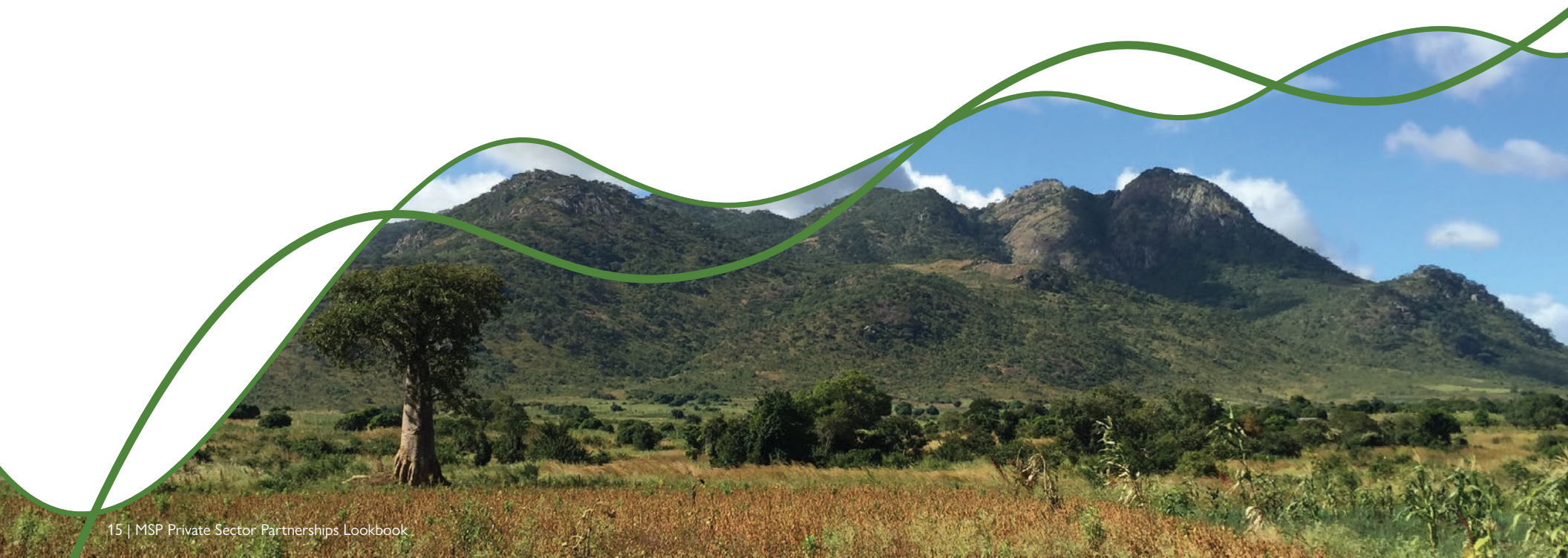
Projected
Partner Leverage

\$629,140



Projected
Smallholder
Farmers Benefitting

5,000



SOLOMON ISLANDS



Commodity Corporation


About the firm: Commodity Corporation (C-Corp) is a cocoa exporter and chocolate manufacturer which sources high-quality cocoa beans from Solomon Islands. Selling its products under the brand name Solomons Gold, C-Corp manufactures organic chocolate products, including chocolate bars, cocoa nibs, and chocolate pieces for individual and wholesale customers.


Partnership objective: C-Corp will pilot the processing and marketing of single origin (Malaita) organic chocolate callets sourced exclusively from smallholder farmers in Solomon Islands. MSP is co-investing with C-Corp to expand its operations into Malaita province, establish a cocoa nursery, introduce organic certification to farmer supplier areas, and test and expand a new product (single-origin organic chocolate callets) into key international markets.

Long-term impact: The partnership will focus on expanding production of cacao in Solomon Islands, improving cocoa processing operations and product quality, and increasing trade of cocoa products from Solomon Islands to New Zealand, Australia, and the United States.

