



3 - YEAR

STRATEGIC PLAN FOR ENGAGING THE PRIVATE SECTOR IN NUTRITION

(2021-2023)



CONTENT

1. INTRODUCTION	1
1.1. Private Sector in Ethiopia	1
1.2. Key Nutrition Issues In Ethiopia	3
2. BACKGROUND	4
2.1. Scaling Up Nutrition (SUN) And Sun Business Network (SBN)	4
2.2. Target Members Of The Sun Business Network (The Lifeline Of The Sbn Ethiopia)	7
2.3. SBN Ethiopia Governance Structure And Operation	10
3. METHODOLOGY	12
3.1. Objectives And Scope Of Work (SoW)	12
3.2. SBN Strategy Development and Core Process	12
4. SITUATIONAL ANALYSIS	17
4.1. Nutrition Landscape and Analysis	17
4.2. Policy Landscape and Analysis	19
4.2.1. National Nutrition Program and Seqota Declaration	19
4.2.2. Agriculture And Nutrition	21
4.2.3. School Feeding Program	21
4.2.4. Coordination	21
4.2.5. Food Standards and Control Systems	21
4.2.6. Regulatory Framework	22
4.3. Private Sector Landscape And Analysis	23
4.3.1. Key Points About The Private Sector In Ethiopia	23
4.3.2. Enterprise Mapping	24
5. STAKEHOLDER MAPPING AND ANALYSIS	26
6. SBN STRATEGY DEVELOPMENT	33
7. VISION STATEMENT	35

8. KEY IMPLEMENTATION AREAS OR IDENTIFIED LOW-HANGING FRUITS FOR SBN ETHIOPIA	36
8.1. Large Scale Food Fortification And Supplements (Micronutrient Powders)	37
8.2. Super Cereal (Previously Csb+) / Super Cereal Plus (Csb++) and Fortified Blended Cereals	38
8.3. Workforce Nutrition	38
8.4. School Nutrition / School Feeding Program	38
8.5. Nutrition-Sensitive Agriculture and Agribusiness	39
8.6. Other Processed Food Products	39
8.7. Distribution Channels	39
9. STRATEGIC CORE OBJECTIVES AND IMPACT	40
9.1. Strategic Objective 1 (Initiatives): Develop A Strong SBN Brand and Membership	41
9.1.1. Direct KPIs – Performance Metrics For The SBN Team	43
9.1.2. Indirect KPIs – Desired Outcomes Not Within The Direct Control Of The SBN Team	44
9.2. Strategic Objective 2 (Initiatives): Improve Nutrition Policies & Regulations	45
9.2.1. Direct KPIs – Performance Metrics For The SBN Team	47
9.2.2. Indirect KPIs – Desired Outcomes Not Within The Direct Control Of The SBN Team	48
9.3. Strategic Objective 3 (Initiatives): Increase Business Engagement in the Non-Nutrition Sector (Outside of The Food System)	49
9.3.1. Direct KPIs – Performance Metrics For The SBN Team	51
9.3.2. Indirect KPIs – Desired Outcomes Not Within The Direct Control Of The SBN Team	52

9.4. Strategic Objective 4 (Initiatives): Facilitate Meaningful Technical Partnerships & Investment Options in Nutrition	53
9.4.1. Direct KPIs – Performance Metrics For The SBN Team	55
9.4.2. Indirect KPIs – Desired Outcomes Not Within The Direct Control Of The SBN Team	56
9.5. Strategic Objective 5 (Initiatives): Improve Nutrition Sensitivity Along The Agricultural Value Chain	57
9.5.1. Direct KPIs – Performance Metrics For The SBN Team	59
9.5.2. Indirect KPIs – Desired Outcomes Not Within The Direct Control Of The SBN Team	59
9.6. Strategic Objective 6 (Initiatives): Increase The Availability Of Fortified Products And Supplements	60
9.6.1. Direct KPIs – Performance Metrics For The SBN Team	63
9.6.2. Indirect KPIs – Desired Outcomes Not Within The Direct Control Of The SBN Team	64
9.7. Strategic Objective 7 (Initiatives): Increase Nutrition Awareness and Demand	65
9.7.1. Direct KPIs – Performance Metrics For The SBN Team	67
9.7.2. Indirect KPIs – Desired Outcomes Not Within The Direct Control Of The SBN Team	67
10. ANNUAL SBN ETHIOPIA WORK PLAN	68
11. RESOURCES REQUIREMENT	76
12. STRATEGIC ANALYSIS (SWOT ANALYSIS)	79
13. MONITORING AND EVALUATION FRAMEWORK (M&E)	82
14. ANNEX	83
15. REFERENCES	87

TABLES & FIGURES

1. TABLE 1: LIST OF PROBLEMS HAMPERING BUSINESSES IN ETHIOPIA	2
2. TABLE 2: THE FOUR MAIN REASONS FOR ENGAGING WITH THE PRIVATE SECTOR ON NUTRITION	6
3. TABLE 3: PRIVATE SECTOR CATEGORIES TO BE TARGETED AS MEMBERS FOR SBN ETHIOPIA	7
4. TABLE 4: OTHER ADDITIONAL MEMBERSHIP FACTORS TO BE CONSIDERED	8
5. TABLE 5: NUTRITION RELEVANT POLICY DOCUMENTS AND FOOD STANDARDS	23
6. TABLE 6: MAJOR FIRMS OF RELEVANCE TO SBN	24
7. TABLE 7: STAKEHOLDER MAPPING AND ANALYSIS	27
8. FIGURE 8: SBN THEORY OF CHANGE (TOC) FROM GLOBAL TO NATIONAL LEVEL	34

ACRONYMS & ABBREVIATIONS

AACCSA	Addis Ababa Chamber of Commerce and Sectoral Associations
B2B	Business to Business
BMI	Body Mass Index
CSR	Corporate Social Responsibility
EDHS	Ethiopian Demographic Health Survey
EFDA	Ethiopian Food and Administration Authority
FMOH	Federal Ministry of Health
FNP	Food and Nutrition Policy
GAIN	Global Alliance for Improved Nutrition
GDP	Gross Domestic Product
GTP	Growth and Transformation Plan
ILO	International Labor Organization
MOTI	Ministry of Trade and Industry
NBE	National Bank of Ethiopia
NNCB	National Nutrition Coordination Body
NNP	National Nutrition Program
SBN	SUN Business Network
SUN	Scaling Up Nutrition
SWOT	Strength Weakness Opportunities and Threat
WFP	World Food Program
WTO	World Trade Organization



3 - YEAR
STRATEGIC PLAN FOR ENGAGING
THE PRIVATE SECTOR IN NUTRITION
(2021-2023)

FORWARD

First, I would like to congratulate Scaling up Nutrition Business Network (SBN) Ethiopia and its members for officially joining the national effort of attaining zero stunting prevalence by the year 2030. I also want to congratulate the sectorial ministries especially Ministry of Trade and Industry and its institute, Food, Beverage, and Pharmaceutical Development Institute, GAIN, and WFP for finalizing its 3 years strategy 2021-2023.

The private sector is one the key players in food systems and a heterogeneous category of actors which includes a range of key players from multinational companies to individual farmers. The private sector includes financial intermediaries, micro, small, and medium enterprises (MSMEs), cooperatives, individual entrepreneurs and others. The private sector is important in that it plays a significant role in production of healthy foods, help us to tackle triple burden of malnutrition, improve health and nutritious food production, and protecting biodiversity and reduction of food waste. Hence, the private sector shall be encouraged to come up with innovative solutions to production, packaging, and protection of biodiversity.

The Federal Ministry of Health, in its unreserved effort to improve nutrition and food system in Ethiopia, has developed and implementing national nutrition program and food and nutrition policy. In these documents, the government has recognized the importance of the private sector in its fight against malnutrition. However, when it comes to bringing the sector to forefront and making it an active player is still lacking.

This calls for an increased Collaboration and Commitment towards healthy and sustainable diets with the private sector at all level starting from the farm to fork. Multi-sectoral collaboration are perceived under the Government sectors and CSOs, which among others, include health, industry, trade, agriculture, and education sectors. The same type of collaboration shall be perceived within the private sector

where the private sector collaborate among other private sectors, the Government, and CSOs for improved food systems in the nation.

These collaborations are better delivered through establishing strong Public Private Partnership by recognizing what each player can bring to the table. As you know, multiple stakeholders are accountable in their respective roles in food systems;

- ❖ Farmers produces the raw materials
- ❖ Processor produce intermediate and/or final products
- ❖ Manufacturers produce – final packaged products
- ❖ Distributors are responsible for – delivery and trade
- ❖ Consumer are responsible for safe and informed use of products
- ❖ The Media shall produce balanced and factual news
- ❖ The Government shall do an oversight, enforcement, capacity building initiatives
- ❖ Academia is responsible for education, research and extension
- ❖ NGOs shall facilitate inter-govt. cooperation, expert consultations, capacity building, setting standards, and training
- ❖ Networks like SUN Business Network shall provide a neutral platform, partnerships and collaborations between business and all actors on nutrition.
- ❖ In the end, I would like to reaffirm that Federal Ministry of Health, the National Nutrition Coordination Body will continue working with SBN Ethiopia, and all key stakeholders and partners to make sure that the plans set out under this strategy are implemented effectively to improve the nutritional status of the populations of the country.
- ❖ Finally, I take this opportunity to express my appreciation and gratitude to all key players who have been involved in due course of the development of the strategy and will work tirelessly for its realization.

Thank you ,



Ferew Lemma (PhD, MPH, MD, DTM&H)
Senior Advisor, Office of the State Minister (Programs)
SUN Focal Point - Ethiopia
Federal Ministry of Health
Addis Ababa - ETHIOPIA

EXECUTIVE SUMMARY

The Ethiopian government has embarked on an ambitious 10-Year Perspective Plan comprehensive development agenda following the five year Growth and Transformation Plans (GTP); it has maintained a double digit GDP growth with an average of 9.3 % during the first GTP II period from 2013/14 to 2017/18. Ethiopia is bestowed with different agro-ecological zones that produce a wide variety of crops and livestock assets. This big resource has not yet been tapped at an industrial scale to meet national and export needs. The government of Ethiopia has a clear roadmap to add value and process such untapped wealth during the 10-Year Perspective Plan period through its multi-faceted and compressive development plans. The Government has already developed more than 17 industrial parks and 7 Integrated Agro-Parks throughout the country.

The parks are expected to better stimulate and lead the industry sector development, becoming an engine of rapid growth and transformation that nurture manufacturing industries and promote and attract both domestic and foreign investors. The parks will significantly contribute to the country's vision of becoming a middle income country with vibrant economy that creates employment opportunities for the educated youth and create dynamism in the agriculture sector and meet the growth needs of the industries.

The country has also registered significant strides in addressing malnutrition in the last decade. Stunting declined from 58.0% to 38.4%, underweight from 41% to 23.6%, wasting from 12.0% to 9.9% from 2000 to 2016, while micronutrient deficiencies such as iron deficiency anemia, vitamin A and D, iodine and calcium are still at bay posing significant threat to the economy and losses of lives.

Despite such progresses, Ethiopia is still one of the highest contributors to the global burden of malnutrition after India, Bangladesh, Pakistan and Nigeria. In 2015 the African Union published a Cost of Hunger Report which estimated the annual cost of under nutrition to the Country at ETB 55.5B (USD 4.7B) which is equivalent to 16.5% of GDP. More concerted effort and unbent resolve need to continue to reduce the high levels of malnutrition in the country.

The private sector as one of the key players in the food sector has an important role to play in such an effort. To date, such sectors, which process, store, pack, label and distribute food, are missing from the public discourse to address malnutrition. There are no effective platforms to date, that engage the private sector to address the high levels of malnutrition in the country. The national nutrition coordinating body (NNCB) led by the Ministry of Health includes government ministries, academia, NGOs and the United Nations.

Under the NNCB, the private sector has been represented by the Addis Ababa Chamber of Commerce Sectoral Associations (AACCSA). While considering the private sector representation by AACCSA a step forward in recognizing the private sector's contribution to nutritional outcomes, the need for a network of private sector businesses that are directly working to improve nutrition will further support the NNCB make well informed decisions on issues that involve the private sector. Hence, Scaling Up Nutrition Business Network (SBN Ethiopia) has come forward to leverage the private sector representation at NNCB along with AACCSA.

The Ministry of Industry with the support from GAIN and WFP has been spearheading the creation and development SBN Ethiopia since 2017. The platform is expected to create awareness among the private sectors working in the food value chain on their potential key role in the fight against malnutrition, and use such a network to build their technical capacity on new innovations and technologies like food fortification and environmentally friendly packaging and labeling, to identify major barriers that need to be addressed by the public sector, to improve collaboration with government line ministries for appropriate incentives, and to better understand and comply with national standards and legislations, and such platforms can create opportunities for Business-to-Business (B2B) engagement with local and international companies.

The Federal Ministry of Industry believes the SUN Business Network fits into the Government's National Nutrition Plan and particularly into the food fortification strategy and more importantly into the Growth and Transformation Plan (GTP II) and the soon to be launched ten-year Perspective Plan which gives prime attention to competitiveness and the private sector development. Considering the Ministry's unique role and position in the food value chain and GAIN's global role in SBN establishment, development, MOTI facilitated the establishment of

the first SBN Ethiopia network in 2017/18. The network was institutionalized in the ministry with the following rationale:

- ❖ SBN should work in close relationship with the Federal Ministry of Industry; the government's support should be concrete and visible, both to private sector SBN members and to relevant government agencies, implanting partners and funding bodies
- ❖ SBN Ethiopia should be established as a partnership between the Federal Government of Ethiopia and the private sector, which aims to achieve large-scale nutrition impact through a strong enabling environment and significant investment in nutrition by the private sector.

The Ministry of Industry was mandated to Co-chair the platform to advance the food fortification agenda in the country and assist blended complementary food producers, wheat millers, industry-scale salt producers, edible oil importers and producers, and in the next to have dynamic and responsible businesses that puts nutrition and healthier diets as one of its core agenda. As evident from the growing fortification momentum in the early 2017/18, SBN Ethiopia core priority of action or intervention area was more focus to the food fortification agenda in its first course and aspired to include or embrace the agro processors in the dairy, fruits and vegetables and other actors across the food value chain in the later stage i.e 2019/20.

There was strong consensus across all stakeholders engaged in the early years of the value and need for stronger, more effective links between public and private sector actors. As a facilitation platform, SBN can support both the private sector and the government to deliver on their respective roles at the intersection of business and nutrition. There are many tangible commercial and social benefits to joining the SBN, The main benefits include the access up to date news, information funding opportunities and research on nutrition; positive publicity; access to government decision makers

to provide and technical guidance and advice.

However, the SBN Ethiopia membership base and its commitments struggled to achieve the desired outcome in the first course of the three-year strategy period (2018-2020). Possible factors for less uptake and slow take off for SBN Ethiopia during the last couple of years would be discussed in the SWOT analysis section of this strategy paper.

In October 2020, GAIN Ethiopia commissioned consultants to develop the next three year SBN Ethiopia country road map and look for ways to expand the current membership of the network which are only 25 in number (business companies located and operational in Addis Ababa city). Following successive consultation and engagement with different stakeholders, a new mission, vision and values of SBN Ethiopia is crafted and priority intervention areas and plans for the next three years (2021-2023) is outlined below.

The Federal MoTI still sees the SBN platform as vital networking platform that can influence business practices around nutrition, leading to the increased access to available and affordable nutritious foods, which will support sustainable and profitable business as well as improved health and nutrition status of the population through increased consumption of nutritious foods and help in the alleviation of malnutrition. Accordingly, the vision of the SBN Ethiopia is: “The vision for SBN Ethiopia is ‘be the focal point for private sector engagement on nutrition.’” And its mission is “To improve and strengthen the private sector’s contribution towards improving nutrition in Ethiopia.”

Based on the vision for SBN Ethiopia stated above, in conjunction with input from key stakeholders in the sector, the following activities were undertaken:

- ❖ A review of the previous SBN Ethiopia strategy (2018-2020)

- ❖ Stakeholder mapping and analysis
- ❖ Consultation with different stakeholders (Key informant interviews)
- ❖ Review of GAIN SBN and WFP global and regional documents, best experience and virtual consultation
- ❖ Preparation of national action plan (one year) and strategic development

Several meetings and discussion with key stakeholders contacted during the strategy reviewing process identified and highlighted seven intervention areas that SBN Ethiopia as a network could make an impactful presence in the current landscape. These intervention areas are further translated into a three year strategy that includes core objectives, priority initiatives, key performance indicator(KPI) accompanied by a time frame and responsible bodies for step-by-step implementation that must be realized to achieve the vision and mission for SBN Ethiopia.

The financial requirement to implement set of activities in the first year of the strategy is estimated to be around \$279,796. It is expected that GAIN Ethiopia will be able to cover some of the activities planned for 2021 from its existing and available funds obtained from Irish Aid and WFP. However, funds to cover the next 2-3 years of the strategic activities could come from different sources and donors.

In summary, there is a strong commitment from the Government of Ethiopia, development partners and from the private sector to strengthen the role of the private sector in achieving the country’s national nutrition objectives. There is consensus that improving the enabling environment for the private sector to contribute its unreplacable contribution to improve the national nutritional landscape. The proposed structure ensures ongoing support from the government and development partners and strong communication links with relevant bodies.



01 INTRODUCTION

1.1. Private Sector in Ethiopia

Ethiopia is the second most populated country in Africa, with estimated total population of 107,534,882 as of the year 2018 and 4.5% of fertility rate (world population review, 2019). The country's total land area coverage is 1.14M KM square out of which 45% is assumed arable. The working age population was 53.6 million in 2016/17 whereas, age dependency ratio for the 2016/17 fiscal year was 75.0 (annual report, NBE, 2018). During the period of 2013/14 to 2017/18, the annual economic growth of the country showed an average 9.3%. During the fiscal year of 2017/18 the growth was 7.7% which was slower than the previous year growth rate due to a decline in agriculture and industry (annual report, NBE, 2018).

Since 2005, the Government embarked on state led development programs and achieved a successive high economic growth rate above by seven percent on average. The government has also

endorsed the Growth and Transformation Plans, GTP I in 2010 and GTP II in 2016, to bring structural change and achieve middle-income status by 2025. Currently, the country has just launched a ten-year Perspective Plan which gives prime attention to competitiveness and the private sector development and which aspires to achieve the Sustainable Development Goals (SDG) by 2030.

Ethiopia is recently signed African free trade area agreement and has also been fulfilling the requirements of WTO since 2008. Heading into a more liberal economic system requires the nation to build very competitive private sectors which can withstand stiff competition coming from competing countries. Besides, the private sector should develop a capacity to tap opportunities associated with access to a wider market. Nevertheless, further efforts are quite required to enhance the competitiveness of the private sector of Ethiopia.

Hence, identification of the appropriate interventions demands assessing different dimensions of competitiveness of Ethiopia. Ethiopia is currently ranked 159 out of 190 countries in the World Bank's Ease of Doing Business indicators (2019 report), sliding two positions from the previous year and down 55 positions from its best-ever ranking back in 2011 (World Bank, 2019). According to this report, the rank for Rwanda, Kenya and Egypt for the year 2019 are 29, 61 and 120 respectively.

