

Appendix

Appendix 1
Task Force Member
Potential Champion Products Company Visits Report

Brief Report on Company Visits

(Potential Companies Products - hand-woven, fashion & natural dye - Participating at the TICAD Africa Fair)

Background:

The sub-committee visiting the selected companies was delegated by the Task Force, involving two members:

- Mr. Jacque Debouch and
- Mrs. Nigest Haile.
- Mr. Fekadu Nigussie from JICA accompanying the team.

The sub-committee was able to visit the following seven companies:

1. Orbit,
2. Sabahar,
3. Entoto Beth Artisan,
4. Muya Ethiopia,
5. Salem's Design,
6. YeFikir Design and
7. Trio-craft.

Following the sequence of the companies mentioned above, the team visited all the seven companies on May 8, 2013. Brief summary note of each company, the details of the companies rating, general and overall comments of the sub-committee is presented below.

Brief Background on the Visited Companies:

1. Orbit –

Orbit company was established in 2004. The owner and manager of the company has knowledge and trainings in the sector. The company has twenty five employees (10 women and 15 men).

Orbit had the opportunity to participate in five international trade shows – 3 of the trade shows in the US, in a fair that happened every year; one in Turkey and one in Hongkong. When it comes to exporting opal, gemstone and precious stones, the Indians were highly involved in exporting the raw materials from Ethiopia, mainly dominating that market in

taking opal and back in India adding value to those raw materials and selling the products generating billions of dollars. The Government of Ethiopia has banned export of such raw materials, starting June 2013, which again will be great opportunity for companies like Orbit involved in the sector.

Orbit is the first company in the country involved in value adding and exporting the products. The products of Orbit include – different grades of opal and other precious stones.

When it comes to export market promotion, the company does not have flyer/broacher/company profile and it does not have website in marketing its products.

2. Sabahar

Sabahar was established in 2004 and is fair trade certified in 2010. It is a company specializing in natural fibers, natural/chemical dyes, silk and cotton. The company mainly uses silk from Ethiopia and also importing from India, where it has problems in the supply of silk. Sabahar has forty nine employees (25 women and 24 men), where it also outsources to 50 weavers.

The company exports to fifteen different countries, that includes – the US (its biggest market), Japan (supplying to three buyers), Germany, Italy, France, Finland, Czech Republic, etc. Sabahar sells strategy targets three outlets, targeting its sells to - boutiques, wholesalers and selling on line (through customers abroad).

In marketing its export products, the company has an international marketing advisor highly involved in that and an up-dated website promoting its export sells.

Sabahar has home and fashion accessories that can possibly be exhibited and the team has advised the company to select products that it thinks meets the Japanese interest, as the company has already the experience exporting to Japan.

3. Entoto Beth Artisan

Entoto Beth Artisan was established in 2007 as an NGO, focusing on HIV positive women, and later on changed to a private company, fair trade registered. The company has 106 employees (40 full time employees, and the rest are part time employees).

The company, starting its establishment, exports to the US, Australia and Austria, mainly selling the story behind the products. The raw materials of the company include – gun bullet casing, nickel beads, coffee beans. The company does not have problem in the supply of raw materials, good stock of raw materials was observed during the visit. The range of its products include – necklaces, earrings, bracelets, key-chains and Christmas ornaments. The company has a foreign volunteer working on export marketing, starting

the past three years.

4. Muya Ethiopia

Muya Ethiopia was established in 2005, the first company in Ethiopia registered as a fair trade company and member of the International Color Group. With the leadership of its owner and manager, a woman, involved in the sector for years, the company is very well structured in its production flow and professionally organized in responding to its export demands on time.

The company does not have supply problem of raw materials and its product lines include – soft home furnishing and fashion accessories and pottery products. The company exports, mainly to the US as well as to different European countries.

In aggressively promoting its export sells, the company develops latest, up-dated flyers/broacher/, buyers kit and website.

5. Salem's Design

Salem's Design was established in 2008, employing seventy workers – 35 in basketry (all women), 14 in weaving (4 of them women), 15 in jewellery (all of them women) and 6 in tailoring (all women). The company is exporting to the US (recently started supplying Wal-Marts), UK, Australia and Germany, exporting to both whole sellers and individual customers. The company is involved in three product lines – jewellery, hand woven home and fashion accessories and basketry. The best sells of the company are scarves and basketry products.

In promoting its export sells, the manager herself is involved in the task; the company has developed its flyer and has plan to develop a look book. The company has web site, some time developed but not continuously up-dated. It has participated in one international trade show in Germany at Tendance.

6. YeFikir Design

YeFikir Design was established in 2009 spearheaded by a young designer. The company has 22 employees (17 of them women). It has started sending export samples to the US and is preparing itself to sell on line.

The product lines of the company include – readymade/custom made dresses, tops, scarves, belts, ties, crocheted works, embroidery, fashion accessories with a modern touch,

mainly using hand woven products.

In promoting its export sells, the company has developed a look book, supported with professionally taken photos and it has developed its web site, preparing itself to start its on line sells. The owner and manager of the company has participated at Ethical Fashion Show in Paris (participated using her products of natural dye)

Working on the continuity of its supply, the company closely works with groups of weavers, outside of Addis Ababa in Sothern Region at Chenchu) where it continuously gets its raw material supply.

7. Trio-craft

Trio-craft was established in 2005, employing 50 workers (40 women and 10 men). The product range of the company includes – carpets, tapestry, cushions, bags and cotton towels of different sizes. The company exports its products to – the US, France and Germany; it also exports hand woven fabrics to Switzerland and Greece.

The team had the chance to see what the company uniquely produces - cotton towels of different sizes, carpet, cushions, wall hang and bags.

Companies Products Rating:

The team agreed on the following four rating criteria:

5. Capacity (in terms of production and vision);
6. Export experience;
7. Capacity/flexibility to respond to export demands and
8. Marketing/promotional tools/materials

No.	Company	Criteria for Rating	Rating Scales			
			Excellent	Very Good	Good	Average
I. Orbit		1.	X			
		2.			X	
		3.	X			
		4.				X
II. Sabahar		1.		X		
		2.	X			
		3.		X		
		4.	X			
III. Entoto Beth Artisan		1.	X			
		2.			X	
		3.		X		
		4.			X	
IV. Muya Ethiopia		1.	X			
		2.		X		
		3.	X			
		4.	X			
V. Salem's Design		1.		X		
		2.			X	
		3.		X		
		4.			X	
VI. YeFikir Design		1.		X		
		2.			X	
		3.		X		
		4.		X		
VII. Trio-craft		1.		X		
		2.		X		
		3.		X		
		4.		X		

General Comments:

1. Orbit –

The company has great potential, exactly lying on the objective of the 'Champion Products'. The owner and manager has the trainings and knowledge of the sector and is exposed to international trade shows. The company is well equipped with modern machines and trained employees. Raw material is available in the country. The team has highly recommended the company's products participation in the TICAD Africa Trade Fair.

In exhibition the products, taking the nature of the products in to consideration, it is noted that there is need for a special stand and lighting to display the products.

Working on customs clearance, in getting the products ready for export, it is from the Ministry of Mines that this issue needs to be dealt, as the process takes some time.

2. Sabahar –

The company is already in export starting 2004 exporting to fifteen different countries of the world, also entered the Japanese market. The team has seen the capacity of the company to respond to export orders and has agreed recommending the company's products to be exhibited.

A question raised by Sabahar during the visit was, 'Are we getting potential buyers in this process of exhibiting the products?' The team has responded that the response to this question will be taken care of by JICA.

3. Entoto Beth Artisan –

The company, with a unique social cause promotion, works on selling its products together with its story, which has enabled the company to enter the export market, where at the visit it was observed that, the company was producing its orders to '10,000 Villages' in the US. The team has observed the capacity of the company in responding to export demands, mainly its unique jewellery made of coffee beans and its other product lines, and the social cause it is promoting, generating employment opportunities to the women that are HIV positive. Thus, the team highly suggests that the products of the company can be exhibited at the planned trade fair in Japan.

In exhibition the products, taking the nature of the products in to consideration, it is noted that, there is need for a special stand and lighting to display the jewellery products.

4. Muya Ethiopia –

The company being one of the pioneer companies in export, the team has agreed that its products, in both its home furnishing and fashion accessories and pottery product lines to be exhibited at the planned trade fair in Japan.

Note the team wants to put here is that, when taking the pottery products for the exhibition, where it demands special handling, precocious measure needs to be taken.

5. Salem's Design –

Even though the company was originally pre-selected in the category of jewellery, the team during the visit had the chance to see that it is also involved in hand weaving and basketry, producing quality and unique products that can be exhibited in the planned fair. Therefore, the team has agreed that, in addition to the jewelery products, the company also exhibits samples of its basketry products and selected hand women products that are uniquely produced in the company.

6. YeFikir Design –

The products of the company, led by a young fashion designer, has impressed the team, producing unique fashion products and accessories. The visiting team has agreed that, its products can best be exhibited at the TICAD Africa fair.

Because of the nature of the company's products, it has requested that, during the exhibition, the products get hanged using manikin/dummy/stands.

7. Trio-craft –

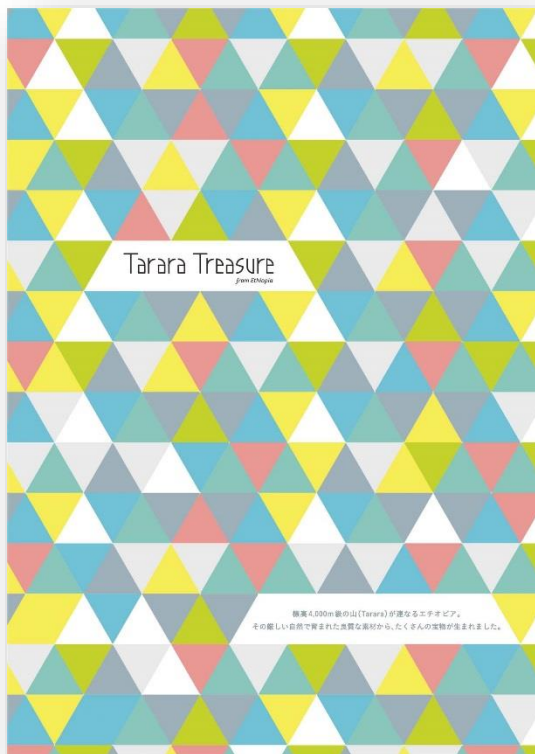
The team had the chance to see the unique products that the company produces and has agreed that those products - cotton towels of different sizes and carpet, cushion, wall hang and bag with same kind of design, gets prepared and be exhibited at the planned show in Japan.

Overall Comments:

- The team has agreed that all the visited seven companies products can be exhibited at the planned trade fair in Japan;
- The companies visited have been asking the team on the number/quantity of product samples to be sent to Japan, a question which the team was not able to respond, thus in this case those selected companies need to be advised on that;
- The need for special consideration when the jewellery & precious stones products are going to be exhibited.
- The issue of customs clearance, in getting the products ready for export was also mentioned to be given due focus and doing that also earlier at good time, as the process of doing so will definitely take time.