 Partnership
Timeline
NOV 2022 – NOV 2024

 Projected
Sales
\$96,000

 Projected
Partner Leverage
\$458,786

 Projected
Smallholder
Farmers Benefitting
100



ZAMBIA

260 Brands

About the firm: 260 Brands is a Zambian food and beverage company that markets and sells products throughout Zambia and the southern Africa region, currently sourcing soy inputs from smallholder farmers.

Partnership objective: To expand its regional trade opportunities, 260 Brands is partnering with MSP to produce premium fresh soy milk destined for exports to South Africa and the region. The partnership introduces two innovations: piloting and testing a new organic certified sourcing model with contract smallholder farmers (40% of which will be women), and expanding the firm's processing capability to include aseptic, shelf stable milk, which allows them to compete in the South Africa market. 260 Brands' investment is three-and-a-half times MSP's funding.

Long-term impact: The partnership will lead to increased incomes and sustained sales relationships for smallholder farmers who receive organic certification and training from 260 Brands. In the region, customers in varying income segments will have increased access to plant-based nutritious milk products that are affordable and could improve nutrition outcomes for customers.



Partnership
Timeline

OCT 2021 – OCT 2023



Projected
Sales

\$96,800



Projected
Partner Leverage

\$3,593,343



Projected
Smallholder
Farmers Benefitting

2,000



Nature's Nectar

About the firm: Nature's Nectar is a honey processor and exporter that sources raw honey from smallholder farmers in rural Zambia using non-destructive beekeeping practices.

Partnership objective: This partnership is enhancing inclusive, regional trade opportunities between Zambia and South Africa by introducing new processing technology to the country that improves quality and expands the integration of smallholder beekeepers into a sustainably-sourced supply chain.

Long-term impact: The partnership with Nature's Nectar will improve the overall efficiency and reduce product loss for the company through its modern processing facility. Further, its expanded supplier network will provide new and diversified economic livelihoods for rural beekeepers who have few possible income generating activities available.



Partnership
Timeline

SEP 2021 – SEP 2023



Projected
Sales

\$283,500



Projected
Partner Leverage

\$266,462



Projected
Smallholder
Farmers Benefiting

2,700

PRIVATE SECTOR PARTNERS BY TECHNICAL THEME

Cold Chain

- Amru Rice
- Khmer Cold Chain
- Khmer Organic Cooperative

Last-Mile Distribution and Sourcing Models

- European African Seed Initiative
- Nature's Nectar

New Technology

- 260 Brands
- AfriFruta
- Amru Rice
- Commodity Corporation
- Condor Anacardium
- European African Seed Initiative
- Nature's Nectar

Postharvest Processing and Storage

- 260 Brands
- AfriFruta
- Amru Rice
- BRM Agro Co. Ltd
- Commodity Corporation
- Condor Anacardium
- European African Seed Initiative
- Khmer Cold Chain
- Khmer Organic Cooperative
- Leang Leng
- Nature's Nectar

Supply Chain Strengthening

- 260 Brands
- AfriFruta
- Amru Rice
- BRM Agro Co. Ltd
- Commodity Corporation
- Condor Anacardium
- European African Seed Initiative
- Khmer Cold Chain
- Khmer Organic Cooperative
- Leang Leng
- Nature's Nectar

Trade

- 260 Brands
- AfriFruta
- Amru Rice
- BRM Agro Co. Ltd
- Commodity Corporation
- Condor Anacardium
- European African Seed Initiative
- Khmer Cold Chain
- Khmer Organic Cooperative
- Leang Leng
- Nature's Nectar

PHOTO CREDITS

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(Left) Mark Pigott, DAI/MSP; (Right) Laura Conn, DAI/MSP

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Fintrac Inc.

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(Top) Documentation Center of Cambodia (DC-Cam)/Makara Ouch; (Right) Fintrac Inc.

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(Left) BRM Agro Co. Ltd; (Right) Khmer Cold Chain

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(Left) Khmer Organic Cooperative; (Right) Mark Pigott, DAI/MSP

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(Top and Right) European African Seed Initiative

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(Top) DAI Global; (Right) AfriFruta

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(Left) Condor Anacardium; (Bottom) DAI Global

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The U.S. Government's Global Hunger & Food Security Initiative

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