For a developing country such as Ethiopia, whose economy is still predominantly agrarian, the private sector is undoubtedly a key player in its overall economic growth. Geda (2008)¹ documented the role of private business in becoming veritable agents of change for employment creation and income generation, human development and poverty alleviation, export promotion, import substitution and entrepreneurship and hence the driving forces behind the growth of the country economy.

Policies and initiatives pertinent to enthralling private businesses are therefore a priority for Ethiopia. The government in its recent important policy-cum-plan documents, an equivocally highlighted the importance it attaches to the development of the private sector (Menkir, 2016)². Although improvements have been registered during the last few years, the performances of enterprises have fallen short of expectations due various challenges (Ethiopian economics associations, 2015)³.

Businesses in Ethiopia are confronted with several challenges stemming from policy and legal framework on one hand and implementations of policies and laws on the other hand. Challenges related to economic status of the country are also not uncommon. Existing literature shows that access to finance tops the list of problems hampering businesses in Ethiopia⁴. The following tables summarizes the key problems that are observed and documented with various literatures.

Table 1 : List of problems hampering businesses in Ethiopia⁵

No	Indicator	Number	Percent
1	Access to finance	46	28
2	Business Skills	21	13
3	Input supply, access to land, electricity	20	12
4	Bureaucratic burden	18	11
5	Tax rate and tax administration	15	9
6	Infrastructure	15	9
7	Corruption	8	5
8	Market Problem	7	4
9	Competition	5	3
10	Limited BDS	5	3
11	Innovation	5	3
Total		165	100

1 Alemayehu Geda (2008) The Road to Private Sector Led Economic Growth in Ethiopia: A Strategy Document of the Addis Ababa Chamber of Commerce

2 Firewoini Gebreyesus Menkir (2016). Access to Finance and its Challenges for Private Sector in Ethiopia

3 Ethiopian Economic Association (2015) Small and Micro Enterprises (SMEs) Development in Ethiopia: Policies, Performances, Constraints and Prospects

4 AACCSA, 2016; Amentie, Negash, & Kumera, 2016; Ethiopian Economics Associations, 2015; Fie, Kumera, & Tanku, 2018; Gurmessa, 2017; Kibret, Lalisho, Rokandla, & Belayneh, 2018; Menkir, 2016; Tesfaye and Hussen, 2018; World Bank/DB, 2019; World Bank/ES, 2015, 2012; World Economic Forum, 2017).

5 AACCSA Policy Plan (2025). The creation of a Robust Private sector, Volume II

1.2. Key Nutrition Issues in Ethiopia

The current nutrition and household food insecurity landscape including hunger and under nutrition remain critical issues; the poor nutritional status of women and children has been a consistent problem in Ethiopia.

Based on the EDHS, 2016, Ethiopia has seen a steady reduction in stunting from 58 per cent in 2000 to 38 per cent in 2016, in the percentage of underweight children from 41 per cent to 24 per cent during the same period, and in wasting from 12 per cent to 10 per cent. These trends indicate an improvement in chronic malnutrition over the past decade.

Further progress was observed under the 2019 EDHS as rates of stunting and underweight have decreased over the past decade but remain high with 37% of children under 5 being short for their age or stunted and 12% severely stunted (below -3 SD). Micronutrient deficiencies in vitamin A, folic acid, iodine and zinc remain the most common⁶.

In 2015, the African Union published a Cost of Hunger Report which estimated the annual cost of under nutrition to the Country at ETB 55.5B (USD 4.7B) which is equivalent to 16.5% of GDP. In addition to the various ongoing efforts to tackle these important challenges, the Government of Ethiopia issued the Seqota declaration in 2015, in which nine ministries commit to a multi-sectoral approach to reduce malnutrition in all its forms. This initiative is part of ongoing effort of implementing the National Nutrition Program and the Food and Nutrition Policy.

Implementation of the National Nutrition Strategy and National Nutrition program in Ethiopia is being coordinated by the National Nutrition Coordinating Body (NNCB), led by the Federal Ministry of Health. This is a cross-sectoral body that includes representatives from 9 government ministries, academia, NGOs, and the United Nations. The private sector is represented by the Addis Ababa Chamber of Commerce, but this link could be strengthened.

⁶ Ethiopian Public Health Institute (2016). Ethiopian National Micronutrient Survey



02 | BACKGROUND

2.1. Scaling Up Nutrition (SUN) and Sun Business Network (SBN)

The Scaling Up Nutrition (SUN) Movement was established in 2010 with a view to tackle the underlying causes of malnutrition, with a particular emphasis on the 1,000 days from conception to a child's second birthday. The remit of SUN is to catalyze support for countries prepared to “scale up nutrition”. Ethiopia joined the SUN Movement as the 30th country in August 2012, and as of December 2015, 56 countries had joined the SUN Movement. The Federal Ministry of Health hosts the national SUN secretariat in Ethiopia as it spearheads the National Nutrition Program (NNP) in close collaboration with other line Ministries.

Multi-sectoral engagement in the fight against malnutrition is core to the SUN Movement; hence SUN encourages participating countries to establish four country-level networks (Civil

Society Network, UN System Network, Donor Network and Business Network) to coordinate efforts and facilitate partnerships across sectors. The SUN Business Network (SBN) was ‘established to mobilize and intensify business efforts in support of the SUN Movement and to ensure that all people realize their right to good food and nutrition’. It aims to find solutions to end malnutrition through business, markets and people.

SBN is convened at the global level by the Global Alliance for Improved Nutrition (GAIN) and the World Food Program (WFP), with a global secretariat within GAIN in London, UK. SBN aims to build a global platform of businesses committed to scaling up nutrition. It currently has more than 400 corporate members, ranging from multinational to national companies, who have made commitments to advance nutrition through commercial



models and corporate social responsibility (CSR) initiatives. These commitments are tracked and reported in the Global Nutrition Report.

The SBN also supports SUN countries to build awareness of the importance of nutrition in the business community and engages with companies to advance nutrition through workforce nutrition practices or the provision of goods or services. In addition to the global SBN platform, 13 country platforms have been established across Africa, Asia and Central America and a further 15+ national SBNs are in the process of being established.

At the national level SBN convenes business to increase awareness of the role the private sector can play at addressing all forms of malnutrition at the country level and shares opportunities for business to play a role. By identifying businesses needs to meet commitments to improve nutrition, the SBN facilitates partnerships between private sector members and

providers of technical assistance, business development support and/or providers of finance to support business contributions to the alleviation of malnutrition.

In addition, national SBNs undertake evidence informed advocacy to SUN stakeholders and partners on the role of business in nutrition and advocates to government and other partners on the need for an enabling policy environment that encourages greater private sector investment in nutrition. SBN's sphere of influence and realm of accountability is limited to direct outputs arising from its activities. However, it is envisaged that a number of outcomes will arise from the activities and outputs of these which are steps in the pathway to improved population health and a more productive society. Looking at the importance of engaging with business on nutrition, there are four main reasons for engaging with the private sector on nutrition as detailed in the following diagram;

The **4** main reasons for engaging with the private sector on nutrition



Figure 1 : The four main reasons for engaging with the private sector on nutrition

2.2. Target Members of The Sun Business Network (The Lifeline of The SBN Ethiopia)

The SBN Ethiopia aims to formally sign up 250+ members by the end of 2021 (building on the target of 25 members by the end of 2020). The following tables summarize the private sector categories that shall be targeted during the membership expansion.

Table 2 : Private sector categories to be targeted as members for SBN Ethiopia

Industry Group	Rationale for SBN Membership
Food production and processing	<ul style="list-style-type: none"> ▶ Work together to raise awareness and generate market demand for nutritious foods and drinks ▶ Advocate for an improved regulatory environment to improve the ease of doing business in food and nutrition ▶ Receive training, tools and templates on building some strong business strategies around nutrition ▶ Broaden the customer base and develop a better understanding of the market and the consumers
Agriculture	<ul style="list-style-type: none"> ▶ Help to grow the market for a diversified food basket ▶ Support local farmers by promoting local & indigenous food products
Retail	Major food retailers: <ul style="list-style-type: none"> ▶ Network with organizations along the food value chain ▶ Discover new food and drink products, advocate for growing the market for nutritious foods
Finance	Banks and financial institutions: <ul style="list-style-type: none"> ▶ Exposure to potential investment and financing opportunities in the food and nutrition industry ▶ Ignite growth in nutrition by financing viable and high impact nutrition initiatives along the food value chain
Transport & distribution	<ul style="list-style-type: none"> ▶ Networking opportunities with organizations looking to expand their supply chains in the country ▶ Work together to form distribution partnerships and leverage existing networks improve distribution efficiency ▶ Help to make nutritious foods more accessible and affordable by helping to drive down distribution costs
Professional services/ construction/ security/ Manufacturing / Energy & utilities, Mobile networks & communications	<ul style="list-style-type: none"> ▶ Establish workforce initiatives to improve nutrition. These can help to increase staff productivity, reduce the burden of sick leave and encourage better nutrition in families and communities of workers. ▶ Discover CSR opportunities in the fight against malnutrition

Other additional membership factors to be considered



Figure 2 : Other additional membership factors to be considered

Benefits of being a member of SBN Ethiopia

- 
- ◆ Network with other companies that have an interest in nutrition and expanding the nutrition market
 - ◆ Contribute to a collective voice & community for nutrition in Ethiopia's private sector
 - ◆ Provide input into government policy decisions and support recommendations for regulatory improvements
 - ◆ Receive updates on the food industry & relevant policy changes that may impact your business decisions
 - ◆ Enable your business to showcase its contributions to improving nutrition at a national and global level
 - ◆ Receive global exposure as a supporter of improved nutrition on the Network website
 - ◆ Access a wide range of Corporate Social Responsibility (CSR) opportunities for your business to improve nutrition in the community
 - ◆ Explore partnership opportunities for private sector members to engage with each other, NGOs, professional associations and other interested organizations on nutrition
 - ◆ Receive practical advice, guidance and training, through workshops and events, to increase your company's commercial engagement in nutrition
 - ◆ Participate in a national movement, including major events, aiming to grow the market and expand business involvement in nutrition.

The member organization's commitments to the SUN Business Network and its objectives.

The members shall commit to:

- ◆ Supporting the SUN Business Network and being active in its vision
- ◆ Promoting action by business towards improving nutrition for public health impact in their country.
- ◆ Adhering to the Principles of Engagement of the SUN Movement and the SUN Business Network
- ◆ Sharing general information about the organization and its efforts to support nutrition
- ◆ Marketing consumables in a way that strictly adheres to the established national regulatory framework

2.3. SBN Ethiopia Governance Structure and Operation

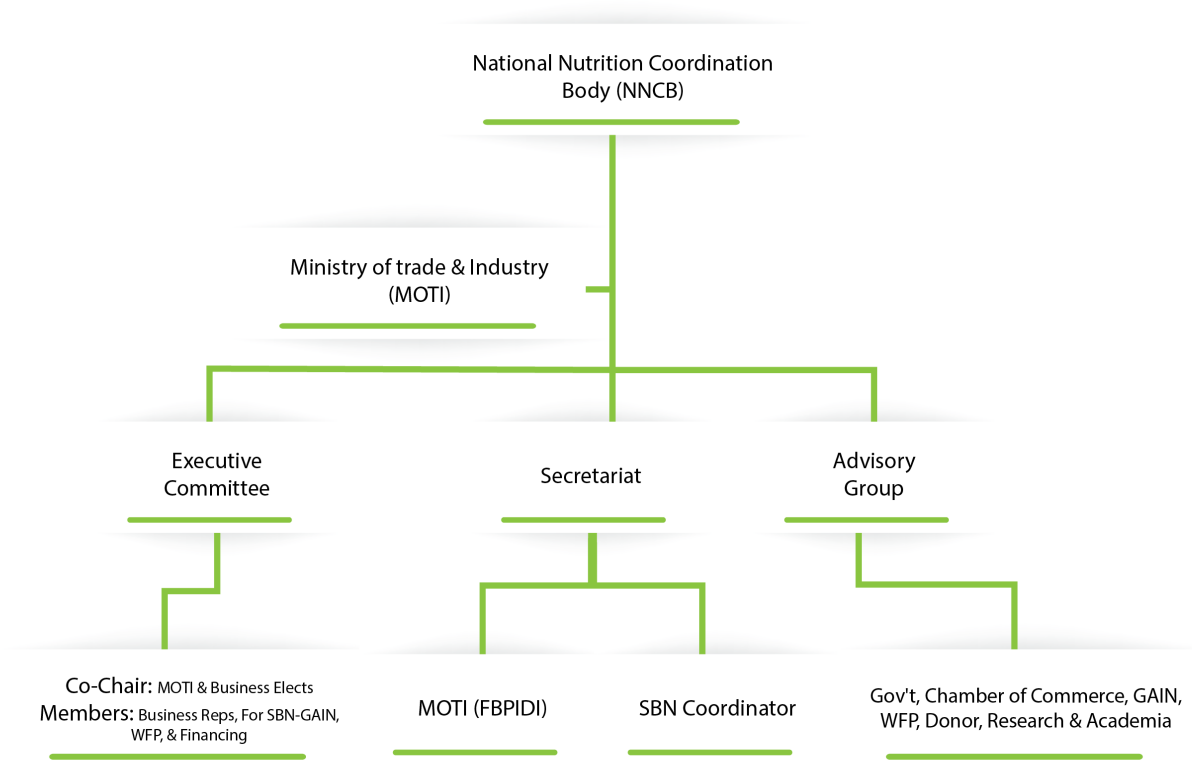
SBN Ethiopia establishment spearheaded by GAIN Ethiopia was launched and endorsed by MOTI in 2017 in an event observed by representatives of the industries and key stakeholders including the then State Minister of Trade and Industry (H.E Dr. Dr. Mebrahtu Meles). Following series of consultations and other countries experience on SBN establishment, the most feasible governance structure for SBN Ethiopia was articulated and proposed with the two principles:

- ▶ SBN Ethiopia should be established as a partnership between the Federal Government of Ethiopia and the private sector, which aims to achieve large-scale nutrition impact through a strong enabling environment and significant investment in nutrition by the private sector
- ▶ SBN should be sponsored by the Federal Ministry of Industry; the government's support should be

concrete and visible, both to private sector SBN members and to relevant government agencies, implanting partners and funding bodies

The platform was co-chaired and managed by the private sector and facilitated by the public sector that is the MOTI. A national Technical Working Group composed of Millers & Blended Food Associations and an advisory group composed of FMOH and WFP was established. In its first course of engagement, the network developed an annual work plan focusing on food fortification as the first phase of SBN engagement. Figure 1, below, shows the proposed structure for SBN Ethiopia.

Following its establishment, the network has achieved some key milestones although it run short of achieving what was planned under its strategy. The following figure summarizes the progress made since 2017/18 and the ongoing and status of the network.



Following its establishment, the network has achieved some key milestones although it runs short of achieving what was planned under its strategy. The following table summarizes the progress made since 2017/18 and the ongoing and status of the network.

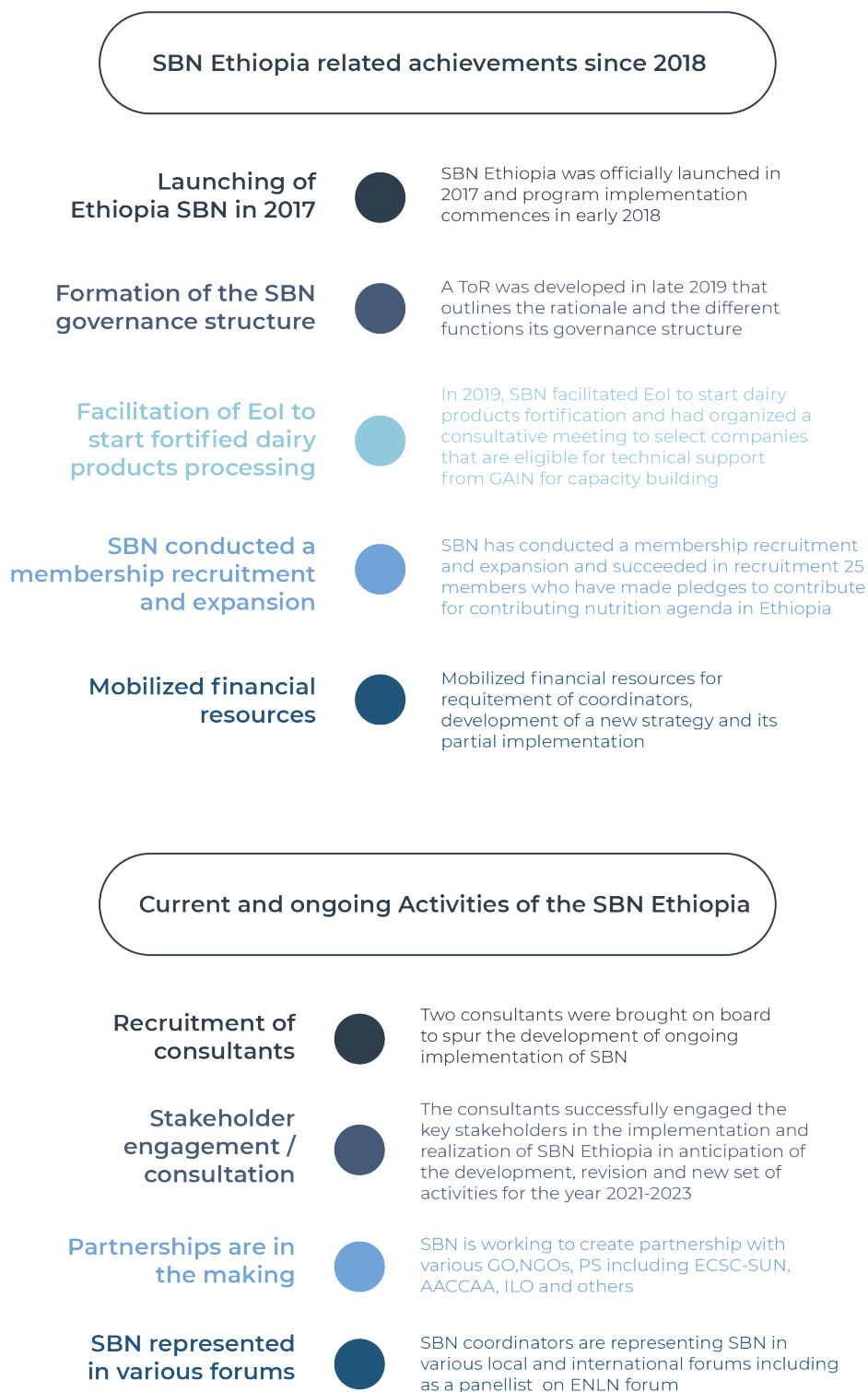


Figure 3 : SBN Ethiopia past achievements and progress and current updates



03

METHODOLOGY

3.1. Objectives and Scope of Work (SoW)

This strategy is the product of a mission to confirm the potential and key objectives for SUN Business Network (SBN) in Ethiopia and to develop, based on the input of key local stakeholders, a strategy and high-level work plan. It has been informed by desk research and interviews conducted in Addis Ababa, Ethiopia, between 28 October and 28th of November 2020 and by subsequent further engagement by GAIN with the private sector.