Appendix 2

Tarara Treasure パンフレット



左：表紙デザイン
下：扉デザイン



ぬくもりのDNAを受け継ぐモノたち

コーセーとヒロの生まれたTararaの国から届いた宝物は、
あたたかな気持ちのこもった逸品ぞうり。
シンの音、機織りの音、鎌の音、ハチの羽音、潮を吹送ける風の音、
そんな音から聞こえて来るのは、いしえからの続く
うつくしいエチオピアの土地の物語。

Appendix 3

アフリカン・フェア 2013

アンケートフォーム

ご覧頂いた、エチオピア ブースにつき、ご意見をお聞かせ下さい。

○—魅力を感じたものを○でかこんで下さい。

◎一ぜひ買ってみたい、使ってみたいと思われるものには◎をつけて下さい。

ファッション	1	スカーフ・ショール	2	ひざかけ	3	ドレス	4	ローブ
	5	ベルト	6	バッグ				
日用品	21	クッションカバー	22	陶器	23	ブレースマット	24	ナブキン
	25	テーフクロス	26	タオル	27	マット	28	カーベット
	29	壁掛け	30	バスケット				
宝飾品	40	原石	41	オパール	42	アクセサリー		
農産品	50	はちみつ	51	プロポリス	52	ジャム	53	コーヒー
	54	紅茶	55	ドライフラワー	56	石鹸		
	58	ローズウォーター	59	精油	60	マッサージオイル	61	クリーム
	62	生薑オイル	63	みつろう				
観光	70							
その他	80	とくに魅力を感じたものはなかった。						
	90	わからない。						

(1) - 2. 回答 No.1 ~ 70 の方→商品のどのようところに魅力を感じたかをお聞かせください。

No	アイテム	魅力を感じた理由

(1)～3. 回答 No.1～ 70 の方へ上記アイテムの参考価格について伺います。ご購入されるとしたら、価格は？

No	アイテム	高い	手頃	安い	わからない	ご意見
		()	()	()	()	
		()	()	()	()	
		()	()	()	()	
		()	()	()	()	

(1)－4. どんなところが改善されたら日本の消費者にとってさらにエチオピア商品の魅力が増すと思われますか？

1. () 品質・デザイン・味
2. () 価格
3. () 安全性・清潔さ
4. () 包装・パッケージ
5. () 商品背景(エシカル、エコ、手作り、等)
6. () 素材(オーガニック、無添加、等)
7. () その他 ()
8. () わからない

(2)-1. エチオピア ブースの展示はいかがでしたか

①	②	③	④	⑤	⑥
とても良かった	まあまあ良かった	どちらともいえない	あまり良くなかった	良くなかった	わからない

(2)-2. どんなところがそうだったですか？

(2)-3. 展示されているロゴについてどう思われましたか？

①“Cradle of Mankind”(エチオピア 人類のゆりかご)	
②“Tarara Treasure”(高原からの贈り物)	

(3)-1.エチオピアと言えば、これまでどんなイメージをお持ちでしたか(複数回答可)?

1. () 3. ()

2. () 4. ()特にイメージがない

(3)-2. エチオピア ブースをご覧になって、今までお持ちだったエチオピアのイメージは変わりましたか？

1. ()大いに変わった 3. ()変わらない
2. ()多少変わった 4. ()わからない

(3) - 3. 上記で「1. 大いに変わった」または「2. 多少変わった」とお答えになった方、どのように変わりましたか？

(4)その他ご感想・ご意見

(5) あなたは、

① () 個人のお客様
② () このブースに展示されているようなアイテムの、買付けや販売をされている方、旅行会社の方
③ () その他 ()

ご回答ありがとうございました!!

このアンケートは独立行政法人 国際協力機構(JICA)から委託を受け一般財団法人 国際開発機構(FASID)が実施しています。頂いた情報は、個人を特定できないよう集計処理したのち、裁断処理いたします。

OFFICE USE	Date				Interviewer	Notes
	30	31	1	2		{ /

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Appendix 4

アフリカン・フェア 2013 エチオピアブース来場者アンケート分析 全文

1 Method of the survey

The survey was conducted in a questionnaire style to 213 respondents at the Ethiopian booth from 5/30 to 6/2. Respondents were selected from visitors to the Ethiopian booth by the interviewer.

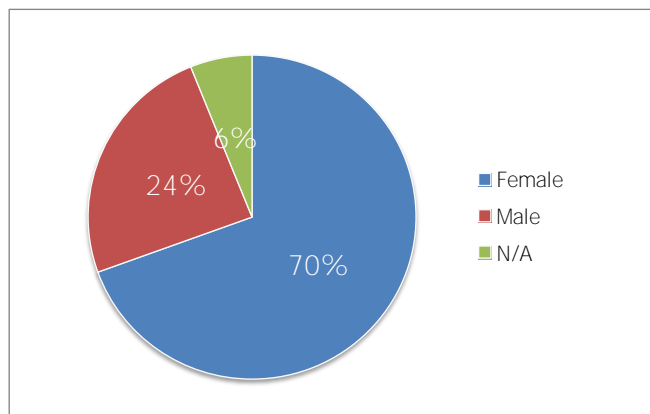
2 Attributes of the respondents

2.1 Gender

About 70% of the respondents are female.

Gender

	<u>Frequency</u>	<u>Ratio</u>
Female	148	69.48%
Male	52	24.41%
N/A	13	6.10%
total	213	100%

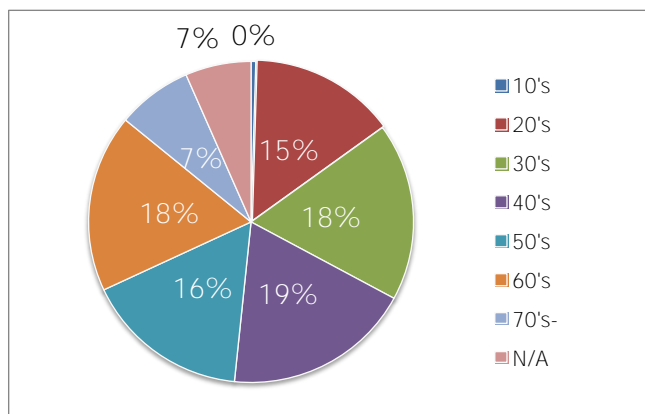


2.2 Age

In terms of age, respondents are distributed in a balanced way.

Age

	<u>Frequency</u>	<u>Ratio</u>
10's	1	0.47%
20's	31	14.55%
30's	38	17.84%
40's	40	18.78%
50's	35	16.43%
60's	38	17.84%
70's-	16	7.51%
N/A	14	6.57%
total	213	100%

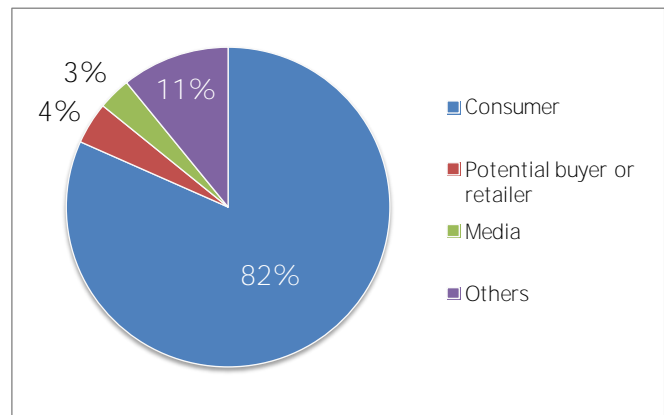


2.3 Occupation

About 4 out of 5 respondents are consumers.

Occupation

	<u>Frequency</u>	<u>Ratio</u>
Consumer	174	81.69%
Potential buyer or retailer	9	4.23%
Media	7	3.29%
Others	23	10.80%
total	213	100.00%



3 Survey results

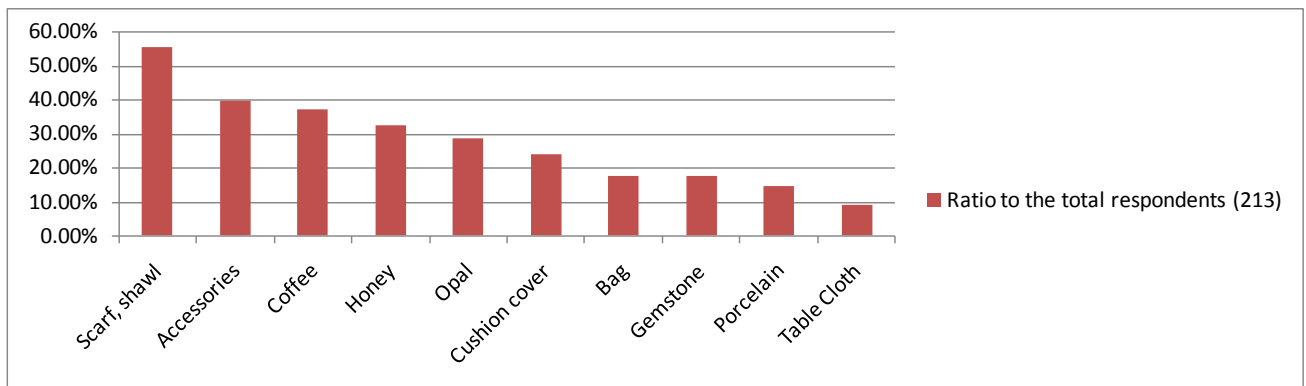
3.1 Attracted items

Certain items got most of the attention of respondents.⁵⁸ About 50% of them selected scarf/shawl, and about 40% selected accessories. However, it should be noted that the display (space, lighting, color, etc.) might have affected the selection.

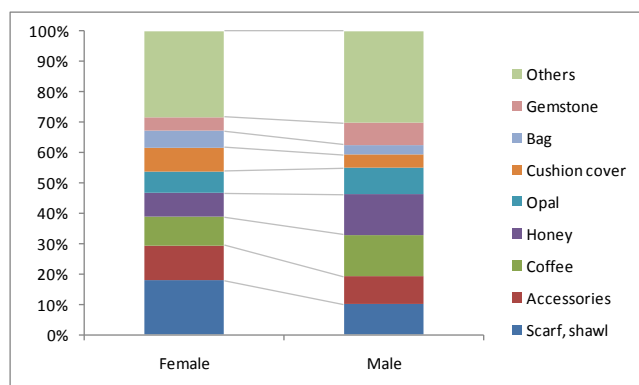
⁵⁸ There were 97 invalid answers, where respondents selected items not displayed in the fair. These answers are excluded from the analysis above, and do not affect the overall result.

