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# Large-Scale Food Fortification (LSFF) Opportunity Assessment for **Country**

Identify the biggest opportunities to expand LSFF of staple foods and condiments in collaboration with the industrial food industry:

- Priority food and condiment vehicles
- Approaches to overcome key LSFF constraints for priority vehicles in collaboration with industrial or large scale food processors, in line with the USAID Results Framework

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# Scope of the Assessment

## X Foods & condiments explored

<b>Food or condiment #1</b>	Rationale for selection
<b>Food or condiment #2</b>	Rationale for selection
<b>Food or condiment #3</b>	Rationale for selection
<b>Food or condiment #4</b>	Rationale for selection
<b>Food or condiment #5</b>	Rationale for selection
<b>Food or condiment #6</b>	Rationale for selection
<b>Food or condiment #7</b>	Rationale for selection

## Definition of *industrial / large-scale* processor

### A processor with:

- significant market share; or
- industrial processes and the installed capacity, technical capacity & resources (i.e. staff, etc.) to produce quantities that would have significant market share

**Food or condiment #1:** >X MT/day

**Food or condiment #2:** >X MT/day

**Food or condiment #3:** >X MT/day

**Food or condiment #4:** >X MT/day

**Food or condiment #5:** >X MT/day

**Food or condiment #6:** >X MT/day

**Food or condiment #7:** >X MT/day

# Historical Context: LSFF in COUNTRY

<b>Legislation</b>	
<b>Successes &amp; challenges</b>	
<b>Key LSFF funders &amp; implementing organizations in Country</b>	
<b>Areas of focus for past and current LSFF program in Country</b>	

# X of the X foods & condiments targeted based on key market dynamics

	Targeted food / condiment	Targeted food / condiment	Targeted food / condiment	Targeted food / condiment	Targeted food / condiment	NON-targeted food / condiment	NON-targeted food / condiment
Status of Fortification Mandate <i>mandatory, voluntary, no standard</i>	X	X	X	X	X	X	X
Compliance Gap (retail stage) <i>(Estimated % compliance, if applicable)</i>	X % (X %)	X % (X %)	X % (X %)	X % (X %)	X % (X %)	X % (X %)	X % (X %)
% Processed In-Country	X %	X %	X %	X %	X %	X %	X %
% of In-Country Processing by Industrial-Scale Processors <i>(# Industrial-scale processors)</i>	X % (X)	X % (X)	X % (X)	X % (X)	X % (X)	X % (X)	X % (X)
Estimated household coverage	X %	X %	X %	X %	X %	X %	X %
Daily food supply (kcal/capita/day)	X	X	X	X	X	X	X
Food supply growth	X %	X %	X %	X %	X %	X %	X %
<b>Prospect for LSFF Program Impact:</b> <i>high, medium, low</i>	X	X	X	X	X	X	X

**Prospect for LSFF Program Impact:**



High



Medium



Low

# Top 5-10 Processors of Target Food Vehicles

**Targeted food /  
condiment**

**Targeted food /  
condiment**

**Targeted food /  
condiment**

**Targeted food /  
condiment**

**Targeted food /  
condiment**

Top 5-10 Firms	Market Share	Installed Capacity (MT/Day)	Top 5-10 Firms	Market Share	Installed Capacity (MT/Day)	Top 5-10 Firms	Market Share	Installed Capacity (MT/Day)	Top 5-10 Firms	Market Share	Installed Capacity (MT/Day)	Top 5-10 Firms	Market Share	Installed Capacity (MT/Day)