The report has been prepared by Asmelash Rezene and Abinet Tekle, Public Health Nutritionist, and both with solid experience working on nutrition programming involving and working with both the public and private sectors. They were commissioned by GAIN Ethiopia as SBN coordinators/consultants to lead the strategy development and lay the ground for smooth SBN Ethiopia program take off.

3.2. SBN Strategy Development and Core Process

Overall, the process of the strategy development encompassed reviewing of existing relevant literature and secondary data on the overall food insecurity and malnutrition. It has tried to assess opportunities and challenges the role of the private sector in the current administration of the country,

conducting targeted consultations with key stakeholders and assessing the link and any possible effect(positive) between current SBN strategy and the recently formulated policies and strategies. The process of the developing the took two phases;

Phase 1

Development of National SBN Action Plan

In the first phase, the consultants set out to complete the following activities in a bid to prioritize the critical lists of activities that are deemed essential and need to be pursued in the first course of the SBN strategy.

Activity 1.1:

Literature review and analysis

The development of SBN national action plan and subsequent revision of the current SBN Ethiopia strategy started with a detailed review of relevant literature on current nutrition and food insecurity facts and figures in Ethiopia, status of actors and framework of the SBN, the trade, investment and marketing policies and strategies, current policies and strategies around nutrition sensitive programming, other stakeholder actively working within the country with a nutrition lens to improve household food security and nutrition and all other relevant literature consistent to the assignment. The consultants in the end developed the National Nutrition Priorities Mapping tool to document the above literature and desk review.

Center (EDC), the international communities (donors and Organizations supporting and implementing a Nutrition /Agriculture/linkage portfolio and advocating for 'NUTRITIONAL LENS' on agriculture projects and their linkage.

The aim of this participatory processes were: to seek information on current activities and plans, complementaries, 'felt need and priorities' for the SBN Ethiopia, lessons learned/from current SBN Ethiopia strategy. A detailed list of stakeholders to be consulted was prepared and followed. For consistency, a check list of key informant interviews was also prepared and followed. Results of the literature review (National Nutrition Priorities Mapping), stakeholder mapping and analysis tool and the different key informant interviews in the end will help prepare the following:

Activity 1.2:

Stakeholder consultations

Relevant stakeholders were consulted (or, better, actively involved in order to improve ownership), in particular: the Ministry of Agriculture, Agriculture Transformation Agency (ATA), Ministry of Health (MoH), Ministry of Trade and Industries (on matters related to investment opportunities and challenges in the country); private companies working on agriculture or that are sensitized with nutrition related investments, other private companies that have potential to spur nutrition at work place, various networking, association and advisory companies (SUN Civil Society Network, SBN Ethiopia members, AgriProFocus Ethiopia/YALTA, First Consult, Master Card Foundation, Africa Development Fund, Entrepreneurship Development

- 🌿 Current malnutrition and food insecurity landscape
- 🌿 Felt need and priorities for SBN to play in Ethiopia
- 🌿 Various policies and strategies affecting positively and negatively SBN Ethiopia
- 🌿 New Regulations/policies around the private sector (current administration priorities such as the Home Grown Economic Policy)
- 🌿 Level of coordination and integration among and in between the different SUN actors at the national level

Activity 1.3:

Nutrition at workplace mapping and analysis

In the current Ethiopian settings, there is a growing momentum to leverage nutrition at workplace. So the consultants did try to learn as much as possible how the current SBN can make use of these important developments and mainstream this concept into the new strategy that is going to be delivered at the end of this consultancy period.

The nutrition at workplace mapping unlike the previous mapping exercise included any companies with or without

any link to nutrition¹. The stakeholder mapping will include major factors and companies providing meals or snacks to its employees. Its emphasis will be to map and consult private companies providing 'Nutrition at Work: Providing healthy meals and snacks for a thriving workforce.

The consultants at the end of the mapping exercise went through the documents/resource on Workforce Nutrition shared by the GAIN Global SBN team and forwarded their comments/advice where the handbook could be more context specific (an Ethiopian flavor) and translation to different local languages; where its required.

¹ Possible stakeholders or engagements Frontier: Ethiopian Airlines, Manufacturing enterprises situated and operational in Bole Lemi or Hawasa Industrial Parks, Agro processing companies based and operational in the 7 Agro Parks, the 40 companies supported by ILO by Decent for Work Project, Cooperatives,

Phase 2

Development or refinement of SBN Ethiopia strategy, operationalize and launch Plan

This is the phase where the above tasks would be helpful to develop the new SBN strategy, membership criteria and establishing a stronger database/membership and finally launching the strategy and the SBN Ethiopia Nutrition at Workplace Handbook. Overall, these activities were slotted from last week of November to last week of December.

Activity 2.1:

Develop SBN Ethiopia strategy (renewed intervention logic and stakeholders mapping)

Once all the preparatory steps for designing the national action plan is completed, the consultants' made use of all available primary and secondary data to refine and design the new SBN Ethiopia strategy. The consultants did make use of all available tools and templates to design the strategy. The new SBN strategy will be designed with inputs and information obtained from the Nutrition Priority Mapping tool, stakeholder mapping and analysis and key informant interviews and stakeholders' involvement-. Among key issues to be addressed will include;

- ❖ Priorities and intervention logic or theory of change in the context of new realities (Covid-19 pandemic, socio-political, and economy)
- ❖ Short term and long term objectives
- ❖ Contribute to government plans and priorities (10-Year Perspective Plan, the national nutrition policy and strategy, the Seqota Declaration, Home Grown Economy, the New Investment Proclamation, etc.)
- ❖ Most feasible governance structure for the new SBN strategy and membership criteria
- ❖ Synergies with other players
- ❖ Private sector involvement
- ❖ Important nutritional and food

security indicators/parameters

❖ Financing leverage

Lessons learned from others SBN Countries strategies will be included in the refinement exercise, in order to improve the common understanding among stakeholders of what is ideal to be achieved in the current strategy or realities in the ground versus the global SBN intervention logic or theory of change.

Activity 2.2:

Stakeholder validation workshop

A one-day validation workshop was organized to consult with the different stakeholders and to solicit their comments and inputs to further enrich the draft SBN Ethiopia Strategy. The stakeholders will be drawn from the Ministry of Agriculture, Agriculture Transformation Agency (ATA), Ministry of Health (MoH), Ministry of Trade and Industries (on matters related to investment opportunities and challenges in the country); private companies working on agriculture or that are sensitized on nutrition related investments, other private companies that have potential to spur nutrition at work place, various networking, association and advisory companies (SUN Civil Society Network, SBN Ethiopia members, AgriProFocus Ethiopia / YALTA, First Consult, Master Card Foundation, Africa Development Fund, Entrepreneurship Development Center (EDC), the international communities (donors and partners organizations). The final strategy will be shared during the launching event, scheduled to take place in the second week of December.

Activity 2.3:

Ongoing engagement of business & relevant stakeholders

The consultants continued to use the SBN Ethiopia membership base to lobby and reach across for their different meetings, technical consultations regarding development of the SBN national action

plan and subsequently the strategy. The consultants continued the same engagement with the different arms of the SUN network currently operational in the country. The consultants also leveraged significant amount of their time to building the networking by using similar platform such as Addis Ababa Chamber of Commerce and Sectorial Association (AACCSA) venue and membership data base as well as YALTA/AgriProFocus Network membership and database. The consultants are already in discussion with the AgriProFocus management team on the ways how to complement the SBN and AgriProFocus Ethiopia Networking experience.

Activity 2.4:

Launch the strategy & mobilize business commitments

A networking will be organized to herald the launching of the revised the SBN Ethiopia strategy and mobilize business commitments. Invitees will be drawn from the private sectors (nutrition active and none), Government line Ministries, Bankers and several active networks and advocates. This event will be organized in the last week of April 2021.

Activity 2.5:

Take part in annual SUN reporting, produce and share best case studies, advocacy and fund mobilization tools

The consultants continued to conduct relevant case studies that come out of their day to day engagements and particularly the Nutrition at Workplace initiative and pioneer companies who have demonstrated a strong commitment in the fight against malnutrition, food insecurity, marketability and advocacy of nutritious and healthy foods will feature as case studies. Moreover, the consultants have taken part in the annual SUN report write up and other engagements deemed necessary to drive SBN agenda beyond 2023.

Tools used:

The consultants primarily would be using all materials and resources shared by the Global GAIN SBN team and develop tools deemed necessary to carry out the specific tasks of revising and designing the new SBN strategy (2021-2023). The following tools and checklists will be referred and used for this particular assignment:

1. SBN National Action Plan- developed by Global SBN team
2. National Nutrition Priorities mapping & nutrition facts and figures (most current)- both by Global SBN team and the consultants
3. Budgeting an SBN strategy- developed by Global SBN team
4. Donor Mapping- developed by Global SBN team
5. New Membership Form/toolkit- developed by Global SBN team
6. Member finance surveys- developed by Global SBN team
7. Member technical survey- developed by Global SBN team
8. Key informant interviews/checklist for Private companies involved in nutrition related activities- developed by the consultants
9. Key informant interviews/checklist for Private companies not involved in any nutrition related activities- developed by the consultants
10. Key informant interviews/checklist for companies targeted for Nutrition at Workplace initiative- developed by the consultants
11. Key informant interviews/checklist for Government Ministerial offices- developed by the consultants
12. Key informant interviews/checklist for networks, advocates and private and non-private banks- developed by the consultants
13. Key informant interviews/checklist for international organizations, SUN civil societies- developed by the consultants



04

SITUATIONAL ANALYSIS

4.1. Nutrition Landscape and Analysis

Ethiopia has achieved remarkable economic and social development gains during the past decade, with income per capita more than doubling in real terms since 2004/05 (IMF). At the same time, poverty has fallen from 44 percent in 2000 to 30 percent in 2011⁷ while inequality has remained low (Gini coefficient of 0.30 in 2010). However, the second most populous country in Africa with over 90m people⁸, Ethiopia still has some of the highest rates of malnutrition and micronutrient deficiency globally.

Among children:

- ❖ Percentage of children age 6-59 months classified as having any Anemia is 57 (EDHS, 2016)
- ❖ 28% of all child mortality in Ethiopia is associated with under nutrition;
- ❖ Chronic malnutrition has improved over the past 15 years, but the stunting rate is still 40% (EDHS2014);
- ❖ Wasting affects 9% of children under five years (EDHS2014);
- ❖ Anemia prevalence amongst under-five year old children remains high at 44% (EDHS2011) (even though it declined by 19% in the last 6 years);
- ❖ Just over half of children under 6 months are exclusively breastfed (EDHS2011);
- ❖ Only 4.3% of children over 6 months consume the recommended 4 food groups daily (EDHS2011);
- ❖ Only 13% of children under 2y consume iron rich foods;
- ❖ Sixteen (16) % of all repetitions in primary school are associated with stunting.

⁷ Ethiopia Poverty Assessment 2014, World Bank, 2015. Washington, DC

⁸ Ethiopian Central Statistics Agency

Low BMI of pregnant women and high anemia rates lead to high rate of stunting in offspring.

Among adolescent girls:

- ✦ The EDHS 2011 revealed that the proportion of non-pregnant adolescents aged 15-19 years with chronic malnutrition (BMI <18.5) was 36%;
- ✦ The median age for a first marriage is around 16.5;
- ✦ 12% of adolescent girls (aged 15–19y) are either already mothers or pregnant with their first child;
- ✦ Prevalence of anemia in adolescents aged 15 to 19 year 13%.

Among women:

- ✦ Percentage of women age 15-49 years classified as having any Anemia is 57 and 24 respectively (EDHS, 2016)
- ✦ Chronic malnutrition among women (15-49y) is relatively high, with 27 per cent having a body mass index (BMI) of less than 18.5 kg/m²
- ✦ Anemia among women in the reproductive age group (15–49y) was found to be 22 per cent (EDHS 2011).
- ✦ Prevalence of inadequate intake of Iron and Zinc is 12.9% and 50.4% respectively among women of reproductive age (15 to 49) (NFCS ,2013)
- ✦ 38.4% of women of reproductive age (15 to 49) consume 0 to 2 foods groups and 49% consume 2 to 4 food groups. Only 12.6% consume +5 food groups (NNPB , 2009)

Within the general population:

- ✦ Only 46% of households are consuming quality iodized salt in accordance to the levels specified in the regulations (NNP II);
- ✦ 67% of the adult population in

Ethiopia suffered from stunting as children, the effects of which are irreversible after the age of 2 years;

- ✦ Overweight prevalence rose by 50 percent, from four to 6 percent, between 2005 and 2011 (DHS).

In terms of commercial nutrition products or products available through the public health system:

- ✦ There is very limited use of complementary foods for prevention of malnutrition; a small number of products are commercially available, but price is prohibitive for most families and products are not reaching rural areas;
- ✦ Micro-nutrient powders (MNPs) are only used in limited NGO pilots; these products are not registered for commercial sale and standards have not yet been developed;
- ✦ Lipid based nutrient supplements (LNS) is being piloted by WFP;
- ✦ There are no products targeting pregnant and lactating women and adolescent groups
- ✦ Malnutrition negatively affects the true economic potential of the country. A World

Bank mission in 2011 developed a “Micronutrient Damage Assessment Report”⁹, (DAR) which concluded that Ethiopia’s GDP is depressed by 1.42% due to anemia, vitamin A and folic acid deficiencies. The full analysis finds economic losses of nearly half a billion dollars annually, including:

- ✦ **Lost Workforce:** More than 50 thousand annual infant and child deaths attributed to vitamin A, iron, and folic acid deficiencies.
- ✦ **Lost Future Productivity:** Net Present Value of productivity deficits from > 8 million children suffering developmental, cognitive, and schooling deficits due to iron deficiency anemia.

⁹ Bagriansky, J.; Ethiopia National Damage Assessment Report.

❖ **Lost Current Productivity:** Depressed work performance from nearly 2.5 million anemic adults engaged in manual and heavy manual labor.

In 2015 the African Union published a Cost of Hunger Report¹⁰ which estimated the annual cost of under nutrition at ETB 55.5B (USD 4.7B) which is equivalent to 16.5% of GDP.

4.2. Policy Landscape and Analysis

4.2.1. National Nutrition Program and Seqota Declaration

To tackle this important challenge, the Government of Ethiopia revised the National Nutrition Programmed (2013-2015)¹¹ with the following strategic objectives:

- ❖ Improve the nutritional status of women (15–49 years) and adolescents (10–19 years)
- ❖ Improve the nutritional status of infants, young children and children under 5
- ❖ Improve the delivery of nutrition services for communicable and non-communicable/lifestyle related diseases (all age groups)
- ❖ Strengthen implementation of nutrition sensitive interventions across sectors
- ❖ Improve multi-sectorial coordination and capacity to ensure NNP implementation

Seqota declaration reiterated and expanded these objectives in the 2015 in which all Regional Presidents and line ministries commit to work together in the implementation. Seqota declaration is a multi-sectorial program to reduce malnutrition in all its forms by 2030. It is expected to hugely contribute to the successful implementation of the National Nutrition Program and the Food and Nutrition Policy. Seqota declaration has the following objectives and targets;

- ❖ Zero stunting in children less than 2 years;
- ❖ 100% access to adequate food all year round;
- ❖ Transformed smallholder productivity and income;
- ❖ Zero post-harvest food loss;
- ❖ Innovation around promotion of sustainable food systems;
- ❖ Continued improvement in accessibility and coverage of adequate and safe drinking water supply; 100% open defecation free kebeles by 2030, and irrigation for supporting agriculture as well as access to drinking sources;
- ❖ Increased efforts to educate women and girls, especially rural girls, to help prevent the intergenerational transmission of poverty, and implement the school health and nutrition strategy initiatives: school feeding, deworming and nutrition education;
- ❖ Focus on poverty reduction and resilience building through predictable cash transfers to the most vulnerable groups and targeted support to school feeding programs, pregnant and lactating women, and children under two years of age.

¹⁰ African Union Commission, NEPAD Planning and Coordinating Agency, UN Economic Commission for Africa, and UN World Food Programme. The Cost of Hunger in Africa: Social and Economic Impact of Child Undernutrition in Egypt, Ethiopia, Swaziland and Uganda. Abridged Report. Addis Ababa: UNECA, 2014.

¹¹ NNP II (2015-2020) has been developed but is pending publication

4.2.2. Agriculture and Nutrition

Ethiopia has been a signatory of CAADP (Comprehensive Africa Agriculture Development Programme), an African-led program bringing together governments and diverse stakeholders to reduce hunger and poverty and promote economic growth in African countries through agricultural development, since 2009 and has followed an agriculture-led industrialization policy for many decades. One important policy mechanism is the Agricultural Growth Programme (AGPP), implemented in four National Regional states (Oromiya, Amhara, SNNPR, Tigray).

AGP is a multi-donor financed programme designed to increase productivity and market access for key crop and livestock products with increased participation of women and youth. AGP 2, the second phase of the programme, includes an indicator for household dietary diversity and will include some nutrition sensitive value chains such as poultry, and cross-cutting themes of gender, nutrition, youth development, climate smart agriculture mainstreaming, and capacity development. For this purpose, GOE and AGP development partners conducted an assessment of what and

how to incorporate nutrition into AGP2.¹²

In recognition of the important links between agriculture and nutrition, the Ministry of Agriculture has developed a draft strategic plan for nutrition-sensitive agriculture¹³. This sets out six strategic objectives:

- ❖ Leverage nutrition into agriculture policy and strategy documents at all levels
- ❖ Establish and strengthen structure responsible for nutrition mainstreaming and build capacity of agricultural sector at all levels
- ❖ Enhance resilience of vulnerable communities and households prone to climate change and moisture stress
- ❖ Increase year-round availability, access, and consumption of diverse, safe, and nutritious foods
- ❖ Gender: Empower women and enhance their role in nutrition sensitive agriculture
- ❖ Develop strong multi-sectorial coordination

4.2.3. School Feeding Program

The Ethiopian National School Feeding Program (ESFP) was designed to

1. Improve school children's health and nutrition status;
2. increase access to education, i.e. enrolment, attendance, retention and completion;
3. Reduce gender and social inequalities by targeting the most vulnerable groups; and
4. Increase smallholder farmers' access to the school feeding market, thereby increasing their incomes.

¹² NNP II. Reference should be: "Study for the Mainstreaming of Nutrition Outcomes in Agricultural Growth Programme (AGP 2) in Ethiopia", EC, 2015.

¹³ Nutrition Sensitive Agriculture Draft Strategic Plan. Ministry of Agriculture and Natural Resource, Government of the Federal Democratic Republic of Ethiopia, October 2015.

4.2.4. School Feeding Program

Ethiopia has a well-developed policy framework for nutrition, and the government has made a strong commitment to dramatically improving the country's nutrition indicators. The National Nutrition Strategy (NNS)¹⁴ was approved in 2008 to overcome the burden of under-nutrition and the National Nutrition Program (NNP) was designed to implement the strategy. The primary aim of the NNP is to improve the nutritional status of the population, especially children, pregnant and lactating women and people living with HIV, through cost effective, sustainable and harmonized interventions primarily at the community level.