Q (1)-1. By which items in Ethiopian booth were you attracted the most? (Multiple choice)

Items	Frequency	Ratio to 213
Scarf, shawl	118	55.40%
Accessories	84	39.44%
Coffee	79	37.09%
Honey	69	32.39%
Opal	61	28.64%
Cushion cover	51	23.94%
Bag	37	17.37%
Gemstone	37	17.37%
Porcelain	31	14.55%
Table Cloth	19	8.92%
Soap	19	8.92%
Towel	16	7.51%
Rose water	16	7.51%
Tourism	13	6.10%
Ginger extract	12	5.63%
Dress	11	5.16%
Cream	11	5.16%
Bees Wax	11	5.16%
I don't know.	9	4.23%
Essential Oils	8	3.76%
Belt	7	3.29%
Wall hanger	7	3.29%
Basket	7	3.29%
Dried flower	7	3.29%
Mat	5	2.35%
Place mats	4	1.88%
Carpet	4	1.88%
Nothing in particular.	3	1.41%
Napkins	1	0.47%
total	757	
invalid answers	97	

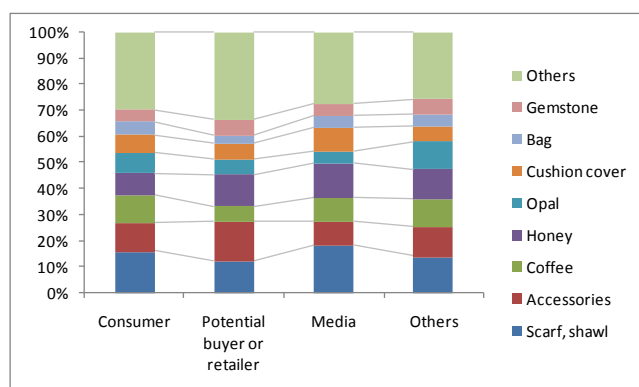
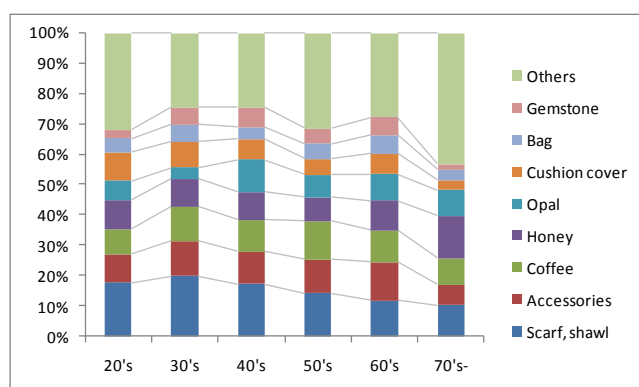


There is a statistically significant difference between female and male in this regard. Female respondents are more attracted by fashion items such as scarves, shawls, and accessories, but male respondents are more attracted by agro-processing items such as coffee and honey.



This again suggests specifying the target group before selecting champion products. Demand varies according to the target group: female, male, or both.

In cross-tabulations with other attributes, age and occupation, some variations can be seen from the chart, although no statistically significant difference.



For the reasons why the respondents picked these items, see Appendix 1.

3.2 Aspects the respondents are concerned of

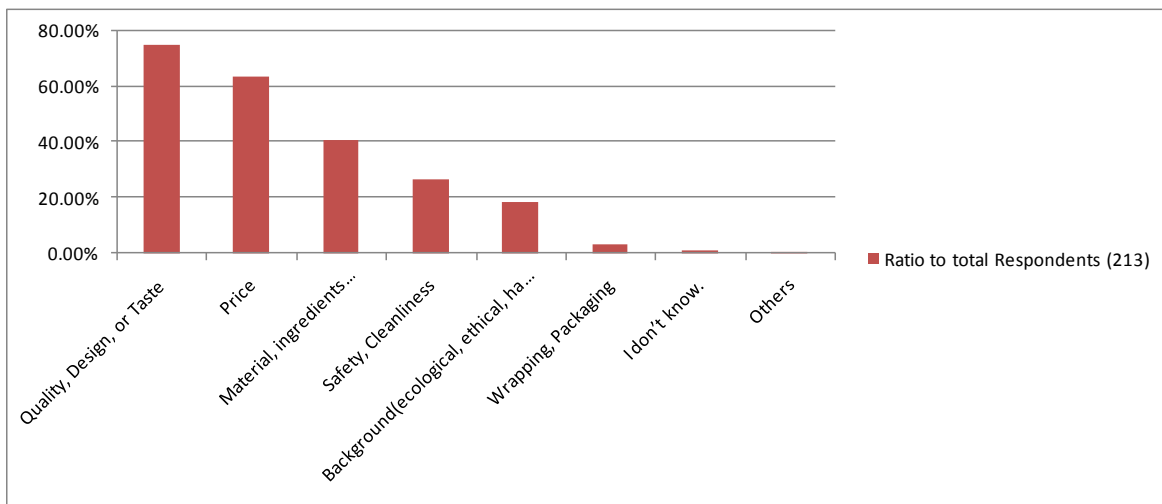
The result of Q(1)-5 on the next page shows the respondents are concerned about quality and price of products most, followed by material/ingredients and safety/cleanliness. This result is consistent with Mr. Yuzawa's presentation on May 29 that Japanese consumers have become health-conscious in recent years

and the explanation by Mr. Yanagisawa on May 30 at Tokyu Department that “Environment,” “Organic,” and “Fair Trade” have become keywords in the Japanese market, especially since the 1990s, after the burst of bubble economy.

This suggests that to succeed in the Japanese market, products must meet consumers’ quality and price criterion, and also their health/safety criterion as well. This result does not change in cross-tabulations with other attributes.

Q (1)-5. When you buy these products, which aspects are you concerned of? (Multiple choice.)

	Frequency	Ratio to total Respondents (213)
Quality, Design, or Taste	160	75.12%
Price	136	63.85%
Material, ingredients (organic, additive-free, etc.)	87	40.85%
Safety, Cleanliness	57	26.76%
Background(ecological, ethical, hand-made, etc.)	39	18.31%
Wrapping, Packaging	7	3.29%
I don't know.	2	0.94%
Others	1	0.47%
total	489	

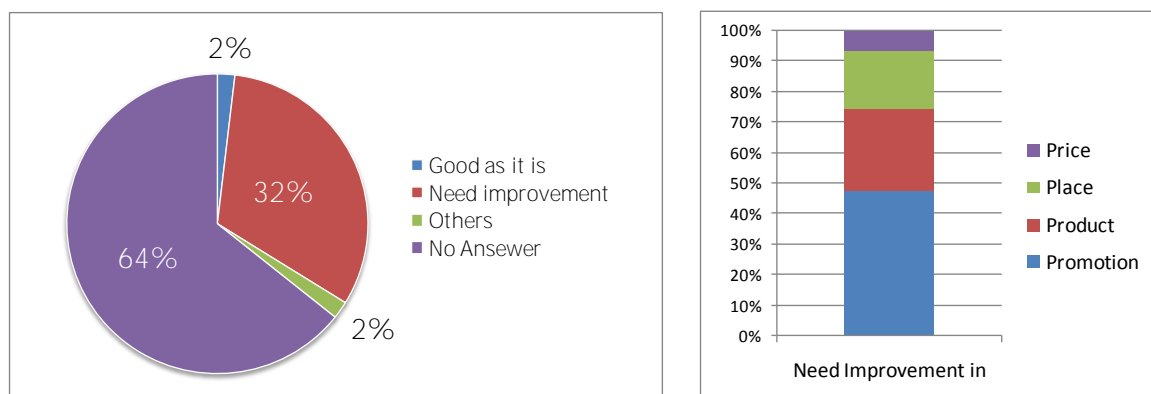


3.3 Improvements necessary to succeed in the Japanese market

The result of Q(1)-4 shows some improvements are necessary to succeed in the Japanese market. Categorizing the proposals by the respondents following the framework of 4P (Product, Price, Place, Promotion), it is found that about half of the respondents who answered “Need Improvement” think that improvement is necessary in Promotion.

Q (1)-4. How these items can be improved to further attract Japanese people?

	Frequency	Ratio
Good as it is	4	1.88%
Need improvement	68	31.92%
Others	4	1.88%
No Answer	137	64.32%
total	213	100.00%



Among the respondents who answered promotion needs to be improved somehow, about 45% of them pointed out simply that more advertisement on products is needed (i.e., the product should be more exposed to customers).

Promotion	Frequency	Ratio to 213
More advertisement on products	17	7.98%
Appeal uniqueness (tradition etc.)	10	4.69%
More advertisement on Ethiopia	3	1.41%
More exhibitions	4	1.88%
Appealing quality/material etc.	3	1.41%
total	37	

Also, as shown in the above table, a significant part of them pointed out the need to underscore the uniqueness of Ethiopian products. This would be especially important in the champion product approach which aims to add “premium” and set champion products apart from the competition. One of the concepts of “Tarara Treasure” is “ONLY ONE.” In this regard, the presentation by DENTSU on 31 May on the approach of “Branded Stories” is suggestive.

In terms of product, some respondents mentioned the need to adjust to Japanese culture, lifestyle, and physical features. This point seems important, but considering the previous point, adjustment to Japanese market should be reconciled with emphasizing Ethiopian uniqueness.

Product	Frequency	Ratio to 213
Improve design	6	2.82%
Adjusting to Japanese culture/life style/physical feature	5	2.35%
Improve packaging	4	1.88%
Improve quality	4	1.88%
More variety of items	2	0.94%
total	21	

Just a few respondents mentioned that cheaper is the better. In this survey, questions concerning pricing were included in the questionnaire. However, since suggested prices of the products were not shown, these questions became invalid. In the future it will be necessary to survey on demand-based price which is based on the perceived value of products by consumers, as well as on competitor-based price (a benchmark price of competitors' products). Pricing should be based on these as well as supply-based price (i.e. price=cost + target profit).

Price	<u>Frequency</u>	<u>Ratio to 213</u>
Pricing	5	2.35%
total	5	

Respondents suggested selling the products in retailing stores or a showroom. Some mentioned that it is important to have a place where consumers can see and touch actual products.

Place	<u>Frequency</u>	<u>Ratio to 213</u>
More retailing	13	6.10%
Open showroom	2	0.94%
total	15	

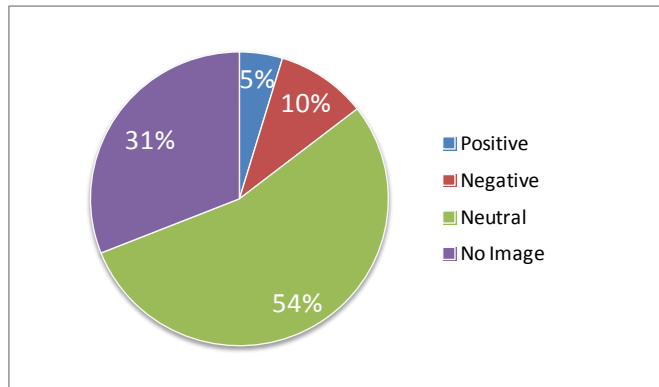
3.4 Country's image and assessment of the branding

In the analysis above, it is found that promotion is a key to success in the Japanese market, and especially that the uniqueness of Ethiopian products is important to differentiate them from competing products in a target market. In this regard, good country's image can be a differentiating factor.

The Q(3)-1 shows that although negative image exceeds positive image in this survey, most of the respondents have neutral image on Ethiopia like "coffee producer," "marathon (many answered just "Abebe")," or no particular image. "Neutral" and "No image" together occupy about 85% of the respondents. Neutral images such as "coffee producer," "marathon," or "mountainous area" could be used in future branding.

