



Ministry of Foreign Affairs

Report On Youth Employment In Agricultural Value Chains: Niger Catalystas

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RVO Scoping Mission Report On Youth Employment In Agricultural Value Chains: Niger

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Introduction

In order to identify a number of agricultural value chains with high potential for a positive impact from Dutch investment and support initiatives, our scoping mission examined various agricultural products available in the three target areas. (A full overview of our research methodology pertaining to this report is available as Appendix G: Methodologies for Job Creation Research and Reports). Through interviews with local suppliers, business managers, groups and cooperatives, government officials and international actors, while keeping in mind the political objectives of the Dutch government, we were able to select a number of value chains that could greatly benefit from maintaining or expanding existing programs with support from the Netherlands. These value chains are dairy products, groundnuts, mango, onions, and moringa.

Although this list is not exhaustive and there are many other investment options, our research suggests that these sectors would greatly benefit the people of Niger as well as the national economy, helping the nation achieve its economic growth objectives while contributing to SDGs 2, 4, 5, and 8.

A complete analysis of each value chain can be found in Appendix E: Recommended Value Chains.

I. Overview of the national economy and businesses

During our mission in Niger and based on further exploratory research, Catalystas Consulting found that young people and women face various limitations in “finding productive employment and decent work opportunities”. The main barriers are: a high rate of illiteracy, especially among rural women; the negative exclusionary impact of (young) women discriminated against by social norms and cultural stereotypes; a lack of professional networking; limited skills for certain technical occupations in high demand; limited access, in rural areas, to information regarding employment opportunities; and lack of representation of state structures in the regions. Finally, it should be noted that the Nigerien State is still the foremost “formal” employer; young Nigeriens who have the chance and opportunity to obtain a diploma aspire to work as civil servants. Self-employment and entrepreneurship are poorly developed.

- *The Association of Student Entrepreneurs of Niger (AEEN), has organized, in collaboration with the Niger Chamber of Commerce and Industry (CCIN), on the 9th of August 2019 the 2nd Edition of Business for Development, which took place in Niamey.*
- *This initiative aims at training 100 students on projects related to leadership, business management and taxation.*
- *The CCIN Secretary-General, Ousmane Mahaman, who presided over the ceremonial launch, has ensured the AEEN members of the support of his administration.*
- *“Education is the best guarantee for success for any company in search of performance. I hope that you will take full advantage of this opportunity to realize your business creation projects, or to improve the situation of those that already exist,” he said.*

This recent Business for Development initiative and the quote from the CCIN Secretary-General on this subject are examples of the growing number of promising initiatives and the optimistic developments in the field of job creation for young people in general. During the field mission to Niger, Catalystas Consulting was able to collect similar data and findings.

However, despite the fact that Niger has made significant progress in reducing inequality in recent years, the population’s poverty rate is still very high (45.41% as of 2017). It should also be noted that diets in Niger are on average not very diverse, partly due to the potential impact of climate change, resulting in a very low Household Dietary Diversity Score.

22% of Niger's population suffers from chronic food insecurity (per capita consumption of <1,800 kcal/person/day). Because of the strong inter-annual variation in staple food crop production, total food availability depends strongly on external food imports and food aid.

Background information on the economy

The Nigerien economy is characterized by its weak economic fabric and constraining labor market: only 1% of the active population works in the formal sector and 75% work in the informal sector. In addition, there have been few public sector job opportunities in the past 20 years, which has unfortunately led to a collapse of public sector services, particularly in the areas of education and health.

The economic growth rate was 4.9% in 2017, mainly due to the strong increase in irrigated agricultural production and the strengthening of oil production (World Bank 2018 WDI). Generally speaking, experts and official reports concerning Niger all agree on the findings that the growth rate of the Nigerien population is incompatible with the country's economic capacities and that there are serious problems regarding the quality of education and (vocational) training.

More than 70% of jobs in the capital, Niamey, were generated by the informal sector and nearly 2/3 of households were run by a person with activity in this sector. Irregularity of work, seasonal variations in activities, and underemployment are all characteristics of informal employment that contribute to increasing vulnerability and levels of poverty for informal laborers.

Gross Domestic Product	Gross Domestic Product Per Capita	GDP Growth Rate
7.12 billion \$ US	1,153 \$ US (2017, IMF)	4.9 % (2017, IMF)

The structure of the Nigerien economy has not changed significantly, with consistently low productivity of subsistence agriculture and minimal private sector development. The Nigerien economy is characterized by very limited diversification and low competitiveness. It participates only to a limited extent in international economic exchanges. In addition, the overall unemployment rate is 17% (as of 2014). The unemployment rate is higher among women than men, amounting to 28.9% vs. 4.4%, respectively (2014). It is also more pronounced among young people, with a youth unemployment rate of 23.7% (between the ages of 15-29). Underemployment affects 68.4% of the total working population. It is most prevalent in rural areas, where it affects 70.4% of the working population (PDES, 2017-2021).

On the government side, public administration is poorly structured and organized when it comes to meeting the challenges in the rural and educational sectors. Recently, there have been considerable security threats, including the deployment of national and mixed forces, resulting in expenditures that are no longer borne by the State budget alone.

During multiple field interviews in Niger, Catalystas heard that trust in public institutions is declining and the gap is widening between users of public services and the public sector. The main causes are poor administrative infrastructure, resulting in decision-making centers that are often located far from the populations they are meant to serve. The second problem is corruption, which is on the rise, to the point where a public service user cannot think of using a public structure without including a *baksheesh* (type of bribe) for the relevant civil servant. Catalystas adheres to the strategy of building the capacity of state institutions. These sections have been removed due to confidentiality. Requests for more detailed information can be sent to io@rvo.nl.

Agriculture, industry, and services sectors

Agriculture, the primary sector (agriculture, livestock, hunting, fishing, and forestry), has always been the main contributor to Niger's GDP. It represented 38.8% of GDP in 2016 (PDES, 2017-2021). The majority of the Nigerien population (86.5%) works in this sector, which is mainly focused in the southern part of the territory. The secondary sector, industry, accounts for some 17% of GDP (2016), over half of which comes from the extractive industries of oil and mining, uranium, and gold production (11%). Food and petroleum product manufacturing activities contribute for about 5% of the Nigerien GDP. Finally, the tertiary sector, services, accounts for nearly 44.2% of GDP (2016). It is steadily increasing thanks to the dynamism of transportation and telecommunications, trade and repair services, and public administration.

Agriculture is fundamental to Niger's development and employs around 82% of the population. The GDP share of agriculture (including livestock, fisheries, and forestry) increased from 38% in 1995 to 42.1% in 2014. At the same time, the decline in services is similar in scale, from 47% of GDP in 1995 to 39% in 2014. Since 1995, with the help of the WB/IMF SAP programs, there has also been a disengagement of the Nigerien State from certain sectors, which has led to the demolition of industrial infrastructure (today not all the factories in the industrial zone are functional) because many of them belonged to state-owned companies.

In addition, nearly 82.6% of the population lives in rural areas and are mainly rural subsistence farmers, who depend on rain-fed agriculture as their main source of food and income. The continuation of intensive and unproductive practices in the agro-silvo-pastoral sector, which are subject to severe land constraints, has led to the fragmentation of farms and the increasing degradation of natural resources. Small farms - the average size of a farm is 5 ha for about 12 people - are becoming increasingly dominant. They rely on the unpaid labor of family members. These small farms are extremely scattered due to population growth and current inheritance laws.

On the agricultural demand side, the production is reliant on manual labor, and productivity remains exceptionally low and limited to archaic traditional equipment. Even if the use of animal traction to plough the fields is slowly gaining ground, its scope remains limited due to the low purchasing power of farmers and the lack of supervision and financing.

During multiple interviews and field visits in Niger, Catalystas was able to observe and gather testimonies from young people living in the rural areas of Maradi and Tahoua, stating that the farming profession is most often a last resort to "earn a living". Those who have the chance and opportunity to study and migrate to the capital of Niamey or elsewhere prefer to work as employees of the Nigerien state or, for example, in mining operations operated by large multinationals such as Orano (ex-Areva).

Internal purchasing power

Niger is a member of the West African Economic and Monetary Union (WAEMU); its monetary and exchange rate policies are therefore defined by WAEMU regulations. The exchange rate of the CFA franc, the common currency of the WAEMU, is indexed to the euro (and previously to the French franc) and has not been changed for 21 years.

The current account deficit deteriorated significantly from 16.4% in 2013 to 17.7% in 2015, partly due to the decline in exports of uranium (which account for almost one-third of exports), petroleum products, and the deterioration in services and income balances. The increase in imports is the result of purchases of capital and intermediate goods.

Inflation has been kept below the EU norm of 3% since 2010 thanks to the Nigerien government's actions to contain cereal prices and the central bank's prudent monetary policy. External debt remains constant thanks to the various restructurings obtained from creditors, within the framework of the Heavily Indebted Poor Countries (HIPC) initiative and the Multilateral Debt Relief Initiative.

Main agricultural products

Niger's agricultural production is dominated by two types of crops: cereals and legumes, mainly cowpeas. Cereal production increased by 25.2% between 2014 and 2015. Among cereals, millet and sorghum, the main crops, accounted for 63.7% and 31.0% of cereal production, respectively, in 2015.

The existence of an enormous potential in agro-pastoral raw materials (tomatoes, cowpeas, milk, meat, onions, sesame, hides and skins, peppers, cereals, and forest products) offers significant opportunities for agro-industrial transformation and modernization. Indeed, agricultural products constitute 16% of the volume of exports through cowpeas, onions, arabic gum, nuts, and sesame seeds. Other vegetable crops such as garlic and pepper are also famous products. The potential for growth is clear; for instance, cowpea production has gradually increased since 2012, from 1.3 million tons in 2012 to 1.6 million tons in 2015, an increase of 23.1%.

Commercial transactions

Niger is a member of the United Nations (UN), the Organisation Internationale de la Francophonie (OIF), and the Organization of the Islamic Conference (OIC). It is also a member of the African Union Commission (AU) and the Community of Sahel-Saharan States (CEN-SAD). Niger is a member of the Permanent Interstate Committee for Drought Control in the Sahel (CILSS), the G5-Sahel, the Entente Council, the Liptako-Gourma Authority, the Niger Basin Authority and the Lake Chad Basin Commission (LCBC).

The regional market also represents an opportunity for Niger, which shares borders with 7 countries. Niger is a member of:

- WAEMU (West African Economic and Monetary Union), which adopted a common agricultural policy in 2001, the PAU (Agricultural Policy)
- ECOWAS (Economic Community of West African States), which adopted a regional agricultural policy in 2005, ECOWAP/PDDAA (Economic Community of West Africa States Agricultural Policy), based on NEPAD (New Partnership for Africa's Development) Comprehensive Africa Agriculture Development Program (CAADP).

II. Overview of international commerce

Food demand and import

Niger imports around 2.9 million euros worth of milk and milk products annually despite having a prevalence of dairies in the country. Catalystas was able to observe disloyal competitiveness between fresh milk versus powdered milk, mainly due to the import of milk powders from France which undercut the value of milk from local markets.

In addition, there is the problem of limited hygienic quality, which has pushed Nigerien consumers towards imported products. For example, Niger imports two-thirds of its overall rice supply, mainly from Asian markets. Local production is insufficient to satisfy domestic demand and provides only 34% of the total supply. Niger furthermore has a deficit in cereals, which are a major component of the local diet. Local production has not been able to meet demand since the 1970s, and today cereals account for more than 8.7% of imports.

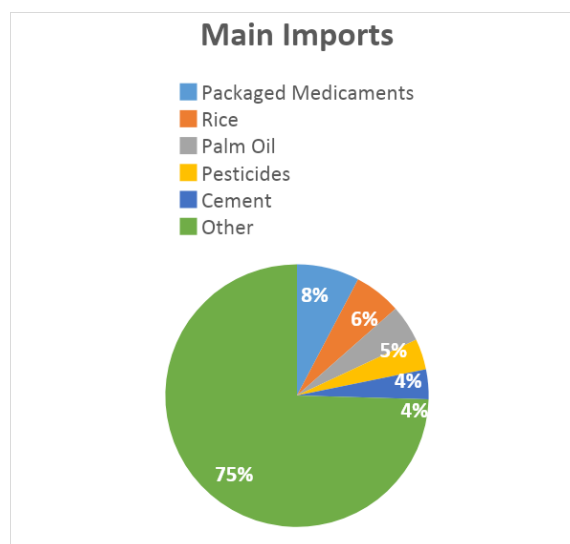
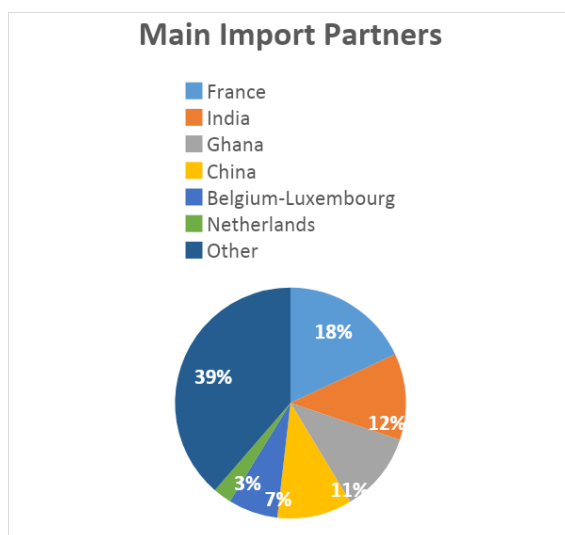
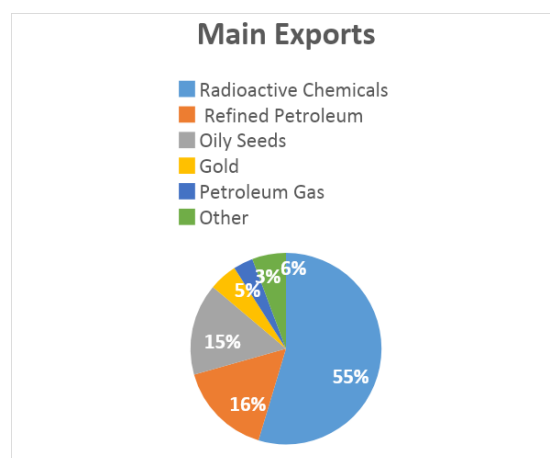
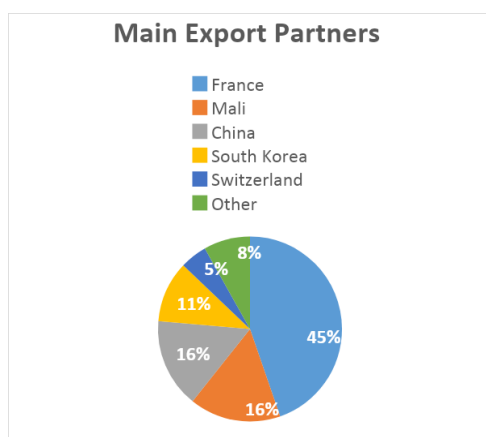
Imports versus regional and international export

In 2017, foreign trade was characterized by 2.1% growth in imports and a 7.1% increase in exports, in line with the decline in the rate of growth of imports of capital goods and the strengthening of sales of petroleum products. This trend has led to an improvement in the foreign trade deficit, decreasing from 16.6% of GDP in 2016 to 15.2% in 2017.

The average import propensity declined again in 2017 to 34.5% from 35.5% in 2016 and 43.5% in 2015, while the average export propensity increased by 0.4 percentage points from the previous year to 19.3% in 2017. The import-export

coverage rate was 50.4% in 2017 compared to 48.7% in 2016. The level and composition of exports changed little between 1995 and 2006, but mining and oil exports increased considerably between 2007 and 2014.

As illustrated in the figures below, with regard to exports, the main partners are: France 45%, Mali 16% and China 16%; and exported products: gold, mineral fuels, oils and other distillation products, vegetable fats and oils. With regard to imports, the main partners are France 18%, India 12%, and Ghana 11%; imported products: medicines, pesticides, aircraft and vehicles, cereals, electrical machinery and equipment, construction materials, animals, vegetables and oils.



Finally, it should be noted that Niger's trade portfolio is automatically stricken with the fact that 70% of its exports are made up of precious materials, of which the most significant is uranium, dominated by large French companies present in Niger, including the multinational Orano (ex-Areva). Although 70% of total exports are made up of this natural resource, they represent only 5% of GDP. This increased dependency on the uranium industry has resulted in a lack of concentration in other sectors, such as food.