Implementation of the National Nutrition Strategy and National Nutrition Plan II are coordinated by the National Nutrition Coordinating Body (NNCB), led by the Federal Ministry of Health. The NNCB is a cross-sectorial body that includes representatives from government sectors, academia, NGOs, and the United Nations. The private sector is represented by the Chamber of Commerce, but this link could be strengthened.

Six task forces have been established under the umbrella of the NNP/NNPII:

1. **Community-Based Nutrition** (UNICEF, WB, JICA)
2. **Emergency nutrition:** ENCU, DRMFSS, WFP, UNICEF, Concern, SCUSA, SCUK, MSH, FAO, GOAL WVI, MC, Merlin, ENGINE
3. **IYCN:** Alive &Thrive, GAIN, UNICEF, ENGINE
4. **Micronutrient/Enhanced Outreach Strategy:** led by MoH rep, MI, WB, UNICEF, GAIN
5. **Food Fortification:** GAIN, MI, TechnoServe, Save the Children, UNICEF
6. **Nutrition Sensitive Agriculture Group:** led by MoA, Save the Children, EU, SNV, USAID, FAO

Some coordination mechanisms at regional and community level have been established. It is recognized that these must be extended and strengthened, and this is a priority of the NNCB.

4.2.5. Food Standards and Control System¹⁵

Key government food regulatory agencies include:

The Ethiopian Standards Agency (ESA) is a semi-autonomous body that reports to the Ministry of Science and Technology. The ESA is responsible for preparation of all national standards, including food quality and safety standards. The Ethiopian Standards Agency (ESA) emphasizes developing key economic sectors including food and agro-processing. ESA has published mandatory standards for edible oil

and iodized salt along with voluntary standards for wheat flour and wheat flour products such as pasta.

While ESA is the implementation body, the Standards Council of Ethiopia is a multi-agency institution that develops and approves new standards. The Standards Council of Ethiopia includes technical committees convened to address specific standards and issues. For food and

¹⁴ National Nutrition Strategy, Federal Ministry of Health, Government of the Federal Democratic Republic of Ethiopia, January 2008.

¹⁵ Assessment of Feasibility and Potential Benefits of Food Fortification in Ethiopia, Federal Ministry of Health, Government of Ethiopia, October 2011; and stakeholder interviews.

nutrition, technical committees include participation of the Codex Committee of Ethiopia, Ministry of Trade, Ministry of Science and Technology, Ministry of Industry and other stakeholders. The ESA as a secretariat to the Standards Council develops the written standards once the technical committee has approved the standard. Food standards are developed following Codex Alimentarius guidelines and reference documents. The time to establish a new standard or to modify an existing one is estimated to take between 6 to 18 months.

The Federal Ministry of Industry (MOI) is responsible for business registration and is responsible, along with other agencies, for inspection of products and industries. With responsibility over business licenses, MOI is a major player in enforcement of standards.

The Federal Ministry of Health (FMOH) is represented on the technical committees for the development of food standards. Development of food fortification standards and specifications are led by the MOH on the relevant technical committees.

The Ethiopian Food, Medicine and Health Care Administration and Control

Authority (FMHACA) and regional health regulatory bodies are mandated to *“promote and protect the public health by ensuring the safety and quality of products and health services through registration, licensing and inspection of food establishments, pharmaceuticals, health professionals and health institutions.”*¹⁶ MHACA is also responsible for regulating nutrition supply manufacturers, importers, exporters and wholesalers. Regional health regulatory bodies regulate food and medicine retail outlets and health institutions in their regions. Both organizations oversee: fortified foods, food fortificants/premix, micronutrient supplements, breast-milk substitutes and formula, complementary foods, therapeutic and supplementary foods, iodized salt, and water, sanitation and hygiene.¹⁷

The National Food Fortification Steering Committee was established as an NNP Technical Working Group in February 2011. The Federal Ministry of Industry chairs this body. The target food vehicles include salt (iodine), wheat flour, and edible oil. While flour and oil fortification are in the development phase, salt iodization has received most attention and is currently being implemented.

4.2.6. Regulatory Framework

The NNPII puts strong emphasis in combating micronutrient deficiencies (through interventions such as supplementation Vitamin A for children 6-59 months and iron folate tablets for pregnant and lactating women). At the same time, food fortification and other feasible food-based interventions play vital roles in reducing under-nutrition and micronutrient deficiencies. In this context, Ethiopia has already taken significant steps in this direction with the enactment of mandatory universal salt iodization, which came into force in April 2011.

¹⁶ National Nutrition Programme, Government of the Federal Democratic Republic of Ethiopia, June 2013, p. 35

¹⁷ IBID

Table 3 : Nutrition relevant policy documents and food standards

Document	Owner	Date
National Nutrition program	Government of Ethiopia	2013
National Nutrition Program II and National Food and Nutrition Policy	Government of Ethiopia	2016/2019
GTP2	Government of Ethiopia	2016
AGP2	Government of Ethiopia	2016
Nutrition-Sensitive Agriculture Draft Strategic Plan; an input to the GTP2 of MOA 2016-2020	Ministry of Agriculture	2016
Food Directives and Standards		
Salt iodization proclamation/legislation	Council of Ministers	2011
Salt iodization directive	FMHACA	2012
Iodized salt standard	ESA	2011
Draft Fortified oil standard	ESA	2014
Draft Fortified flour standard	ESA	2014
Infant formula directive	FMHACA	2015
Food supplement directive	FMHACA	2015
Food, medicine and health care administration and control proclamation	Government of Ethiopia	2009

4.3. Private Sector Landscape and Analysis

4.3.1. Key Points About the Private Sector in Ethiopia¹⁸¹⁹

While Ethiopia has the second-largest population in Africa (107,534,882 as of the year 2018), it has one of the lowest levels of GDP per capita and has had one of the highest GDP per capita growth rates over the past five years. In early this year, the Government of Ethiopia unveiled its **10-year economic development plan under the theme ‘Ethiopia: An African Beacon of Prosperity’**. The plan will replace the current five-year growth transformation plan or GTP. Agriculture, Manufacturing Industries, Mining, Tourism, Urban Development, Innovation and Technology are the key development sectors of the plan.

The Premier said the development plan, the first for his administration, will be **“women and youth multidimensional prosperity, according to the PM.” centered and guarantees private sector-led growth**. It strives to ensure the impact of projects and investments are undertaken to add value to GDP; focuses on quality of projects so that expenditures are effective; and transforms attitudes from ‘battling poverty’ narrative towards building.

¹⁸ Sutton, J. and Kellow, N.; an Enterprise Map of Ethiopia, International Growth Centre, 2010.

¹⁹ Ethiopia Investment Climate Statement, United States Department of State, 2015.

Most private businesses are first- or second-generation family businesses with most managerial positions occupied by family members. Some owners, especially of larger firms, have expanded their businesses and transferred management to their children who were educated abroad and attempted to modernize their firms. Access to technical skills and new technology are still considered important constraints on the private sector. Large manufacturing firms, including those food-processing companies interviewed for this mission, are highly dependent on imports of spare parts, supplies and raw materials. Quality control in the food processing sector is also considered a major issue, and the inconsistent quality of local and imported foods is a concern.

The emphasis of most large-scale firms is on diversification; whereas growing and developing a single business unit is given less priority. The domestic market has been limited in size, but with high levels of urbanization and a growing population (Ethiopia is expected to reach 185m population by 2050), this may be changing.

Many major firms have expansion projects in place, but the lack of finance available from banks for large-scale projects has led many firms to seek equity or technological partnerships with foreign companies. In all of our interviews, access to finance and access to hard currency for imports were considered major constraints.

4.3.2. Enterprise Mapping

Ethiopia has a small but growing food processing sector. It also has established export sectors – floriculture, textiles/garment manufacturing, leather products, cotton and coffee – that may offer potential for workplace nutrition initiatives. Table 6, below, identifies a number of the country's

major private sector employers. SBN can explore these companies' interest in support for programs that improve employees' access to nutritious foods, increase health and nutrition knowledge and improve behavior, and develop and implement supportive policies.

Table 4 : Major Firms of Relevance to SBN²⁰

Sector	Major Firms
Fortified staple foods and nutritious food products	
Wheat Flour	ASTCO Food Processing Complex PLC, KO J.J. Food Complex, NAS Foods Factory PLC, Nile Food Processing Factory, Gider Agro-Industry, Misrak Flour and Bread Factory, FAFA Food Share Company, Kaliti Food Share Company, Diredawa Food Complex, Grand Doro Flour and Macaroni Factory, Healthcare Food Manufacturing, East African Business Group PLC., Sun Light Industry and Distribution PLC, Awassa Flour Factory, Kokeb Flour Factory, Yerer Flour Factory, ADAA Flour and Pasta Factory, and one flour mill cooperative

²⁰ Sutton, J. and Kellow, N.: An Enterprise Map of Ethiopia. International Growth Centre, 2010, London.

Sector	Major Firms
Cooking Oil / Oilseeds	Addis-Modjo, Adama Edible Oil, Hamaressa Edible Oil, Bahrdar Ed-ible Oil, Girmaa Abera & Sons Edible Oil, Nazreth Edible Oil, Mulat Abega Edible Oil, Teiba Shifa Edible Oil, Bahrdar Edible Oil, Dil Edible Oil
Salt	Kedaba Salt Processors, Guts Agro Salt Processors, Afar Salt Production Company, SVS, a new salt fortifying company to Start salt fortification shortly,
Food Processing	NAS Foods, Dire Dawa Food Complex, Health Care Food Manufacturers, Brothers Flour and Biscuit Factory, SEKA Business Group, Organic Export Abattoir, Luna Export Slaughter House, Sebeta Agro Industry, Modjo Modern Export Abattoir PLC
Major employers – workplace nutrition	
Floriculture	AQ Roses, Red Fox PLC, Golden Rose Agro Farms Limited
Commercial Farms	Teppi – Green Coffee Estate, Bebekka Coffee Plantation, Middle Awash Agro Industry
Textiles garment located in and outside of the current Industrial and agro-industries Parks built in the country	Crown Textile Weaving, GG Super Garment Factory, Woinu Curtain Trade Arvind Lifestyle Apparel Manufacturing PLC, Evertop Sports Wear Plc., J P Textile (Ethiopia) plc, Jiangsu golden textile, J P Textile (Ethiopia) plc, Quadrant Apparel PLC
Leather/ shoes	Anbessa Shoe, Ramsey Shoe Factory, Hafde Tannery, Ethiopia Tannery Share Company,
Cotton	Amibara Agricultural Development, Blen Tsegaye Business Industrial Group
Coffee	Moplaco, Great Abyssinia, Robera
Widely diversified firms	Ahadu, DH GEDA, East African Holdings
MIDROC Ethiopia	Private Investment Group with 41 companies operating in agriculture & agro-industry, construction, hotels & tourism, manufacturing, mining, oil & gas distribution, real-estate development, transport (Including air transport), trade & commerce, health care and education & training.



05

STAKEHOLDER MAPPING AND ANALYSIS

‘Who does what and where’ or a first stakeholder mapping followed by analysis of their influence to SBN and general attitude for SBN was summarized in the following tab. The stakeholders are grouped as those companies with direct impact on the food system, those with no direct impact, Government line ministries, banks and corporate, international organizations, networks and advisory groups; and finally the Donor communities.

Table 5 : Stakeholder mapping and analysis

SBN Stakeholder Analysis Mapping and Analysis Tool				
Stakeholder	Engagement or Role with respect to SBN or SUN movement	Influence towards SBN	Attitude towards SBN	Strategies for engagement
Private companies that have direct potential impact on the food system				
Current members of SBN Ethiopia	Have executive members and ordinary members that are 25 in numbers? The platform didn't provide much of an added value to its members, except for two pilot projects initiated by GAIN Ethiopia to support two business cases	High	Positive	Conduct a KII with members of the executive committee; invite all members of the network to: assist in work plan development; design a SBN strategy; create a stronger membership database and launch the strategy with full involvement of all key stakeholders
Current members of AgriProFocus	Provides networking and mentorship to members (that are more than 2000). There are a good number of companies operating in the food system/organic farming so engagement with the SBN platform is going to be helpful	High	Positive	Agriculture and nutrition
Millers Association	Fortifying edible oils and cereals in the country	High	Positive	In large scale food fortification
Salt processors Association	Fortifying iodized salt	High	Positive	In large scale food fortification
Agro processing farms and companies working across the value chains	Produces foods(from harvest, processing and packaging)	High	Positive	Agriculture and nutrition

SBN Stakeholder Analysis Mapping and Analysis Tool				
Stakeholder	Engagement or Role with respect to SBN or SUN movement	Influence towards SBN	Attitude towards SBN	Strategies for engagement
Private companies (that have no direct impact on the food system)				
Manufacturing industries located across the 8 or 9 industrial parks	Has a huge work force and companies also involved in various social corporate responsibilities	Medium	Neutral	SBN can engage with few companies based in Addis Ababa or outskirts(Bole Lemi IP) and Hawassa IP to engage them with Nutrition at Workplace initiative
Companies targeted and supported by ILO	Has a huge work force and companies also involved in various social corporate responsibilities	Medium	Positive	GAIN Ethiopia has already initiated some discussion to engage these companies to commie good nutrition or healthy meals or snacks for its workforce so SBN Ethiopia will capitalize on these efforts
Ethiopian Airlines	Has a huge work force and companies also involved in various social corporate responsibilities	Medium	Positive	SBN consultants have already pulled some triggers to also include ET airlines commit nutrition at workplace and at the same time open up a collaboration platform with the existing members where the company could source organic or farm produces from local than sole import
Government ministerial offices				
Ministry of Health	Has one of senior advisor tasked to lead the SUN movement at the government level so has a huge influence to SBN formation and successful	High	Positive	Policy advocacy on the role of the private sector to get engaged and tackle malnutrition

SBN Stakeholder Analysis Mapping and Analysis Tool				
Stakeholder	Engagement or Role with respect to SBN or SUN movement	Influence towards SBN	Attitude towards SBN	Strategies for engagement
Ministry of Agriculture	The ministry produced a strategy on nutrition sensitive programming so will have huge influence to the private sectors engaged or want to engage in this sector	High	Positive	Policy advocacy on the role of the private sector to get engaged and tackle malnutrition
Ministry of Industry Food and beverages	Hosts the current SBN Ethiopia and is a convener to SBN Ethiopia	High	Positive	Engage the ministry in the national SBN work plan development; design a SBN strategy; and launching the strategy with full involvement of all key stakeholders
Agriculture Transformation Agency (ATA)	Supports MoA technically and financially and is a strong advocate of Nutrition sensitive programming	Medium	Positive	Engage the agency in the national SBN work plan development and SBN strategy design
Ethiopian Standards Authority	Very vital for SBN members who are engaged in the food system or production and would need certification in the near future	High	Neutral	Brainstorming and introduction of the SBN or SUN movement in the country and what GAIN achieved with the authority regarding certifying the complementary food space
Ethiopian Food and Medicine Drug Authority	As a regulatory body of the government, the authority would need to level the field so that those members 'doing right' and those 'not complying' poorly will have same marketability and business attractiveness	High	Positive	Brainstorming and introduction of the SBN or SUN movement in the country and what GAIN achieved with the authority regarding certifying the complementary food space
Ethiopian investment commission	To loosen up regulations and proclamation that would encourage a lot of the private sector to engage in the agriculture sector and a platform to lobby for the exemption of different tax tariffs	Medium	Positive	Brainstorming and introduction of the SBN or SUN movement in the country and what the commission could do to alleviate some of the barriers noted

SBN Stakeholder Analysis Mapping and Analysis Tool				
Stakeholder	Engagement or Role with respect to SBN or SUN movement	Influence towards SBN	Attitude towards SBN	Strategies for engagement
Banks and corporates				
Ethiopian Commercial Bank and Development Bank	Key but missing point in the SBN platform. Can avail different types of financial products that are attractive for the private companies and especially for SBN members	High	Positive	Supporting pitch competition and availing startup funds and other financial products
Dashen Bank	Key but missing point in the SBN platform. Can avail different types of financial products that are attractive for the private companies and especially for SBN members	High	Positive	Supporting pitch competition and availing startup funds and other financial products
Awash Bank	Key but missing point in the SBN platform. Can avail different types of financial products that are attractive for the private companies and especially for SBN members	High	Positive	Supporting pitch competition and availing startup funds and other financial products
African Development Bank	Key but missing point in the SBN platform. Can avail different types of financial products that are attractive for the private companies and especially for SBN members	High	Positive	Supporting pitch competition and availing startup funds and other financial products
Eco Bank	Key but missing point in the SBN platform. Can avail different types of financial products that are attractive for the private companies and especially for SBN members	High	Positive	Supporting pitch competition and availing startup funds and other financial products

SBN Stakeholder Analysis Mapping and Analysis Tool				
Stakeholder	Engagement or Role with respect to SBN or SUN movement	Influence towards SBN	Attitude towards SBN	Strategies for engagement
International organizations, networks and advisory group				
SUN Civil society	It's an ally to SBN and the two net-works could support one another to pivot the private sector in the fight against malnutrition	High	Positive	Conduct a KII with members of the executive committee; invite all members of the network to: assist in work plan development; design a SBN strategy; create a stronger membership database and launch the strategy with full involvement of all key stakeholders
Chamber of Commerce	Provides enabling environment for business communities and strong advocate for easing doing business in Ethiopia or ease bureaucratic legislations and policies	Medium	Positive	Policy advocacy on the role of the private sector to invest and propel agriculture to feed the nation and with healthy and organic produces
Precise Consult	Provides business and investment advisory role and has been an instrumental ally in private sector development in the country	Medium	Neutral	Supporting pitch competition and availing startup funds and other financial products

SBN Stakeholder Analysis Mapping and Analysis Tool				
Stakeholder	Engagement or Role with respect to SBN or SUN movement	Influence towards SBN	Attitude towards SBN	Strategies for engagement
Donors communities (Gates Foundation, Irish Aid embassies and the UN organizations)				
WFP	Co-convener of SBN	High	Positive	Drive the agenda of SBN together with GAIN and other important stakeholders
Gates Foundation	Key ally in supporting health and nutrition investment including nutrition sensitive programing	High	Positive	As a key ally for private sector development and growth in the country, the foundation can be a good source for financial support and funds to support pitch competition
Master Card Foundation	Key ally in supporting private sector development and investment	Medium	Positive	As a key ally for private sector development and growth in the country, the foundation can be a good source for financial support and funds to support pitch competition
Irish Aid	Key ally in supporting health and nutrition investment including fortification	High	Positive	As a key ally for private sector development and growth in the country, the organization can be a good source for financial support and funds to support pitch competition
USAID	Key ally in supporting health and nutrition investment including nutrition sensitive programing	High	Positive	As a key ally for private sector development and growth in the country, the organization can be a good source for financial support and funds to support pitch competition



06

SBN STRATEGY DEVELOPMENT

Within Ethiopia the SBN is in the third year of program implementation. The purpose of SBN Ethiopia is: to improve and strengthen the private sector's contribution towards improving nutrition in Ethiopia, through the creation of an enabling environment to commit and align behind national strategies on nutrition and to advocate for, mobilize and support private sector commitments and investments in nutrition. SBN will champion and mobilize business behind the National Food and Nutrition Policy and support the Federal Government of Ethiopia to provide a strong enabling environment for business investment in nutrition, to ensure that all people have access to good food and nutrition in Ethiopia.