Q (3)-1. What sort of image have you had concerning the country of Ethiopia ? (Multiple answers)

	<u>Frequency</u>	<u>Ratio</u>
Positive	10	4.69%
Negative	21	9.86%
Neutral	116	54.46%
No Image	66	30.99%
total	213	100%



Positive

	<u>Frequency</u>	<u>Ratio to 213</u>
Rich history and culture	6	2.82%
Other positive image	4	1.88%
Brilliant people	2	0.94%
total	12	

Negative

	<u>Frequency</u>	<u>Ratio to 213</u>
Underdeveloped	15	7.04%
Insecurity	3	1.41%
Other negative image	4	1.88%
total	22	

Neutral

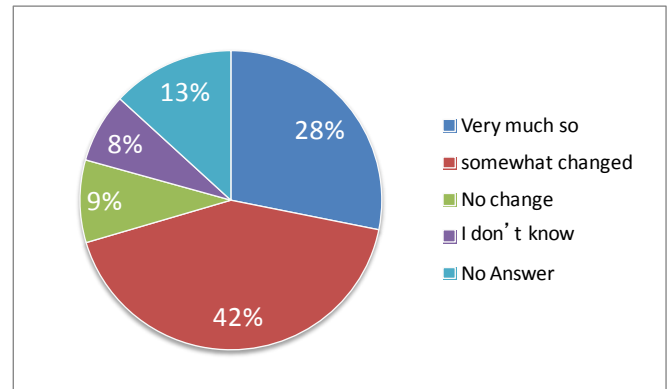
	<u>Frequency</u>	<u>Ratio to 213</u>
Coffee producer	53	24.88%
Marathon	35	16.43%
Hot weather	14	6.57%
Mountainous Area	12	5.63%
African Nation	7	3.29%
Far location	8	3.76%
Christianity	7	3.29%
Independence from Italy	2	0.94%
Agriculture	1	0.47%
Origine of homosapiens	1	0.47%
Other fact statement	24	11.27%
total	164	

The fact that consumers do not have a particular strong image can be an opportunity. This potential is shown in the result of Q(3)-2. Most of the respondents (about 70%) answered that their image had changed after visiting the Ethiopian booth.⁵⁹

⁵⁹ For the details on how their image has changed, refer to Appendix 2.

Q (3)-2. After you visited this Ethiopian booth, did the image you had concerning Ethiopia change?

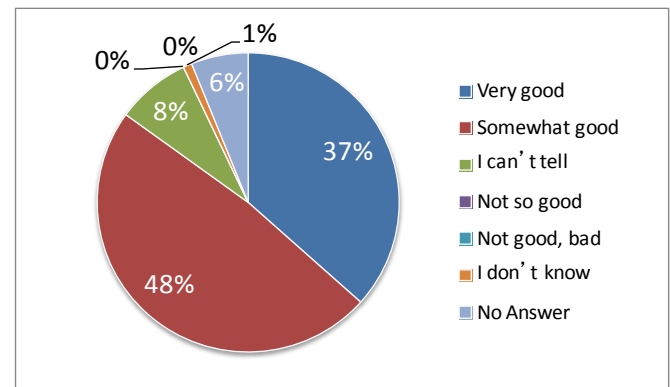
	<u>Frequency</u>	<u>Ratio</u>
Very much so	60	28.17%
somewhat changed	90	42.25%
No change	19	8.92%
I don't know	16	7.51%
No Answer	28	13.15%
total	213	100%



This change seems brought by the positive impression of the Ethiopian booth. The result of Q(2)-1 shows that all of the respondents answered that the booth was either “Very good” or “Somewhat good.” There was no respondent who answered “Not so good” or “Not good, bad.”

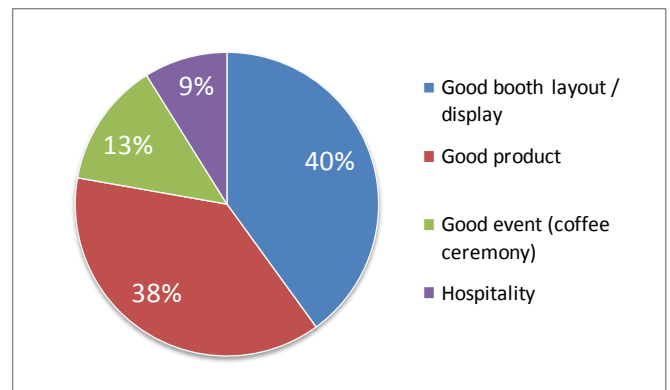
Q (2)-1. What was your impression of the Ethiopian booth?

	<u>Frequency</u>	<u>Ratio</u>
Very good	78	36.62%
Somewhat good	103	48.36%
Not so good	0	0.00%
Not good, bad	0	0.00%
I don't know	2	0.94%
I can't tell	17	7.98%
No Answer	13	6.10%
total	213	100.00%



Q (2)-2. Why did you think so ? (for respondents for answered "Very good" / "Somewhat good")

	<u>Frequency</u>	<u>Ratio</u>
Good booth layout / display	36	19.89%
Good product	34	18.78%
Good event (coffee ceremony)	12	6.63%
Hospitality	8	4.42%
Others	16	8.84%
No Answer	75	41.44%
total	181	



Respondents generally seemed to like the logos, a major component of branding. After removing “No Answer,” about 70% of the respondents had positive reactions for Tarara Treasure, and about 60% for Cradle of Mankind.⁶⁰

Q(2)-3.What did you think of the logo mark exhibited in the booth ?



Cradle of Mankind

	<u>Frequency</u>	<u>Ratio</u>
Positive	50	23.47%
Negative	31	14.55%
Neutral	4	1.88%
No Answer	128	60.09%
total	213	100%

Positive

	<u>Frequency</u>	<u>Ratio to 213</u>
Good	19	8.9%
Nice Amharic letters	5	2.3%
Natural/relaxing	5	2.3%
Express Ethiopia well	3	1.4%
Humanity	3	1.4%
Mystical	2	0.9%
Strong impact	1	0.5%
Easy to understand	1	0.5%
Nice colors	1	0.5%
Stylish/fashionable	1	0.5%
Kindness	1	0.5%
Others	9	4.2%
total	51	

Negative

	<u>Frequency</u>	<u>Ratio to 213</u>
Difficult to understand	15	7.0%
No strong impact	9	4.2%
Others	4	1.9%
Not good	2	0.9%
Need more color	2	0.9%
Not express Ethiopia well	1	0.5%
total	33	

Neutral

	<u>Frequency</u>	<u>Ratio to 213</u>
OK	4	1.9%
total	4	



Tarara Treasure

	<u>Frequency</u>	<u>Ratio</u>
Positive	73	34.27%
Negative	27	12.68%
Neutral	1	0.47%
No Answer	112	52.58%
total	213	100%

Positive

	<u>Frequency</u>	<u>Ratio to 213</u>
Good	20	9.4%
Colorful	17	8.0%
Pretty/Cute	9	4.2%
Natural/relaxing	7	3.3%
Good design	6	2.8%
Highland	4	1.9%
Kindness	4	1.9%
Express Ethiopia well	3	1.4%
Stylish/fashionable	3	1.4%
Strong impact	2	0.9%
innovative	2	0.9%
Modern	2	0.9%
Nice letters	1	0.5%
Refreshing	1	0.5%
Prosperous	1	0.5%
Diversity	1	0.5%
Others	2	0.9%
total	85	

Negative

	<u>Frequency</u>	<u>Ratio to 213</u>
Difficult to understand	12	5.6%
No strong impact	6	2.8%
Not Express Ethiopia well	4	1.9%
Not Good	2	0.9%
Artificial	1	0.5%
Others	3	1.4%
total	28	

Neutral

	<u>Frequency</u>	<u>Ratio to 213</u>
OK	1	0.5%
Others	1	0.5%
total	2	

⁶⁰ The numbers are slightly different in the aggregated table and the break-down table. This is because some respondents raised multiple comments within the same category.

One of the important features of good branding is that it is memorable and has a power to deliver the brand concept. In this regard, it is worrisome that some respondents mentioned that “it was difficult to understand (the meaning)” or “it does not express Ethiopia.” Moreover, although the logos got positive feedback from the respondents, the image they had from the logos are somewhat dispersed. This might mean that the logos might not deliver the concept well.

These results suggest that promotion with correct branding can help set a certain image on the country or products, differentiating champion products from competing products, but at the same time it is quite important to set the brand concept first, and deliver this concept through well-designed brand components such as a brand name and a logo.

4 Conclusion

1. Attracted items are different by gender, suggesting it would be necessary to make target groups clear before selecting champion products to make sure of the consistency between target groups and the selected champion products.
2. The respondents are concerned of health/safety as well as quality and price, suggesting that it is important to take these aspects into consideration in product design and promotion.
3. Most of the respondents suggested that improvement is necessary in order to succeed in the Japanese market, especially in Promotion, and a significant part of the respondents suggested that the uniqueness of Ethiopian products should be emphasized to differentiate them from other competitors and validate the “premium” of Ethiopian products.
4. Most of the respondents answered that their image on Ethiopia had changed after visiting the Ethiopian booth, suggesting the importance of promotion with a right branding.

Appendix 5
Task Force Member
Japan Report



**REPORT ON
PARTICIPATION OF THE ETHIOPIAN EXPORT CHAMPION PRODUCTS
TASK FORCE TEAM ON AFRICAN FAIR.**

JAPAN -YOKOHAMA; MAY 29 – JUNE 3, 2013.

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1. Introduction

Among various export promotion approaches, there are two schools of thought. One is to target mass-produced commodity market, swiftly adapt to the international trade dynamics and win the fierce competition. Another is to target niche and premium market and create unique room of segment. While the former requires sophisticated coordination between supply and demand, the latter mostly requires only the demand-side improvement, which commonly called Champion Product Approach.

On the last Policy Dialogue Forum conducted in Ethiopia, the concept of Champion Product was one of the agendas of discussion. The concept is explained in relation to export promotion of Ethiopia from the perspective of the demand side in addition to the conventional supply side interventions.

In addition to the capacity development activities and interventions of the supply side such as

quality & and productivity improvement, getting better access to the market by understanding and working on the demand side of a certain market is found to be essential.

The purpose of the Ethiopian Champion Product initiative is to diversify and boost up Ethiopian export through an alternative way of dealing with selected champion products that fits the taste and preference of a certain niche market.

TICAD V and the related side event called African Fair is picked as an opportunity to start and practically test the idea and JICA facilitated participation of task force members in representing companies' products and in view of experience sharing for the initiative.



The fifth TICAD (TICAD V), is its 20th year anniversary, is co-hosted by the government of Japan, the African Union Commission, the United Nations Office of the special advisor on Africa, the United Nations Development Program and the World Bank at Yokohama Japan from 1 to 3 June, 2013.



African Fair is the largest African business- related event in Japan and the 2013 event hosted 49 African countries together with Japanese company zone introducing Japanese technology and products aimed at contributing to Africa's sustainable growth, a food court with a range of African cuisines, a sales area with African products, an event stage and more.

2. In Country Preparation for African Fair

The task force team, under the facilitation of JICA/Ethiopia, conducted many meetings to discuss and organize the whole TICAD V African Fair participation. Two video conferences were also conducted with JICA Head Quarters. After deciding on the way forward on how to select sectors, companies and products by a pre-defined criteria and transparent way sub committee with four members from the task force team established and mandate is given to the sub committee to work on the selection of four priority sectors - hand woven products (home & fashion accessories), agro-business, gemstone/opal/precious stones and tourism.

The sub committee successfully conducted its screening assignment through a detailed visits to the companies and reported back to the task force for concluding approval and selection is completed successfully.

For overall preparation and facilitation of African Fair from two FACID hired consultants, hired by JICA, joined the task force for further finalizations activities of participation on African Fair. Following a detailed consultation on the roles and relevant experiences of each members of the task force, four individuals selected to represent the four sectors beyond the specific products and companies selected to represent the country as a whole through championship approach. The overall overseeing role of the traveling team decided through consultation to be done by representative of the Ministry of Industry (Mol) to be backed up by representative from Ethiopian Chamber of Commerce. Considering the future broader plans and expected engagements of the task force in this starting Ethiopian Export Champion Product Project (EECPP), the current and working representatives of Mol and ECCSA in the task were decided to be part of represent be part of the traveling team to leverage the future activities with practical exposures.