Trade with West African countries, particularly Nigeria

In particular, the city of Maradi shares a trade route with the Dakama market in northern Nigeria. Both formal and informal trade are common practice. The Hausa region of south-central Niger constitutes a hub for transportation and agriculture. It is located on the main east-west paved highway that connects Niamey, in the west, to Diffa, in the far east. Maradi has long been a commercial city located on the road north of Kano, Nigeria.

The cities of southern Niger and northern Nigeria have long been connected through the trans-Saharan trade route, dating back to the medieval period. Cities such as Kano and Katsina have been historical southern gateways of the commercial networks that supply a large part of the Nigerien economy. Nigeria benefits from agricultural trade and sales (especially Nigerien cattle brought to Nigerian markets), while Niger's most direct routes to foreign trade pass through the Nigerian and Beninese rail systems. With regard to bilateral agreements, the two countries formed the Nigeria-Niger Joint Cooperation Commission (NNJC), established in March 1971 with its permanent secretariat seated in Niamey, Niger.

A special anecdote can be found in the testimony of a young female entrepreneur (28 years old) in the town of Maradi. At an early age, she was able to escape premature marriage and worked hard to learn the craft of dressmaking. Thanks to her perseverance and entrepreneurial support (in the form of a 6-month US Embassy program for "emerging women"), she was able to set up a small textile store in the center of Maradi. Given the preference of her Nigerian clientele for the "Nigerian cut", her strategy was to hire a few Nigerian dressmakers from the border of Nigeria to learn from them this fashionable style, and then successfully transferred this knowledge to her few Nigerien employees.

During our mission to Niger, particularly in the Maradi region, the importance of regional trade was clearly demonstrated. These sections have been removed due to confidentiality. Requests for more detailed information can be sent to io@rvo.nl.

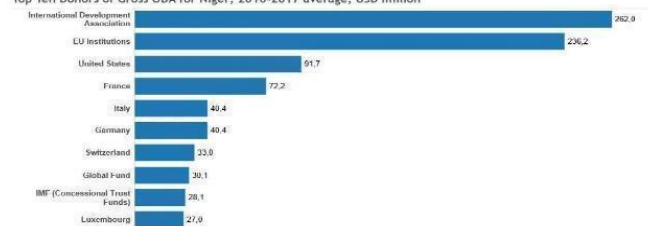
The importance of ODA in agriculture

ODA (Official Development Assistance) funds mobilized by the Nigerien government to finance the country's development priorities - defined in the Economic and Social Development Plan - amounted to US\$1,206.7 million net, according to the Official Development Assistance in 2017, which represents 0.6% of total ODA worldwide. For the production sector, the percentage of ODA amounts to 12% of total ODA in Niger, see diagram below (source: OECD DAC 2016-2017).

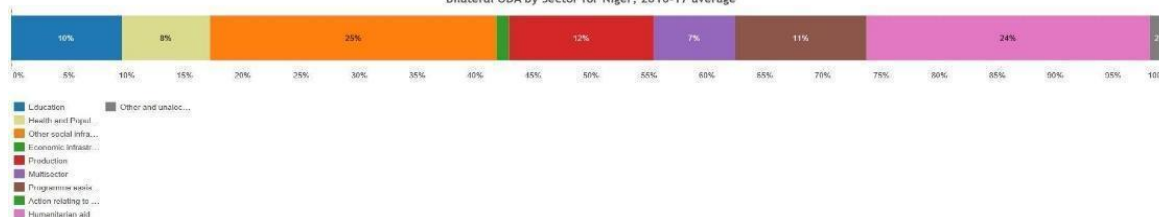
Receipts for Niger			
	2015	2016	2017
Net ODA (USD million)	958.0	951.4	1,206.7
Net ODA/GNI (%)	17.2	17.8	15.2
Gross ODA (USD million)	901.3	997.1	1,241.5
Bilateral share (gross ODA) (%)	39.5	39.5	35.8
Total net receipts (USD million)	523.1	1,110.9	1,278.8

For reference			
	2015	2016	2017
Population (million)	19.9	20.7	21.5
GNI per capita (Atlas USD)	399.0	370.0	366.0

Top Ten Donors of Gross ODA for Niger, 2016-2017 average, USD million



Bilateral ODA by Sector for Niger, 2016-17 average



Source: OECD - DAC: <http://www.oecd.org/dac/financing-sustainable-development/development-finance-data/aid-at-a-glance.htm>

During our Catalystas mission, it was stated several times that approximately 90% of the budget used by the Ministry of Agriculture has been coming from ODA external aid for decades, which shows the strong Nigerien dependence on international solidarity.

The description of governmental budgetary resources must logically be complemented by the financial volume provided by non-governmental organizations (NGOs), development associations, the private sector, and local authorities.

Catalystas has observed in the field that the national economy is underdeveloped (few registered companies, recent withdrawal or closure of large national and international companies, lack of export knowledge and experience) and that it is dominated by border trade with neighboring countries, particularly Nigeria. As mentioned above, Catalystas supports the strategy of strengthening the capacities of state institutions, in particular by constraining the problem of the "porosity" of borders in customs matters. However, despite the importance of this subject and given the limitations of this mission, this subject could not be studied more in-depth.

III. National situational analysis of the current trends in youth employment

Niger has a very young population; 85% of the population lives on less than \$2 per day; 68.88% are under 25 years old. In 2011, young people between 10 to 24 years old, were estimated at 32.8% of the total population (a total of 5,159,687 people (RGPH, 2012)). The rate of population growth in Niger is doubling every 18 years. Thus, in 2030, Niger's population will likely exceed 34 million inhabitants, and in 2050, it could exceed 68 million inhabitants. The result of this is an extremely young population, 68.88% of whom are under 25 years of age, which explains the enormous need for public investment in the basic sectors (health, education, infrastructure, etc.) (PDES, 2017-2021).

Unemployment is higher for women than for men, with levels of 28.9% and 4.4% respectively as of 2014. The rate of youth unemployment is also high: 24% of 15-29-year-olds are unemployed. In general, the employment system is characterized by a structural discrepancy between rapidly growing labor demand for low quality (low educational level) that is largely exposed to the phenomenon of poverty on the one hand and a very low dynamic labor demand on the other. Under such conditions, underemployment, unemployment, and poverty remain unavoidable.

More than half of employed young people, between 15 to 34 years old, are self-employed and work as independent farmers, traders, or craftsmen because the economy remains heavily dominated by the informal sector. In large cities, the educational level of young people and young adults seems to be a fundamental determinant of the socio-professional category to which they belong, beyond their gender and age.

The quality of the labor force is low: 62.6% of the working population have no education at all. In addition, the majority of the working population is poor (58.1%). The percentage of the adult population (over 15 years of age) that can read and write is extremely low, sitting at 19% in 2015 (including 11% for women) (UNESCO 2015). Furthermore, the percentage of young people (15 to 24 years old) who can read and write is also low: 27% (17% for women).

According to statistical data on illiteracy rates, it is difficult to aim for easy access to employment for vulnerable target groups, especially women in rural areas of the Maradi and Tahoua regions. These sections have been removed due to confidentiality. Requests for more detailed information can be sent to io@rvo.nl.

A. Current labor needs in the agricultural sector

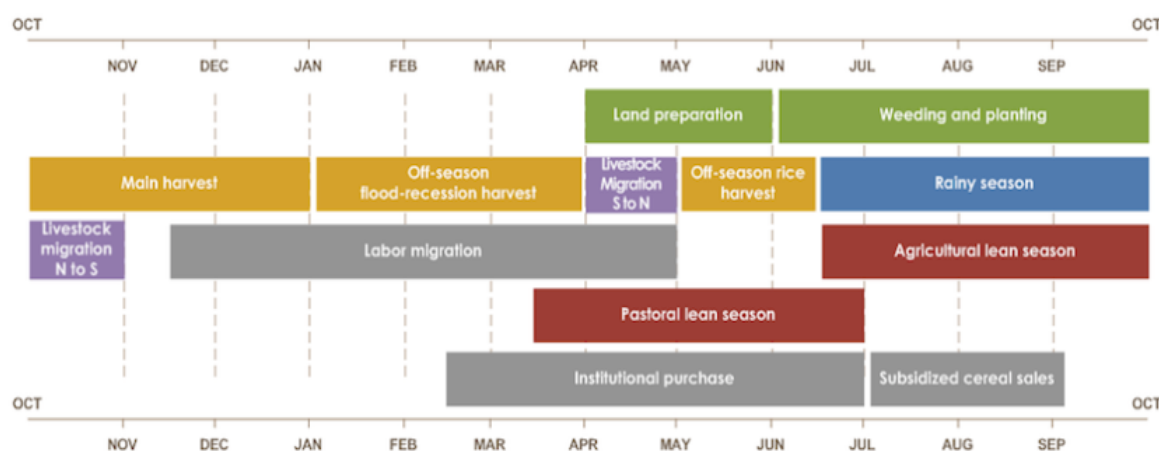
The development of the modern private sector, capable of supporting the diversification of the Nigerien economy and necessary for inclusive growth, remains a major challenge. Indeed, there is a high concentration of activities in the trade and services sectors, to the detriment of industrial activities that create more added value (SDNOIP, 2016).

As mentioned above, Catalystas must rely on statistics that are often outdated, especially when it comes to disaggregated figures of gender, age, and/or region. Although in general, the statistics are relatively recent for the education and health fields, they are lacking in the employment field.

The overall unemployment rate increased from 13% in 2011 to 17% in 2014. The unemployment rate is higher for women than for men, with levels of 28.9% and 4.4% respectively as of 2014. It is also more pronounced among young people, with an unemployment rate of 23.7% for youth between the ages of 15 to 29. Underemployment affects 68.4% of the working population. It is most prevalent in rural areas, affecting 70.4% of the rural working population (PDES, 2017-2021).

To meet these challenges and to transform the youth into real leaders for the Nigerien economy, several strategies have been put in place by the state and its development partners in favor of youth. These include, among others, the National Youth Policy and the National Strategic Framework for the Promotion of Youth Entrepreneurship.

From the point of view of the seasonal calendar in Niger (see figure below) it appears that the lean season is relatively long and sometimes - due to lack of sufficient harvest and/or challenges in storage of staple foods - leads to situations of famine and food insecurity, especially in rural areas such as Maradi and Tahoua.



i. Overall youth employment rate

The State of Niger is obliged to have a youth policy focused on providing employment for young people. In 2015, the National Agency for the Promotion of Employment (ANPE) registered 27,295 job applications against 26,930 in 2014. The number of job vacancies declined to 8,151 in 2015. The 27,295 job applications in 2015 will hardly be satisfied in view of the job offers registered during the same year. The satisfaction rate of job offers in 2015 was only 29.9%.

The population aged 15 to 34 years who are out of school or have stopped studying and reside in one of Niger's four major cities are considered "available" to access the labor market. However, some of them do not enter this market, either because of physical incapacity, because they are confined to domestic tasks (mainly women), or because they have given up on finding employment.

These sections have been removed due to confidentiality. Requests for more detailed information can be sent to io@rvo.nl.

ii. Sectors of youth employment in the spotlight, breakdown by gender and age

In Niger, the urban labor market is characterized by a very low number of salaried employees (salary rate of 24.40% in 2012). In other words, the national economy is essentially dominated by the informal sector. This informal nature of the economy explains the importance of the socio-professional categories of independent agriculture, independent trade, and independent crafts, which do not require education or qualification. This is why, in large cities, many young people, aged 15-34 without any basic education, technical instruction, or adult education are self-employed and fall into these

types of socio-professional categories such as taxi drivers and construction assistants. It should be noted that this self-employment and non-formal self-employment work is generally 'unreliable' and focuses on occasional seasonal jobs and is often subject to unfair and unstable wages.

The unemployment rate is 15.9%. This phenomenon affects women more than men (25.0% compared to 11.8%). When breaking down into age, the 15-29 years old population has the highest unemployment rate at 23.7%. Among the 15-34 years old population, women are the most affected by inactivity. Almost three-quarters of women are inactive (78.98% of 15-24 year-olds and 68.61% of 25-34 year-olds). In contrast, among men, only 31.63% are inactive among 15-24 year-olds and 11.33% among 25-34 year-olds.

Catalystas notes that women are key players in Niger's agricultural sector; however, they face real difficulties when it comes to land ownership, and very few women own their own land. Women also have difficulties in accessing financial aids and credits. In addition, there is a dominant persistence of prejudices based on gender inequality against female heads of households, as well as against female entrepreneurs.

These sections have been removed due to confidentiality. Requests for more detailed information can be sent to io@rvo.nl.

B. Risks related to the non-employment of young people

When addressing the topic of risks, we are mainly talking about problems related to extremism and migration. These are risks of crisis/conflict resulting from the fragile context of Niger. Generally speaking there are multiple crises which have led to these risks:

- A social crisis causing tensions linked to the discontent and despair of the population, especially young people.
- An economic crisis leading to high living costs, corruption, flight of skilled workers, and massive immigration.
- A security crisis caused by unemployment, despair and the search for easy money that can lead young people to join small extremist groups (Aqmi) or armies of mercenaries (e. g. in Libya) and delinquency.

Instability in neighboring countries (i.e. Mali, Libya, and Nigeria), as well as internal conflicts in parts of Niger, periodic droughts and floods, and the creation of the ECOWAS Free Movement Zone are all factors that determine migratory movements affecting Niger. Migrants from ECOWAS countries enjoy freedom of movement and enter Niger legally. The Nigerien authorities are powerless to return migrants from ECOWAS countries attempting to enter Libya illegally. In the absence of opportunities for voluntary return, many remain stuck in Niger with no choice but to try to earn enough money to pay to continue on their journey. For more than 90% of migrants assisted by IOM (Nigeriens and other nationalities), the desire to improve their living conditions and seek better job opportunities is the main reason for their decision to migrate. Although Niger is considered relatively stable, population movements and the continued growth of migrant "ghettos" in hot spots on migration routes are increasing pressure on already limited resources (food and land) and could pose a threat to the fragile security balance in the north of the country.

According to IOM, Niger is mainly known as a transit country for migration flows from West Africa to Libya and Algeria, and some to the Mediterranean. The country has an estimated Net Migration Rate of -0.3 migrants/1,000 inhabitants for the period 2015-2020. The IOM assessment shows that migrants are generally young men who emigrate because of economic reasons, hailing from Senegal, Nigeria, the Gambia, Mali, and other West African countries.

It was observed during our mission that the city of Tahoua and its surroundings in particular were affected by the so-called phenomenon of a cultural exodus, which poses major problems for teachers and workers in general. On the other hand, this local culture is so dominant that young people do not marry until the 'future groom' has had experience abroad.

C. Obstacles of youth employment within the agricultural sector

The shortage of skilled jobs leads many young people to accept work in socio-professional categories for which they are overqualified. This leads to people creating their own economic activity in order to work on their own in the informal sector despite their high level of education.

Improvement of schooling has led to an increase in the level of education required for some jobs. As a result, what may have been described as a decommissioning yesterday may not be so today. This is why, in this context, it would be prudent to qualify the seriousness of the phenomenon.

The job search instructions for unemployed people do not come from the official circuit. Indeed, job seekers in the urban community of Niamey go through either the mobilization of family networks (this process concerns 70% of cases), by means of direct prospecting with employers (8.9% of cases), registration in a competition (4.4% of cases), or through classified advertisements (3.3% of cases).

In fact, only 10.2% of unemployed people request the services of the Nigerien Agency for the Promotion of Employment (ANPE). In reality, very often job seekers are not informed of the institutional possibilities available to them to facilitate contacts and placements. This means that there is a problem with the actual coordination between labor supply and demand.

There is a clear difference between the ability to access information in the capital Niamey and in the other regions. In addition, people interested in employment and/or entrepreneurship are not always informed of promotional activities such as relevant fairs and seminars such as the *Salon de l'Agriculture, de l'hydraulique, de l'Environnement et de l'Elevage du Niger* (SAHEL Niger). This is a well-known and visited Fair by various groups of farmers and suppliers of agricultural products throughout Niger; it is organized by the *Réseau des Chambres d'Agriculture du Niger (RECA)* in partnership with the Ministry of Agriculture and Livestock, held this year from 19 to 24 February 2019 at the *Palais du 29 Juillet* for the 5th edition of the Fair.

As for access to entrepreneurship, regarding the gaps identified among young people who wish to put their entrepreneurial ideas into practice, it is clear that with a low literacy and schooling rate, the emphasis should start with basic skills, and then move on to more technical knowledge such as business plan design.

- Basic literacy skills needed : reading and writing, focus on management, accounting
- Life skills needed : overcoming the fear of entrepreneurship, lack of self confidence
- Access to information regarding opportunities such as support programs or calls for tenders, is also needed.