SUN Business Network (SBN) 2.0: Theory of Change

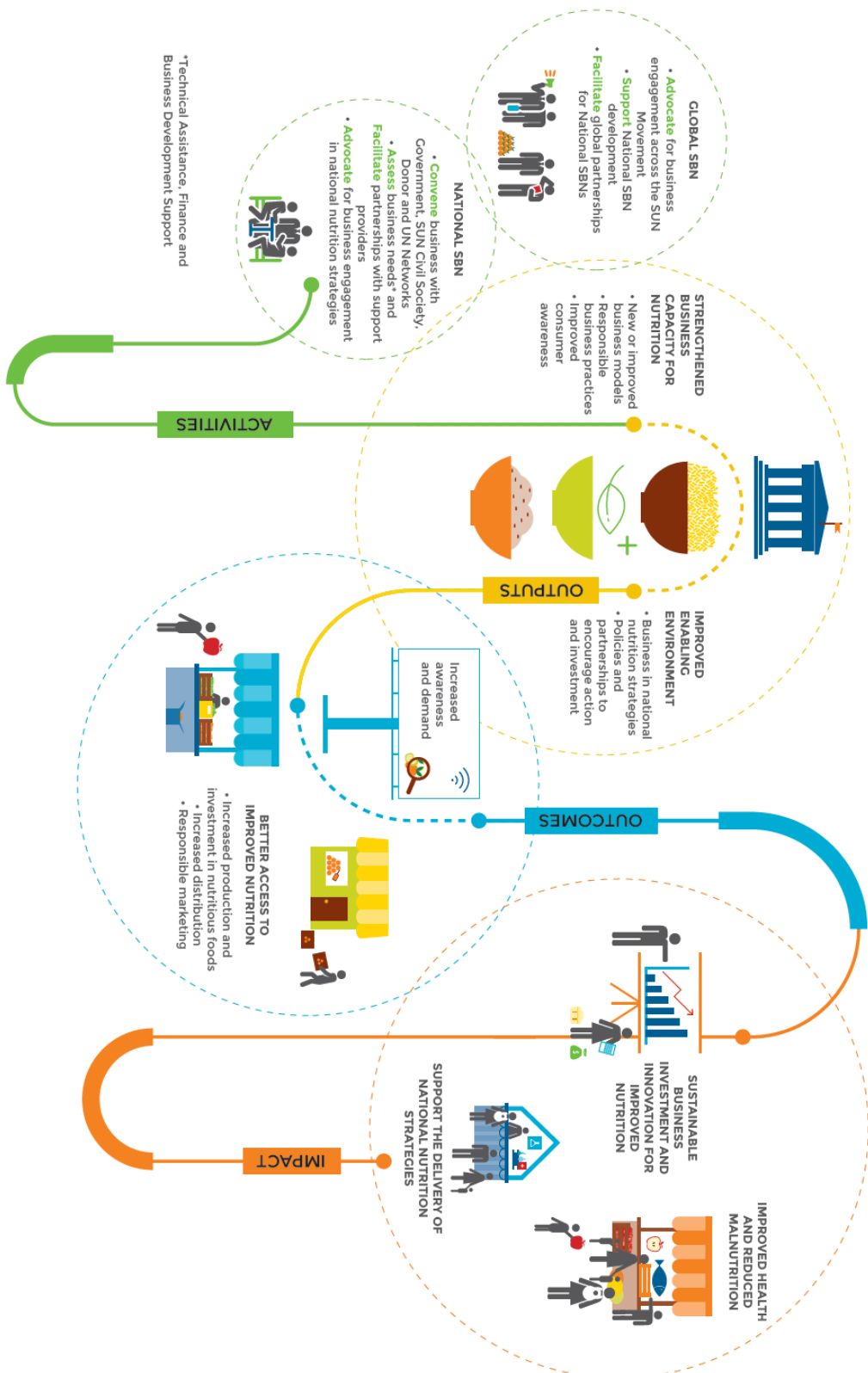


Figure 4 : SBN Theory of Change (TOC) from Global to National level

The SBN's expected impacts are to strengthen business propositions and expand responsible businesses to contribute in a meaningful way towards reduction of malnutrition and improve health through consumption of nutritious and healthy foods.



07

VISION STATEMENT

The vision for SBN Ethiopia is

“To be the focal point for private sector engagement in the nutrition agenda of Ethiopia

And its mission is

“To enhance the private sector’s contribution towards improving nutrition in Ethiopia

And a look beyond 2023, SBN-Ethiopia hopes

“To empower businesses to positively and effectively engage in the Ethiopian Food System.



08

KEY IMPLEMENTATION AREAS OR IDENTIFIED LOW-HANGING FRUITS FOR SBN ETHIOPIA

This section explores opportunities (in order of priorities) for SBN in Ethiopia that have been identified as low hanging fruits through the stakeholder consultation.

8.1. Large Scale Food Fortification and Supplements (Micronutrient Powders)

The NNP II indicates food fortification as one of the means of addressing micronutrient deficiencies, and promises greater focus on fortifying flour and edible oil. The subject has received great attention recently, with major efforts in the form of feasibility studies, workshops and working groups, and there is a broad consensus among stakeholders that the fortification of wheat flour and cooking oil shows good potential for cost-effective nutrition impact. A World Bank study conducted in 2011¹ concluded that flour fortification with iron and folic acid, and oil fortification with vitamin A would be affordable and feasible options for Ethiopia which offer significant nutritional value to large populations.

The study noted that urban and affluent groups consume more of these foods than the rural and poor (only 20% of people consume wheat flour) but pointed to evidence that a high prevalence of anemia and vitamin A deficiency exist among all socio-economic groups. Wheat fortification is not without significant challenges, however. The sector is disaggregated, with more than 200 industrial mills producing flour, many of which have outdated equipment and poor manufacturing practices. Moving the sector towards fortification would be a challenging undertaking, but could draw from the experience of GAIN, WFP and Nutrition International (NI, formerly the Micronutrient Initiative; MI) in other countries.

All of the wheat millers involved in this mission expressed a willingness to fortify wheat flour, assuming the enabling environment is suitable. Companies' perceived constraints are set out later in this report. The reach of cooking oil as a means of delivering vitamin A to large populations is also skewed towards urban areas – 42% of rural women (15-45y) consumed oil in a 2014 study², as compared to 72% of urban women. Even so, this reach far

exceeds wheat flour in rural areas. Further, commercial production of cooking oil is highly concentrated, though the majority of cooking oil consumed in Ethiopia is imported palm oil³. But the Government has recently taken a bold step by banning these imports, paving a greater room for demands to be met from local production where members of SBN could explore and take advantage of. Sugar fortification with vitamin A is not considered to show much interest at this point based on relatively low coverage, skewed distribution and high cost.

Salt iodization has been mandatory since 2012. In 2013 the national salt iodization program was established by the Ministry of Industry. Since then, the government has conducted a review of regulatory monitoring activities to work towards a more effective implementation system to implement the salt iodization legislation. There have been difficulties with enforcement, however, and the quality of iodized salt is often low. As a result, only 43% of households are thought to consume adequately iodized salt⁴.

No other staple foods are subject to mandatory fortification at present. A very small number of companies are equipped to produce fortified flour under a pilot project supported by USAID (with TechnoServe and NI), production is based on specific customer orders; fortified product is not available on retail markets.

Food fortification is not new to Ethiopia. Agencies such as UNICEF, NI, GAIN, WFP and CHAI are actively supporting the government's efforts in this area, and some are working directly with companies to pilot fortification. It will be important, therefore, that SBN align with the government's priorities, identify gaps in existing and planned programs of support, and coordinate effectively with other players.

¹ Assessment of Feasibility and Potential Benefits of Food Fortification in Ethiopia, Federal Ministry of Health, Government of Ethiopia, October 2011.

² Ethiopian Food Consumption Survey, Ethiopian Public Health Institute, 2014

³ Stakeholder consultation

⁴ NNP II

8.2. Super Cereal (Previously CSB+) / Super Cereal Plus (CSB++) and Fortified Blended Cereals

The domestic retail market for blended foods is very small (only 4% of children 6-23 months consume fortified baby cereal according to GAIN), but this market is likely to grow especially as Ethiopia continues to urbanize; and if companies introduce affordable brands and market these products to low income consumers.

Seven companies are producing Super Cereal at scale, largely for institutional markets (sold to government and NGOs) and exported for international food aid, mainly destined for neighboring Sudan.

WFP recently stopped buying Super Cereal from domestic producers over quality concerns, but expect to resume once quality is improved.

The government has expressed a strong interest in supporting domestic Super Cereal producers to exploit international markets, which would bring in much-needed hard currency. Both export and domestic markets demand quality improvements from Ethiopian producers, so this is a clear area of focus for SBN and implementing agencies.

8.3. Workforce Nutrition

Workplace wellness programs can deliver returns of approximately \$3 for every \$1 spent. With modest investments in workplace nutrition programs that are repaid in fewer sick days and accidents, companies can strengthen workers' health, while reducing the impact of undernutrition-related illness and enhancing productivity.

SBN Ethiopia could explore the good experience GAIN and ILO had in Bangladesh and Jordan under the decent work initiative program implemented in the garment sector. Once these initiatives are explored in a pilot project, other interested companies in the manufacturing and garments sectors based in the different industrial parks (Hawassa, Bole Lemi, Jima, etc.) can further be explored.

8.4. School Nutrition / School Feeding Program

There is a growing optimism and acceptance of the role of school feeding programs while promoting pupils school productivity and providing healthy meals or snacks. Thanks to the hard work of WFP globally and here in Ethiopia. Addis Ababa City Administration is now to set up an agency to manage the school feeding program that is currently providing free meals and school materials to over 300, 000 students at state-run junior schools in the capital.

SBN could tap and explore business opportunities by availing meals or fortified cereals for the government run schools (ex. The schools soon to be supported by the City Administration) as well as providing healthy snacks and drinks for those private run schools in their own business model; SBN members can tap both technical and financial or start up aids to realize this intervention.

8.5. Nutrition-Sensitive Agriculture and Agribusiness

Agriculture employs 72.2% of Ethiopians and contributes 40% of GDP and 88.2% of Exports, but the sector is in the early stages of its development⁵. Only 5% of land is irrigated, most smallholders rely on rainfall, the use of fertilizers and improved seeds is very low, and access to markets is limited. Private investors are interested in developing new agro- food industries, but the enabling environment is still less attractive to FDI than some alternatives, and access to capital is a major constraint on domestic investment. These constraints notwithstanding, the 10-Year Perspective Plan considers agriculture

as the country's main driver of growth, and the government has recognized the need for value addition along the agricultural value chain. There are now 7 Integrated Agro Parks in the country soon to be operational to accommodate agro industries with the rural communities to achieve a continuum supply of raw materials and sustain productivity.

The role that SBN could play is to engage these companies to have nutrition at workforce agenda agribusiness as well as advocate for nutrition-sensitive agriculture practice at the Rural Transformation Centers(RTC).

8.6. Other Processed Food Products

The local food processing sector is growing rapidly and is dominated by small, family-owned businesses. Food processing is not only the largest but also one that offers top opportunities for investment. In fact, Ethiopia has huge potential for the further development of emerging food processing industry sectors such as cereals, pulses, oilseeds, fruits and vegetables, spices, coffee, tea, livestock and meat, poultry, and dairy. In

addition, there are prospects for chain development and value addition in new sectors such as commercial intensive scale aquaculture and potato where processing is still non-existent⁶. In terms of products, biscuits, pasta, nutria-dense products(granola) and bread show opportunities for expansion, especially in urban markets. This is an area for further research by SBN Ethiopia

8.7. Distribution Channels

Fortified staple foods, nutritious processed foods, nutrition products (such as micronutrient powders) and products that can improve nutrition-sensitive agriculture, reduce post-harvest losses and facilitate family-based and local food processing and storage all require effective distribution channels, in particular if they are to effectively reach low-income and rural populations. This is an area for further research by SBN to identify potential companies that can

connect the producers to the consumers as well as those with cutting edge technologies that ultimately reduce the cost of transportation, food safety and reducing postharvest loss.

5 UNDP, Ethiopia Quarterly Key Economic Indicators 2015 No.2

6 A Short Guide to Business Opportunities for Food Processing in Ethiopia



09

STRATEGIC CORE OBJECTIVES AND IMPACT

The above identified low hanging intervention areas are now grouped under seven core strategic objectives with clear direct key performance indicator and indirect key performance indicator and proposed timeline to actualize the set out vision and purpose of the three-year strategy (2021-2023).

9.1. Strategic Objective 1 (Initiatives): Develop A Strong SBN Brand and Membership

No.	Initiative ¹	What	How	Impact	
1.1	Recruit and retain members	<ul style="list-style-type: none"> Formally sign up businesses and organizations as members of the SBN Ethiopia on an ongoing basis Request members to sign up SBN Ethiopia principles of engagement pledge form Electing new Executive Members and governance structure 	<ul style="list-style-type: none"> Develop a comprehensive stakeholder database and ensure it is continuously added to and strengthened. To be checked and updated on a monthly basis Identify, approach and meet with a large proportion of all businesses within other like-minded networks(YALTA/AGRIPROFOCUS, AACCSA and the likes by signing up cooperation MoU's Setting up different social media platforms (WhatsApp group, Messenger, SBN web site, etc. Develop and implement a membership platform (including nutrition commitment tracking mechanism) as outlined in the Nutrition Advocacy Plan Liaise regularly with existing and prospective members, private sector champions and other key stakeholders, as outlined in the Nutrition Advocacy Plan/ Stakeholder mapping and analysis tool 	High Low Low Low	Members Consumers Market Nutrition
1.2	Monitor and track commitments	<ul style="list-style-type: none"> Record, monitor and track nutrition commitments made by SBN members when they sign up 	<ul style="list-style-type: none"> Develop a tracking tool to list all the nutrition commitments made by members upon joining the network. This should be a simple Excel spreadsheet, maintained regularly Contact members on a quarterly basis (4 times per year) to discuss progress on meeting their commitments. Review and update commitments where necessary Develop an annual nutrition commitment report on progress made against all commitments, with commentary, and share this with SBN global team and government Organize regular (quarterly) networking events to share and exchange experience Organize and facilitate SBN and its members representation at different countries, regional global conference meetings and exchange visits. 	High Low Low Low	Members Consumers Market Nutrition

¹ Direct KPI Desired outcomes not within the direct control of the SBN team

No.	Initiative ¹	What	How	Impact	
1.3	Provide networking opportunities	<ul style="list-style-type: none"> ▶ Ensure that SBN members have regular opportunities to physically meet and interact with each other, government stakeholders and key partners 	<ul style="list-style-type: none"> ▶ Organize regular (quarterly) networking events to share and exchange experience ▶ Organize and facilitate SBN and its members representation at different countries, regional global conference meetings and exchange visits. 	<p>High</p> <p>Moderate</p> <p>Moderate</p> <p>Low</p>	<p>Members</p> <p>Consumers</p> <p>Market</p> <p>Nutrition</p>
1.4	Actively generate positive SBN brand & its publicity	<ul style="list-style-type: none"> ▶ Design and create the first of its kind SBN-ET logo and encourage members to adhere the logo in their package labelling ▶ Maintain an active communications agenda and dissemination on the works of SUN/SBN 	<ul style="list-style-type: none"> ▶ Act as the spokesperson for the nutrition private sector and collectively represent members on nutrition topics in the public arena (NNCB, meetings with other SUN network, member of TA for standards, etc.) ▶ Develop and share a quarterly newsletter which includes (but not limited to): <ul style="list-style-type: none"> ▶ Update on SBN initiatives from Ethiopia team and global team ▶ Upcoming events (both SBN and in the community) ▶ Good news stories from members and international case studies ▶ News from the Tanzanian nutrition market ▶ Liaise regularly with the other SUN groups in Ethiopia and highlight the critical role that the private sector can play in scaling up nutrition 	<p>High</p> <p>Moderate</p> <p>Moderate</p> <p>Low</p>	<p>Members</p> <p>Consumers</p> <p>Market</p> <p>Nutrition</p>
1.5	Establish an active and accountable governance structure	Revamp the current SBN Advisory Group and project management framework to provide strategic guidance and review progress	<ul style="list-style-type: none"> ▶ Establish an active Advisory Group with members from the private sector, donors, civil society organizations and / or high profile members of the community ▶ Prepare for, coordinate and convene quarterly advisory group meetings ▶ Develop an accountable internal project management framework to review SBN progress ▶ Recruit full time SBN coordinator and other necessary project team 	<p>High</p> <p>Moderate</p> <p>Moderate</p> <p>Low</p>	<p>Members</p> <p>Consumers</p> <p>Market</p> <p>Nutrition</p>

9.1.1. Direct KPIs – Performance Metrics for the SBN Team

KPI	Description	Time Period
250+ members	<ul style="list-style-type: none"> ▶ To have at least 250+ formally registered local members which satisfy the membership criteria (database, social group media & written files) ▶ All members to be on relevant mailing lists and will receive newsletters, updates, invitations etc. <p><i>Note: Short term objective is to achieve 100+ members by the end of 2021</i></p>	By end of 2023 (to be reviewed in 2022)
12 Quarterly Networking events	<ul style="list-style-type: none"> ▶ Plan and coordinate 12 networking events (4 per year) in order to provide networking opportunities for members, provide useful and practical information and support, and share up to date information on the Network and its activities ▶ Each year, 1 of these events should incorporate an Annual General Meeting (AGM) (i.e. to look at the year that was and the year ahead) ▶ This will also contribute to achieving initiative 	By end of 2023
12 Advisory Group meetings held & SBN Ethiopia logo developed	<ul style="list-style-type: none"> ▶ To have organized and facilitated 4 advisory group meetings in 2021, as per the long term goal of convening the advisory group four times per year ▶ SBN members get a uniform and an acceptable logo that identifies and accelerate their acceptability in the market system as 'Nut Champion' 	By end of 2023 (4 per year) SBN ET logo emblem by 2021
12 quarterly newsletters	<ul style="list-style-type: none"> ▶ To develop and send SBN Ethiopia newsletters, as per the 'How' under initiative 1.3. This will also contribute to achieving initiative 3.3 – <i>Support food & nutrition companies with guidance, tools & information</i> ▶ Newsletters to be sent 4 times per year, at regular quarterly intervals from 2021 – 2023 	By end of 2023 (4 per year)
3 annual nutrition commitment reports	<ul style="list-style-type: none"> ▶ To develop 1 comprehensive report each year which outlines the nutrition commitments which SBN members have made and the progress achieved over the course of the year ▶ To be shared with the government SBN focal point, SBN global team and any other relevant stakeholders 	By end of 2023 (1 report each year)

KPI	Description	Time Period
1 nutrition fact sheet & audio-visual presentation	<ul style="list-style-type: none"> ▶ To develop a fact sheet, or brief report, on the role of the private sector in scaling up nutrition. Include topics on salt iodization, food fortification and locally produced food products ▶ This should be complemented by a brief audio-visual presentation(or a suitable alternative if agreed with the authors of the Advocacy Plan) ▶ To be shared with the government SBN focal point and any other relevant stakeholders 	By end of 2021