In preparing a joint company brochure for the event, JICA's assistance in collecting information from companies were a great help.

i. Challenges Faced:

- The difficult customs process at the Ethiopian customs side, where the beurocratic process was time taking and the process lacking clarity in accomplishing the task at good time;
- The difficult customs process at the Japan customs side, where there was not enough information on the whole process (products like – soap and cream remained in the customs due to the health regulation of the country, huge amount of tax was paid for the semi-processed opal/precious stones);
- Lack of coordination between the taskforce, JICA and the Ethiopian Embassy, starting form the selection process of the participating companies and the use of the exhibition space;
- During the participation in the Africa Fair, continuous requests were made by potential buyers and individual customers to buy the exhibited products, but because the products taken for exhibition were expected to be abck home, it was not possible to make the sells.

ii. Areas of Improvement:

- At the Ethiopian Side –
 - . The need for a clear customs process in taking product samples for exhibition and also in taking products for sells during exhibition;

- . The need for a favorable/preferential customs process in facilitating the export promotion of the Champion Products;
 - . The need to start the customs process earlier at good time.
- At the Japan Side –
 - . The need to clearly know the customs requirements;
 - . The need to start the customs process earlier at good time.
- At the Ethiopian Embassy Japan Side –
 - . There is need for a coordinated effort to promote the Champion Products Project, advisable to assign an individual at the Embassy that can be a contact to the task force as well as to JICA and on top of that, to closely follow-up and monitor the market test and sells of the Champion Products at the Japanese market, thus frequently contacting the main actors of the project.

3. Participation in African Fair

- Preparation of the Ethiopian stand started earlier, before the arrival of the team, where the Ethiopian Embassy and JICA took lead role on that;
- During the preparation of the Ethiopian pavilion, the involvement of Japanese professionals in the area of expertise was very instrumental for the Ethiopian stand to look beautiful;
- The early arrival of the Ethiopian team was very helpful in consulting the professional team and working together on the display of the products;
- Eleven companies in four sectors were represented;
- The Fair took place for four days, May 30 - June 02, 2013, where the official opening took place on May 30, officially opened by the Prime Minister of Japan, with all the Heads of States that came for TICAD V were present. During the official opening, it was only the Ethiopian pavilion that was visited by both the Prime Ministers of Ethiopia and Japan.



The benefit of having prime location of the Ethiopian pavilion was an opportunity to attract many visitors.





A recorded, 40-45,000 people visited the last African Fair. With a remarkable improvement, this African Fair of TICAD V is visited by 55-60,000 people.

During the four days of the African Fair, the Ethiopian pavilion was visited by prominent personalities, like – The President of Djibouti, President of Tanzania, Ambassadors of Different countries, Executives of different UN organizations, the Ethiopian delegation, like – The 1st Lady, Economic Adviser of the Prime Minister, Minister of Mines, Minister of Industry.

Members of the taskforce team provided press briefing and interviews, focusing on the Champion Products Project, to different media that were present in Yokohama to cover the event, this includes 'the Asahi Shimbun' (Japan's very trusted and prestigious newspaper that has eight million subscribers and FUJI Press and TV.

4. Side Meetings and Visits

In the preparation, as well as parallel to the participation of the TICAD V African Fair, the Champion Products Project team that travelled to Japan participated in different meetings and visits, which was very instrumental in providing to the team, with information and exposure of the Japanese market.

4.1. JICA (Japan International Cooperation Agency) Headquarter in Tokyo

The task force that works on Champion Products had its first meeting, on May 29, 2013, at the JICA headquarters in Tokyo in a meeting that took place with the following participants:

- H.E. Saburo Yuzawa – Adviser to JICA on Champion Products,
- Mr. Ishigame Keiji – Deputy Director, Private Sector Development Division & Industrial Development & Public Policy Department – JICA,
- Mr. Kuniako Kato – Global Management Service – Consultant,
- Mr. Noriyuki Nagai – Consultant, International Development Research Institute and
- Ms. Watenbe Yuko – Consultant, JICA.



The discussion started with the presentation made by H.E. Yuzawa, where his presentation mainly focused on the following issue areas of concern, with a focus to the theme “Knowing the Japanese Market Characteristics”

- The need for perfectionism, as it is most expected by Japanese customers and buyers;
- The position of buyers’ upper-hand over sellers’;
- Trust, most valued business ethics;
- Curiously on new products and imports;
- Frequent gift rituals, with a focus to packaging (June & December being months for sells of gifts);
- Women are the best buyers in Japan and the need to focus on ths category of buyers;
- Japanese buyers being fashion driven and health conscious.

Following the presentation was discussion, where the Ethiopian team thanked the presenter in sharing his wisdom and deep knowledge. During the discussion that followed, to be able to

promote Champion Products in Japan, the issue of promoting the image of Ethiopia at large was discussed as instrumental and the preparation of a brief video film (3-5 minutes) was suggested as an area of focus.

4.2. Tokyu Department Store

A company named as 'Team-Green, Keep greening Forward' was established in 2009, with a very special to sell African products, an opportunity to show to the Japanese buyers and consumers what Africa has.

During the meeting, the CEO and buyer of the company briefed the team on the establishment of the company and its focus areas, where the following points were mentioned:

- The company participated in different trade shows where African products are exhibited;
- The company focusing on – eco-friendly, environmentally sound, socially friendly, naturally dyed, organic and fair trade products;
- Focus on the story of the products;
- As a starting point, in the promotion of African products, which it buys from ten African countries, the company has rented a special spot at the Tokyu department store, a very strategic place where customers walk by, as a trail and sells promotion, the company has also sells spot in six department stored, where form April-July 2013, the company is testing those African products;
- Ethiopian hand woven products being organic (cotton and wild silk) and handmade can have the opportunity to be favored by Japanese buyers;
- Lack of timely response in e-mail communications and problem in meeting dead line of delivery tome was mentioned as a challenge when it comes to importing products form Ethiopia.

Following the briefing of the CEO and buyer of the Tokyu department store, the team had the chance to further discuss and appreciated all the efforts made by the company in trying to promote Ethiopian products. The Champion Products project team assured the CEO that the task force will do all its level best in supporting all the efforts of the company in promoting the sells of the Champion Products in the Japanese market.

Following the discussion, the task force team had the chance to visit the sells spot of the African products.

-



During the visit, the team was able to see the products of five Ethiopian companies – Sabahar, Muya Ethiopia, Salem’s Design, YeFikir Design and Entoto Artisan, where all of them are involved in the Champion Products project. The team was able to see two product lines – scarves and jewellery. The label of all the products (the company name and Ethiopia mentioned on the tag, which in many markets buyers do not usually put that, instead put their own level), where the task force team has appreciated this and expressed that to the CEO of the company. It was observed during the visit that the price of the products for the scarves ranged from USD 65 – 115 and for the jewellery USD 80-150.

4.3. Hasuna Jewellery

Hasuna Jewelry one of the concrete business deals made with during our visit. It has shown a tremendous interest in Ethiopian Opal. It has two jewelry shops in Japan. Japanese youth is very much interested. Their ethical jewelry business – from Rwanda (caw horns), Vietnam (different precious stones), China (feather) and from Latin American Companies is penetrating the potentially virgin but sold Japanese market that needs a consistent promotion and uninterrupted communication.

Hasuna want to see the place where we are digging our opal, and our processing details. They are planning to fix program for this visit. They gave us samples to prepare and send them prototype.

General perception – opal is common in Japan – the Ethiopian opal is already promoted by other countries in Japanese jewelry market. Our product, starting from end of this June, we are not going to export raw opal, so we have to work hard starting from now. One of the rooms of improvement perceived during our display is our product presentation, which needs further technical and professional support.

4.4. DENTSU Advertising

With more than annual turn over of 4.5 bln. USD and more than 30000 clients globally, DENTSU advertising stands first in Japan’s Advertisement industry.

The reason for Dentsu's dominance in the global Advertisement seen is twofold, as explained. The Company has a diverse client portfolio and enjoys solid buying power in all major mass media formats. Dentsu handles the advertising campaigns of many multi nationals, and major global clients have chosen the Company to act as a partner in the Japanese market, which is the third biggest economy in the world. Such connections underpin a well-balanced client portfolio.

With prior communication with JICA, DENTSU prepared a creative idea of promotion presented in the context of building Ethiopia's image in Japan market using unique features of culture, history and economy that can be attached to products.



Enhancing the tourism potential of Ethiopia and mobilizing Ethiopian Export Champion products under the spearheading effect of image uplift was the major area of discussion. The taskforce took assignment of further testing and fine-tuning discussion for home to consider the idea as component of way forward.

4.5. SME Support JAPAN

Organization for Small & medium Enterprises and Regional Innovation of Japan is the responsible organ for the formation and development of SMEs in Japan. Japan's economy is SME-dominated in terms of both GDP contribution and employment generation. And SME Support JAPAN, majorly a private association which its formative stage is supported by government in terms of budget and institutionalization, is in charge of the over all development and smooth operation of SMEs in Japan. It has more than 3000 experts in different fields, nine regional offices across the country and has got nine SME universities.

SME development strategy that they adopt is one of the strongest and successful strategies ever seen in the world. One of the unique feature of their SME strategy is since it is difficult for SMEs in to bigger companies in Japan's matured economy, they have different mechanisms to sustain SMEs in their lower level of business. One of the mechanisms they developed is a pension mechanism prepared for the owners of SMEs through a unique saving schemes.

Supporting efforts of SMEs in Ethiopia both in the chamber system and in the government system has got a lot of best lessons to learn from this organization for the future.

4.6. Mujirushi Ryohin, Household Division

Mujirushi Ryohin was established in 1980 as a private brand 40 products, growing into a brand carrying 7,000 products presently. The company has been developing and supplying consumer driven daily necessities including clothing, household goods and food. The company's basic principle is to develop new, simple products at reasonable prices by making the best use of the materials while considering environmental issues.

The company has been steadily developing its design concept and the popularity of its products sold under MUJI brand, spreading worldwide as a global trend originating in Japan. MUJI operates in 24 countries, using its 604 shops and 200 stores overseas. The company is very much focused in buying quality products in closely working with supplier companies, through the provision of expertise support in product development, design, quality standard, labeling, packing, etc. When buying from companies, MUJI mainly focuses on – the product story, good design and good price.

MUJI buyers were in Addis Ababa few months back and had the opportunity to visit the Ethiopian companies that were identified for the Champion products project. The buyers mentioned that the companies have potential to export their products to the Japanese market but the problem mentioned that, the products are expensive, mainly those in the hand weaving. When it comes to companies involved in food processing, it was mentioned that, the sector has too much competition from suppliers of other countries, for example honey, the Ethiopian honey has great market potential because of its quality and variety. The other potential export product mentioned was Ethiopian sheep skin, where great effort needs to be done working on such areas, to make the products export ready.

From the discussion that the team had with MUJI buyers, it was observed that, there is great demand on Ethiopian products, where continuous discussions and contacts need to be done with MUJI buyers to be able to supply products based on their demands and requests.

4.7. Ethiopia Business Seminar

Prepared by WAFA marketing PLC and the Ethiopian Embassy in Tokyo, the Ethiopian Business Seminar, organized at Tokyo Intercontinental Hotel, was attended by Ministry of Economy, Trade and Industry of Japan and Chairman of JETRO in addition to Japanese Business communities and their Ethiopian counterparts.

The African Fair Team had a chance to attend half of the program right before departing for its return flight back home.