Other obstacles can be found in the inaccessibility of the internet which is due to the low level of computer literacy of the population, poor infrastructure, and the high cost of Internet services.

Electricity supply is also insufficient. Large rural areas are not connected to the networks and large urban centers are frequently cut off. An outreach program to raise awareness and introduce young people to computers is an interesting method to develop computer skills in the population.

Catalystas has observed that with the country's growing population and low economic development, unemployment and non-employment has unfortunately increased. In addition, the trends towards self-employment and formal entrepreneurship are still very modest, and anecdotally, several interviewees in Niamey spoke about the loss of employment opportunities at the African Union Summit held in the Nigerien capital on 4-8 July 2019. We have witnessed the construction of the Mahatma-Gandhi conference Center, the renovation of the Palais des congrès, and a new international airport Diori Hamani. However, most of the construction workforce was not of Nigerien nationality, with employers preferring to hire foreign skilled workers.

IV. Employment policies and efforts

Historically, the Nigerien State has been the largest “formal” employer in Niger and remains the largest current employer with a total of 34,184 employees as of 2005. A wage bill has absorbed most of the state’s budget, to the detriment of investment actions. In terms of gender, the distribution of civil servants shows a huge disparity between men and women. Out of a total of 39,746 officers (in 2000), there were 10,349 women, a proportion of only 26%.

According to the directory of companies registered in Niger, only 8 major companies are mentioned. However, due to economic and national security factors, several companies - multinational and national - are currently closing their doors, including Braniger, Olga Oil, and Orano. Most entrepreneurs prefer to remain in the informal sector (they do not ask for a NIF (tax ID number) to avoid tax requirements); in general, few companies in the formal sector operate in Niger; this is particularly true for the agro-food sector. Irregularity of work, seasonal variations in activities and underemployment are all characteristics of informal employment that, together with the elements mentioned above, contribute to increasing vulnerability and poverty for workers in this sector.

With regard to youth employment, it is a priority and an important concern of the Nigerien government. With a natural growth rate of around 3.3%, the Nigerien population is growing at a rapid pace. In addition, there is a mismatch between training and labor market needs, a weak education system in terms of supply, access, and quality, and a low overall level of human development in the country. This is reflected in the persistence, in both urban and rural areas, of economic and social challenges such as poverty, illiteracy, begging, delinquency, emigration, and the like. The ANPE estimates that an average of 34.62% of the working population is underemployed at the national level.

In rural areas, the main sources of employment are agriculture, livestock, fisheries, and the non-agricultural rural sector, which includes agro-pastoral processing activities, handicrafts, the manufacturing of agricultural and household equipment, trade, construction, transport services, food services, and other services.

During our mission to Niger, we learned through anecdotal testimonies and media reports that the areas identified by the Dutch government/RVO are not at the same level of socio-economic and commercial development as the capital of Niamey.

More precisely, with regard to the regions, the importance of Maradi as the economic and commercial capital is accentuated thanks to its proximity to neighbouring Nigeria. On the other hand, it also leads to smuggling and imminent threats of terrorism and banditry. As for the Tahoua region: this city has suffered for decades from an instability of its working population; it might seem like a farce, but the emigration from the city of Tahoua to the capital of Niamey and especially abroad has become so deeply rooted in its culture that “one is only ‘ready to marry’ when one proves oneself abroad”.

Catalystas is of the opinion that measures taken by the public authorities have not succeeded in reversing the trend of rising unemployment and its consequences. Without a proactive policy to promote sustainable and decent jobs in all sectors of activity, particularly in agriculture and the informal sector (rural and urban) where the majority of the poor work, it will be difficult for Niger to reverse the trend of worsening poverty in the long term.

A. Government youth employment programs

There are four ministries in charge of education in Niger. These include the Ministry of Primary Education, Literacy and National Language Promotion; the Ministry of Secondary Education; the Ministry of Vocational Education; and the Ministry of Higher Education and Scientific Research.

The relevant programs of the Nigerien government are all carried out by the National Employment Agency (ANPE), which currently runs two programs that Catalystas considers relevant for this mission and are aimed at young people: the *Programme d'Aide à l'Insertion Professionnelle des Jeunes* (PAIJ) with the objective of improving the employability of youth and promoting their integration into working life; and the *Programme d'Aide à la Création d'Entreprise* (PACE), which targets groups of young people wishing to become independent through self-employment or microenterprises. The PAIJ Instruments are twofold: first come Traineeships permitting access to an internship style first employment (*Stages initiation à la Vie Professionnelle* in French or COSIVIP), which are contracts for graduates of higher, technical, and vocational institutions seeking a first job; and second is the possibility of converting from one profession to another (*Contrat de Reconversion Professionnelle* in French or CRP), which constitutes a mechanism for graduates of higher, technical, and vocational institutions and employees who have lost their jobs.

These sections have been removed due to confidentiality. Requests for more detailed information can be sent to io@rvo.nl.

In the education sector, the School Enrolment Rate (UNICEF 2017) is 72% for girls and 83% for boys. Only 34% of children (31% girls, 42% boys) enrolled in primary school have completed the cycle; and only 14% of women (42% men) are literate. Thus, primary education is not provided for all, and the goal of universality is clearly not achieved.

At the level of job opportunities, it should be noted that the structures of the Nigerien economy are rigid and not conducive to the promotion of sustainable and massive job creation. Job offers are often characterized in particular by massive underemployment (more than 750,000 people employed) and informality.

Taking into account all these constraints, the current employment market does not provide sufficient protection against poverty, seeing as more than 58% of the people actually employed remain poor.

In light of this information, Catalystas was able to observe several promising projects and programs in the field to stimulate the creation of youth employment. *These sections have been removed due to confidentiality. Requests for more detailed information can be sent to io@rvo.nl.*

B. Educational programs related to youth employment

The proportion of students in vocational and technical training compared to students in basic education has certainly increased sharply, from 15.5% to 25.57% between 2013 and 2015, which is excellent but still low in general terms. The low capacity of vocational and technical educational institutes partly explains these results.

A significant number of young people with secondary and higher education diplomas (7,300 as of 2009) are already unable to find jobs. Youth with low levels of education have an even higher chance of joining the population of underemployed in an informal sector with very low productivity and miserable wages.

i. Technical and vocational training (TVET)

The Nigerien government, through a three-year action program to promote youth employment in Niger (2010-2012), has proposed an inter-ministerial strategy to "promote the training and integration of at least 100,000 young people from 2010 to 2012". Aimed at implementing the sectoral policy on technical and vocational education and training (TVET) adopted in March 2006, the Ministry in charge of this sub-sector drafted the "Program for the Modernization and Development of TVET, (PMD/EFPT)".

Since 2008, the AfDB, Luxembourg Cooperation, and SWISSCONTACT have been Partners involved in financing and supporting the TVET sub-sector. Accordingly, basic cycles 1 and 2 are now supported by the development of the network of the College of Technical Education (CET) and the Centre de Formation aux Métiers (CFM) on the one hand, and, by

the vocational high schools, on the other hand. A network of information and career guidance platforms for young people is currently supported by SWISSCONTACT (European Union, Swiss Cooperation, and UNICEF programs). The National Youth Policy was updated in 2016 with the support of UNESCO, BREDA, and UNICEF, and is currently being adopted by the Government. This policy first and foremost enshrines the need to take up the challenge of the socio-economic integration of young people in relation to SDG 8. A regional operational plan for the implementation of this policy has already been drawn up by the various local versions of the National Youth Council (CNJ).

During the elaboration in 2013 of the Education and Training Sector Program (ETP), the strategies defined in the LDC/EFPT were revised. On the basis of the potential demand estimated for 2010 (91,700 young people), then projected for 2016 (229,000) and 2024 (more than 504,000 young people), the PSEF forecasts that about one-sixth of these numbers will be received in training. With regard to enrollment: out of a total enrollment of 187,838 TVET students in 2014-2015, 151,621 were enrolled non-formal training (non-degree) TVET, and 36,217 students, including 18,301 girls - with a parity index of 1.02 girls to boys in the formal TVET program (STATISTICAL ANNUITY _MEPT_2014_2015).

Based on field observations as well as documentary research, Catalystas believes that the TVET sector will need to reform itself to facilitate the response to the potential demand for youth job niches and to be linked to the professional integration of students leaving TVET programs. There is a need to determine effective ways of operating the various processes and opening up the sub-sector's field of action to training related to other productive sectors and economic actors. As an illustration, Catalystas emphasizes the significance of and employment potential for youth and women in the processing of fresh milk, moringa, onion, peanut, and mango agricultural products. This also applies to food sectors such as bakery, pastry, and beverage distribution such as milk and fresh juice.

[REDACTED]

ii. Sponsors and private training programs

At the local level, there are only a few private training programs, most of which are provided by local firms or NGOs, such as: Maradi Association Epp, Groupement Munyukura Mu Samu, Nigeteche, Ong Cecit, Ong Mica, Ong Rail Niger, Ong Salsani, Ong Sacred, and Ong Tattali. In addition, job search strategies consist of helping those unemployed to find a job through the use of family relationships or ties other than formal institutions, mainly due to the lack of information on these institutions.

During the Catalystas mission in Niger, we met interesting people and institutions who are committed to training young people in finding decent work in promising sectors. In this context, Catalystas suggests that the Dutch government/RVO facilitate specific vocational training actions. [REDACTED]

[REDACTED] For a more complete list of stakeholders, reference is made to the [REDACTED] list of stakeholders (Appendix B).

C. International and bilateral efforts in the area of youth employment

The main bilateral and multilateral donors implementing projects and programs in this field are GiZ, Lux Development, SDC, Swiss Contact, Oxfam, SNV, Agriprofocus, Mercy Corps, World Bank, IOM, and the European Union.

These sections have been removed due to confidentiality. Requests for more detailed information can be sent to io@rvo.nl. The stakeholders with whom Catalystas was able to exchange views are available on the [REDACTED] list of stakeholders (Appendix B).

V. Regional situational analysis of youth employment and overview of the agricultural sectors by region (Niamey, Maradi, Tahoua)

In summary (see above): the agro-silvo-pastoral sectors employ 82% of the active population. In Niger, the agricultural sector is still archaic and the population within this activity is often very poor. Most of the production (85%) is for self-consumption. The main obstacles regarding the development of the agricultural sector are: the low volume of private investment in agriculture; the archaic way in which agriculture is conducted; and the absence of a sector and a formalized value chain for large-scale production.

Faced with these challenges, the Nigerien government is actively pursuing the implementation of the 3N Initiative: "Nigériens Feed Nigériens" (« Les Nigériens Nourrissent les Nigériens »), which is an example of success and good practice in the field of food security and agricultural development. The objective of this Initiative is to strengthen national capacities for food production, supply, and resilience to food crises and natural disasters.

Security problems in the regions have an impact on market activities in Niger. The insecurity caused by Boko Haram in the Lake Chad region has disrupted the functioning of agricultural markets, including the markets in the capital Niamey and in Maradi.

The main agricultural products of the country and the areas already identified by the Dutch government / RVO are: millet, sorghum, cowpeas, and groundnuts. Some cotton is produced further south in the Sudanese zone. Depressions created by old or recent rivers are used for market gardening (tomatoes, onions, etc.) or fruit trees. Rice is grown around the Niger River. Other minor crops are sugar cane, maize, cassava, and sweet potato.

Agricultural production mainly for subsistence purposes:

Maradi: Millet, Sorghum, Corn, Cowpea, Voandzou, Gombo, Manioc.

Tahoua: Millet, Sorghum, Corn, Cowpea, Voandzou, Gombo.

Niamey: Peanut, Sorghum, Cowpea, Mil..

The main donors (and their programs) in this field are: the World Bank Group; MCA; USAID Development Aid Agencies; AFD; SNV; and UNDP. Very recently (8 July 2019) a vast training program for 100,000 young people in the Sahel was launched in Niamey.



A. Niamey

As the national capital, the city of Niamey is the main commercial and administrative Centre and is home to most of the country's industries. It is the most populated city, with a population of 1,026,848 as of 2012 (49.78% male and 50.22% female). The Niamey region is a megalopolis, depending mainly on the import of food products, and exporting almost nothing to the outside world. Various products from all regions of Niger are transported to the capital of Niamey, such as cereals, tubers, sugar cane, groundnuts, moringa, onions, garlic, and potatoes.

Youth Education and Employment

In 2015, Niger had about 3.5 million young people aged 15 to 24. In principle, a large proportion of this age group should be in school or university, with only a minority entering the labor market. As school attendance declines gradually with

age, it can be estimated that some 2.4 million jobs would be needed to fully meet the expectations of this current 15-24 year old cohort.

The region of Niamey remains the driving force behind the other regions in terms of coverage and access to school. Indeed 79.7% of the establishments are located in urban areas, which implies easy access. Niamey ensures almost equality between girls and boys with a fairly developed private education (one student out of four comes from the private education sector). The regional education system is in line with the national system, which is characterized by a pyramidal structure with three levels of education: primary, secondary, and higher/tertiary. The duration of the cycles is six (6) years for primary, four years (4) for lower secondary and three (3) years for upper secondary. In addition to these three levels of education, there is pre-school education, which was introduced in 1977 and concerns only urban centers. In terms of illustrative figures, the enrollment rate in secondary education in the academic year 2016-2017 was 74.4% (boys 72.2%, girls 76.4%, Source: Regional Directorate of Secondary Education).



It is primarily the Luxembourg Cooperation and SWISSCONTACT that are the partners involved in the financing and support of this TVET sub-sector. Cycles 1 and 2 are supported by the development of the network of the Academy of Technical Education and the Center for Training Trades, on the one hand, and vocational schools, on the other hand. A network of information and vocational guidance platforms for young people is currently supported by SWISSCONTACT (European Union, Swiss Cooperation, and UNICEF Programs).

Security threats and obstacles

Security problems in the regions have an impact on market activities and humanitarian conditions in Niger. The insecurity caused by Boko Haram in the Lake Chad region has disrupted the functioning of agricultural markets, including the market in the capital Niamey.

As highlighted by the FAO Information and Early Warning System regarding Niger: "Insecurity and the effects of the state of emergency will continue to hamper the movement of people and goods and access to some markets and areas with high pastoral production potential. This can lead to food and nutrition difficulties for poor and very poor households. According to the Regional Office of Civil Status, Migration, and Refugee Affairs, in November 2018, approximately 300,000 people were displaced, including approximately 51,900 internally displaced persons in Tahoua and Tillabery Regions" (FAO GIEWS, 2018).

Challenges for Youth

Many unemployed youths have to search for job opportunities in the cities, especially Niamey, which currently has neither the infrastructure to accommodate nor the jobs to offer them. Others seek employment through emigration. The existence of a large number of unemployed young people is a major political and social risk factor.

Identification of the major sectors within the Agricultural Market

The Niamey region is a land of cultivation for a variety of products. The most important products or cash crops intended for processing or export are onions, cowpeas, souchet, sesame, arabic gum, meat, hides, and skins. In order to remain competitive, Nigerien products must meet international requirements for food safety and quality, market needs, and prices, which is a challenge for the country.

Various products from all regions of Niger are transported to the capital of Niamey, such as cereals, tubers, sugar cane, groundnuts, moringa, onions, garlic, and potatoes.

The basic alimentation in Niamey consists of the following products: rice, corn, millet, and sorghum. In the peri-urban area, there is production of fresh products and dairy products intended exclusively for the Niamey market. Champions in vegetable production are tomatoes and lettuce. Recently, there has also been a significant development of poultry farming in peri-urban areas (mainly egg production).

B. Maradi

The Maradi Region is located in the south-central part of Niger. It is bordered to the east by the Zinder Region, to the west by the Tahoua Region, to the north by the Tahoua and Agadez regions, and to the south by the Federal Republic of Nigeria. Maradi is the economic capital and the largest economic center in the country. It owes its development to its strategic position on the main road linking the country's largest cities, Niamey and Zinder.

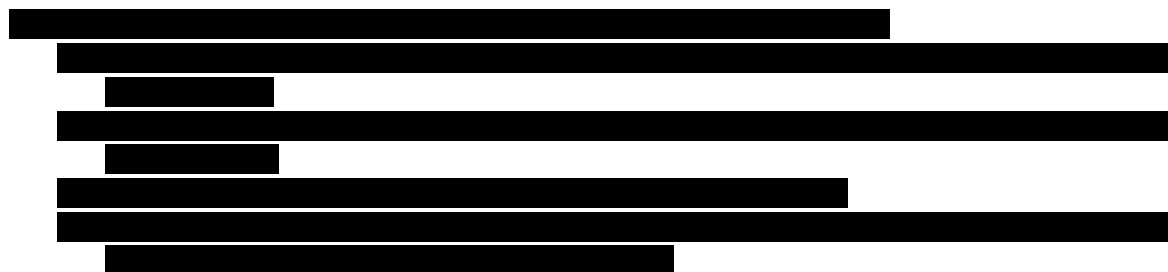
Regarding the demographic aspect, Maradi remains the most populated region in Niger, with an estimated population of 3,678,028 inhabitants as of 2015. An important factor is that the majority of the region's population (2,747,666 people as of 2012) reside in rural areas (85.4%). With regards to age distribution, there is a high proportion of young people (54.7% of the population under 15 years of age). This high proportion of youth is associated with an increase in certain social needs such as education, health, and especially employment.