9.1.2. Indirect KPIs -
Desired Outcomes Not Within the Direct Control of The SBN Team

KPI	Description	Time Period
Satisfied, supportive and active membership base	<ul style="list-style-type: none"> ▶ The majority of members see the Network as a valuable contributor to growing the market for nutritious foods ▶ The majority of members take an interest in the Network and respond to emails, attend events, receive and value communications shared ▶ Prospective members actively reaching out to the SBN to request to join, unsolicited 	By end of 2023
Members actively working to honor their commitments	<ul style="list-style-type: none"> ▶ The majority of members take their commitments seriously and are actively striving to honor them as part of their broader business objectives ▶ Commitments made by members are well understood and valued by senior managers within the business 	By end of 2023

9.2. Strategic Objective 2 (Initiatives): Improve Nutrition Policies & Regulations

No.	Initiative	What	How	Impact	
2.1	Act as the primary convener & link between government & the private sector on nutrition	<ul style="list-style-type: none"> ▶ Provide input to government on behalf of the private sector, in relation to nutrition ▶ Provide updates to the private sector on policy and government initiatives('info hub') ▶ Build strategic relationships with key government departments 	<ul style="list-style-type: none"> ▶ Through SBN newsletters, events and meetings; encourage members to use the SBN as a vehicle for a meaningful and ongoing dialogue with government on nutrition ▶ Develop an ongoing register of major private sector issues, challenges, opportunities and recommendations for change. This will enable the SBN to have an accurate view of the private sector's views at all times ▶ Share with government decision makers the key opportunities, challenges, issues and concerns of the private sector on nutrition. This should be done via position papers and meetings ▶ Liaise with government to understand relevant nutrition policy information, news and updates and share this with the private sector ▶ Support SBN members in understanding the policy and regulatory environment by taking inquiries and linking to relevant stakeholders (government or other) for input 	High Low Moderate Low	Members Consumers Market Nutrition

No.	Initiative	What	How	Impact	
2.2	Provide input to national nutrition policy, regulations & standards	<ul style="list-style-type: none"> ▶ Provide input into the national nutrition policy on the role of business in nutrition ▶ Make recommendations to government decision makers in order to create a more conducive business environment in nutrition 	<ul style="list-style-type: none"> ▶ Review key national nutrition and fortification documents, including government position papers and standards on NCD and promote for mandatory standards, directives & overarching legal framework for fortification, complementary foods and organic produces ▶ Carry out an assessment of existing fortification initiatives to determine their effectiveness, including the fortification logo. Make recommendations for improving or scaling up relevant initiatives ▶ Synthesize challenges and opportunities identified in initiative 2.1 (above) which are appropriate for the government attention and develop recommendations for potential improvements to national nutrition policy, regulations and standards ▶ Discuss these recommendations with private sector champions and formally submit to government decision makers ▶ Consult with government decision makers to understand the market opportunities and challenges inhibiting the production and distribution of high priority, nutrient-rich or dense foods (incl. fortified foods) and offer practical solutions (tax regulations, import tariffs policies & directives that incentivize business in fortification & organic produces 	<p>High</p> <p>Moderate</p> <p>High</p> <p>Low</p>	<p>Members</p> <p>Consumers</p> <p>Market</p> <p>Nutrition</p>

9.2.1. Direct KPIs – Performance Metrics for the SBN Team

KPI	Description	Time Period
3 annual position papers on the nutrition private sector & launching of NCD tax and legislation	<ul style="list-style-type: none"> ▶ Using the register outlined in initiatives 2.1 and 2.2, develop an annual position paper summarizing the major private sector nutrition issues, challenges, opportunities and recommendations ▶ Share position paper with key government decision makers and support them in identifying practical solutions to prioritize and implement the recommendations ▶ SBN as a convener and representing the private sectors would contribute TA in the finalization of the current NCD preventing legislation/tax(high trans fats, sugar and sweetened beverages) and promote for healthy food production & consumption from its members to the public in general 	By end of 2023 <i>(1 position paper each year)</i> Launching and adoption of NCD preventing legislation/ taxation by end of 2021
Meet with 3+ non-MoH ministries	<ul style="list-style-type: none"> ▶ Meet with at least 3 ministries outside of the Ministry of Health to raise the profile of the private sector's role in nutrition, and how the private sector can also benefit. Highlight the commercial opportunities in nutrition and the potential benefit to the Ethiopian economy of an improved business environment in this area ▶ Develop a light touch, ongoing relationship with stakeholders in these relevant ministries and invite to SBN events ▶ Potential ministries should have the economy, the food industry and / or business in general as a core focus. E.g. Ministry of ▶ Agriculture, ATA; Ministry of Finance and Economic Affairs; Ministry of Industry and Trade; Food and Beverage, MOE, EIC, etc. 	By end of 2021 <i>(To be reviewed in 2022)</i>
Arrange 3+ meetings between government and the private sector	<ul style="list-style-type: none"> ▶ Arrange at least 1 meeting per year (3 total) between a government SBN decision maker and a member of the private sector, with a nutrition focus. This aims to demonstrate the SBN's role as the primary link and convener between government and business on nutrition ▶ This could take the form of a joint SUN Ethiopia meeting whereby the SBN brings the SUN networks together with the relevant government SUN focal points 	By end of 2023 <i>(1 meeting per year)</i>

9.2.2. Indirect KPIs – Desired Outcomes Not Within the Direct Control of the SBN Team

KPI	Description	Time Period
Improved nutrition regulatory environment	<ul style="list-style-type: none"> ▶ Government policies, regulations and standards around nutrition more accurately considers the contribution of the private sector and are having a positive effect on the business environment ▶ Rules and regulations related to the development, fortification and sale of nutritious products are being more strongly monitored and enforced ▶ Rules and regulations related to marketing, advertising and product placement of nutritious products are being more strongly monitored, enforced and complied with 	By end of 2023
Regular & open dialogue with government	<ul style="list-style-type: none"> ▶ Private sector challenges and opportunities around nutrition are shared and communicated openly to reflect the sentiment of the private sector ▶ The SUN Business Network is seen as a reputable and balanced body which strongly represents the private sector in areas related to nutrition 	By end of 2021
SBN is the main conduit for government & private sector nutrition issues	<ul style="list-style-type: none"> ▶ From the perspective of both the government and the private sector, the SBN is seen as the primary conduit and link between the two parties on nutrition ▶ The SBN is the first port of call for government on private sector nutrition matters; and the first port of call for the private sector on nutrition matters which require government attention 	By end of 2023

9.3. Strategic Objective 3 (Initiatives): Increase Business Engagement in the Non-Nutrition Sector (Outside Of The Food System)

No.	Initiative	What	How	Impact	
3.1	Advocate for improved nutrition in the workplace	<ul style="list-style-type: none"> ▶ Provide advocacy and encouragement, as part of day- to-day SBN activities, for workplace health and nutrition programs ▶ Facilitate linkages and introductions of workplace nutrition agenda amongst interested business companies 	<ul style="list-style-type: none"> ▶ Provide TA to mainstream nutrition at workplace for prospective companies (ILO supported companies), companies based at 20 industrial parks & 7 Agro parks ▶ Advocate and share information with SBN members and other stakeholders on the benefits of a healthy workforce ▶ Encourage SBN members to consider suitable workplace health programs to promote improved nutrition; such as maternity leave for new mothers, breastfeeding-friendly areas, nutrition workshops, nutritious meals for staff etc. ▶ Encourage more nutrition-focused food purchasing behavior; and advocate for equal pay for men and women to improve female purchasing power ▶ Encourage businesses to support community based activities that promote good nutrition; such as sponsoring local events, holding youth nutrition programs etc. (food bazaar, world breastfeeding day, world food day, etc.) 	Moderate Low High High	Members Consumers Market Nutrition

No.	Initiative	What	How	Impact	
3.2	Advocate for improved nutrition in the school (private and non-governmental)	<ul style="list-style-type: none">Facilitate linkages and introductions of healthy snacks and drinks at some of the pilot schools located in Addis Ababa	<ul style="list-style-type: none">Encourage SBN members to formulate business case around healthy snacks and drinks provision for prospective private and non-governmental schools located in Addis AbabaEncourage SBN members to engage in the conventional school feeding(those governmental or public schools)Determine and implement effective methods for providing advice, guidance or training on identified knowledge gaps in order to build capacity on the concept of conventional school feeding, meal preparation and project management.	High Low Moderate High	Members Consumers Market Nutrition
3.3	Encourage increased CSR support for nutrition	<ul style="list-style-type: none">Encourage and promote Corporate Social Responsibility(CSR) support and engagement in nutrition for existing and prospective members	<ul style="list-style-type: none">Regularly meet with prospective CSR partners in order to promote nutrition in the private sector and to encourage CSR engagement through the SBNShare opportunities for CSR involvement in nutrition with relevant SBN members and prospective members	Moderate Low Low Low	Members Consumers Market Nutrition

9.3.1. Direct KPIs – Performance Metrics for the SBN Team

KPI	Description	Time Period
5 pilot workplace nutrition program with ILO supported companies & 10+ with companies based on Agro Parks/IPDC	<ul style="list-style-type: none"> Facilitate the conclusion of cooperation of agreement between GAIN/SBN and ILO Country office Make at least 5 pilot linkage between prospective workforce companies supported by ILO Work Decent program and SBN (e.g. SBN coordinator who will provide TA and prospective client companies) 	<p>By end of 2023 (5 pilot ILO –GAIN/SBN linkage)</p> <p>By end of 2023 (10+ pilot with AP/IPDC)</p>
5+ linkages made for a school feeding program(3 public and 2 private schools)	<ul style="list-style-type: none"> Make at least 1 linkage per year (at least 5 total) between prospective schools for healthy snacks and drinks/school feeding program, and member of SBN (e.g. SBN member providing the service and prospective schools receiving the service or implementing the program) Facilitate an introduction and provide basic nutrition context to support the conversation 	By end of 2023 (1 per Year)
3+ potential CSR partners identified & approached	<ul style="list-style-type: none"> Identify at least 3 major companies with the potential to engage in nutrition from a CSR perspective Approach these companies and provide background to SBN, an overview of the nutrition situation in Ethiopia, the benefits of improved nutrition and discuss potential CSR opportunities or areas of engagement Formally sign up these companies as members of SBN Ethiopia 	By end of 2023
3+ capacity building initiatives	<ul style="list-style-type: none"> As outlined above in initiative 3.2, facilitate at least 3 capacity build initiatives for SBN members. These could be in the form of workshops, presentations, guidance brochures, seminars etc. Their aim is to improve the capacity, efficiency and effectiveness of SBN members in the production, distribution and sale of their nutritious products These could be included as part of the 12 annual business networking drinks as outlined in initiative 1. Or, they could be held separately 	By end of 2023 (1 per Year)

9.3.2. Indirect KPIs –
Desired Outcomes Not Within the Direct Control of the SBN Team

KPI	Description	Time Period
Productivity of workers increased and less absenteeism	<ul style="list-style-type: none">▶ To have at least 3 total workforce health initiatives successfully rolled out in at least 2 companies (e.g. nutrition workshop p held, health and nutrition program established for staff, a healthy food initiative such as company-sponsored fruit bowls etc.)	By end of 2021
Enhanced School learning and performance	<ul style="list-style-type: none">▶ School kids are productive, healthy and have access to healthy snacks and drinks decreasing incidence of NCD and any form of under and over nutrition	By end of 2023
Greater exposure and access for all consumers	<ul style="list-style-type: none">▶ There are more nutritious food and drink options available for consumers in all areas of Ethiopia at all income levels▶ Nutritious products are more readily available and more widely distributed by the end of 2023 than they are at the start of 2021	By end of 2023

9.4. Strategic Objective 4 (Initiatives): Facilitate Meaningful Technical Partnerships & Investment Options in Nutrition

No.	Initiative	What	How	Impact	
4.1	Partnerships: Select, facilitate and grow nutrition partnerships	<ul style="list-style-type: none"> Partnerships: Select, facilitate and grow new nutrition partnership (transfer of skills, knowledge and capacity) The SBN will help to establish and sustain such partnerships through its partnership brokering facility 	<ul style="list-style-type: none"> Initiatives 5.1, 6.1 and 7.1 relate to 'identifying opportunities' across our 3 focus areas. Here in 4.1 the SBN will build on the potential and SBN will get or have access to different sets of TA's, training a capacity building activities Develop a set of objectives, rules and criteria for SBN-brokered partnerships, for each of our 3 focus areas. SBN will facilitate and broker partnership (PPP) among the private companies (producer/SBN), Government bodies, the financial institutional (private & public) <p><i>Note: This will contribute to the SBN's 'integrated partnerships and investment plan' outlined in the KPIs</i></p> <ul style="list-style-type: none"> Develop an ongoing register of partnerships and partnership opportunities. This can be shared with stakeholders who may be interested in participating. This is known as the partnership brokering facility. This facility should be built upon over time so that it also becomes a repository for key documents required to establish future partnerships (such as contracts and templates). It should also include all relevant information to effectively manage the partnership framework Work with interested parties to facilitate the partnership agreement process Liaise regularly with partners to offer guidance and support, helping to sustain and grow the partnerships <p><i>Note: In this context, investments (below) Refer to one way commercial investments and partnerships refer to bilateral agreements for non-monetary cooperation (e.g. sharing transport, sharing wholesalers, sharing storage space etc.)</i></p>	High Moderate Low Low	Members Consumers Market Nutrition

No.	Initiative	What	How	Impact	
4.2	Investments: Publicized facilitate corporate investments in nutrition	<ul style="list-style-type: none">Facilitate establishment of startup funds and national SME pitch programPublicize and share potential investment opportunities across our 3 focus areas of nutrition sensitive agriculture, building demand and behavior change, and food fortification and supplementationFacilitate the implementation of these investments	<ul style="list-style-type: none">For interested parties, work with stakeholders to design the investment and facilitate its establishment of SME startup funds and national pitch program (e.g. support the creation of a contract, financial modeling, establish a governance framework, link with financial institutions to arrange money transfer etc.)Initiatives 5.1, 6.1 and 7.1 relate to ‘identifying opportunities’. Here in 4.2 the SBN will publicize and share the commercial investment opportunities identified, in order to attract interest from investorsElaborate on the commercial investment opportunities identified in initiatives 5.1, 6.1 and 7.1 by selecting the most viable or marketable ideas(Precise Consult, First Consult, etc.)Share and publicize these opportunities with SBN members and the broader stakeholder group through newsletters, events or specific communications. Where possible, target specific parties who may be interested	High Moderate Moderate Low	Members Consumers Market Nutrition

9.4.1. Direct KPIs – Performance Metrics for the SBN Team

KPI	Description	Time Period
Partnership brokering facility established	<ul style="list-style-type: none"> ▶ Design and develop the SBN's partnership brokering facility, ready for use. This should take the form of a simple Excel spreadsheet which houses all the relevant information of existing and prospective partnerships and investments, including ideas and suggestions ▶ It should be complemented by suite of documents and templates required for establishing and maintaining partnerships and investments (e.g. contracts, templates, example MoUs etc.) 	By end of 2021
1 integrated partnerships & investment plan developed	<ul style="list-style-type: none"> ▶ As outlined in initiatives 4.1 and 4.2 above, a plan is to be developed which outlines the SBN's objectives, rules and criteria for establishing both partnerships and investments in nutrition initiatives ▶ The plan should serve as a guiding framework for partnerships (non-monetary) and investments (monetary) across our 3 focus areas: nutrition sensitive agriculture, building demand and behavior change, and food fortification and supplementation ▶ It should also set out what the conditions of a typical partnership or investment would look like (i.e. the foundations of and MoU) ▶ The plan should be brief, practical and easy to use. It should be less than 10 pages long and can be updated / refined on an ongoing basis 	By end of 2021
5 formal partnerships established (technical transfer or assistance)	<ul style="list-style-type: none"> ▶ At least 5 formal partnerships between private sector stakeholders established, with the SBN playing a lead role in the process (e.g. identification of the partnership, facilitation of the partnership agreement etc.) ▶ The partnerships are recorded and monitored through the partnership brokering facility and relate to nutrition initiatives with a commercial objective (in addition to the social objective) ▶ Cooperation Mouse with ILO, AACCSA and Ethiopian Airlines are initiated and partly secured. Ethiopian airline is keen to source its food products locally so SBN members/SME can leverage such a huge demand to avail organic produces 	By end of 2021/2023

KPI	Description	Time Period
3 corporate investments secured to establish SME Startup funds and National SME Pitch program	<ul style="list-style-type: none">▶ At least 3 formal investments secured between prominent financial institutions (private and non-private), with the SBN playing a lead role in the process (e.g. identification of the investment opportunity, development of the investment model, negotiating the contract). SBN SME will have access to startup funds for those companies with promising or high impactful nutrition investments. SBN members could also have access to different financial products that are going to be available from these pledging financial institutions	By end of 2023

9.4.2. Indirect KPIs –
Desired Outcomes Not Within the Direct Control of the SBN Team

KPI	Description	Time Period
More businesses are partnering on or investing in nutrition initiatives	<ul style="list-style-type: none">▶ There are more viable investment and partnership opportunities in nutrition, from Both a social and business growth perspective▶ The number and diversity of businesses participating in nutrition initiatives, through investments and / or partnerships, has grown between 2021 and 2023	By end of 2023
The SBN is the focal point for nutrition investments and partnerships	<ul style="list-style-type: none">▶ The SBN is seen within the nutrition community as the focal point and primary contact for corporate investments and partnerships in nutrition (including public-private partnerships)▶ Businesses, government, CSOs and donors will look to the SBN for investment opportunities and potential partnerships on commercial nutrition initiatives	By end of 2023

9.5. Strategic Objective 5 (Initiatives): Improve Nutrition Sensitivity Along the Agricultural Value Chain

No.	Initiative	What	How	Impact	
5.1	Identify nutrition opportunities in agriculture	<ul style="list-style-type: none"> ▶ Seek out and identify new opportunities for nutrition sensitivity initiatives along the agricultural value chain and within existing agricultural infrastructure ▶ Focus on opportunities for corporate investment and partnerships, ensuring sustainability 	<ul style="list-style-type: none"> ▶ Here in 5.1 SBN will identify opportunities / ideas and then, in initiatives 4.1 and 4.2, these opportunities are elaborated, shared and implemented ▶ Type of opportunities: As part of the SBN's regular meetings, events, workshops, field trips, news and research; identify potential opportunities for <i>nutrition sensitive agriculture initiatives</i>(USAID/FEED THE FUTURE/GTN project, SNV, etc.) ▶ Record these ideas in the partnership brokering facility Excel spreadsheet ▶ All types of ideas should be identified, since the vetting process will occur at a later stage ▶ These ideas will then be fleshed out and elaborated in initiatives 4.1 and 4.2 ▶ Examples include ideas related to crop diversification, financing for diverse seed groups, farmer nutrition programs, vegetable production etc. ▶ Work closely with ATA to provide nutrition input into their programs and agricultural initiatives 	<p>Moderate</p> <p>Low</p> <p>Low</p> <p>Low</p>	<p>Members</p> <p>Consumers</p> <p>Market</p> <p>Nutrition</p>