Speeches and Presentations of Ethiopian Government Authorities and Earnst and Young-Ethiopia has created a stronger point of attraction in selling Ethiopia as a nation for Japanese potential business people.

As indicated earlier in this report, the coordination between different entities involved in this TICAD V/African Fair from Ethiopian side (Our Embassy, WAFA, Task force ...) is seen minimal, which needs further actions.

5. The Way Forward

The idea of attending TICAD V and African Fair has come in to picture while formative activities for the Ethiopian Export Champion Product Project (EECPP) was being conducted, after conceiving the idea on the past Industrial Policy Dialogue Forum in the frame of strengthening and supplementing the mass marketing and bulk production export strategy that we follow and which primarily deals with the supply side issues.

Specially participating on the Yokohama's African Fair of TICADV has given ideas and exposures

on how should EECPP need to be formulated and strengthened to serve as a supplementing arm for our export ventures

The following points are considered as way forward that should be pursued by each stake holders of EECPP, especially the taskforce.

- Sharing what we saw and experienced during our visit for Authorities and heads in our respective institutions to develop a common perception towards EECPP;
- Briefing and making to feel what we felt for the rest of task force members and further discussing specific proposals already forwarded; like the idea of promoting Ethiopia as a tourist destination for Japanese through our connection formed with DENTSU Advertisement Company and promoting Carefully selected Champion Products of Ethiopia by constructing centralized display center targeted to tourists; (the discussion here is going to focus on details of the project idea and whether can be accommodated in the shape and structure of EECPP; if so, what is next, if not what would be the recommended future direction)
- Institutionalizing EECPP – TOP PRIORITY!
- Developing plan and strategy for EECPP.
- Playing a leading role in EECPP to get a progressive support from JICA in our efforts of implementing our plans.
- Broadening the range of products to be included in EECPP progressively.

Appendix 6
Report on Custom Clearance for the “Champion Product Approach”
by Fekadu (JICA Ethiopia Office Inhouse Consultant)
June 26, 2013

Report on Custom Clearance for the “Champion Product Approach”

Fekadu June 26, 2013

Here below some of the practical challenges and lessons that need to be observed carefully in the process of facilitating custom clearance for African Fair at different levels are indicated.

1. Introduction

There are two ways in which exhibition related custom clearance can be facilitated:

- i) If the preparation of custom clearance for exhibition is facilitated by the Ethiopian government, then the government needs to write a guarantee letter to bypass the mandatory “bank permit letter”⁶¹ or
- ii) If the preparation of custom clearance for exhibition is facilitated by the individual (private companies), then the company needs to attach a bank permit letter which shows the cost of all products to be exported is kept in blocked account (in foreign currency); or
- iii) If the preparation of custom clearance for exhibition is facilitated by third party (as in the case JICA has done), a blend of different activities that need to be done by the private companies and government were made (see below 2.2).

2. Necessary Custom Procedures

2.1) Packing list and invoice

Exporters (private companies) need to prepare and provide the packing list and invoice to custom office. The packing list refers to an exhaustive list of each item, which shows weight/quantity, size, code and description of the product. The invoice includes all indicated issues in the packing list, but the only new issue to be included in the invoice is every item to be given equivalent monetary value in foreign currency.

2.2) Other custom procedures

The fact that JICA is involved in the facilitation process for the export/import of the products to/from TICAD V side even exhibition the procedure that either need to be done by the Ethiopia government side or the private company is mixed. The following were procedures made to

⁶¹ “Bank permit letter” is a mandatory letter that exporters’ need to provide for custom clearance; whether they are exporting their products for temporarily (exhibition) or permanently (through trading) purpose. For that buyers (from aboard) are expected to transfer the amount of money (in foreign currency) equivalent to the products that they wanted to import (buy) to Commercial Bank of Ethiopia in a blocked account before they received products. Once the bank confirmed that the buyers (from aboard) transferred the money to the blocked account to Ethiopia, the bank will provide what is known as “Bank permit letter” to the exporter company.

export/import products to/from the exhibition in Japan.

- a) The Ministry of Industry (MOI) wrote a support letter to the Ministry of Foreign Affairs (MoFA), Revenue and Custom Authority (ERCA) and to the Ministry of Mines (MoM) explaining that the products are exported for exhibition purpose; so that MoFA can facilitate smooth custom process through “diplomatic pouch” for all products and MoM to give permission to the export of opal;
- b) Then MoFA also wrote a letter to ERCA to smooth the custom clearance for the products; however, MoFA indicated verbally to MoI that the products cannot be granted a “diplomatic pouch.” And MoM requested verbally to the Opal exporter company (Orbit Ethiopia), very late, to bring the products to ministry for check in order to get the support letter from the ministry.
- c) Following ERCA wrote a letter to its branch office, the Addis Ababa Airport Custom and Revenue Branch Office (AAACRBO), explaining the purpose of export and attaching the products list.
- d) Then in Passenger Custom Office (PCO), every item based on the prepared packing list and/or invoice of products, the packed carton opened and checked item by item in the presence of two officers-one from PCO and other one from the International Cargo and Aviation Service Office (ICASO). The PCO officer signed on the invoice/packing list (provide also a receipt indicating remarks on mismatched between actual count and packing list/invoice) prepared. Based on the confirmed list the ICASO officer also prepared a receipt to temporally store the products in the storage warehouse. Care should be taken to register the owner of the products during the storage; if the company/organization name is not indicated in the receipt issued by the ICASO, then the company/organization need to write a delegation letter for the person to withdraw the products. Lack of this information (not having delegation letter) created an enormous challenge in the last minute when JICA’s consultants were to take products to Japan.
- e) In the Cargo Custom Office (CCO), the list of procedures that need to be fulfilled (particularly paper works), attached and submitted. The following papers were requested by CCO: i). Bank permit letter (if it is not possible to show the bank permit, then the support providing Ministry needs to write a grantee letter to take the full responsibility); ii). The MoM permit letter (referring to export of precious minerals); iii) Certificate of the Tax Identification Number (TIN); and iv). The Ministry of Agriculture (MoA) and Ministry of Health (MoH) permit letters (health certificate for agro-processing and agricultural products).
- f) Once the requested procedures indicated in above (e) are fulfilled, the Transit Office filled out all the products manually, categorized based on the nature of the products, coded

based on pre-identified items codification manual and exact weight and tariff price code of each products.

- g) Following Direct Trade Input (DTI) services were made, all manually categorized and coded items entered into software and crosschecked with the standard tariff tag to each item.
- h) Before posting the “Revenue Stamp” all manually filled out papers by Transit Officer, electronically registered DTI paper, invoice/packing list checked, and all documents indicated in above (e) are compiled together and crosschecked for the correctness. After that, the “Revenue Stamp” posted on a page where there is a custom clearance agreement document is indicated.
- i) The compiled documents submitted to the final cargo Document Assessment Office, where the assessor finally crosschecked and verified the following documents and other related issues:
 - ♣ The type of export products;
 - ♣ The total Invoice amount of the products and currency type indicated in the declaration form;
 - ♣ Checking the CPC code, declaring company/organization and receiver company name filled out by the transit officer;
 - ♣ Permit documents from Bank, MoM (if applicable), MoA (if applicable) and MoH (if applicable).
- j) After the assessor checked and verified the procedure indicated in (i) above, the assessor provided a signal to get the “Gate Pass Paper” from the Documentation Office, which allows products to be exported.
- k) The same procedure without any change repeated when the products are brought back. Every item are re-checked again, the missing products were identified and proper justification letter provided from the support ministry (MoI) to avoid tariff payment on the lost and broken items. But there was a slight change in terms of: i) The length of time it took for custom process (for exporting it took us 3days, while for importing 2weeks); ii). Custom declaration and service charge (for exporting Birr 650 per/declaration, while for importing Birr 800 per/declaration); and iii) DTI service charge (for exporting Birr 35 per/declaration, while for importing around Birr 66 per/declaration). In both cases (exporting and importing), it took a total amount of Birr 10,000.

3. Challenges and Problems Encountered in the process

3.1) Lack of Coordination

- ♣ The Mol, MoFA, ERCA and MoM are some of the line ministries that are supporting and facilitating export promotion. They are, however, not integrated, lack mutual understanding and proper coordination for smooth export promotion. To illustrate this, for instance, Mol wrote a letter to MoFA and to MoM to facilitate the shipments of the products explaining the purpose and attaching detail products list. Then, MoFA and Mol wrote letters to ERCA requesting ERCA to facilitate the custom issue smoothly. Following, ERCA wrote a letter to the AAACRBO. In the end, AAACRBO abandon all the support request letters of the line ministries and demanded cumbersome custom procedures and unnecessary additional criterions to be fulfilled. That effective makes all the pervious line ministries effort meaningless and increased transaction costs (please refer Figure 1 the rough pictorial representation of custom clearance process) .
- ♣ It was the responsibility of the Ethiopian Embassy in Japan to handle the Ethiopian booth, decide on what products to exhibit, how to exhibit and organize it discussing with the head office-MoFA; the role of JICA is, however, to support the efforts of the embassy, but not to act as a key player in the process. In addition, the embassy informed to JICA that the embassy is preparing to exhibit two products-coffee and leather. Nevertheless, the embassy did not give any further detail on the products-nature of coffee (green bean or roasted coffee) and on the type of leather products (finished leather or last consumer products), etc. MoFA has a department that works on Business and Economic Diplomacy; parts of its duties are to facilitate business, trade, and investments in abroad in coordination with oversee Ethiopian embassies. However, MoFA had little or no information on who were the exhibitor's companies, types of products to be exhibited and the nature of exhibition in Japan. This seems that there is information gap between the head office (MoFA) and the embassy; perhaps, this is due to lack of coordination. This lack of coordination had also a repercussion on the kind of products exhibited. For instance, it is enviable to present Ethiopia's potential and capacity of the leather sector, as leather is one of the comparative advantage areas that Ethiopia has, but no leather product were presented in the exhibition due to the information gap and confusion.

3.2) Less Experiences and Lack of professionalism of Private Sector

- ♣ It is to be reminded that JICA's role supposed to be limited to facilitating the process of exporting/importing the company's products, but not totally to substitute the role of the private sector and do everything on behalf of the private sector. It is undeniable to acknowledge the cooperation of the private sector companies. However, it is worth also

to look into what went wrong in the process of facilitation. Except few exhibitors' companies, most of the companies lacked the spirit of business making, were not serious on or have little interest to prepare necessary paper works for custom clearance. Most companies were reluctant to fill in documents properly with the required accurate information, and failed to deliver the information on time. Besides, the companies had to be informed and coached several times to prepare the promotional materials and provide detail information. Even with the intense coaching, most companies failed to prepare the packing list and/or invoice properly, as a result JICA needed to re-do the packing list and/or invoice. Still except few companies, most of the companies do not properly label each product and pack their products.