In terms of poverty, the results of the ENBC 2007/2008 rank the Maradi region as the poorest region in Niger. These results show that 79.7% of the population of the Maradi region lives below the poverty line compared to 59.5% at the national level.

Youth Education and Employment

Maradi is the economic capital and the largest economic center in the country. It owes its development to its strategic position on the main road linking the country's largest cities, Niamey to Zinder. According to the 2012 census, there are 267,249 people living in the area (51.28% male and 48.72% female).

Maradi is above all a trading city that acts as a hub for its inland economy in the trade of agricultural products and commodities. Moreover, its geographical location makes it a border city: Nigeria is only about forty kilometers away and Kano is hardly more than three hours away by road.



It is primarily the Luxembourg Cooperation and SWISSCONTACT that are the partners involved in the financing and support of this TVET sub-sector. Cycles 1 and 2 are supported by the development of the network of the Academy of Technical Education and the Center for Training Trades, on the one hand, and vocational schools, on the other hand. A network of information and vocational guidance platforms for young people is currently supported by SWISSCONTACT (European Union, Swiss Cooperation, and UNICEF Programs).

Security threats and obstacles

Imminent security threats are emerging in the Maradi region, due to the proximity of the border with Nigeria and the existence of armed groups. During our mission, there were incidents over contested legislation for religious tolerance. Individuals wanting to "defend" an anti-Christian adjudicate set fire to a church.

Challenges for Youth

From the economical point of view, in the region there is still potential to be exploited for the processing of onion, tomato, pepper, mango, sesame, souchet, milk, and meat (Tessaoua kilichi) as well as leather and skins, including those in demand from the red goat of Maradi.

It should be noted that there is a strong potential for processing groundnuts into oil, which explains the existence of Niger's only oil mill in Maradi, "OLGA OIL", which is currently unable to satisfy national demand. It is regrettable that this oil mill has recently announced it will be closing its doors, due to strong competition from 'Nigeria's neighbors' and Nigerien consumers' preference for foreign products.

Identification of the major sectors within the Agricultural Market

The basic diet in the Maradi region consists of the following products: millet, sorghum, cowpeas, corn, rice, moringa. There is a high production and consumption of groundnuts (especially processed products), souchet, and sesame. As far as small ruminants are concerned, it should be noted that Maradi is the famous home of the red goat. These goats play an important role in the rural household economy for milk and skins. The Maradi red goat is improving the lives of family farmers, stimulating local economies, and making better nutrition more accessible. These native livestock species are becoming easier and more profitable to raise. Fresh products (pepper, tomato, cabbage, melon, watermelon, and cowpeas) are also produced in the region.

Cereals and market garden products are exported to other regions (Agadez, Niamey, and Diffa). Cowpeas, moringa, and groundnuts are also exported to other Nigerien areas. Part of the local production of millet, Tiger Nuts, and fresh products (peppers, tomatoes, and cabbage), and live cattle, is exported to Nigeria. Moringa is exported to China, Morocco, Algeria, and Saudi Arabia.

C. Tahoua

Tahoua is the fourth largest city in the country, with a population of 149,498 (49.56% male and 51.44% female). It is a crossing point on the route that connects the cities of the east and southeast to the cities of the north, a position that has enabled it to become an important economic center throughout the country. Finally, given the reputation of the Tahoua region, which is associated with a relatively high rate of immigration (national and international), there are various measures - such as the provision of loans to young people - to discourage rural emigration and create the conditions for urban emigration. This aims to reduce urban unemployment and rural underemployment.

Youth education and employment

The Tahoua region is an agro-pastoral area and livestock farming is highly developed for meat production (cattle, sheep, goats, and camels) and milk production (cattle and camels). Also of interest are important mining sites that can generate sustainable employment, such as coal and phosphate. Crafts are also very developed and tend to take on an importance that should not be neglected in the environment of the Tuareg and Fulani ethnic groups.

[REDACTED]

The Luxembourg Cooperation and SWISSCONTACT are the primary partners involved in the financing and support of this TVET sub-sector. Cycles 1 and 2 are supported by the development of the network of the Academy of Technical Education and the Center for Training Trades, on the one hand, and vocational schools, on the other. A network of information and vocational guidance platforms for young people is currently supported by SWISSCONTACT (European Union, Swiss Cooperation, and UNICEF Programs).

Security threats and obstacles

There are security measures in place for local/expatriate staff of international agencies travelling to the Tahoua region. There is no unescorted passage through the red zones in the regions of Tillabéri, North Tahoua, Diffa, and Agadez. This affects the operational exploitation of value chains, especially for transportation and marketing chains; for example, there are strong restrictions on the passage of motorcycles, which is nevertheless the means of transportation for most family farmers in their activities to access local markets. This aggravating situation of insecurity also affects men and women in their freedom of movement in general, including access to schools, shops, and more.

Challenges for Youth

The fight against environmental degradation: the sustainable security of agricultural activities requires more proactive environmental protection actions to reverse the degradation of natural capital (agricultural land, pastures, forests, water resources).

The Tahoua region can provide opportunities for the creation of mini farms and mini dairies; three sectors with clear comparative advantages: onions, cowpeas, and peppers. In addition, arabic gum can also eventually lead to the establishment of a pre-export processing plant, which could generate added value through the decent and sustainable jobs generated.

In onion conservation: the ANPIP/INRAN experiment attempted was positive to the extent that in the Gindan IDER area, out of a production of 20 tons, a loss of less than two (2%) percent was observed, whereas losses usually amount to around 10 to 15% using conventional methods. The conservation effect results in a gain of at least 20,000f per bag from the harvesting period to the seasonal selling period, two or three months later.

Identification of the major sectors within the Agricultural Market

The basic diet in the Tahoua region consists of the following products: millet, sorghum, and imported corn. Livestock production is highly developed for both meat production (cattle, sheep, goats, and camels) and milk production (cattle and camels). It should also be noted that there are large onion production basins, and tomatoes, potatoes, manioc and sweet potatoes. The importation of cereals comes from the regions of Dosso, Maradi, and Zinder. Sugar cane is also imported from the Dosso and Zinder regions.

VI. Five recommended value chains

The country's agricultural exploitations are often of modest size, and family based. They produce several commodities, depending on the season. When considering promising value chains, these local and regional specificities must be taken into account. Indeed, there is a risk in encouraging the specialization of farms on a single product, as was often done during colonization. The soils exploited in this way often tend to become poorer, and in addition, make families extremely vulnerable to external factors such as fluctuating prices or an invasion of pests, for example. A reflection on synergies and complementarities between value chains, or a vision in terms of a "product basket" is therefore to be recommended. In the same vein, the development of the "shared economy", for example by developing a common pooling of means of production, processing infrastructures, processing product packaging and packaging lines, and marketing activities, is extremely relevant.

In order to identify a number of agricultural value chains with high potential for positive impact from Dutch investment and support initiatives, our scoping mission examined various agricultural products available in the three target areas. By interviewing local suppliers, business managers, groups and cooperatives, civil servants and international actors, while taking into account the political objectives of the Dutch government, we were able to select some value chains of choice that could greatly benefit from the continuation or expansion of existing programs with support from the Netherlands.

These value chains are :

- Dairy products (Niamey, Maradi, Tahoua)
- Onions (Niamey, Tahoua)
- Mango (Niamey)
- Groundnuts (Niamey, Maradi)
- Moringa (Niamey, Tahoua)

Although this list is not exhaustive and there are many other investment options, our research suggests that these sectors would greatly benefit the people of Niger as well as helping the national economy, in achieving its economic growth objectives while contributing to SDGs 2, 4, 5, and 8.

We also aimed to ensure that we chose value chains with ample opportunity for expansion or support of existing programs which provide both opportunities for partnership as well as lessons learned, in addition to matching labor market needs with identified gaps in skill sets and expertise. Finally, we endeavored not to contribute to oversaturation of any one sector, to avoid the risk of economic under-diversification, and to keep in mind the environmental impact of cultivation and production with both economic and environmental sustainability as a main goal.

Refer to [REDACTED] **Appendix E: Recommended Value Chains, for information on the value chains studied during this mission.**

VII. Recommendations for the Dutch Government

These sections have been removed due to confidentiality. Requests for more detailed information can be sent to io@rvo.nl.



RVO Scoping Mission Report: Niger

List of Acronyms

ACP	Africa, the Caribbean, and the Pacific
AfCFTA	African Continental Free Trade Area Agreement
AfDB	African Development Bank
AFN	Association des Femmes du Niger
ANSI	l'Agence Nationale des Systèmes d'Information (ANSI)
ANPE	Nigerien National Employment Agency
APEJ	(National) Agency for Youth Employment
ARM	Agence de Régulation Multisectorielle
ASP	Agro-Silvo-Pastoral
AU	African Union
AVCN	National Agency for Verification of Compliance with Standards
BAGRI	Agriculture Bank
BCEAO	Central Bank of West African States
BDRN	Development Bank of the Republic of Niger
BRMN	Office of Modernization and Restructuring
CERPOD	Center for Studies and Research on Population for Development
CFA/fCFA	(Central) West African Franc
CFFP	Center for Training and the Promotion of Women
CFPT	Professional and Technical Training Center
CGE	Accounting and Business Management
CMCAN	Center of Leather and Art Trade of Niger
CNCA	National Credit Agricole Fund
DDE	(Dutch) Sustainable Economic Development Department
DEFTP	Department of Education and Vocational and Technical Training
DEFTPP	Department of Private Vocational and Technical Training
DEP	Department of Studies and Programming
DGEF	General Directorate of Teaching and Training
DGOIP	Directorate General of Professional Orientation and Integration
DIEP	Infrastructure and Pedagogical Equipment Department
DIFPS	Direction of Insertion and Financing of Outgoing Projects
DMP/DSP	Directorate of Public Procurement and Public Service Delegations
DOSP	Directorate of Orientation and Professional Training
DREP/T	Regional Directorate of Technical and Vocational Education and Training
DSCN	Directorate of Statistics and National Accounts
DSO	(Dutch) Social Development Department
DSH	(Dutch) Department for Stabilisation and Humanitarian Aid

ECOWAS	Economic Community of West African States
ECVMA	National Survey on Living Conditions of Households and Agriculture
EDS	Demographic and Health Survey
EDSN-MICS	Demographic and health survey and multiple indicators of Niger
EJOM	Développement de la chaîne de valeur et emploi des jeunes
ENABEL	Belgian Development Agency
ENBC	National Survey on Budget and Consumption
EPA	Economic Partnership Agreement
EU	European Union
FAFPA	Fond d'Appui à la Formation Professionnelle et l'Apprentissage
FAFPCA	Fonds d'Appui à la Formation Professionnelle Continue et à l'Apprentissage
FAO	Food and Agriculture Organisation (UN)
FOPROR	Rural Professional Training
GDP	Gross Domestic Product
GIZ	Deutsche Gesellschaft für Internationale Zusammenarbeit
GNP	Gross National Product
HDI	Human Development Index
ICRA	International Center for Development Oriented Research in Agriculture
ICRISAT	International Crops Research Institute for the Semi-Arid Tropics
IDP	Internally Displaced Person
IEC	Information Education Communication
IFDC	International Fertiliser Development Center
ILO	International Labor Organization
IMF	International Monetary Fund
IOM	International Organization for Migration
IHPC	Harmonized Index of Consumer Prices
ILRI	International Livestock Research Institute
Lux Dev	Luxembourg Development Agency
MA/E	Ministry of Agriculture and Livestock
MEP/A/PLN/EC	Minister of Primary Education, Literacy, Promotion of National Languages and Civic Education
MES/R/I	Ministry of Higher Education, Research and Innovation
MEPT	Ministry of Technical and Vocational Education
MES	Ministry of Secondary Education
M/F	Ministry of Finance
MFA	Ministry of Foreign Affairs
MFP/RA	Ministry of Public Service and Administrative Reform
MMD	Matu Masa Dubara
MPF/PE	Ministry of Women's Empowerment and Child Protection
NEPAD	African Union's New Partnership for Africa's Development
NNN / 3N	Nigeriens Nourishing Nigeriens
NIGELEC	Société Nigérienne d'Electricité (Nigerian Electricity Company)
NIGETIP	Nigerien Public Works Agency for Employment
NIG-017	Programme Coopération Niger - Luxembourg N°017
NGO	Non-Governmental Organization
NZO	Dutch Dairy Association

OECD	Organisation for Economic Co-operation and Development
OEC	Observatory of Economic Complexity
OHADA	African Organization for the Harmonization of Business Law
MDG	Millennium Development Goals
NEP	National Employment Policy
PAP	Priority Action Plan
PADE / FPT	Programme d'Appui au Développement de l'Enseignement et de la Formation Professionnels et Techniques
PAFHa	Projet d'Appui à la Filière Halieutique
PPP	Public-Private Partnership
PAIPCE	Programme d'Appui à l'Initiative Privée et à la Création d'Emplois
PAS	Programmes d'Ajustement Structurel
PDDE	Ten-year Education Development Program
PDES	Economic and Social Development Plan
PIJD	Graduate Youth Integration Program
PISI	Integration Program in the Informal Sector
PPA	Parité de Pouvoir d'Achat
PNPS	Politique nationale de protection sociale
PRC	Long-term Unemployed Reconversion Program
PRODEC	Projet de Développement des Compétences pour soutenir la Croissance
RECA	Network of Chambers of Agriculture of Niger
RESAEN	Network of Support Structures for Entrepreneurship of Niger
RGP/H	General Census of Population and Housing
RNDH	National Report on Human Development
SME	Small and Medium Size Enterprise
SDG	Sustainable Development Goal
SDR	Rural Development Strategy
SDRP	Stratégie de Développement accéléré et de Réduction de la Pauvreté
SGBV	Sexual and Gender-Based Violence
SNV	Netherlands Development Organisation
SONIBANK	Nigerian Bank Corporation
SONICHAR	Société Nigérienne du Charbon(Nigerian Coal Company)
SRP	Poverty Reduction Strategy
TFP	Technical Financial Partner
TIFA	Trade and Investment Framework Agreement
TVET	Technical and Vocational Education and Training
UAM	Abdou Moumouni Niamey University
UI Say	University of Islamique de Say
UM	University of Maradi
UNICEF	United Nations Children's Fund
UT	University of Tahoua
WEAMU	West African Economic and Monetary Union
WFP	World Food Programme
WIA	Women in Africa

Appendix B: List of Stakeholders for Niger

City	Name of the Structure	Website
POLICY Government		
Niamey	Ministère du Commerce	
Niamey	Ministère du Travail	
Niamey	Ministère de l'Agriculture de l'Élevage	
Niamey	Ministère de l'Entrepreneuriat des Jeunes	
Niamey	Ministère de la Promotion de la Femme	
Niamey	Ministère de la Jeunesse et des Sports	
Niamey	Haut Commissariat Initiative 3 NNN	http://www.initiative3n.ne
Niamey	ANPE agence nationale de la promotion de l'emploi	http://www.anpe-niger.ne/
Niamey	Ministère de l'économie et des finances	http://www.finances.gouv.ne/
Niamey	FAFPA (Fonds d'Appui à la Formation Professionnelle et à l'Apprentissage)	https://www.fafpa.net/
Niamey	DAC/POR action coopérative	
Niamey	Ministre d'État, Ministre du Plan, de l'aménagement du territoire et du développement communautaire de la République du Niger	
Niamey	CCIAN Chambre de Commerce (Maison de l'Entreprise)	http://www.mde.ne/
Niamey	RECA Réseau National des Chambres d'Agriculture du Niger	http://www.reca-niger.org/
Tahoua	CRA Conseil Régionale d'Agriculture	
Tahoua	Chambre de Commerce et d'Industrie	
Maradi	Conseil Régional de Maradi	
Maradi	Regional Governor Maradi	
Tahoua	Direction de l'Elevage	
Tahoua	Conseil Régional de Tahoua	
Tahoua	Ministère de la Formation Professionnelle	
Tahoua	Regional Governor Tahoua	