# Food Processor Capabilities: Definitions

Definition		
<b>Average Technical capability</b>	<b>Technical capacity</b>	Feasibility of modifying the process flows to accommodate fortification; Identified best point for fortification in their process; Includes micro-dosifier, mixer, etc.
	<b>Procurement/ storage</b>	Defined procurement processes; storage capacity, etc.
	<b>Staffing/ Training</b>	Equipped production personnel, with experience or training in fortification
	<b>Quality Assurance Systems</b>	Sign of GMPs, GHPs and related practices; Certified for ISO 9001 Quality Management System; ISO 22000; In-house laboratory or access to labs/ testing facilities; Samples in-process and finished products for testing
	<b>Traceability</b>	Batch numbering system, with date of manufacturing; utilize traceability labels
<b>Average Commercial capability</b>	<b>Operational efficiency</b>	Inventory management; employee health & safety; environmental safeguards
	<b>Financial capacity</b>	Strong financial records and controls; collateral base; access to finance
	<b>Packaging</b>	Packaging adequate to maintain integrity of fortified products in the market
	<b>Logistics &amp; Distribution</b>	Access to logistics and distribution systems that retain quality of product / fortificant
	<b>Marketing &amp; Consumer awareness</b>	Strong marketing capability; Consumers with awareness of fortification benefits
<b>LSFF capability of processors:</b>		<b>Average capability of processors re: readiness for fortification</b>

# Food Processor Capabilities: Summary

		Targeted food / condiment	Targeted food / condiment	Targeted food / condiment	Targeted food / condiment	Targeted food / condiment
<b>Average Technical Capability</b>	Technical capacity					
	Procurement / storage					
	Staffing / training					
	Quality assurance systems					
	Traceability					
<b>Average Commercial Capability</b>	Operational efficiency					
	Financial capacity					
	Packaging					
	Logistics & distribution					
	Marketing & consumer awareness					
<b>Average processor capacity to support LSFF:</b>						

**Legend:**  High capacity to support LSFF     Partial capacity     Low capacity

Highlight **each box** in the appropriate color, based on this legend

# Incremental Costs of Fortification

## Capital and recurrent costs of fortification

Estimated average annual incremental costs of fortification (\$ per MT)

	Targeted food / condiment	Targeted food / condiment	Targeted food / condiment	Targeted food / condiment	Targeted food / condiment
Annualized capital costs					
Premix cost					
Micro-feeder operating cost					
Maintenance, Marketing, QA/QC, etc.					
<b>Estimated average annual total incremental cost of fortification (\$ per MT)</b>					

**Guidance:** In case cost data is not available through secondary resources, kindly note that Sub-IR 2.2.1 of USAID Results Framework (Conduct studies on fortification costs and effects on price and margins) might have high scope to add value. One of the ways cost can be estimated is using [FFI's cost-benefit tool](#) – this assists countries in comparing the estimated cost of implementing a national fortification program to the benefits the program will generate in return, also referred to as the program's cost:benefit ratio.

Sources: [X](#)



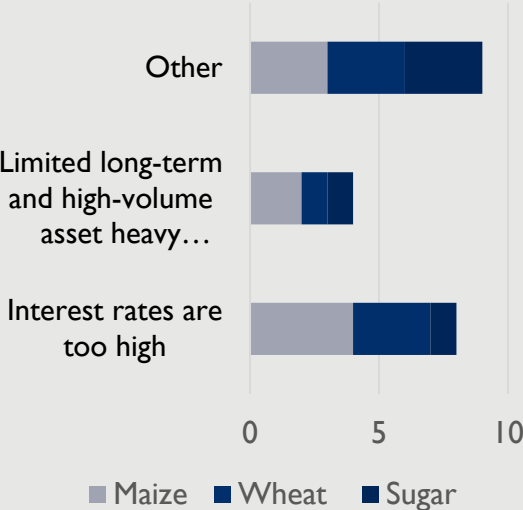
# Stakeholder Capacities & Constraints

Capacities & Constraints per Target Vehicle				
Targeted food / condiment	Targeted food / condiment	Targeted food / condiment	Targeted food / condiment	Targeted food / condiment
X	X	X	X	X
X	X	X	X	X
X	X	X	X	X
Cross-cutting Ecosystem Challenges				