3.3) Cumbersome Custom Clearance System;

- ♣ Day before we (JICA) started the custom clearance we were told by one custom officer that the products will not be checked at the airport custom office. However, later we learned that the information was indeed wrong. Every carefully packed item, thus, had to be unpacked and checked (one by one) based on the prepared packing list and/or invoice of each company products at the PCO. The process was a tedious job, which took more than 6 hours. After all, it affected the safety of products shipment and too much time taking for every product supposed to be unpacked, checked, and re-packed.
- ♣ Above all, the most challenging task related to custom declaration process is that every single item indicated in the packing list and/or invoice was manually coded in Custom Transistor Officer (CTO). The coding activity includes: i) searching and matching the exact code for the product (that either to be exported/imported) referring to coding manual, which is expected to be exhaustive list to all export/import products of the country. If the product has no exact match in the manual, then approximation will be made; ii) Weight of the product; iii) Source and destination; iv) Currency type used; etc. This particular activity took us about 18 hours to finish. This shows a high transaction cost in terms of doing business.
- ♣ Once the coding in the CTO is done, the DTI officer entered all the manually code information into a software to get exact amount of tax and duties for each product exported/imported. That it took us a quite a long time to finish entering every item (about 6 hours);

3.4) Individualized Custom System

- ♣ Airport Cargo and Airport Custom offices have two working shifts. When one shift workers changed by the other shift workers, custom declaration process started by one

shift not easily welcomed by the other shift workers. It is common to notice that the decision of one shift worker being altered/not accepted by the other shift worker. As a result, customers were subjected to unnecessary time wastage and need to explain everything from scratch to the new shift worker and re-do everything again. Even with the explanation, the officers were observed being very hesitant to take decision and facilitate the custom declaration. It is a lot hassle to customers, and ridiculous (red-tape), which shows how activities are highly individualized, and that there is a lack of clear institutional procedures as to how to handle custom clearance. Challenges would have not been alleviated without a relentless support and intervention of the Mol.

3.5) Lack of proper location of custom office and more

- ♣ The locations of the custom offices are far apart and difficult for customers to identify which is which, easily.
- ♣ The Custom Transistor Office is located in a “cave” like place, and it is very difficult to accept it as an office.

3.6) Un-institutionalized Taskforces members

- ♣ The taskforce members are group of voluntary individuals without any formal institutional attachment, framework and with no defined role to play with. This made the process of “Champion Product Approach” very slow particularly in decision making and to be attached to individual efforts and willingness. Sometimes, it was very difficult to communicate with some of the taskforce members due to their frustration on the process. It is, thus, understandable and expected to see hesitance and lack of commitment from some of the taskforce members. Some were very keen to cooperate and to work hard to realize the intended goal in the approach.
- ♣ The extra ordinary support and willingness that we got particularly Ministry of Industry, particularly from Mr. Ahmed, throughout the process was exemplary and decisive to ship the products. Unequivocally, the relentless support that we got from Mr. Asegerd, Director ECF and Mr. Tewordos of the Orbit Ethiopia, Mr. Jacques’s, MUYA Ethiopia, and Ms. Nigest’s, Founder and Executive Director of CAWEE, tireless and sincere support were also decisive.

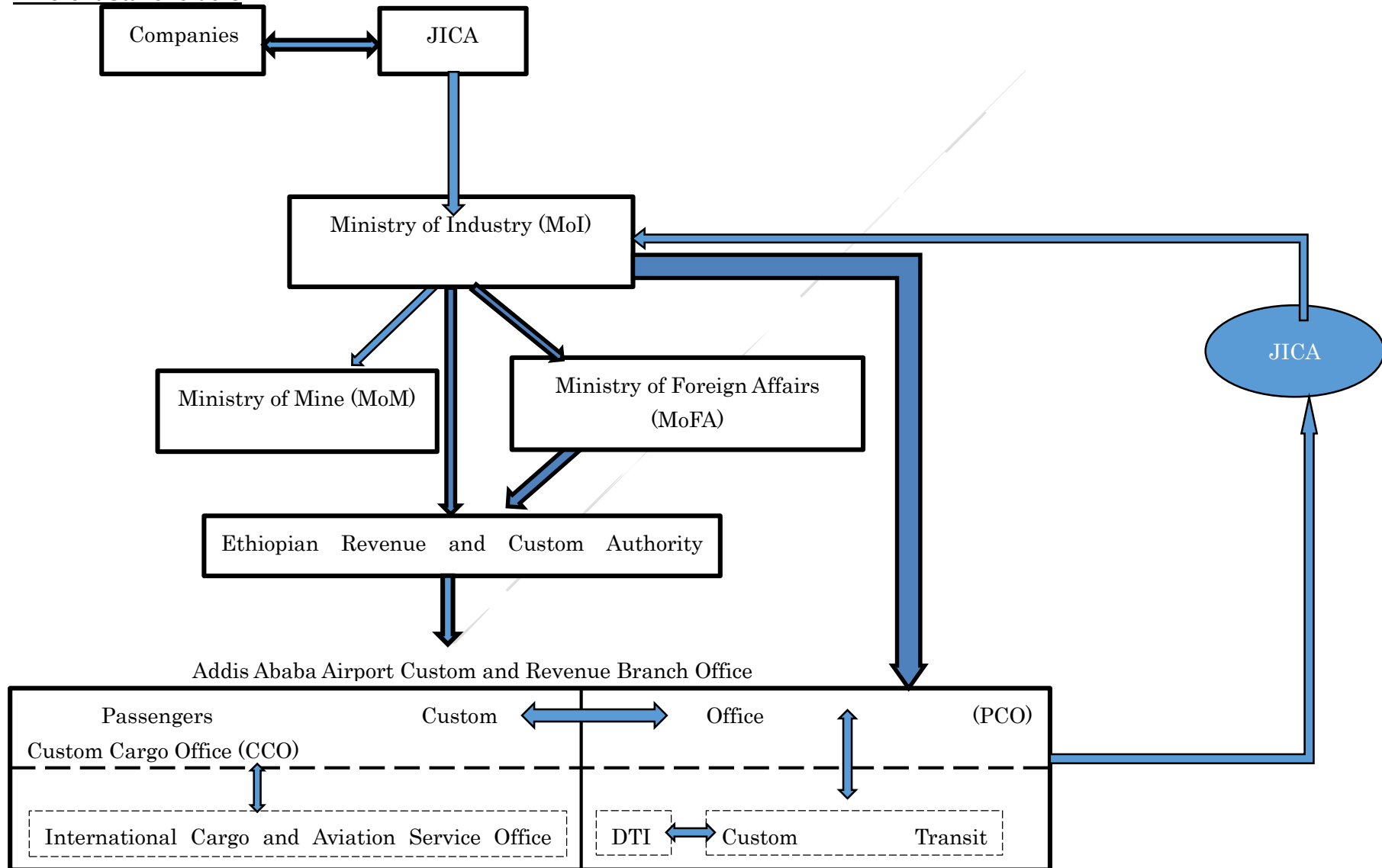
4. Lesson Learned

- ♣ There is no way to avoid the cumbersome procedures of custom office; whether it is facilitated by the line ministries or individual business people.
- ♣ If the line ministries provided a guarantee letter to ship back exported items, it is possible to bypass the mandatory bank permit letter. In addition, it is important to get support letter to avoid import taxation from the line ministry.
- ♣ It is mandatory to have permission licenses (hygienic) from the MoA for exporting agro-process and agricultural products; when products are exported both for exhibition and trading purposes.
- ♣ For mineral resources, it is also mandatory to get permission letter from the MoM (for the export of opal products we have exceptionally bypass both mandatory activities through a strong push and lobby by Mr. Ahmed).
- ♣ It seems that MoFA and Ethiopian embassy in abroad are poorly coordinated and have information gap.
- ♣ Ministries that are working on export promotion are poorly coordinated and not well understood the real challenges of export promotion and doing business. It sounds like what is in the paper is detached from the realities on the ground. Individuals effort and support from the line ministries were found to be decisive than the established system.
- ♣ There is no anyone to tell all the necessary procedures required to fulfill in the custom declaration process until the last minute where the customer face the challenge. It is a better approach to say that “expect the unexpected.” It is worth to mention that it is indeed necessary that the custom office prepares a manual (that shows procedures) for exhibition export/import.
- ♣ The fact that there is no institution that works directly on export promotion, the hassles and hurdles that would have been avoided easily with a thorough investigation will remain to be a challenge for export promotion, doing business and investment attraction. It is, thus, indispensable to have an institution that works on export promotion in the future to ameliorate export promotion of the country.
- ♣ It is equally worth to notice that private sectors have poor understanding on export promotion. And their understanding of delivery time, provision of accurate information on export products, labeling and packaging is still very low and need capacity building in that respect.
- ♣ Lesson need to carefully drawn, institutionalization of approach and comprehensive framework as to how to go about in the approach need to be prepared if there is any future plan to continue support in the approach. The framework need at least to

highlight activities that shows who should do what and when (specifying the role of the government, private sector, taskforce members and other stakeholders). Otherwise, it seems that the approach is tied up with very few individuals and on their willingness to cooperate.

Figure 1 Rough Pictorial Representation of the Custom Clearance Process for African Fair 2013 Exhibition and Interaction Among

Different Stakeholders



Appendix 7

Trara Treasure パンフレット

英語版



Treasure 3 Leather Product

Create with the Premium Leather

Visit any monastery in Lalibela or Bahir Dar and the monks may show you Bibles written on parchments made of finely tanned sheepskin. Some of these Bibles, written in Ge'ez, the language used in ancient Ethiopia, have illustrations, which still retain bright colors after many years.

Ethiopia has the largest number of livestock in Africa and the tenth largest in the world. The country has 41 million cattle, 25 million sheep and 73 million goats. Even in the central area of cities, you often see donkeys and sheep walking between the cars in traffic. Ethiopia therefore boasts of a leather industry with a long history and has exported leather for more than 80 years.

The leather from kind of sheep called Hair Sheep, which live in tropical areas between the southern and northern latitudes, of 15 degrees, is thin, smooth, light, and strong. In the Ethiopian highlands, there is a breed of sheep with even smoother skin than those of the other areas, which is used to make the finest sheepskin. Additionally, the cattle's skin from Ethiopia is internationally popular for leather shoes. Because of the high quality, leather has grown in recent years to become the second most important export product next to coffee.

Even with such high quality, however, leather before final

processing treatment cannot be exported at high prices. In Ethiopia, only about 10% of all exports undergoes final treatment (tanned leather), which creates the highest value. The Ethiopian government has initiated a policy of increasing the added value by restricting the export of raw leather and exporting only tanned leather or leather processed into shoes and bags. In Addis Ababa, many young people now study at technical schools to learn leather tanning and the design and production of leather products.

Mr. Azariyah originally was a magazine editor. In covering stories about the country's industries, he decided to establish a fashion brand using Ethiopian materials and let the world know of the high quality of Ethiopian products. A few years ago, with Mr. Broye, a shoe designer he had known with experience in working for a Japanese fashion brand, he established FNZI, a high-quality leather sneaker brand. Their sneakers currently are sold in the West and Asia. The dream of Gerschew, who operates Kas Dashen Shoes, is to produce the highest quality classic shoes within Ethiopia for export to Europe. "We are globally recognized as having the highest quality raw materials. So, we should develop our skill and technology into a world-class level." Their challenge to establish a fashion brand from Ethiopia has just begun.



Ethio Leather Industry PLC (ELICO)

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elico@ethioleat.et

Ethio Leather Industry (ELICO) was established in 1997 after acquisition of new business from the Ethiopian Private Sector Agency. ELICO has achieved process management standards and received ISO 9001:2000 and ISO 14001 Certification. ELICO is a trailblazer in the production and export of finished dress and sports shoes, leather, its finished dress and sports leather from sheepskin has penetrated the international finished



OK Jamaica Shoes Factory

www.okjamaicashoes.com
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okjamaicashoes@ethio.net.et

OK Jamaica Shoes Factory is one of the few footwear factories based in Addis Ababa. OK Jamaica Shoes Factory has its roots back to 1960's when it has started on with limited employees by producing various types of men's, women's as well as children's shoes using old fashioned machine for exclusive domestic market consumption. The persuasive efforts & dedication of the workers together with the wisdom & visionary



leadership of the owner have led the enterprise expand its customer base & notably increase its market share. The company has now 70 own new plant equipped with advanced technology that lay on the 2,500 m² of land located in the southern part of the capital.