HUMAN CAPITAL		
Niamey	African Development University	
Niamey	UASTM	
Niamey	SAFEM Salon de l'artisanat pour la femme	http://niger.areva.com/EN/niger-321/salon-de-lartisanat-pour-la-femme.html
Maradi	Leadership Challenges	
Maradi	Swiss Contact- Fédération des Coopératives Maraîchères du Niger- FCMN Niya	www.swisscontact.org/fr
Maradi	AREN Association pour la Redynamisation de l'Elevage du Niger	
Maradi	Femmes productives, FGD Fagagaou (MMD group Matsiga)	
Maradi	Femmes productives, FGD Giran Dawaye	
Tahoua	Leadership Challenges	
Tahoua	Associations des Femmes Walwala	
Tahoua	CIPMEN	
Tahoua	GIE groupe d'intérêt économique Kossom	

SUPPORT STRUCTURES		
Niamey	CIPMEN (Centre Incubateur des PME au Niger)	www.cipmen.org
Niamey	Université Abdou Moumouni, incl. centre d'incubation	www.cipmen.org / www.sahelinnov.org
Niamey	DC Coworking	
Niamey	L'Oasis, EmpowerHer	www.loasis-ne.com
Niamey	Cabinet AccEntrepreneur	
Niamey	2M Invest Mata Matassa	www.2mi-sa.com

Experts		
Niamey	Amza Tahirou	
Niamey	Ouma Kaltoume Issoufou	

Donors (multilateral & bilateral)		
Niamey	World Bank	
Niamey	Délégation de l'Union européenne en République du Niger	
Niamey	GIZ	www.giz.de
Niamey	USAID	
Niamey	NORAD	
Niamey	Coopération Suisse	
Niamey	EIB	
Niamey	AFD	
Niamey	Enabel Niamey	
Niamey	Ambabel	
Niamey	AFP-PME	
Niamey	Millenium Challenge Account US	
Niamey	Coopération Danoise	
Niamey	Coopération Espagnole	
Niamey	Lux-Development	www.luxdev.lu https://niger.luxdev.lu/fr/activities/project/NIG/025
Niamey	IFDC	www.snv.org
Niamey	2 SCALE (SNV & IFDC)	niger@snv.org
Niamey	SNV	
Niamey	PASEC	
Niamey	PRODEC	

NGOs		
Niamey	Plan International	
Niamey	Caritas	
Niamey	Agriterria via Trias	
Niamey	Croix Rouge Belgique	
Niamey	CARE Niger	www.care.org
Niamey	CISP (ONG Italienne)	
Niamey	Mercy Corps	
Niamey	Oxfam	
Niamey	Swisscontact	https://www.swisscontact.org/en/home.html

Multilateral Organizations		
Niamey	PNUD (UNDP)	
Niamey	ILO	
Niamey	BAD	
Niamey	IOM	
Niamey	FAO	
Niamey	FIDA	https://reliefweb.int/report/niger/le-niger-reoit-un-financement-du-fida-pour-appuyer-les-petits-agriculteurs-familiaux
Niamey	PAC 3	
Niamey	OCHA	

Technical Vocation Educational Training Centers or Job Training		
Tahoua	Direction de formation professionnelle et technique	

Networks of entrepreneurs / organizations / Business promoters		
Niamey	Réseau AgriProFocus (SNV)	
Niamey	Confédération cooperative paysanne horticole du Niger	
Niamey	Réseau Femmes émergentes (Ambassade des USA)	https://ne.usembassy.gov/fr/grace-a-lambassade-americaine-deux-groupes-de-femmes-entrepreneures-sepanouissent/
Niamey	FUCOPRI (faitière sur le riz)	
Niamey	AFJ (Afrique Fondation Jeune)	http://ne.viadeo.com/fr/profile/ousmane.dantata
Niamey	CNJ (Conseil National de la Jeunesse)	
Niamey	JCI (Jeune Chambre Internationale)	
Niamey	Centre Agroécologique de Productions Intégrées et de Formation en Agrobusiness/ Agro InnoveInspire	

MARKETS		
Niamey	Achats Service International S.A.	https://www.netherlandsandyou.nl/your-country-and-the-netherlands/niger/about-us/honorary-consulate-in-niger
Niamey	Niger Lait	
Niamey	Laitière du Sahel	
Niamey	STA (Société de Transformation Agroalimentaire)	
Niamey	Niger Business Angels Network	
Niamey	Avi Niger	
Maradi	Femmes émergentes, coopérative 'babyfood'	
Maradi	SIFA, site intégré de formation agricole, accompagné par Swiss Contact	
Maradi	Groupeement de femmes qui transforment moringa, FGD Giratawa	
Maradi	CRA Chambre régionale de l'Agriculture Maradi	
Maradi	Cabinet Sahel Bio	
Maradi	Maradi Guest House	

FINANCE		
Niamey	BCEAO	
Niamey	SONIBANK	
Niamey	BAGRI	
Niamey	Proxifina Niger SA	

CULTURE		
Niamey	Impact Com. Media Business Challenge	www.businesschallengeniger.com

Appendix E: Analysis of Recommended Value Chains that Promote Youth Employment in Niger

Region	Dairy Products	Moringa	Peanuts	Onions	Mango
Niamey	X	X	X	X	X
Maradi	X		X		
Tahoua	X	X		X	

Summary table of sectors with employment, income or income-generating activities by region and ranked according to their importance; the stars are understood according to the following legend:

**** : very strong
 *** : strong
 ** : average
 * : weak

Sectors	TAHOUA	MARADI	Urban Center NIAMEY
<u>Agropastorales industries</u>			
meat/milk	****	***	*
onion	***	**	-
peanuts	**	***	-
Nutsedge	*	****	-
sesame	*	***	-
black-eyed peas/beans	**	****	*
peppers	**	**	*
cotton	*	**	**
fruits/vegetables	**	**	-
Cassava	**	***	-
Sugar Cane	*	*	-
Arabic Gum	**	**	-

In the following chapters, Catalystas Consulting first describes the sectors considered as promising in terms of job creation among young people, then briefly explains the reason for not covering the other sectors which, nevertheless, would deserve more in-depth study.

1. Recommended value chain: dairy products in the Niamey, Maradi and Tahoua regions

1.1 Overview

The area of milk production in Niger is quite substantial because it covers several regions simultaneously. Taking part in milk production also offers the opportunity to replicate the best cases in other regions of Niger (strong capacity for scaling). However, a large percentage of the dairy products consumed in the country are imported, with powdered milk coming from France being the cheapest, and only increasing steadily.

Milk is an important source of protein in sub-Saharan Africa. Livestock, and milk in particular, is thus a major contributor to food and nutrition security (FAO, 2016). Consumption surveys conducted in Niamey indicate that more than 99% of households consume dairy products, and 67% of them consume it every day.

In nomadic areas, milk is the most essential staple diet of the Peul, Tuareg, Arab and Toubou populations. Nevertheless, urban populations consume more milk than settled rural ones but less than nomadic populations. In agricultural areas, settled rural populations use milk as a supplementary food either in kind or diluted in a *boule* (a dish prepared from millet or sorghum).

Even though consumption of milk per capita has declined in Niger, general demand is slowly increasing under the influence of population growth.

A 2016 FAO study, milk production would reach 500 million liters per year in Niger by 2020. while the milk production potential according to statistics from the Ministry of Livestock, exceeds 1 billion liters according to female lactation rates of 15% for cattle, 30% for sheep, and 35% for goats. However, this potential has not yet been fully exploited, as not all quantities produced are collected or processed, and only a small proportion of urban and semi-urban production (around 300,000 to 500,000 tons) is collected to be sold directly to consumers or to mini-consumer dairies.

1.2 Obstacles

During the Catalystas Consulting mission, and particularly during our interview with the group GIE Kossom in Tahoua, as well as with Mrs. Zeinab, the CEO of NigerLait [REDACTED], we learned that there are several obstacles in terms of youth job creation in this otherwise leading sector:

- There is a real need to improve the quality of milk on the market by improving milk hygiene, by improving quality control in order to boost consumer trust in Local milk rather than imported milk powder.
- There is a demand for diversifying the range of products on the Nigerian market (milk bi-products)
- In view of the large gap in the volume of milk production, a volume increase would be necessary, especially through improving the productivity of the herds by aiding the producers' supply with zootechnical inputs (cattle feed, veterinary products).
- The processing of fresh milk requires specific equipment, such as a milk collection station, motorbikes for milk collection, a tricycle for milk delivery, equipment for preserving milk for the collection phase, etc; in lacking the resources and infrastructure to maintain it, a decent amount expires during delivery.
- When it comes to storing fodder, the lack of infrastructure and sheds leads to shortages of milk during the dry season.
- Infrastructure that allows for the transport of milk is nonexistent or dilapidated which poses problems for local producers to be able to package, quality control and distribute their milk and milk products to urban areas where there is greater market demand.
- A business plan and collection schedule are necessary to properly measure the balance between supply and demand.

The largest obstacle is the low price of large quantities of powdered milk exported by industrialized countries to, among others, Niger. This unfair competition with the fresh milk of Nigerian producers is often cited as an example of a region of the world where imports of powdered milk have severely destroyed the local markets. Even more specifically, West Africa imports more than 2 million tons of powdered milk a year, mainly from New Zealand and the European Union. The fact that these products are cheap and deemed more reliable prevents the development of local milk production in these countries.

Hence, the potential of the milk sector in Niger is overshadowed by the price difference in local and external production¹. This price difference comes from the fact that the producers benefiting from financial assistance have larger farms and meet as a cooperative, thus reducing their production and transport costs. Additionally, local cow breeds produce, on average, 2- 7 times less milk than European dairy cow breeds.

Furthermore, there is no incentive for local governments to improve the milk production because they are disincentives by the detrimental trade agreements with the EU that removed the 5% tax tariffs on imports including powdered milk (which undercuts the local product and makes it uncompetitive).

Catalystas identified a number of major constraints on local milk value chains:

1. The low levels of output from the cow; due to breed as well as outdated milking methodologies, producing half of what a European cow and milk facility would.
2. The extensive amount of product loss due (over 99% of milk in Niger is consumed at a very local level) and does not make it to the broader cities markets, due to the lack of processing and distribution infrastructure.

¹ About 95% of commercial milk is imported as powdered milk. Powdered milk costs about 250 FCFA (€0.23) per liter, while fresh milk produced in Niger costs about 400 FCFA (€0.60) per liter. This huge difference in price means that powdered milk is dominated by imported powdered milk, with the exception of the niche market for high-end dairy products such as fresh milk, yogurt and cheese, which cannot be created from powdered milk.

3. Only 5 milk collecting centers have been established in the country, improving the livelihoods of cowherds in a radius of 30- 40 kilometers from the center. If collection services are available, then in the morning² milk collectors go by motorcycle to collect the milk product³with jerrycans.

4. There is a lack of electricity throughout the country which especially affect dairies, who if they do have processing machinery become subject to power outages on production lines and storing to keep milk cold. Often the inconsistency of electricity causes entire batches of milk and milk bi-products to spoil and to be discarded.

5. Reliable supply of milk is seasonal variability. During the dry, hot season (April to June), dairy production can fall by two-thirds due to lack of feed and pastoralists moving to more fertile areas during this season.

Finally, it's important to note the role of the Milk Collection Centres which are run as cooperatives, pursue margins high enough to sustain themselves, though making a profit is not their primary goal. These centres not only collect and process milk but also provide vaccination services and other veterinary services, hygiene training, and sell animal feed at the lowest market price (5,000 FCFA per bag), making them the most important stakeholder to work through and within improving most parts of the milk value chain.

1.3 Involved actors

Location	Actors
Niamey	<ul style="list-style-type: none"> Concerning milk-derived products (yogurt, cheese, butter etc.) produced by dairy companies such as Niger Lait SA, Solani, Laban, Tarmamoun Ader etc. Producers and processors [Solani, mini-dairies, FEPPEN (Fédération des femmes pasteurs et éleveurs du Niger), PROLAIT]
Maradi	<ul style="list-style-type: none"> Collection center supported by Oxfam
Tahoua	<ul style="list-style-type: none"> The Belgian PRADEL projet de l'Agence de Développement Enabel operates in Tahoua for the profit of livestock raisers for milk as well as to improve various links in the dairy product value chain.

The dairy sector is organized fairly well. Apart from the dairy companies (which, for the most part, use imported flour and milk), there are several associations of breeders (umbrella organizations such as AREN, GAJEL FNEN, DADD0) and multiple development partners that support the growth of this sector under various angles of attack, the two most important being: (i) the organization of the market through setting up cooperatives or mini-dairies (SNV, Agriprofocus, Italian cooperation, ...), (ii) the supply of livestock feed (Enabel, ...).

1.4 Creating job opportunities for young people

Young people are involved at several levels of the dairy value chain production (breeding, maintenance, and milking). Young people and women are involved as breeders and employees of dairies, raw milk collectors, dairy sellers, and suppliers of inputs and miscellaneous services. Mini-dairies such as GIE Kossom in Tahoua employ young people who have motorcycles to pre-collect at the farmer level in the field. It should also be noted that women are very active in this sector; some mini-dairies such as "Kirkissoye" in Niamey are exclusively organized and ran by women. This sub-sector, from this angle, strongly contributes to the economic inclusion of young people and women.

More specifically, there are real opportunities for young women to process, package, distribute and sell dairy products that are not widely used in the Nigerian market, such as cheese, butter and yogurt. Similarly, Catalystas Consulting has identified job creation opportunities related to machine modernization, refrigerated milk collection and transportation (in operation and maintenance), as well as capacity building for the use of machines for processing or maintenance of cooling systems. Finally, as the case of NigerLait demonstrates (see Appendix B- List of Stakeholders), there are clearly job opportunities in

² The milk from the afternoon milking session is still used for personal consumption. The milk is transported to the milk collection centers, where it is tested for dilution with water (tested with a blue chemical compound for dilution) and temperature. If the temperature of the milk is too high, the milk is rejected. It is then stored in large containers, pasteurized at 80 ° C and finally transported to processing and packaging plants for milk, yogurts and cheese. The capacity is about 700 liters per day. This means that they collect milk from 100 to 200 cowherds a day who then receive 250 FCFA per liter.

quality control and phytosanitary standards, as well as marketing and advertising that encourage local consumption of fresh milk. In the medium term, together with actors such as RECA and the Regional Chambers of Agriculture, employment in this sector also relates to modern techniques of processing and producing milk-based bioproducts (milk, cheese, butter).

1.5 Involvement of young people and women

As in neighboring countries such as Burkina Faso and Mali, most of the milk is produced by women, particularly Fulani communities, which are highly involved in livestock farming and recognized as experts in the field. The dairy sector is mainly occupied by female entrepreneurs, such as the milk collection center built and equipped by WAAPP-Niger for the Habsou Lait de Chamelle company (see appendix C). In addition to the building, Habsou Lait de Chamelle also received aid in the form of support capacity. Milk is collected at a site located a few kilometers from Niamey, on the Say road in front of Yuri market. The decision of this site to collect camel milk is justified by the existence of many camel breeders in the area. The promoter talked about her business plan, and her ambitions to expand to other areas.

From the point of view of social and economic organization, milk is usually consumed in kind among pastoral populations (Fulani, Tuaregs and Arabs). Originally, regardless of ethnic group, milk management is the responsibility of women in pastoral farming. This management includes milking, the distribution of milk within the household for consumption, the processing of milk, and the barter of milk for cereals.

1.6 SWOT analysis

Cow milk: fresh milk, yogurt, butter, cheese

<p><u>Strengths</u></p> <ul style="list-style-type: none"> Potential of high nutritional value for infants Inclusive, high-participation women and youth sector Traditional and mostly natural products Several family farms involved Presence of a large national and sub-regional market 	<p><u>Weaknesses</u></p> <ul style="list-style-type: none"> Low structuring of marketing channels Insufficient storage structures Low processing capacity Low turnover of sector operators Specific equipment needed for milk processing and a collection center High price of the product on the market (contrary to imported alternatives) Lack of conservation methods Milking still done the traditional way Rarity of water for watering animals, especially in dry periods Not drilling availability during dry periods; Multiple conflicts between farmers and breeders Inadequate material for storage and milk manufacturing Transhumance of animals
<p><u>Opportunities</u></p> <ul style="list-style-type: none"> Strong scalability throughout Niger High added value through retail packaging High demand in the market (local production does not meet the demand) Existence of a sub-regional platform for promotion and advocacy of local milk (see Oxfam) Development of insemination techniques Possible development of public-private partnerships with mini-dairies Industrial slaughter and solar drying 	<p><u>Threats</u></p> <ul style="list-style-type: none"> Demanding and challenging hygiene standards Competitive price of powdered milk Strong foreign competition with mass production of powdered milk products Substantial irregularity of the supply of milk from nomadic farmers Climate change and possible reduced rainfall Liberalization policies in the commercial sector

1.7 Potential contributions and suggestions for the Dutch government/RVO

These sections have been removed due to confidentiality. Requests for more detailed information can be sent to io@rvo.nl.