Source: X primary interviews

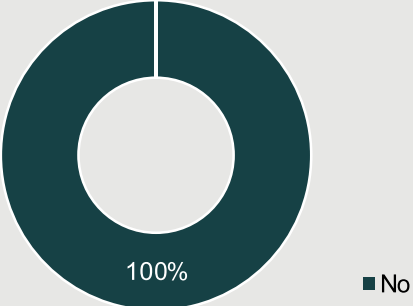
# Access to Finance

**Do you face any of the below challenges obtaining financing?**



**Have you received a loan in the last 12 months?**

**Are you interested in receiving advisory services to address access to finance gaps?**



Source: X primary interviews

# Summary: LSFF Feasibility Per Vehicle

**LSFF Feasibility**  
(High to Low)



	Priority Vehicle	Priority Vehicle	Priority Vehicle	NON-Priority Vehicle	NON-Priority Vehicle
<b>Status of Mandate</b>	X	X	X	X	X
<b>Compliance Gap</b>	X %	X %	X %	X %	X %
<b>% Processed In-Country</b>	X %	X %	X %	X %	X %
<b>% of In-Country Processing by Industrial Processors</b> (# Industrial scale processors)	X % (X)	X % (X)	X % (X)	X % (X)	X % (X)
<b>% Households Consuming</b>	X %	X %	X %	X %	X %
<b>Processors' Interest in LSFF</b>					
<b>Processors' LSFF Capabilities</b>					
<b>Other Themes Surfaced in the Research</b>					

# LSFF Opportunities for High-Feasibility Vehicles

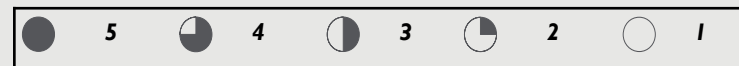
	Priority Vehicle	Priority Vehicle	Priority Vehicle
Technical Strategy Summary			
Support to Processors			
Improvements to Enabling Environment			
Changes to support services (pre-mix, finance, etc.)			

# Value Addition of Results Framework Activities: all vehicles

Activity	Vehicle 1	Vehicle 2	Vehicle 3	Vehicle 4	Vehicle 5
<b>IR 2.1: Food industry compliance with fortification standards through business development, food technology, quality control &amp; marketing guidance strengthened</b>					
Sub-IR 2.1.1	Food industry mapping/ scoping/ analyses				
Sub-IR 2.1.2	Help offset fort. costs through business/ operational / tech support/ marketing				
Sub-IR 2.1.3	Strengthen compliance with labeling standards, digital systems, etc.				
Sub-IR 2.1.4	Ensure premix availability, quality and traceability				
Sub-IR 2.1.5	Improve packaging of cooking oils and sugar				
Sub-IR 2.1.6	Promote use of fortified ingredients in processed, blended foods				
Sub-IR 2.1.7	Support tools and brand/ marketing indices to improve compliance				
Sub-IR 2.1.8	Engage private sector to foster fortification alliances				
<b>IR2.2: Food industry compliance with fortification standards linked to improved access to finance and financing terms for general operations, as well as procurement of fortificants and food processing equipment</b>					
Sub-IR 2.2.1	Conduct studies on fortification costs and effects on price and margins				
Sub-IR 2.2.2	Increase food fortification-compliant industry's access to finance				
Sub-IR 2.2.3	Advisory services to improve access to finance				

1) Paste the appropriate Harvey Ball (see legend) into each box to show the projected value add of each Sub-IR activity for each vehicle

2) Highlight in **yellow** all boxes with Harvey Ball scores of 4 & 5



Legend: scope to add value; 5 = high, 1 = low

# Priority Results Framework Activities: all vehicles

## Sub-IR Activity

## Opportunities for Impact

2.X.X: ...

X

2.X.X: ...

X

2.X.X: ...

X

2.X.X: ...

X

2.X.X: ...

X

2.X.X: ...

X

- 1) **On the left** (red boxes): copy/paste all Sub-IR activities from slide 13 for which 1 or more vehicles has a Harvey Ball score of **4 or 5**
- 2) **On the right**: For each Sub-IR activity listed, write the rationale and emerging impact opportunities for each vehicle with a score of **4 or 5** (slide 13)