No.	Initiative	What	How	Impact	
5.2	Promote nutrition sensitive agriculture investments	<ul style="list-style-type: none">▶ Work with MOA/ATA, MoTI, EIC and businesses to advocate for increased integration and priority of nutrition in rural areas▶ The commercial objective is to realize improved productivity and productive capacity as a result of improved nutrition	<ul style="list-style-type: none">▶ As part of the SBN's regular activities hold quarterly networking events , events, workshops, field trips, news and research; highlight and promote the commercial benefits of having a well-nourished workforce▶ Encourage businesses to establish organic food production and offer support to for their certification(MOA, ATA, Standards Authority)▶ Provide SBN and other like minded networks(YALTA) to learn, exchange best practices of implementing organic and sustainable supporting such nutrition programs▶ Engage regional contacts and nutrition champions to expand the reach of the SBN, identify nutrition opportunities for smallholder families and estate workers, and promote nutrition in rural areas	Moderate	Members
				Moderate	Consumers
				Low	Market
				Moderate	Nutrition

9.5.1. Direct KPIs – Performance Metrics for the SBN Team

KPI	Description	Time Period
6+ opportunities for nutrition initiatives in agriculture identified	<ul style="list-style-type: none"> ▶ Identify at least 6 commercial or business related opportunities for nutrition sensitive agriculture initiatives as per initiative 5.1 above ▶ Record the opportunities identified in the partnership brokering facility Excel spreadsheet 	By the end of 2023
3+ smallholder / Agro Parks with nutrition initiative implemented	<ul style="list-style-type: none"> ▶ To have successfully implemented 1 commercial or business related nutrition program, as per initiative 4.2 above, within a smallholder community or estate ▶ The SBN should play a key supporting role in the design, planning and implementation of the program ▶ Examples of such nutrition programs may include a meal service provided by a large business to their estate workers and families, a local education program sponsored through CSR on nutrition for smallholder farmers etc. ▶ This would be in addition to the KPI '5+ workforce nutrition initiatives' outlined in Objective 3 	By the end of 2023

9.5.2. Indirect KPIs – Desired Outcomes not within the Direct Control of the SBN Team

KPI	Description	Time Period
Improved nutrition along the agricultural value chain in rural Ethiopia	<ul style="list-style-type: none"> ▶ The general level of nutrition, including nutrition knowledge, education and advocacy, has improved within the targeted rural agricultural communities/vicinity of the targeted Agro Parks as a result of the increased involvement of the private sector ▶ There has been a positive shift towards more consideration of nutrition in rural agricultural business ventures and projects 	By the end of 2023
Improved productivity of smaller and / or Agro Parks in target areas	<ul style="list-style-type: none"> ▶ In target smallholder and Agro parks areas where there has been an increased presence of private sector involvement on nutrition, the general level of productivity of workers has increased ▶ Employers who have participated in, supported or sponsored such nutrition initiatives have noticed an improvement in the productivity, health and general wellbeing of their workers 	By the end of 2023

9.6. Strategic Objective 6 (Initiatives):
Increase the Availability of Fortified Products and Supplements

No.	Initiative	What	How	Impact	
6.1	Identify and strengthen fortification opportunities	<ul style="list-style-type: none">▶ Seek out and identify new opportunities for fortification initiatives in the private sector▶ Focus on opportunities for corporate investment and partnerships, ensuring sustainability	<ul style="list-style-type: none">▶ Here in 6.1, SBN will identify opportunities / ideas and then, in initiatives 4.1 and 4.2, these opportunities are elaborated, shared and implemented▶ Type of opportunities: As part of the SBN's regular meetings, events, workshops, field trips, news and research; identify potential opportunities related to fortification and supplementation▶ Record these ideas in the partnership brokering facility Excel spreadsheet▶ All types of ideas should be identified, since the vetting process will occur at a later stage. These ideas will then be fleshed out and elaborated in initiatives 4.1 and 4.2▶ Examples include ideas related to micronutrient fortification at hammer mills, voluntary fortification of new food products, HEPS for high priority consumers, investing in locally produced food products to target acute malnutrition, investing in low cost fortified complementary foods for children aged 6 -24 months etc.	Moderate Low Low Low	Members Consumers Market Nutrition

No.	Initiative	What	How	Impact	
6.2	Stimulate innovation and new product development	<ul style="list-style-type: none"> ▶ Engage in innovation and product development programs with the aim of supporting businesses in developing new nutritious products ▶ Focus on fortified foods and supplements 	<ul style="list-style-type: none"> ▶ As part of the SBN's regular meetings with members, donors, civil society organizations and other stakeholders; identify and assess opportunities to engage in innovation and / or new product initiatives around fortification ▶ Develop brief concepts or proposals to engage in such opportunities in a way that will have the potential to stimulate new product development in this area. This may include examples such as establishing a fortification innovation program, holding a product development workshop, sponsoring a prize in a business plan competition for fortification, providing pro bono support to an SBN member on their product development process around fortification, etc. ▶ Where relevant, share opportunities with SBN members who may be interested in participating or supporting ▶ Encourage voluntary fortification of food products and supplements and guide businesses in promoting fortification & nutrition as a selling point 	High High Moderate Moderate	Members Consumers Market Nutrition

No.	Initiative	What	How	Impact	
6.3	Encourage increased retailing and sales of fortified products and supplements	<ul style="list-style-type: none"> ▶ Liaise with retailers & wholesalers to advocate for increased accessibility, availability and affordability of fortified products as well as nutri-dense local produces 	<ul style="list-style-type: none"> ▶ Identify and engage major retailers and wholesalers along the food value chain in Ethiopia ▶ Highlight the growing commercial opportunities in nutrition and encourage increased trading and retailing of fortified food products ▶ Encourage new initiatives which promote the consumption of nutritious foods such as in -store promotions, sales events, free samples etc. ▶ Alert retailers and wholesalers about new and locally made nutritious products in the market, and new food producers 	High High Moderate Low	Members Consumers Market Nutrition
6.4	Support fortification initiatives in collaboration with government	<ul style="list-style-type: none"> ▶ Support the private sector in understanding and complying with government fortification requirements 	<ul style="list-style-type: none"> ▶ Encourage SBN members to ask for assistance on understanding the regulatory environment. Based on requests, link SBN members with relevant government contacts or existing information to answer their queries ▶ Encourage SBN members to help in the compliance process by highlighting loopholes or raising issues of potential breaches within the community. The SBN team can then raise these with government 	High Moderate Moderate Low	Members Consumers Market Nutrition

9.6.1. Direct KPIs – Performance Metrics for the SBN Team

KPI	Description	Time Period
6+ fortification opportunities identified & implemented	<ul style="list-style-type: none"> Identify at least 6 private sector related opportunities for fortification initiatives as per initiative 6.1 above (salt iodization, edible cooking oil and cereals) These opportunities, or ideas, may be put forward by SBN team members, SBN members, external stakeholders etc. Record the opportunities identified in the partnership brokering facility Excel spreadsheet 	By the end of 2023
3+ innovation / new product program engaged in	<ul style="list-style-type: none"> To have successfully implemented 1 commercial or business related nutrition program, as per initiative 4.2 above, within a smallholder community or estate The SBN should play a key supporting role in the design, planning and implementation of the program Examples of such nutrition programs may include a meal service provided by a large business to their estate workers and families, a local education program sponsored through CSR on nutrition for smallholder farmers etc. This would be in addition to the KPI '5+ workforce nutrition initiatives' outlined in Objective 3 	By the end of 2023
3+ retailers and wholesalers engaged	<ul style="list-style-type: none"> As part of initiative 6.3 above, engage with at least 3 stakeholders from the retail or wholesale community Meet with them, outline the purpose and objectives of the SUN Business Network, establish a relationship and provide ongoing dialogue and updates to them as stakeholders of the SBN in Ethiopia 	By the end of 2023
1 review of national fortification program completed	<ul style="list-style-type: none"> Carry out a review of the role of the private sector in strengthening Ethiopia's public fortification programs. Identify the major players in fortification, analyze the competitive landscape and understand the major issues, risks, opportunities and challenges This includes reviewing existing policies, research and literature and developing achievable recommendations to improve the private sector's contribution to national fortification initiatives <p><i>Note: The ToR of the 'fortification consultant' aims to achieve this KPI and further details are included therein</i></p>	By the end of 2023

9.6.2. Indirect KPIs –
Desired Outcomes not within the Direct Control of the SBN Team

KPI	Description	Time Period
SBN is the focal point for the private sector on fortification	<ul style="list-style-type: none"> • The SBN plays a role (whether director indirect) in all major food fortification initiatives related to the private sector • The SBN is seen as the first port of call for the private sector on fortification issues which require broader community attention 	By the end of 2023
Increased sales, variety & availability of fortified nutrition products	<ul style="list-style-type: none"> • More people are buying and more businesses are selling fortified food products. Generally, fortified foods are more accessible e and readily available for consumers of all income levels than they were at the beginning of 2021 • There are more players, and variety of products, in the fortification market and the products are higher quality than in 2016 	By the end of 2023
Regular and open dialogue with MOTI and FMHACA, Standards Authority on fortification	<ul style="list-style-type: none"> • Meetings are held regularly with MOTI, FMHACA, Standards Authority and other key government nutrition contacts • Private sector food fortification issues, challenges and opportunities are shared and communicated openly to reflect the sentiment of the private sector • The SUN Business Network is seen as a reputable and vocal body which strongly represents the private sector in areas related to fortification 	By the end of 2023

9.7. Strategic Objective 7 (Initiatives): Increase Nutrition Awareness and Demand

No.	Initiative	What	How	Impact	
7.1	Identify awareness / SBCC opportunities	<ul style="list-style-type: none"> ▶ Seek out and identify new opportunities and ideas for partnerships and investments in nutrition awareness and SBCC ampaigns ▶ Focus on opportunities which will build demand for nutritious products 	<ul style="list-style-type: none"> ▶ Here in 7.1 SBN will identify opportunities / ideas and then, in initiatives 4.1 and 4.2, these opportunities are elaborated, shared and implemented ▶ Type of opportunities: As part of the SBN's regular meetings, events, workshops, field trips, news and research; identify potential opportunities for corporate investment and / or partnerships related to SBCC and nutrition awareness ▶ These ideas may also form the basis of concepts developed in initiative 7.2, below ▶ Record these ideas in the 'partnership brokering facility' Excel spreadsheet ▶ All types of ideas should be identified, since the vetting process will occur at a later stage ▶ These ideas will then be fleshed out and elaborated in initiatives 4.1 and 4.2 or, as mentioned above, leveraged in 7.2 below 	Moderate Moderate High High	Members Consumers Market Nutrition

No.	Initiative	What	How	Impact	
7.2	Facilitate and support awareness and SBCC campaigns	<ul style="list-style-type: none"> ▶ Facilitate and support the roll out of a broad based awareness campaign and / or a behavior change communication campaign ▶ Purpose is to increase awareness of nutrition and increase consumption of certain nutritious products 	<ul style="list-style-type: none"> ▶ Based on ideas generated in 7.1 above, and others offered by interested stakeholders, develop a generic campaign concept; including objectives, target consumers, scenarios of potential target products or subject matter (e.g. 'eat indigenous vegetables x, y and z' vs. 'eat healthy'), potential private sector supporters and desired outcomes ▶ Identify and approach potential implementing partners with concept, including donors ▶ Liaise regularly with potential partners to build case for concept sponsorship, design and implementation ▶ If successful, support implementing partner by facilitating input from SBN Ethiopia members and, where required, input from relevant consumer groups and / or research ▶ Develop a nutrition fact sheets and audio visual presentation, as outlined in the Nutrition Advocacy Plan ▶ In addition, or concurrently, conduct planning meetings and advocacy workshops with relevant associations including the Salt Producers Association, Food Producers Association and National Food Fortification Alliance, as outlined in the Nutrition Advocacy Plan 	High High High High	Members Consumers Market Nutrition

9.7.1. Direct KPIs – Performance Metrics for the SBN Team

KPI	Description	Time Period
6+ opportunities for awareness / SBCC identified	<ul style="list-style-type: none"> Identify at least 6 SBCC and nutrition awareness opportunities as per initiative 7.1 above Record the opportunities identified in the partnership brokering facility Excel spreadsheet and also use them to develop concepts for major SBCC and awareness campaigns for initiative 7.2 above 	By the end of 2021
1 nutrition fact sheet developed	<ul style="list-style-type: none"> As per the Nutrition Advocacy Plan, develop a brief, high level fact sheet outlining the key nutrition facts in Ethiopia and an overview of private sector engagement in nutrition 	By the end of 2021
1 nutrition audio visual presentation developed and shared	<ul style="list-style-type: none"> As per the Nutrition Advocacy Plan, design and develop, in PowerPoint, a high-level presentation to accompany the fact sheet outlined above. The presentation should provide general overview of nutrition in Ethiopia and discuss the importance of engaging the private sector on nutrition 	By the end of 2023
5+ potential partners identified and approached	<ul style="list-style-type: none"> Formally approach at least 5 potential implementing partners with the SBN's ideas / concepts with the aim of establishing a nutrition SBCC / awareness campaign Target donors and NGO partners 	By the end of 2023

9.7.2. Indirect KPIs – Desired Outcomes not within the Direct Control of the SBN Team

KPI	Description	Time Period
1 major nutrition awareness / SBCC campaign funded and implemented	<ul style="list-style-type: none"> To have successfully rolled out (through partnerships) 1 major nutrition awareness / SBCC campaign aimed at increasing the demand and consumption of nutritious foods Either a broad based awareness campaign for a particular nutritious consumable or a generic SBCC campaign on nutritious food consumption 	By the end of 2021
Positive shift in public perception about the role of private sector in nutrition	<ul style="list-style-type: none"> Key stakeholders involved in nutrition in Ethiopia have shifted towards a more accepting and supportive stance regarding how the private sector can contribute towards national nutrition goals 	By the end of 2023



10 | ANNUAL SBN ETHIOPIA WORK PLAN

SBN Next Steps		Timeline (2020-2021)															Country: Ethiopia	
Strategic Priorities	Action	N	D	J	F	M	A	M	J	J	A	S	O	N	D	External Support Needed	Additional Details	
SO.1 Develop a strong SBN membership & brand	1. Develop SBN strategy building on the Government priorities as depicted in the landscape analysis and other desk/literature review																Use SBN Global tools	
	Review of the current SBN strategy	X															Use SBN Global tools	
	Review of current SBN tools(membership/recruitment)	X															Use SBN Global tools	
	Stakeholder mapping and analysis	X															Use Consultants developed tool	
	Consultative meetings through KII	X															Use Consultants developed tool	
	Develop/enhance SBN Criteria for Selection/ Recruitment of Members	X														GAIN Global Team	Use SBN Global tools	

[illegible]

SBN Next Steps		Timeline (2020-2021)															Country: Ethiopia	
Strategic Priorities	Action	N	D	J	F	M	A	M	J	J	A	S	O	N	D	External Support Needed	Additional Details	
	5. Kick Off Meeting with SBN Advisory Group, Food and Beverage/MOI, GAIN, WFP (what and how to do more by SBN-ET and the revised strategy)						X									GAIN Global Team		
SO 3. Increase business engagement in the Non-Nutrition sector	6. Grand Launch of the SBN strategy(2021-2023) and the Nutrition at Workforce Handbook		X			X				X			X			Workforce Nutrition Alliance	Use SBN Global tools	
	7. Further Business landscape review and assessment to launch Nutrition at Workplace program amongst private companies with little or no impact on food system		X			X				X			X					
SO.4 Facilitate meaningful partnerships(TA transfer) & investment options in Nutrition	8. Engagement of private sector and other key stakeholders																	
	-Facilitating the creation of different partnerships and membership strengthening					X												

SBN Next Steps		Timeline (2020-2021)																Country: Ethiopia	
Strategic Priorities	Action	N	D	J	F	M	A	M	J	J	A	S	O	N	D	External Support Needed	Additional Details		
	- Submission of signed membership forms from partners and assessment/ validation by SBN Core Group						X												
	- Facilitate the transfer and support of three pledges and partnership creation (technical, business related.....								X	X	X								
	- Promoting healthy school feeding concept and produce a business case for members to provide such service to both private and government affiliated schools in the country										X		X						
	9. Facilitate the creation and establishment of SME startup funds									X						Private and Non-Government Banks			
	10. Launch national SUN/ SBN pitch in Ethiopia											X							

SBN Next Steps		Timeline (2020-2021)														Country: Ethiopia	
Strategic Priorities	Action	N	D	J	F	M	A	M	J	J	A	S	O	N	D	External Support Needed	Additional Details
	11. Facilitating smooth linkage and partnership amongst the different SUN networks																
	- Coordinating and arranging follow up meetings with different SUN network and engage in annual SUN report		X												X		
	- Attend global SUN meeting/ MNF/ Second Global Summit on Food Fortification		X												X		
	- Learning Exchange visit to other SBN Countries (e.g. Kenya, Tanzania)										X	X					
	- Attendance to Nutrition in the workplace conference in Indonesia (NJCC, ILSI, Indofood)															Miriam	Check when this summit takes place in 2021
SO.1 Develop a strong SBN membership & brand	12. Fundraising for SBN-Next 2-3 years						X	X									
	13. Facilitate three business networking events						X			X			X				

SBN Next Steps		Timeline (2020-2021)															Country: Ethiopia	
Strategic Priorities	Action	N	D	J	F	M	A	M	J	J	A	S	O	N	D	External Support Needed	Additional Details	
SO.7 Increase nutrition awareness & demand	14. Awareness raising platform and events about SUN and what SBN wants to achieve																	
	- Developing SBCC and media owners on healthy means, lifestyle						X	X	X									
	- Facilitate the dialogue and creating enabling environment for the fortification industry(legislation, tax exemption privileges						X	X	X									
	- Level the field for companies to thrive in the iodized salt and fortification of edible oils in the country							X										
SO.3 Improve nutrition policies & regulations	15. Facilitate the establishment of standards for organic food produces								X		X					Moa, ATA		

SBN Next Steps		Timeline (2020-2021)															Country: Ethiopia	
Strategic Priorities	Action	N	D	J	F	M	A	M	J	J	A	S	O	N	D	External Support Needed	Additional Details	
SO.1 Develop a strong SBN membership & brand	16. Establish a common consumer logo to promote SBN members marketability of their products(healthy and locally produced organic foods)											X						
SO.5 Improve nutrition sensitivity along the agricultural value chain/food system	17. Advocacy and linkage with different actors working on Nutrition sensitive investment and share experience or facilitate learning events									X	X	X	X	X	X	Save the Children/ USAID/ Tuft's	USAID/ GTN project	
SO.1 Develop a strong SBN membership & brand	18. Develop a robust and standard monitoring and evaluation matrix to gauge and evaluate the performance of SBN programing and its impact to curbing malnutrition in Ethiopia												X	X				



11 | RESOURCES REQUIREMENT

	Budget lines	Unit	Unit price in USD	Qty.	Total	Description
Staffing Needs	SBN Coordinator	Person	5250	1	\$63,000	80% of time spent on SBN
	Analyst	Person	2500	1	\$30,000	100% of time for full time junior staff member (0 – 3 years' experience)
	Consultants	Person	400	3	\$62,400	Estimated cost at \$400 per day. It is expected that 3 consultants will be engaged for up to 4 weeks each in 2021.
	Consultant expenses	Lump sum		Lump sum	\$5,000	Including flights, accommodation, transport etc.
	Intern	Person	1,333	1	\$15,996	
Networking Events	Quarterly networking events and networking	Person	20	250	\$20,000	Quarterly networking events with all members of SBN-ET
	Advisory Group meetings	Person	20	30	\$2,400	4 meetings per year to held at a hotel (held quarterly)
	International exchange visit and local exchange visit	Person	2,000	7	\$42,000	7 members of SBN-ET will have both an international and national field exchange trips(3 trips)
	Attending Global SUN/SBN/ Food Fortification summit	Person	5,000	1	\$10,000	SBN coordinator attending 2 global summits

	Budget lines	Unit	Unit price in USD	Qty.	Total	Description
Research and business profiling studies	Market research & profiling of business climate in Ethiopia	Lump sum			\$10,000	
	Workshops	Number			\$5,000	Hold workshop for the presentation of results of the research study
Travels	Regional travel	Person	500	1	\$2,000	4x small regional trips for SBN Coordinator to meet with prospective SBN stakeholders/ Workforce for Nutrition companies located in the IPDC or Agro Parks
	Taxis				\$1,000	Taxis for meetings around Addis Ababa
Miscellaneous	Printing				\$1,000	General printing for events, and banners etc.
	Media & Communications				\$10,000	Newspaper notices, PR initiatives, advertising etc.
Staffing cost					\$176,396	
Non-staffing cost					\$103,400	
Grand Total					\$279,796	



12

STRATEGIC ANALYSIS (SWOT ANALYSIS)

Opportunities

Ethiopia is a big market with significant commercial growth opportunities in nutrition (edible oil fortification, cereal and salt). The government has set to suspend the import of edible oil as of the beginning of the Ethiopian New Year after local processors are at a final stage to commence massive production. Early this week, Prime Minister Dr. Abiy Ahmed said that the government is working to substitute the import of basic commodities like wheat and edible oil by local production. He said that the wheat production that expanded in these two years will enable the government to stop the import of wheat fully that consumes close to a billion dollar every year. The country under the new leadership is also trying hard to level the ground for more private sector engagement unlike the previous administration where the priority is for public investment than the

later.