2. Recommended value chain: moringa in the Maradi region

2.1 Overview

The moringa crop is a great opportunity for improving food and nutritional security of low-income consumers, thanks in particular to its accessibility of around 0.25 euro per kilo (400 FCFA per 2.5 kg cup according to the le Réseau des chambres d'agriculture du Niger). This in turn leads to a strong demand from the local market, always with a lower supply than the demand despite the high potential for development of this crop (Source RECA).

Moringa is subjected to processing (be it precooked, as an herbal tea, as infant flour for malnourished children, etc.). These initiatives can be developed and strengthened through Public Private Partnerships (PPPs) (the existence of several private micro-enterprises) that support the development of oringa production and processing. There is therefore the possibility of developing and collaborating with them.

The cultivation of moringa is strongly resistant to climate, it's production is both compatible with and very beneficial for the production systems. Nigerian producers combine moringa cultivation with several agroforestry techniques, in order to benefit their exploitation of its various beneficial effects on their crop systems.

The high nutritional value makes moringa a prominent choice among recommended products for dietary habits and balancing the energy and nutritional needs of the population. It is highly recommended by health professionals in the reversal of malnutrition in infants and children that suffer from nutritional deficiencies.

Therefore, it is necessary to introduce new processed moringa-based products of high nutritional value to the market e.g. in infant flours and / or purées of high nutritional value that will greatly contribute to improving the nutritional status of Nigerian populations. Moringa leaves are generally preferred cooked, in a salad, or accompanying different dishes. They are sold in bags of 25 and 50 kg (for between 30 to 38 euros) by retailers depending on the time of year (eg Ramadan, holidays ...) (RECA, 2017).

Total production for the 2018 irrigated countryside is estimated at 79,636 tons. Yields fluctuate between 15 to 18 tons / ha, with a potential of 27 tons / ha (MAG, 2018). Moringa is a crop produced all year round and throughout the country in areas sometimes operated by women (it is a source of significant income for them). There is growing interest in its cultivation because of demand in the domestic market and, to a certain extent, in the international market (North Africa, Asia, and Europe).

2.2 Obstacles

There are few value chain studies about moringa. Based on field data, Catalystas Consulting was able to observe the following challenges: the difficulty of accessing credit for groups of women processing moringa, and the fact that packaging and certification standards are quite demanding, especially in the export market.

2.3 Involved actors

The principal actors in the moringa sector are found in the Maradi region: Producers and processors [FCMN Niyya, CAAB, Gorou-Bi, Tillakaina Cooperative in addition to the company Alf production, SMEs, large individual producers, Moringa processing company, VLAN). During the field mission, Catalystas Consulting met with moringa businesses:

- Amfanin Zogale, a grassroots association / group of women who process moringa in the Maradi region and produce it into a moringa powder
- Santhea, MoringaLand <https://www.facebook.com/Moringaland/>, a enterprise-school of the NGO AFJ, which sells moringa powder with basil and a 100% organic guarantee, free of pesticides and chemical fertilizers; it is a SANTHEA tea with moringa and spices www.kaomini.ne (delivery within half a day in Niamey)

2.4 Creating job opportunities for young people

Regarding employment opportunities, Catalystas Consulting has identified, among other things, the need for training on agro-ecological farming methods, which offers opportunities for women's associations in the production, processing, quality control, packaging and advertising of dried moringa leaves and powder for local markets. Moreover, moringa lends itself to innovation in processing new products such as moringa couscous. Finally, there is an increased potential for the export of organic moringa to international markets.

2.5 Involvement of young people and women

Above all, the young people are the ones active in production and transportation, and women who are essentially active in the marketing and processing of various by-products. The associations that Catalystas Consulting met in the field were all run by women's groups (see above).

These women experiment and thus transform moringa into other food products such as [couscous](#) and [other products](#).

2.6 SWOT analysis

Cooked leaves: (Pre-cooked leaves, Dambou (cereal and moringa mixture, Moringa salad, Moringa herbal tea, Moringa nutritional flour)

<p><u>Strengths</u></p> <p>Opportune for the inclusion of young people and women. Consumed in various forms and in various recipes, available in the markets Presence of enterprises and units of production, processing, and marketing</p>	<p><u>Weaknesses</u></p> <p>Low access to equipment and inputs; lower soil fertility Weak organization of producers</p>
<p><u>Opportunities</u></p> <p>Certain potential for income generating activities Improve access to finance Opportunity to prompt creation and development of women-led microenterprises</p>	<p><u>Threats</u></p> <p>Improve the adoption of eco-efficient production practices Uncertain authorization of productivity and net income</p>

2.7 Potential contributions and suggestions for the Dutch government/RVO

These sections have been removed due to confidentiality. Requests for more detailed information can be sent to io@rvo.nl.

3. Recommended value chain: peanuts in the Maradi region

3.1 Overview

The quantity of peanuts produced during the 1970s was 300,000 tons and then 113,216 tons in 2000, ie CFAF 1.2 billion corresponding to 10% of the oil needs of the country, importing from the Ivory Coast an order of 27,211 tons in 2001, or 12 billion FCFA.

In the Nigerien market, demand is focused on peanuts as solvents; and by-products included in the market such as oil, crabs, peanut paste commonly known as "DIGADIGUE", and bricks made from peanut shells. This sector mainly involves women, is aimed at self-consumption, or is processed into cooking oil, butter, or flour; aflatoxin problem; a possibility to use peanut paste to fortify and enrich foods (e.g. Plumpy'nut).

3.2 Obstacles

For the entire sector, there are few (inter)professional organizations. Moreover, there is an unfair competition with the supply imported from neighboring countries.

3.3 Involved Actors

In Maradi and Tahoua regions there are various producers and processors (STA, seed farms, Halal, Amaté, processing companies, livestock feeds, a group of women processing peanut oil). Catalystas Consulting draws particular attention to the importance of the STA company (see Appendix C and various examples from [Plum Fields SARL](#), founded in 2001, which aims to contribute to the improvement of the nutritional state of the most vulnerable children by manufacturing products for the treatment or prevention of malnutrition, and to develop products adapted to Nigerian dietary habits. The creation of the

STA followed the production unit "VITAMIL", created in 1991 by the NGO CARITAS NIGER, and was subsidized by the Royal Tropical Institute (KIT) to support the government's actions in infant nutrition.

3.4 Creating job opportunities for young people

In the field, Catalystas Consulting encountered a large peanut processing company called STA (see above, and also Appendix B) and the entire peanut chain was located there. In the production phase, there are opportunities for employment in the training of cooperative associations, especially among women's groups. This allows for formalizing the creation of stable jobs for groups of women transforming peanuts into Plumpy'nut (humanitarian food aid) and other processed products for local and national markets.

Secondly, there is certainly an openness to create employment for 'young greens', for example through the transfer of knowledge and circular economy methods using 'peanut shell' residues. This represents the research potential for improving the diversity of diets, especially concerning baby foods.

3.5 Involvement of young people and women

Several women in the Maradi region are active in the processing of peanuts into the various by-products mentioned above. Building partnerships with women's FOs specializing in production and marketing or the food processing company will revive and revalue production at the level of major production areas. It will also create significant income for women (production and processing) for young people (non-agricultural jobs especially in terms of the distribution of products resulting from processing (innovate in other peanut-based food products) or its by-products (association with other commodities such as cassava, millet, moringa, potato etc.).

3.6 SWOT Analysis

Peanuts: Plumpy'nut, peanut oil, peanut paste (tigadégué), Peanut cake (Koulikouli), Peanut shells for cattle feed, Boiled / roasted peanuts, Boiled peanut flour and soy flour, Preparation of Yazi with the peanut cake which is also commonly consumed by the population

<u>Strengths</u> Existence of several groups of peanut processors Processing peanuts into baby products for infants Improved seed production Peanut hull processing for livestock feed, peanut oil, and tigadégué (peanut paste) processing	<u>Weaknesses</u> The bankruptcy of peanut processing companies such as Olga oil Limited performance Too many intermediaries in the supplier and transport links
<u>Opportunities</u> Important and certain potential in the fight against food security (all social classes consume it and easily accessible by all) Young entrepreneurs are very interested in this, especially in the marketing of peanut by-products Existing seed farms and input suppliers interested in peanut production (improved seeds) Perspectives of some innovations in product processing	<u>Threats</u> Few agro-ecological practices Rehabilitation of SONARA is uncertain in terms of a new start in peanut production and processing, which is also of great importance

3.7 Potential contributions and suggestions for the Dutch government/RVO

These sections have been removed due to confidentiality. Requests for more detailed information can be sent to io@rvo.nl.

4. Recommended value chain: 'Purple Galmi' onion in the Tahoua region

4.1 Overview

The best known variety of onions is Galmi's Purple Onion; White Galmi; White of Saumarana, with a total production in 2007 of 447,000 tons (ORO / AOC, 2008). The main production zones are: Tahoua, Zinder, Agadez, Tillabery, Dosso, Diffa, with a

production area of 9,500 ha (FAO, 2008). Exports in 2007 were for a total of 68,000 tons (FAO, 2008); the main export markets: Benin, Ghana, Ivory Coast, Togo, Nigeria.

In general, after uranium, onions are the second largest source of export earnings for Niger. Niger's dry climate - which normally poses incredible challenges for local farmers - offers producers a special and distinct competitive advantage in onion farming compared to their counterparts in other West African countries. Since onions thrive in drier, lower moisture soils, they grow abundantly in manually irrigated cropland bordering the Niger River and along the southern border region shared with Nigeria. Additionally, Niger's well-trained producers are consistently achieving average yields that far exceed those of their counterparts both in the sub-region and elsewhere, which partially explains why their production costs are also considerably lower. Finally, Niger benefits from a strong "brand" recognition throughout West Africa for its Galmi Violet, which is widely appreciated by consumers for its succulent flavor and high quality. The onion industry is one of the most organized in terms of governance and level of structuring and organization of its market. Current yields are of the order of 32 tons / ha per cycle (with a potential that can go beyond 40 tons / ha, in 2018 in Agadez).⁴

In terms of consumption, onion is a product consumed by all urban Nigeriens (3.3 kg / person / year) and rural Nigeriens (1.1 kg / person / year). The leaves and stems of the onion are used to make different kinds of products, for example, the gabou which is used as a condiment. Consumers appreciate the onion and its by-products, especially for their spicy tastes. It enjoys a commercial advantage in local and sub-regional markets. Niger is the leading producer and exporter of onions in the ECOWAS region, excluding Nigeria. More than 95% of the national production is for export (especially from Tahoua and Agadez). The Nigerian onion is mainly oriented towards neighboring and coastal countries: Ivory Coast, Ghana, Benin, Burkina Faso and Nigeria. Other destinations are Mali and Algeria.

In summary:

- The onion is the main speculation for which Niger has a real comparative advantage compared to other countries in the sub-region and its competitiveness in West African markets gives it an important place in the national economy.
- Note that not only is the demand for onions sustained, but the varieties of "Galmi violet" and "Tillabéry white" are often sought after for their taste, hence their use in industrial mustard, for example.
- The production of onion is as much for commercial purposes as food ones, it offers a veritable opportunity to access financing mechanisms present in the business environment in Niger.

4.2 Obstacles

In terms of exports, Niger and Burkina Faso are the only two countries in West Africa that produce enough onions to meet domestic demand and export their surplus. Unfortunately, the weak capacity of states to monitor cross-border flows - particularly when much of the trade is done by the "informal" sector - does not facilitate a more comprehensive analysis and understanding of the current scope of sub-regional onion and shallot trade. Additionally, there is still a need for improved production through the use of more appropriate intensive and selective techniques as well as a strong demand for elaborate conservation techniques such as "ANPIP".

The recent data available place Niger's exports as of 2005 at 68,000 tons, or about 20% of total production, although these data are probably very high because they are based on the evidence gathered during the present study. In 2005, exports to Ghana accounted for almost half of all Nigerien exports. There is no other more recent data available publically demonstrates the level of export of onions or other products, a symptom of the greater lack of governance and regulation and monitoring of evaluation of the economy and markets in Niger.

4.3 Involved actors

In the Tahoua region: Farms and Seed Companies (Alheri, Ainoma, Husa'a, Halal, Amatén, Sotraco, Large individual producers, Gabou Hamni of Sakoir, Onion and Potato collection counters, VLAN).

⁴ The cultivation of onions is practiced in two (2) or three (3) campaigns by producers (\pm 25% of women) grouped in cooperatives and groups. The first campaign runs from September to December (4 months), and the second from November to March (5 months) and then the last from January to May (5 months), with overlaps due to the implantation of nurseries towards the end from the previous campaign. Grown on an area of 31,011 ha, the potential for onion production was over 1,081,499 tons per year according to the horticultural census for the 2017-2018 crop year (MAG, 2018).^[4] Since onions thrive in drier, lower-moisture soils, they thrive in manually irrigated cropland bordering the Niger River and along the southern border region with Nigeria.]

Several organizations and processing units already exist such as the association ANFO. The processing of onions (SOTRACO has planned an onion powder production project in Madaoua, one of the major production basins) aims to produce 22,000 tons of powder per year, of which 7,000 tons are destined exclusively for the Nestlé company. The remaining 15,000 tons are intended to produce local dishes made from onion flour (a mixture of onions and other local products such as Gaya salt and soumbala).

Other promising initiatives already exist (Société Gabou Hamni de Sakoiria) that produce this highly appreciated dish, which proves to be a product that can validly replace the "Maggi". This product already has its place in the shops of Niamey, some capitals (Lomé) and already attempts to break into the European and American market.

From the perspective of developing a sub-regional trade, SOTRACO has a partnership agreement facilitated by the 2Scale program (SNV, Agriprofocus) with the company Tays Foods of Sokoto in Nigeria to guarantee a long-term supply for an onion flour production plant that will be installed before the end of 2019 in Madaoua, Niger.

4.4 Creating job opportunities for young people

Onion is a high-value product with a fairly stable market and a very well-organized marketing channel. It also offers processing companies the opportunity to emerge and generate sustainable jobs (agricultural and non-agricultural):

- especially for young people who are mainly active in transport companies and also within the distribution network.
- for women: mainly active in processing activities, marketing and other innovative initiatives.

As mentioned above, there is certainly a lot to improve in terms of training and equipment in terms of storage and processing techniques (dried onions, onion paste). This also applies to training in drying and treatment methods, especially solar energy. Finally, in urban areas, there are employment opportunities for young people in the areas of marketing and distribution in cities, as well as training on marketing and sales distribution for processed products.

4.5 Involvement of young people and women

Young people are very much involved in the cultivation of onions in Niger; in fact, market gardening (unlike cereal cultivation for example) is seen as an activity that can lead to quick profits. They take the most action in the cultivation and marketing, but currently very little in the processing: the small processing which is done (puréed tomatoes, and dry or powdered onion) is carried out by women.

4.6 SWOT analysis

Onion: Bulb (Strips of dehydrated onion), Gabou, onion powder, jam

<p>Strengths</p> <ul style="list-style-type: none"> Seed production, processing and marketing Produced all year long and available in the markets Product affordable for the average consumer Market available (at national and regional level) and unmet Substantial consumer interest Long tradition of onion cultivation Highly qualified producers Production areas spread out geographically Strong label identification (Galmi Violet) among consumers Easily accessible and abundant water resources High average yields (35 t / ha) 	<p>Weaknesses</p> <ul style="list-style-type: none"> Lack of mechanization in production and processing stages Major conservation issues during transport and storage Lack of cool rooms Lack of real estate regulation Distance from the main sub-regional markets; road networks either do not exist or are in poor condition; high transport costs
<p>Opportunities</p> <ul style="list-style-type: none"> Definite potential for income-generating activities Veritable national and international market opportunities Job creation and opportunities to include women and youth at all levels of the value chain Development of market gardens in the Sahel and the North to support off-season market gardening 	<p>Threats</p> <ul style="list-style-type: none"> Competition from neighboring countries Substantial dependence on climatic factors

Underestimated potential of turning the onion into a puree, seasoning cube, or jam.	
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4.7 Potential contributions and suggestions for the Dutch government/RVO

These sections have been removed due to confidentiality. Requests for more detailed information can be sent to io@rvo.nl.

5. Recommended value chain: mango and its processed derivatives of juice and dried mangoes consumed in the Niamey region, export potential

5.1 Overview

In general, fruits and vegetables have grown enormously, offering development opportunities for the private sector. These products do not necessarily meet the set criteria in terms of food safety because they are mainly intended for export; moreover, women are often involved as unskilled workers. However, the potential in terms of processing is still only very partially utilized, so there is room for job creation for young people.

Unfortunately Catalystas Consulting has not found a recent study of the mango industry in Niger. However, it is assumed that the potential for women in processing is relatively large, when it is manual. It is difficult to estimate the importance of mango sector processing. In any case, the rate of transformation is low, and a substantial part of the production is lost during the high season. The statistical data are non-existent or often include mango products (puree, juice, etc.) along with products from other fruits. However, some indications can be made. Apart from the dried mango, which is estimated to be at around 3,400 tons, mango-based processed products are mainly canned, frozen purees and nectars. The main producers of frozen pulp are India, the Philippines, Thailand and Mexico. China, Peru and Brazil are present but in smaller quantities. In addition to frozen pulp, Thailand directs some of its production to canning. The volumes of processed mango-based products appear to have increased since the 2000s, with an increase between 2006 and 2010.

We can certainly build a solid value chain around the mango, primarily in Niamey, which is surrounded by a strong production base and consumes substantial amounts of fresh mangoes.

5.2 Current status of young people and women

Young people (men) are employed to manage the machines and ovens used in processing. The mango industry is also likely to provide processing companies with the opportunity to emerge and generate sustainable jobs (agricultural and non-agricultural)

- for young people: There are a number of young people who are already processing mangoes, specifically in juice or dried slices.
- for women: mainly active in processing activities, marketing, and in other innovative initiatives.

5.3 Obstacles

There is a need for improving agroecological production through the use of appropriate intensive and selective techniques. In addition, there is an underestimated potential for processing mango as a juice, a jam, or 'dried'.

5.4 Creating job opportunities for young people

Niger is a major producer of mango, tamarind, A1: K11 and Hibiscus; products that can be used to produce good quality natural juice that meets the expectations of both domestic and international consumers. Young people have employment opportunities in the processed mango sector (dried mangoes or mango juice) to meet the growing need of individuals who want to consume healthy and natural drinks, possibly to export to the markets of Niger's neighboring countries. In this way, they could even make profit off of the farmers by providing them with income during the 'hunger gap'. Employment opportunities arise from the conversion of cultivation methods to agro-ecology, which in turn creates jobs in processing organic products. Additionally, there is a field for training the drying methods of mango slices and powder, especially through solar energy. Finally, with the prospect of organic certification and / or fair trade, there are job opportunities in the packaging, distribution and customer service sectors related to exporting to the global market, especially for organic products.

5.5 Involved actors

The processing of mango into dried mango and juice is developing in Niger. As mentioned above, Catalystas Consulting has not found a recent study of the mango industry in Niger. During the Catalystas Consulting mission, only a few mango producers were met. Most consumers buy fresh mangoes at the local market.

However, there are more and more female entrepreneurs selling mango juice as an alternative to imported juice in cans or bottled. These include:

- Creation of a natural fruit juice processing unit within la Société Nigérienne de Transformation des Fruits (SONITRAF).
- Small businesses such as Kalto Juice, run by a woman coming directly from the entrepreneurial program supported by the US Embassy (see Appendix B).

5.6 SWOT analysis

Mangue

Strengths Produced throughout the year and available in the markets Product affordable enough to reach the average consumer Products in demand High productions Women are very involved in these sectors	Weaknesses Lack of mechanization in production and processing Strong dependence on climatic factors Major conservation issues during transport and storage Lack of networking and links between producers and processors Lack of training in entrepreneurship, packaging, and networking of small unit managers Organic labels are complicated to obtain for small units
Opportunities True potential for income-generating activities Real national and international market opportunities (dried organic mangoes) More opportunities in the field of fair trade Job creation and opportunities for inclusion of women and youth at all levels of the value chain Mango processing is seasonal, allowing time to take care of business development activities Bringing together small processing units into cooperatives could pool human, intellectual and material resources Using cleaner energies, such as solar energy, would reduce environmental impact	Threats Competition from neighboring countries Climatic fluctuations: excess or shortage of water during the vegetative cycle of the tree can lead to significant variations in production quality The high seasonality of mango production causes significant fluctuations in the supply

5.7 Potential and suggested contribution to the Dutch government/RVO

These sections have been removed due to confidentiality. Requests for more detailed information can be sent to io@rvo.nl.

6. Other non-priority value chains

Other value chains were analyzed in this study but did not uphold the different prioritization criteria that were:

- Potential for job creation for women and youth in target areas
- Sustainability (especially environmental)
- Contribution to food security
- Existing projects or companies to support in the value chain

Catalystas Consulting makes directly references Annex D for an overview of value chains in Niger.

In the following, we list some value chains that, at first sight, offer great opportunities for job creation for young people and women. At the time of the mission, however, there were few success factors, which led us to categorize them as non-recommended or deemed non-priority. We can mention among others:

1. Tomatoes

- The tomato is cultivated on an area of 10,507 ha, including: Tahoua (3,425 ha), Maradi (2,426 ha), Niamey (1,375 ha), Zinder (1,011 ha), Tillabéri (802 ha), Agadez (710 ha), Dosso (679 ha) and Diffa (76 ha). Domestic production is currently 279,229 tons with yields ranging from 18 tons / ha (Diffa) to 25 tons / ha (Maradi) (current average of 22-25 tons / ha), with potential for up to 30 tons /ha.
- The Nigerian consumer prefers to consume the tomato while fresh. According to the RECA, national consumption is estimated at 15 kg per person per year, which implies a demand of 240,000 tons for Niger (RECA, 2016). It is produced mostly for a maximum of six months (January to June), but the introduction of new varieties popularized by development structures also allow for production in winter. This makes tomato produced locally available at times when it is usually unavailable on the market, although this presence is still insufficient. The deficit is therefore supplemented by tomatoes imported from the subregion (mainly Burkina Faso, Nigeria, Benin, Ghana and since 2015 from Morocco (RECA, 2016).) The tomato goes "in all directions". Niger exports tomatoes to Benin in the dry season and imports them during the rainy season.
- In recent years, Niger has lost part of its tomato market due to multiple factors, but mainly substantial pests and disease (whitefly and virus, moth, Tuta, red spider mites, nematodes, diseases during the rainy season, and, at the technical level, producers who are too weak (fertilization, protection, plant nursery).
- The old varieties required a significant variation in temperature between day and night for fertilization and were sensitive to high temperatures. Over the last 20 years, breeders have produced successful varieties, even throughout the hot and wet seasons. This choice and variety makes it possible to cultivate tomatoes all year round, provided the right variety is chosen.
- With regard to processing, several unsuccessful attempts have been made to produce tomato purée due to the lack of competitiveness with imported purée from Asian and North African countries. The only interest in reduced-scale processing is that it minimizes production losses due to rot during peak production periods or when the market is saturated by the group harvesting.

2. Livestock / meat

- Livestock contributes 25% of agricultural gross domestic product (GDP) and 16% of GDP (2013). After uranium, it is the second product exported by Niger, but its share has dropped dramatically; from over 20% of exports in the 1970s to 9% in 2010.
- Nigerian livestock production is based on extensive grazing, but climatic hazards, the extent and quality of grazing land, as well as the health and economic constraints, constitute significant obstacles to its performance.
- Fodder production is very handicapped by the recurrence of climatic hazards. As a result, livestock production is increasingly limited today in northern Niger. The pets are scattered, staying practically all year at the same place.
- Fodder production is very handicapped by the recurrence of climatic hazards. As a result, livestock production is increasingly limited today in northern Niger. The pets are scattered, staying practically all year at the same place.
- In addition, 20.8% of farming households own no livestock, 45.5% of households have between 1 and 9 heads, 16.5% of households have more than 30 head of livestock and only 2.6% have more than 50 heads.

The main reason for not including this sector in the list of channels recommended to the Dutch government / RVO is the fact that women play a rather marginal role in the meat supply chain. As described above, they are more important during the dry season in the general management of the household when the shepherds are gone. Shepherds look after the animals all year round during foraging, especially animals that are suitable for sale at the market or for cow feeders. Men fatten cows, slaughter them and sell them at the market. If more consideration is given to private sector development for women, it is better to focus more on the dairy supply chain than on the meat sector.

3. The black-eyed pea

- The black-eyed pea is an important source of affordable income and protein in the Nigerian diet. Its production (90 percent in combination with millet and / or sorghum) is concentrated in the regions of Maradi, Tahoua and Zinder. Leaves and grains (both fresh and dry) are regularly eaten in a variety of dishes. Income from the sale of black-eyed peas is often used to purchase cereals, especially millet. Black-eyed peas are primarily eaten by the rural population, often replacing meat.
- Domestic production (about 1,588,488 tons per year) is more than Ghana (889,570 tons per year).

- The per capita consumption of black-eyed peas is 19 kg per year, contributing to a daily calorie consumption of 3 to 4% (National Institute of Statistics and World Bank, 2013). Rural populations consume twice as much as urban dwellers (Republic of Niger, 2006). In rural areas, black-eyed pea expenditures represent 3% of all food expenditures and have increased in recent years.
- urban and rural, households, especially in rural areas, combine black-eyed peas with other cereal products to ration out their reserves.
- The national average annual black-eyed pea requirement for food consumption is 363,745MT. Other uses include industrial demand (634 MT per year) and exports (889 570 MT per year, INS, 2016), exports being the main source of demand.
- The remaining plants left after harvest are used for animal feed (black-eyed pea fava). About 80% of small farmers depend on mixed farming / livestock production systems. The lack of fodder, especially during the dry season, is one of the main obstacles to livestock production, which is increasingly present in urban and peri-urban areas.

4. Rice and millet

- These are the products that are apparently already sufficiently supported and whose sector seems well organized.
- Rice, rejected because of the lack of environmental sustainability, and its cultivation are often at the expense of traditional cereal which are adapted to the local climate and should be the focus instead (like fonio).

5. Cotton

- The production (200,000 tons in 1999) fell to 111.154 tons in 2000, given the large quantities exported fraudulently, estimated at around 65%.
- It is possible to consider not only the ginning of cotton, but also its use at the level of industrial production in textiles as is the case at the ENITEX level.

6. Gum Arabic

- Production is estimated at 800 tons in the 1970s and 102 tons in 2000, but currently in full expansion taking into account European and US requirements (1,400 USD per ton).
- The possibilities of industrial use of the gum are: confectionery, drinks, pharmaceuticals, dietetics, cosmetics, gummed paper, wine etc. The stage of primary processing can at least be considered first locally in Niger before supplying the industries involved.

7. Sesame

- Sesame is not considered a priority because it is a product almost exclusively for export, and highly dependent on price fluctuations.
- Sesame is a plant adapted to the Sahelian climate. Opportunities in the areas of conservation and industrial processing do exist in Niger. Production in 1998 was 30,000 tons while global demand is estimated at 635,000 tons with an average price of 705 USD per ton.
- The value of the sector is specifically seen in the processing of sesame biscuits or other elaborate commodities, as well as possibilities for processing sesame into oil.

8. Nutsedge

- Nutsedge is a rigorous crop in terms of labor, especially for women. The 2000 exports amounted to 14,000 tons, mainly to Nigeria, for a total income of 2.5 billion FCFA per year. It should be noted that, like sesame, nutsedge does not pose a problem of conservation or storage.
- It is necessary not only to increase its production but also, above all, to consider the possibilities of processing it into juice or other biscuits because the taste is very well appreciated by both locals and the European and American consumers alike.

9. Peppers

- Peppers are a vital crop for the economy of the Diffa region, the main supplier of the national market and also of Nigeria, but only fresh or dried form. Very recently we have witnessed some slight processing and packaging of this product for a wider and therefore more economical sale.
- Special attention should be given to cultural methods that are currently traditional and highly sensitive to climatic hazards and insect attacks.

10. Potatoes

- Conservation is hardly a problem that arises; urban demand is sustained, in particular from the capital of Niamey. There is a substantial need gap.
- Routes can be explored for the industrial processing of potatoes. It can also be used for potato croquettes which are well appreciated by Western customers and children alike.



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World Bank

Appendix G: Youth Employment Methodology

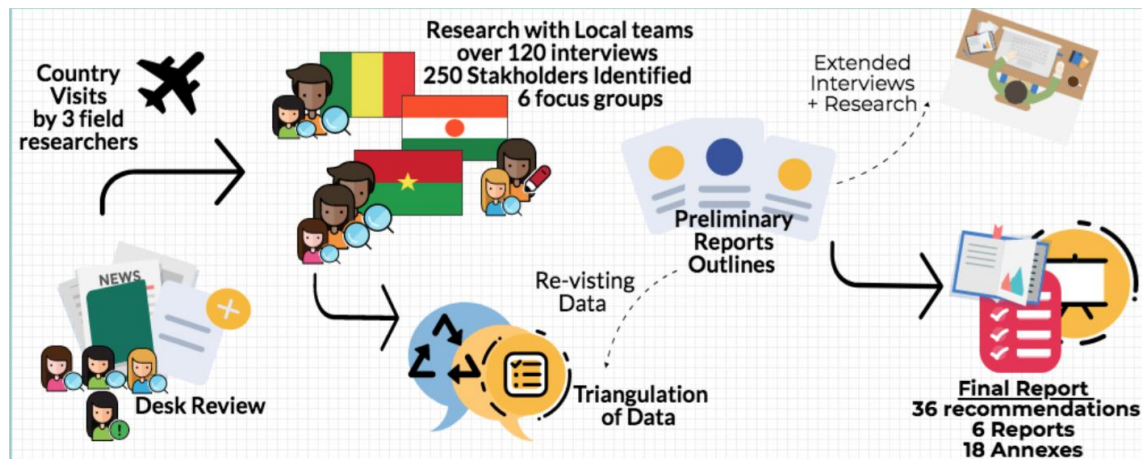
1. Introduction

Catalystas conducted a study on youth entrepreneurship and job creation across Mali, Burkina Faso, and Niger, consisting of in-depth desk research, extensive field missions to identified scoping locations, and post-mission cross-country triangulation.¹ We delivered our findings in a clear and comprehensive set of reports that include, per country: a labor market analysis of the agriculture sector with an emphasis on scoping locations, a thorough overview of the current ecosystem for youth entrepreneurship, and an itinerary proposal for the upcoming i4Y team's field visit. These documents aim to provide a snapshot of the current opportunities and challenges facing job creation and entrepreneurship in Mali, Burkina Faso, and Niger, with specific insights into the central questions of this mission:

- (i) labor market needs and demands, with a specific focus on Small to Medium Size Enterprises (SMEs), as well as shortcomings in sectors such as agriculture and agricultural processes and other EKN focus sectors that can provide jobs to young (especially female) Sahelians; and
- (ii) The current state of youth entrepreneurship opportunities and initiatives (with a specific emphasis on women) with a focus on opportunities, activities, and areas in need of improvement.

These identified areas are those in which the Dutch Ministry of Foreign Affairs can best support RVO and the i4Y framework in identifying and providing leads for developing appropriate partnerships and accelerating effective initiatives already underway in each country that a) stimulate and create youth employment programs that build the capacity and skills of the younger generation; and b) foster a new generation of African entrepreneurial leaders that consider starting a business a viable and sustainable career path. Diligently and proactively, we have gathered data and findings that will support the Dutch Ministry of Foreign Affairs Sustainable Development Agency (DDE) and PSD-Toolkit Team (Orange Corners Program) in creating an enabling and empowering environment for youth employment and entrepreneurship based on reinforcing and future-proofing skill sets; equipping youth with the right education, tools, and technical skills; and ensuring that local market and private sector needs and demands are met.

¹ It is important to note that we have clearly indicated where, due to time constraints, lack of data, or scope of the mission, certain information has not been verified. In each report, this information is clearly laid in order to fully inform the reader of areas where further research is needed.