Various legislation and policies have been reformed and brought to life in the last couple of years. This include the recent liberalization of major banking and public sector, the new ease of doing business, revised investment proclamation, the new 10 Perspective Plan that puts the private sector at the core of its heart, the rapid expansion and establishment of industrial parks and agro parks, the new Food and Nutrition policy further placing greater interest on the private sector are all conducive for the growth of the current private sector growth and engagement in nutrition sphere. The presence of other like-minded networks such as YALTA/AGRIPROFOCUS, AACCSA and strong enabling for school feeding, workforce nutrition agenda and general food system thinking would be an additional

capital for smooth launching of SBN

agenda (2021-2023).

Threats

In recent years and more particularly under the current leadership, Ethiopia has witnessed continuous political unrest that lead up to for a longer and protracted displacements in most major towns and regions of the country. Incidence of droughts, floods, locust infestation in the east and northern regions and the covid-19 pandemic in the country.

The current political unrest coupled

with any potential second wave Covid-19 attack will further put strain on the businesses landscape, the food system, new investment opportunities including the SBN Ethiopia agenda. Members and prospective members may lose interest if SBN Ethiopia may lose momentum again; especially if the network will not be able to get a full time SBN Coordinator. Our unproven model and the difficulty in measuring impact may limit future ability to raise funding.

Strength

Both SBN and SUN movement have gotten a good reception and acceptance by key stakeholders (Government and Non-Government). There is also growing strong momentum within nutrition circles, with the development and soon enactment of the Food and Nutrition Policy and other important private sector development and empowerment legislations, policies

and enactments. There is also Robust strategic foundation and long term plan such as the 10-Year Perspective Plan. GAIN has a strong reputation in the nutrition community and has already spurred a lot of enthusiasm for what SBN intends to do. Moreover, there is already good and working relationship with all existing SBN members

Weakness

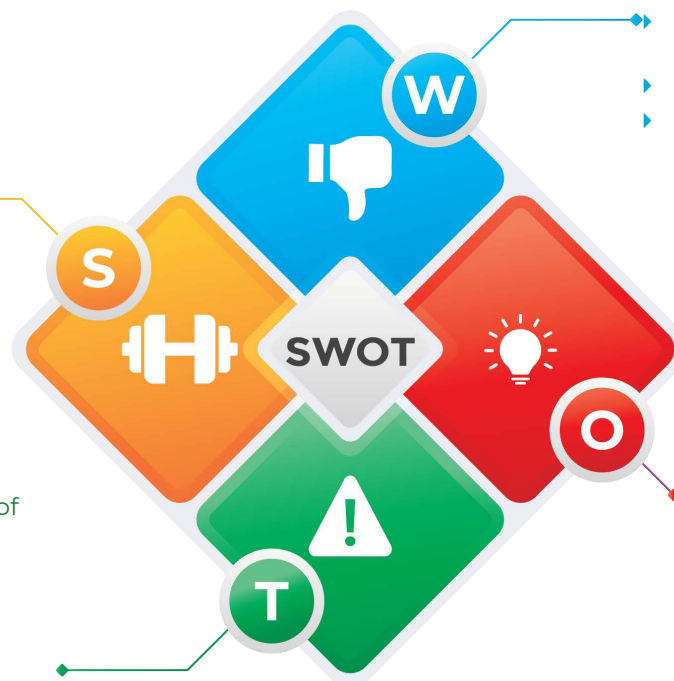
Since the launching of SBN Ethiopia in 2017/18, the network hasn't taken off and widened its membership base as expected. Among the many factors for the slow and weak operation of the SBN in its first course were absence of full time SBN coordinator, absence of key performance indicator to trace the three-year performance, SBN intervention area focused on the food fortification or no other alternatives low hanging fruits for its engagement, change in management structure (CD with GAIN and Ministry

with MOTI), geographically sparse & decentralised private sector (no room to navigate and sell SBN agenda). Most importantly, there is no proven formula or empirical data that proves business engagement on nutrition platforms brings economic profitability or the intervention logic lacks market testing than the traditional research and analysis. It's also expected the overall impact on nutritional outcomes could be a long and slow road to impact realization.

Summary of strength, weakness, opportunities and threats

- ▶ Strong momentum within nutrition circles (Food and Nutrition Policy) and private sector support policies and)
- ▶ Good working relationship with SBN existing members
- ▶ Good relationship with key Government stakeholders including the national SUN focal point
- ▶ GAIN has a strong reputation in the nutrition community and has already spurred a lot of enthusiasm to what SBN intends to do and experience working on both food and market systems
- ▶ Robust strategic foundation and long term plan legislation (10-Year Perspective Plan, revised investment proclamation, etc)

- ▶ The current geo-political situation and instability may pose danger to the overall implementation of the project
- ▶ Members and prospective members may lose interest if SBN Ethiopia may lose momentum again
- ▶ Our unproven model and the difficulty in measuring impact may limit future ability to raise funding
- ▶ Second wave of Covid-19 and any extended unrest and natural calamities will further derail the gains made so far and exacerbate food insecurity, malnutrition, unemployment and civil strife
- ▶ Our unproven model and the difficulty in measuring impact may limit future ability to raise funding
- ▶ Second wave of Covid-19 and any extended unrest and natural calamities will further derail the gains made so far and exacerbate food insecurity, malnutrition, unemployment and civil strife



- ▶ Network of prospective SBN members and stakeholders is very small (no active platform for exchanging ideas and networking)
- ▶ Geographically sparse & decentralised private sector (no active room or other networking opportunities to also sell SBN agenda)
- ▶ No established relationship with retailers/distributors and wholesalers
- ▶ Very long and slow road to impact realisation
- ▶ Unproven formula. Based on research and analysis rather than sound market testing

- ▶ The nutrition agenda has strong support from government and is a national priority
- ▶ Key private sector stakeholders see the SBN as being able to make their lives easier in nutrition / fortification
- ▶ Very encouraging environment and laser focused private sector development (10 Year Perspective Plan, National Food and Nutrition Policy, Ease of Doing Business and revised investment legislation, etc)
- ▶ Ethiopia is a big market with significant commercial growth opportunities in nutrition (edible oil fortification and production has banned imports of edible cooking oil and wheat)
- ▶ Positive sentiment among donor and NGO groups about the need to engage and gauge the private sector on nutrition investment (WFPs recent study on FNG)
- ▶ The many industrial parks and agro parks the country able to establish/continue to establish for workforce nutrition and other similar opportunities
- ▶ Nutrition is now a 'hot cake' at the moment with strong commercial and social appeal



13

MONITORING AND EVALUATION FRAMEWORK

The SUN Business Network has a responsibility to monitor its progress against its objectives and demonstrate the impact that the Network is having on business and nutrition at the country level on a regular basis. A number of common indicators have been developed for national SBNs to report against at the local level, which will then be collated at the global level to demonstrate collective impact of the SBN.

The common indicators relate to activities and outputs articulated in the SBN pathway to impact, where SBN is accountable for these outputs, e.g. relating to the effectiveness of the SBN private sector engagement platform (number of members and convening's), the identification of member business needs around access to finance, technical assistance and business development support and the identification and

facilitation of partnerships as well as the generation of evidence of the role of business in addressing of malnutrition and associated evidence informed advocacy.

A number of common indicators also reflect outcomes, for which SBN is not accountable but demonstrate SBN's influence, for example, around an improved enabling environment for business in nutrition, improved business practices to deliver nutrition and improved marketing practices and more and better behaviour change communications. In addition to the common indicators, national SBNs can develop their own specific indicators related to specific priority areas of focus and it is envisaged that some national SBNs will be able to undertake evaluations of their programs, subject to available funding.



14 ANNEX

Annex 1: The Role Executive Committee

The Executive Committee (EC) is the SBN's governing body. It includes members from the private sector, government and the development sector co-chaired by a Federal Ministry of Industry representative and an elected chairperson from the private sector on a two year rotation. Members from outside of the private sector and business associations are non-voting.

The EC is tasked with:

- ✿ Setting strategic and annual operational plans for SBN Ethiopia to execute;
- ✿ Guiding the SBN in the development of projects, proposals and partnerships for sustainable nutrition and business impacts;
- ✿ Advocating for business engagement in nutrition and identifying opportunities for such engagement;
- ✿ Recruiting new companies to the Membership Network; and
- ✿ Overseeing implementation of the SBN work plan and contributing in-kind resources towards that end where possible.
- ✿ The members of the SBN will elect the executive committee members from the private sector. However, the Chair from the government side will be The State Minister or his delegate.

The work plan is coordinated by the SBN Coordinator, but may be implemented by EC members, staff within their organizations, or by other SBN members and stakeholders.

It is proposed that initial membership of the Executive Committee comprise:

- ✻ Federal Ministry of Industry
- ✻ ASTCO, Guts Agro Industry plc., Norrish, FAFFA Foods, the Millers' Association and the Blended Foods Association, and dairy sectors;
- ✻ Addis Modjo representing the cooking oil sector;
- ✻ The Salt Association, representing
- salt producers, SVS Salt Processing Company;
- ✻ GAIN and WFP to provide technical support (non-voting)
- ✻ Federal Ministry of Health (non-voting), representing SUN Secretariat
- ✻ Financing Institute to be identified

These members have the following responsibilities beyond the general remit set out above:

Private Companies <ul style="list-style-type: none"> ✻ Represent private sector priorities and requirements. ✻ Ensure work plan and specific projects are appropriate and will deliver bottom-line value to SBN members 	Associations <ul style="list-style-type: none"> ✻ Represent members' priorities ✻ Provide communication channel between SBN and members
Government <ul style="list-style-type: none"> ✻ Provide leadership and advice from the public sector perspective ✻ Ensure the EC is aware of national priorities and relevant initiatives ✻ Advocate for SBN within the highest levels of government and across government sectors 	GAIN/WFP <ul style="list-style-type: none"> ✻ Provide technical support and guidance to the EC. ✻ Facilitate fundraising ✻ Recruit and supervise SBN coordinator

Annex 2: The Role Executive Committee

The Technical Advisory Group (TAG) will be established to advise the SBN Executive Committee and to facilitate linkages, two-way communication and effective partnerships between SBN and other relevant bodies.

The TAG will:

- ✻ Provide strategic advice to SBN EC;
- ✻ Advocate for business engagement in nutrition, especially with leaders and influencers within TAG members' own organizations;
- ✻ Build consensus on entry points with government, business and civil society;
- ✻ Facilitate links between SBN and other relevant bodies and stakeholder groups, especially TAG members' own organizations; and
- ✻ Support the EC and SBN Secretariat as required;

It is proposed that initial membership of the TAG comprise:

- ✻ Federal Ministry of Industry Chair;
- ✻ SBN Coordinator (recruited for the position, with dual reporting lines to State Minister of FMol and GAIN SBN Director)
- ✻ Federal Ministry of Industry Food and Beverage Industrial Development Institute
- ✻ Ethiopian Meat and Dairy Industry Development Institute
- ✻ Ethiopian Industrial Input Development Enterprise
- ✻ Federal Ministry of Health (someone who is a member of the National Nutrition Coordinating Body)
- ✻ Addis Ababa Chamber of Commerce (someone who is associated with the food processing sector)
- ✻ GAIN
- ✻ WFP (member to be appointed by WFP Country Representative)
- ✻ Ethiopian Public Health Institute
- ✻ Ethiopian Consumers Association/ society representing consumers

The work plan is coordinated by the SBN Coordinator, but may be implemented by EC members, staff within their organizations, or by other SBN members and stakeholders.

ANNEX 3: SBN SECRETARIAT AND SBN COORDINATOR

The SBN Secretariat is to be hosted at FMol seconded by GAIN, which will recruit, fund and supervise the SBN Coordinator, and FMol provide office space and administrative support to the SBN. The SBN coordinator should have dual reporting lines to the SBN chair from the Federal Ministry of Industry and the GAIN SBN Director. Since the SBN works on behalf of a range of business sectors and interests, it is important that the secretariat and the SBN Coordinator be seen as neutral, representing all sectors and members that comprise the SBN. A stable office space and support from the GAIN office reinforces this neutral position.

The SBN Coordinator is a senior position and must be a dynamic, capable individual who can inspire and work effectively with senior business and government leaders. His/her remit will include:

1. Development of the SBN membership platform

Mobilize commitments from business:

- ✻ Create a business engagement membership platform for companies to sign up and commit to activities to improve nutrition in the identified priority areas and in support of the NNP II.
- ✻ Advocate for business engagement in implementation of the SBN strategy and work plan.
- ✻ Hold regular networking events and build an active communications platform.
- ✻ Outline priority areas for business engagement.
- ✻ Track and report progress towards business commitments to contribute to the NNP II.
- ✻ Ethiopian Consumers Association/ society representing consumers

2. Refine and revise the SBN strategy every three years

Identify entry points for business:

- ☀ Review key policy documents to identify entry points for private sector investment in nutrition.
- ☀ Map and assess business presence and capabilities in country to determine the current level of activity, challenges in delivery and potential gaps which merit additional entry points for business
- ☀ Identify priority areas for business investment and potential action based opportunities for business to scale up nutrition in alignment with national nutrition strategies.
- ☀ Identify 3-4 priority nutrition areas which can be leveraged by, and are relevant to, business in country covering core objectives, time lines and required budget and personnel resource for strategy implementation
- ☀ Determine how to leverage existing programs/commitments, infrastructure, finance.

Stakeholder consultation: Review and validate/build consensus on entry points with government and other stakeholders including business and civil society.

3. Develop roadmaps and work streams for action

- ☀ Develop detailed program roadmaps or work streams, which articulate new investment opportunities for each of the thematic areas agreed between government and the EC.
- ☀ Identify opportunities to strengthen ongoing investments, key policies, infrastructure, technical and financial assistance, mechanisms in-country and gaps (if mechanisms do not exist) and any research requirements which can collectively be leveraged/ addressed to implement a program link up with academia or the SUN Research Network if/when it is established in Ethiopia.
- ☀ Develop detailed investment blueprints, which analyze key costs, constraints, and partners. Establish investment mechanisms
- ☀ Work with donors, the investment community, and the business community to build mechanisms in the country, which can provide technical and financial assistance to support new partnerships and business investment.
- ☀ Serve as head of the secretariat of SBN Office, run the day-to-day and secretary of the SBN EC

4. Other key responsibilities

- ☀ Set up SBN governance structures plan
- ☀ Develop toolkits for private sector e.g. for workforce nutrition policies, drawing on and adjusting international models to reflect the local context
- ☀ Concurrently identify and secure funding for the SBN secretariat in Ethiopia and the annual SBN work
- ☀ Represent the SBN in SUN meetings and other relevant national and international meetings to build visibility for SBN, establish and strengthen relationships and share feedback with SBN membership investment mechanisms

Core to the achievement of these objectives are the underlying principles of advocacy, accountability, multi-stakeholder approach, identifying and preventing conflict of interest and monitoring and evaluation. This role will support and align with the framework laid out in SUN's Guiding Principles for Private Sector Engagement.

15

REFERENCES

- I. Assessment of Feasibility and Potential Benefits of Food Fortification in Ethiopia. Federal Ministry of Health, Government of Ethiopia, October 2011.
- II. Business Enabling Environment Assessment, Agricultural Growth Program - Agribusiness and Market Development (Agp- Amde) Project, USAID, October 2012.
- III. Ethiopia Demographic and Health Survey 2011. Central Statistical Agency [Ethiopia] and ICF International, Addis Ababa, Ethiopia and Calverton, Maryland, USA: Central Statistical Agency and ICF International, 2012.
- IV. Ethiopia Investment Climate Statement 2015. United States Department of State, 2015.
- V. Ethiopian National Food Consumption Survey. Ethiopian Public Health Institute, Addis Ababa, August 2013. Ethiopia Poverty Assessment 2014. World Bank, Washington, DC. 2015.
- VI. Forsman, C. Fortification of Staple Foods in Mozambique. Mozambique Support Program for Economic and Enterprise Development (SPEED), funded by USAID, Maputo, 2014.
- VII. National Nutrition Program II. Government of the Federal Democratic Republic of Ethiopia, January 2016. National Nutrition Program. Government of the Federal Democratic Republic of Ethiopia, June 2013.
- VIII. National Nutrition Strategy. Federal Ministry of Health, Government of the Federal Democratic Republic of Ethiopia, January 2008.
- IX. Nutrition Sensitive Agriculture Draft Strategic Plan. Ministry of Agriculture and Natural Resource, Government of the Federal Democratic Republic of Ethiopia, October 2015.
- X. Saqota Declaration Implementation Plan (2016-2030), Summary Program Approach Document. Government of Ethiopia, March 2016.
- XI. Sutton, J. and Kellow, N.: An Enterprise Map of Ethiopia. International Growth Centre, 2010, London.
- XII. The Cost of Hunger in Africa: Social and Economic Impact of Child Under nutrition in Egypt, Ethiopia, Swaziland, and Uganda. Abridged Report. African Union Commission, NEPAD Planning and Coordinating Agency, UN Economic Commission for Africa, and UN World Food Program. Addis Ababa: UNECA, 2014.



Business Network

ማሳተፍ • ማነሳሳት • ማልማት

www.sunbusinessnetwork.org