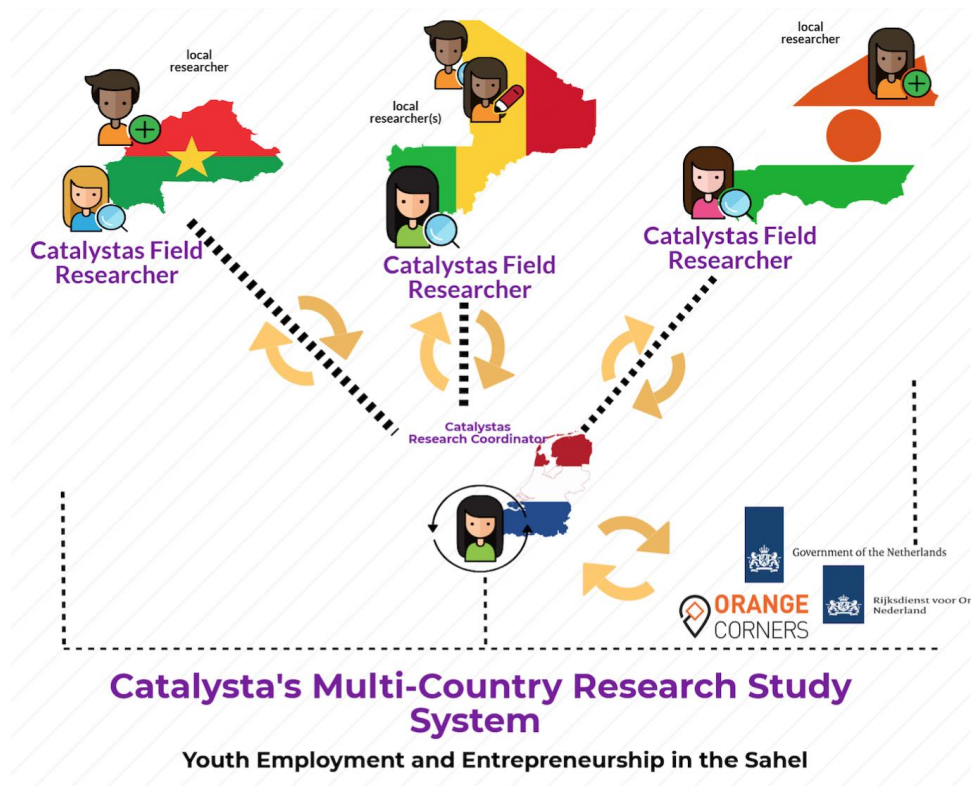


The finalized reports are separated into two categories, namely “Enabling Environments for Youth Job” and “Youth Entrepreneurship”, although there is much overlap in content. Each set of documents aims to answer the above mentioned research questions, through a specific target lens and scope. The distinctions between reports and research focuses is outlined below.

a. Our Values: Equity-based research

Our team successfully conducted insightful, localized, and grassroots research to form the basis of our findings through working directly with pre-selected local consultants who were familiar with the contexts of economic empowerment, agricultural value chains, and specific scoping locations in each country. These local consultants worked alongside each Catalystas field researcher throughout each stage of research, from initial organization to final triangulation. This approach ensured findings based in equity and co-creation, provided multiple layers of data verification, and infused our final reports with local insights and both an internal and external understanding of each localized context and country to the highest degree - all while avoiding the traps of historical colonialist mindsets and thought processes.

The efforts of our field team and local consulting partners were centralized - in real time, as often as possible - and triangulated by an HQ-based leading Research Coordinator and supporting Technical and Logistical Coordinator.



2. Research Design and Implementation

Our six-person team of experts has over 45 years of combined experience in program assessment and design on economic empowerment, education for women and youth, and social empowerment, including extensive experience in the Global South. Drawing on our past experiences, we developed a methodological approach based on previous assessments conducted for a wide range of international development clients, including Stichting SPARK, ActionAid International, and Caritas Kosovo on the topics of youth employment, technical and vocational education and training (TVET), and women's empowerment.

Onset Interviews and Fine-Tuning the Scope of Research

Before beginning our mission, our team sat down with various divisions of the Dutch Ministry of Foreign Affairs in order to understand the wide range of focuses as well as current and potential programs planned for both the focus countries and the region as a whole. In coordination with RVO, we narrowed down the scope of our mission and created outlines for our two main lines of research, as well as a detailed set of centralized criteria for recommendation analysis and identification.

The following is the specific terms of research for the resulting report on Youth Employment:

Our Deliverables:

1. A report detailing:
 - a. Labor Market Analysis of agri-process supply-chains per location

- b. Detailed analysis of (approx.) 5 value chains we believe have a high potential²
 - c. Gender-specific insights on labor in agri-processing
 - d. Regional security culture and economic impacts on jobs for youth per locations
 - e. Governmental policies and national and international interventions
- 2. Minimum 5 suggested interventions
[REDACTED]
- 4. Appendix B: Comprehensive List Serve
[REDACTED]
- 7. Appendix E: Selected Value Chains Comprehensive overview

Our Research Specifics:

1. A situational analysis of current youth employment trends based on interviews with government officials, focus groups, examination of economic trends, and discussions with locally based INGOs who are working in the specific context of youth employment. The report specifically highlights:
 - a. Regional economic and labor overview with a specific focus on the impact on youth and women in every focus city;
 - b. Identification of local and international stakeholders in the agriculture (processing) sector in selected value-chains that the Dutch government can consider coordinating with;
 - c. Identification of barriers to employment in these value-chains with specific focus on gaps in skills in training;
 - d. Identification of potential skill-building and employment; matching providers and trainers;
 - e. Identification of good practices happening in each country with a specific focus toward CSR and equity;
 - f. Identification of Dutch specific niches (water resource management, circular agriculture, Dutch Agri-Innovation, and Sustainability etc.) that are suitable for market needs;
 - g. Identified risks, vulnerabilities, and shocks that could affect any program the Dutch MFA would consider getting involved in, with a specific focus on greater impacts on marginalized groups and the effects of corruption and nepotism;
 - h. Provide analysis and recommendations on gender-specific barriers, opportunities, and factors for the Dutch government to take note of in youth economic empowerment and employment opportunities in the Sahel (and per country, and with specific focus per target location).
2. Identification of the highest potential sectors and businesses for expanding employment opportunities in each selected agricultural value-chain. Value-chains have been chosen specifically based on the following criteria:
 - a. Potential to Create Jobs for Women and Youth: First and foremost, our team looked to what specific commodities (as well as what parts of each commodity's value-chain) have the greatest potential to support growing numbers of women and youth. We sought to highlight value-chains that have room for improvement through Technical and Vocational Educational Training programs (TVET) that can be geared towards youth and women to fill those future jobs. (Supporting SDG 1, SDG 5, and SDG 8).
 - b. Potential for Market Share Acquisition: We looked particularly for agricultural value-chains that have potential for growth with support from donor intervention(s). Our means of indicating this potential is based on:

² See criteria below

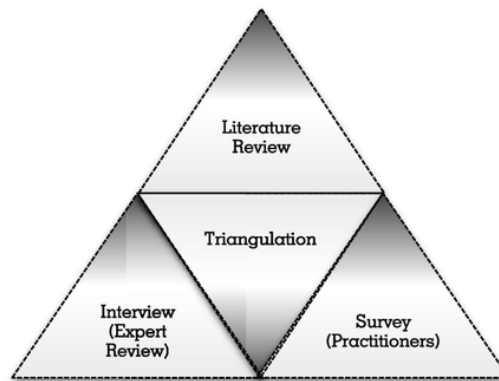
- i. The local and international demand on specific commodities being unmet;
 - ii. Saturation, competition, and the size of the value-chain; and
 - iii. Potential for having a high return on investment.
 - c. Potential for Transformation: Our team specifically chose value-chains that are currently using low or rudimentary technology or methodologies which, if improved, can not only create more jobs for young people (especially women), but will also have a positive transformative effect on output, cost, quality, competitiveness, and revenue (supporting SDG 5, 8).
 - d. Sustainability (environmental, social, and economic): We looked specifically to industries that support versatility in the local economy (not promoting commodities that create overdependence on one agricultural product, thus relieving the potential for future external shocks). We also looked to value-chains that, when possible, can support a circular economic model, do not use an excessive amount of water or other natural resources, do not pollute the local environment (as a means of protecting the natural ecosystem and promoting resilience toward climate change), and are not overdependent on electricity for transformation and processing (due to the limitations of power and energy availability in all three countries). This means we have aimed to promote value-chains that support food security, with an emphasis on lowering costs and making locally consumable food products more widely available whenever possible. Finally, we have focused on value-chains that are economically sustainable by looking to promote agricultural processing systems that are easy to repair and maintain in order to ensure no overdependence on expensive processing machinery and equipment or high electricity or energy costs. (Supporting SDG 1).
 - e. Potential for Dutch Value-Added (via alliances or Dutch niches/instruments): We have specifically looked to identify value-chains which will benefit most from Dutch experience and expertise, such as water resource management in bi-annual crop planning and the dairy industry. Our team has aimed to suggest specific Dutch academic and private stakeholders in various identified value-chains who can help implement effective and timely absorption of their expertise in local markets. (Supporting SDG 8).
 - f. Conflict Sensitivity: We have selected value-chains and locations of operations where we believe the threat of terrorism and destabilization - present in all three countries - has had a limited impact. We have held in particular focus means of transport and ease of access for businesses in identified value-chains in order to ensure we promote commodities that can create benefits without undue security risk (for all beneficiaries and stakeholders involved).
3. Identification of local and international stakeholders in selected value-chains within the agriculture (processing) sector which the Dutch government can consider coordinating with, and in what capacity.
 4. A List of Policy and Project Recommendations: Based on our assessment and understanding of the context as highlighted under the specific criteria (defined above), our team has determined a selection of recommendations for projects and programs that we believe the Dutch government can support through direct or financial involvement. We have looked to - as often as possible - highlight like-minded donor government initiatives based on our positive assessments of existing program³ successes in filling identified gap(s) in line with the focus of the Dutch government. We have made our selection

³ Note that this project did not include the auditing or assessment of the various existing projects we came into contact with. We have noted details and opinions, when possible, on quality based on interviews and available documentation. There is, therefore, a need for a more in-depth analysis of the existing programs highlighted.

bearing in mind the limited Dutch presence in some of the locations as well as the limitations of annual budgets. In doing so, we have delineated local, national, regional, and international interventions per country. We have also provided impact timeline guides for our recommendations. Our recommendations are not listed in order of importance; readers should feel free to read, assess, and fit recommendations to their specific divisional focus. It is up to each governmental agency to make the decision of which - if any - recommendations should be followed up on based on their own knowledge, understanding, and focus.⁴

3. Limitations and Adaptations in Methodology

Due to limited quantitative and quantitative data available to answer our central research questions directly, our team utilized an approach of research triangulation to help support and lead our research and final findings. Our three-part methodology: **1) desk-research** (including meeting with foreign-based stakeholders), **2) field missions** (conducted by Catalystas field researchers and partnered local consulting researcher(s) per-country, centralized by the HQ Research Coordinator and Technical and Logistical Coordinator), and **3) final formulations** of our research, triangulated cross each country to ensure capture, verification, and substantiation of our findings.⁵



a. Desk Research:

Our research began with the exceptional report provided to us by the 2Scale program implemented by SNV, which had recently conducted a 21-person agricultural production and food processing country assessment across all three of our target countries. Based on this data, our team narrowed the scope of our mission, continuing to dig even further into the value chains identified in this report, as well as additional value chains, through the addition of a gendered lens to focus specifically on creation of opportunities for women and youth together with the criteria set out in coordination with RVO in our initial meeting (noted above).

After initial methodology design, primary research, and review, our team recruited 1-2 local consultants per country based on a profile of expertise in women and youth economic empowerment, agricultural value chains, and localized contexts in each scoping location. Once hired, each local consultant was onboarded by the relevant Catalystas field team member in order to ensure familiarity with the scope of the mission, methodologies, and

⁴ Catalystas is available for follow up discussion and advising to support selection and implementation of this recommendation with the government.

⁵ As previously noted, we have made a clear indication in each report where, due to lack of data, time, or scope of work, we were limited in substantiation capacity (particularly with regards to in-depth assessments of INGO programs, which fell outside the scope of our study).

needs. Each country team worked closely to verify desk-research findings, make logistical plans, and initiate local contacts in the field. The teams coordinated while in field, with local consultants working alongside our field researchers to schedule and conduct meetings, conduct additional research, identify new and important persons and institutions of interest, and hold focus groups. Our local partners also provided extensive insights into navigating the complex security situations in each country. Field visits were made on a case-by-case basis, with the security context, accessibility, and approachability of specific stakeholders determining whether a visit was made by a Catalystas field researcher, a local consultant, or both.

b. Field Missions:

During the field missions, each Catalystas field researcher deployed to their respective country and met their local consultant(s), who assisted them in preparing for the pre-planned itinerary developed together before departure in order to meet with various stakeholders. The itineraries were designed specifically to allow the local consultant(s) to accompany their Catalystas partner at the beginning of the mission in order to gain hands-on training, experience, and insights into our approach and methodology for each interview and meeting. During the first few days of the field mission, our Catalystas team member(s) provided hands-on training for their local consultant on topics relating to organizing focus groups, categorizing data, transferring information securely, and/or other areas on an ad hoc basis. This hands-on experience and training made it possible to ensure the quality of our research throughout the mission, including when the local consultants conducted certain location visits on their own due to their inaccessibility to the Catalystas team members (including Dori, Burkina Faso, and Gao, Mali). Any location visits conducted solely by the local consulting partners were held in the second half of the field missions, ensuring that each Catalystas-local researcher team would have the opportunity to conduct at least one visit together before a local researcher was sent to a location alone.

In-field, our team gathered information categorized as essential and secondary in regards to developing a full market analysis on the agricultural food processing sector respective to each country, as well as the greater value-chains surrounding these processes and the factors and stakeholders which influence them. We also conducted a definitive and deep ecosystem scope and analysis to capture the current status needs and opportunities for youth entrepreneurship in Niger, Mali, and Burkina Faso.

c. During Field Mission:

- i. Focus Group Discussions (FGDs): In order to gain in-depth insights from the future potential beneficiaries' sides, several FGDs were organized during the field missions. Between five and nine persons were invited to participate in each FGD, and Catalystas ensured that the participants were representative of the target population(s). The FGDs were carried out in an open, participative, and respectful way, in order to create a safe space for the participants, where they could freely share their thoughts and feelings. The objective was to capture the challenges and obstacles that stand between them and the job market, as well as their wishes and expectations for the future. The exact composition and location of each focus group was decided during the desk study phase; including at least one FGD with women only (so as to gain a deeper understanding of their specific challenges), and at least one FGD in each city targeted by the study.
- ii. Centralized reporting and reformulation of agenda: During the field missions, each field researcher sent a daily recap of their findings to the centralized Research Coordinator based in the Netherlands. This process allowed for the field researcher to make the best use of field time, utilizing video conferencing and voice and audio recordings in order to send information to the Research Coordinator and Technical and Logistical Coordinator, who worked to formulate and cross-examine findings between all three missions. This process allowed for increased data collection as well as rapid triangulation, eliminating time normally wasted in writing multiple reports while in-field.

This process also allowed for the central researcher to provide feedback to each field team member on a daily basis. Based on these feedback meetings, the agenda of each field mission remained flexible and able to adapt in order to meet the most pressing and newly identified needs and challenges. Furthermore, this system ensured that the final analysis and formulation of deliverables was time sensitive, effective, and conducive to the short timeline of delivery request for this scope of research.

4. Formulated Findings

Following the return of our field teams to home-base, Catalystas assessed both the documented paper findings collected by the researchers in-field, as well as the triangulated data centralized by the research coordinator. Based on a thorough review of these materials in combination with additional desk research and validated assumptions, Catalystas triangulated the findings for our reports. The final documents consisted of a per-country labor market analysis (emphasis on agricultural processing in the selected cities), Google Map of ecosystems as identified by RVO, Stakeholder Listserv pertaining to each focus, comprehensive summary analysis which makes fully transparent our methodologies for data collection and formulation of findings, as well as final recommendations and a draft of a recommended itinerary for follow-up visits to each country for i4Y staff (with a specific focus for Orange Corners differing from PSD-Toolkit teams). Final report findings have been substantiated, when necessary, with the local consultants contracted in each country as well as with other relevant stakeholders met throughout the scope of this study. This has resulted in an individualized assessment of each country and an overarching Sahel-focused strategic approach that the Kingdom of the Netherlands can (re)formulate around their Multi-Annual Regional Strategy (MARS), Year Plans, and i4Y framework programs for the Sahel.

Finally, with the help of our local consultants, we have developed draft follow-up mission plans for the i4Y team in each country. Our local consultants, now familiar with the objectives and scope of research as well as with the stakeholders visited during the field missions, will be excellent support staff for i4Y's team, should they require local assistance for their visits to each country during the follow up mission.

We have also mapped out the existing national and international youth-oriented education, job training, and entrepreneurship programs as well as public, private, INGO, and civil society stakeholders, assessed their effectiveness and shortcomings, and provided market-driven insights into how the Dutch can contribute to strengthening existing projects while simultaneously developing new programs to improve economic empowerment for youth across the Sahel Region through closing the gaps identified in our assessment.

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