Ethio-International Footwear Cluster Cooperative Society Ltd. (EIFCCOS)

P.O. Box 10102, Addis Ababa
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eifccos@ethio.net.et

Ethio-International Footwear Cluster Cooperative Society Ltd. (EIFCCOS) was established by integrating about 1,000 footwear and related material producers in Addis Ababa in 2008. The special and the unique features of EIFCCOS are the provision of various supports it has been given and promised by the government and other organizations. Back there with no collateral, provisions of buildings with lease payments very close to zero, plots of land for the constructions of other buildings and



others are the government supports given and promised to EIFCCOS. Other organizations like IIT and ECF have shown very keen interests to provide the Cluster Cooperative Society with supports in the form of capacity building, e.g. training of technical employees and staff members.

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追加となったレザーセクター紹介ページ



Treasure 5 Coffee Beans

"Tears of God" May Its Drops Bless You

Long time ago, a young goat herder named Kaldi in Ethiopia was surprised to see his goats standing on their back paws and dancing. They were eating red berries that he had never seen before. On the next day, they ate the berries and danced energetically. Curious, Kaldi tasted one of the berries. Then, strangely enough, he became energetic in no time and danced with the goats.

Southwest Ethiopia, the birth place of this folk story, produces Coffee Arabica, and the name "coffee" itself is said to derive from the place named Kaffa. Meanwhile, the name "mocha," is a famous type of coffee, is the name of a port in Yemen where coffee from Ethiopia was exported to the Islamic world. The coffee spread around the world in the Age of Discovery; people around the world now drink 2 billion cups a day, and coffee is cultivated in 80 countries.

Ethiopian people also enjoy coffee in their everyday life. When having visitors, they make a fire with charcoal and roast freshly washed raw beans. The beans then take on a beautiful brownish color with a nice aroma. They grind the beans in a small mortar and detect them with hot water from an unglazed pot. While drinking coffee in small cups, people add herbs, butter, or salt and chat. They say that there are regions where people drink "Kut" coffee tea.

Currently, Ethiopia has over ten thousand varieties of coffee and the country is famous about its extraordinary organic coffee including wild forest coffee. Ethiopia's coffee has earned three official brands like Sidama, Yirgacheffe and Harar, and sold at a premium price in Starbucks shops.

One out of every five citizens in Ethiopia is engaged in the production of coffee - a specialty of Ethiopia, constituting about 70% of all exports. However, some farmers are experiencing economic difficulties because of the declining prices of raw coffee beans. Black Gold (directed by Nick and Mark Francis, released in 2006) is a documentary film following the struggle of Mr. Tadesse, the general manager of the Oromia Coffee Farmers Cooperative Union in Ethiopia. While instructing producers to let grow and manage quality coffee beans, he flies all over the world and negotiates fair prices for the beans. His efforts are gradually bearing fruit, and coffee producers in Oromia have established a school, health center, and water facility with the funds accumulated from their earnings.



TO.MO.CA Coffee Pvt. Ltd. Co.

1820/1820-cafe.com
Wasef street Addis Ababa
+251-11-113488
tomoca@ethio.net.et

This family owned coffee-roasting company was established in 1983 in Addis Ababa. The company's name is abbreviated from the Italian Tostazione Moderna Caffè which directly translates modern coffee roasting. For over half a century the company has been meticulously roasting and grinding the finest Ethiopian coffee with the Italian made roasting machines. In the last ten decades TOMOCA has grown and has been exporting its coffee to North America, Europe, Middle East, Japan and Australia.



Aster Bunna

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asterbunna@gmail.com

Aster Bunna was established by Mr. Aster Mengesha in 1995. Due to tough management and devotion to promoting the local market with the best quality coffee possible, Aster Bunna rapidly developed its relations with local customers such as cafes, restaurants, private and government offices, and other organizations that are passionate with the coffee they drink. Today Aster Bunna ranks as one of the most trusted distributors of quality coffee in Ethiopia.



Moplaco Trading PLC

1820/1820-mopla.com
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moplaco@ethio.net.et

Moplaco was established in 1972 in Dire Dawa, exporting predominantly Near Coffee around the world. After moving into Addis Ababa after 1988, the company started in export business of all types of Ethiopian coffee. Moplaco operates in a facility of more than 4000 square meters, where modern machines and an electronic sorter give the possibility to process up to thirty metric tons a day. It has grown to become one of the major exporting companies in the country.



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追加となったコーヒーセクター紹介ページ

Appendix 8

6th Ethio Chamber International Trade Fair

アンケートフォーム

A) アムハラ語版

B) 英語版

የኢትዮጵያ ቻምፒዮን ምርቶችን ለተጠናቀቁ የተዘጋጁ ማጠቃለያ አባባሎችን ስለሚያሳዩ የኢትዮጵያ ቻምፒዮን ምርቶች ያልሆኑ አስተያየት ያካፍሉ

- በአዲሱ የኢትዮጵያ ቻምፒዮን ምርቶች አስተሳሰብ ዙፋንና በአጠቃላይ በኤግዚቢሽኑ ለተመለከቱት ነገር ምን አስተያየት አልዎት? (አባባሎ ጭፍሩ ላይ ያክብቡ)
 - በጣም ወደጀግላሁ
 - በጣም ወደጀግላሁ
 - አልወደድኩትም
 - አስተያየት የለኝም
- ከተጠቃለሉ የኢትዮጵያ ቻምፒዮን ምርቶች መካከል የትኛውን ይበልጥ ወደጀግኛው?

☐ — አባባሎን ይበልጥ የወደዱት ምርት ቁጥር ላይ አንድ ጊዜ ያክብብሱ

☒ — አባባሎን የወደዱትና እንዲሁም ለገዙት የሚፈልጉት ምርት ቁጥር ላይ በድጋሚ /ለሁለተኛ ጊዜ/ ያክብብሱ

በአጅ የተሰሩ ባህላዊ ምርቶች	1	የአንገት ልብስ	2	ምግብ የቆዳ ቦርሳ	3	የሽክለ ሰራ
	4	ሰለጌ	5	የቅርጫቱ የስፈቶች	6	የበጀ...ዛ ልብስ
የከበረ ድንጋይ	7	ቅጣጥ	8	ፎቃ /ናገኪ/	9	የትራስ ልብስ
	10	አጋል	11	የከበረ ድንጋይ/ Gemstone /	12	ጌጣጤጦች
የቆዳ ወጣቶች	13	የሰት ቦርሳ	14	የወንድ ቦርሳ	15	የሴቶች ጫማ
	16	የወንዶች ጫማ	17	የሴቶች ጉት	18	የወንዶች ጉት
የግብርና ወጣቶች	19	ጣፊ	20	ሚ	21	ሰም
	22	የደረቀ አበባ	23	የማገጃ ጉባቶች (አሲንግል አይልስ)	24	ሳማ
	25	ክፊም	26	ሚግላታ	27	የደረቀ ፍራፍሬ
በኛ ቱልዝም	28	በኛ				
	29	ታሪክ	30	አደሽንቸር ቱልዝም	31	ተፈጥሮ
	32	ከተማ				

- በጥያቄ ቁጥር 2 በሚጠቀሙ ምርቶች ላይ በዋጋው ዙሪያ ምን አስተያየት አልዎት? (ለዘረዘሯቸው ምርቶች 1ጊዜ ብቻ የ (✓) ምልክት ያድርጉ)

ተ.ቁ	የምርቱ አይነት	ወድ ነው	ምክንያታዊ ነው	ርካሽ ነው	ሌላ አስተያየት ካልዎት

- ኤግዚቢሽኑ ላይ በተጠቃለሉ የኢትዮጵያ ቻምፒዮን ምርቶች በስንጠረዥ ከተዘረዘሩት ጉዳይ አንዱን ያልዎት አስተያየት ምን ይመስላል? (የ✓ ምልክት ያድርጉ)

	በጣም ጥሩ	ጥሩ	ማካከለኛ	የወረደ	በጣም የወረደ
ልዩ መሆኑ (Uniqueness)					
አዳዲስ ፊጣሪ መሆኑ					
ጠቃሚ ታቸው					

- ኤግዚቢሽኑ ላይ የኢትዮጵያ ቻምፒዮን ምርቶችን ገዝተው ከሆነ የገዙበት ዋና ምክንያት ምን ነበር? -----

- ምርቶቹን በጣም ዘብት ወቅት ማንኛው ጉዳይ ላይ ትክክል በሚደረግ ነው የሚዘቡት? (ጭፍሩ ላይ ያክብቡ ከአንድ በላይ ጭፍሮች ይጻፉ)

- ጥራት, ዓዘይን/ጣጥም/
- ዋጋ
- ምድብ, ንጽህና
- አስተሳሰብ
- በአጅ የተሰሩ መሆናቸው, ባህልን የሚያልፉ መሆናቸው...
- የተሰሩባቸው ግብአቶች አርጋኒክ መሆኑ
- ሌላ ካለ ይግለጹ -----

- ወደጊዜ ኤግዚቢሽኑ ከማምጣቱ በፊት ስለኢትዮጵያ ቻምፒዮን ምርቶች ሃሳብዎ አላማ ያወቁ ነበር? -----

8. እባክዎ ስለ አቅናቃ ምርቶች ምርቶች አጠቃላይ አስተያየትና ሃሳብ ካልዎ

ይግለጻልን.....

ስለሪሲዎ ጥቂት ይነገሩን

- ጽታ? ምን ድ 2. ሴት

- አድራሻ (ከሰንጠረዥ ላይ ይምረጡ ያከብቡ)

1. ከ 18 አመት በታች	2. 19-24 አመት	3. 25-34 አመት	4. 35-44 አመት	5. 45-54 አመት	6. 55-65 አመት	7. ከ 65 አመት በላይ
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- እርስዎ-----ነዎት?

1. በጥቅም ገዝተው ስለሆኑት የምርሶች
2. የግል ተጠቃሚ
3. ሌላ ካለ

ስለተባበሩን እናመሰግናለን !

Questionnaire to the Visitors of the Ethiopian Potential Champion Product Booth

Please give us your opinion about the Ethiopia Potential Champion Product booth you just visited.

Q1. How do you like this new product concept? (Please circle on the number)

1. I am very interested
2. I am slightly interested
3. Neutral
4. I am mostly uninterested
5. I am completely uninterested

Q2. Which items in Ethiopia Potential Champion Product Booth were the most attractive? (Multiple choice)

○—Please circle the number of the items attracted you.

◎—Please double circle the number of items you wish to purchase, or use it for yourself.

Hand-woven, Fashion and Natural Dyed Product	1	Scarf, shawl	2	Carpet	3	Porcelain
	4	Throw	5	Basket	6	Table cloth
	7	Dress	8	Place mat	9	Cushion cover
Gemstone, Opal & Accessory	10	Gemstone	11	Opal	12	jewelry
Leather Product	13	Ladies' Hand bag	14	Men's Hand bag	15	Ladies' shoes
	16	Men's shoes	17	Ladies' Coat	18	Men's Coat
Agro-processing Product	19	Tej	20	Honey	21	Beeswax
	22	Dried Petal	23	Essential oil	24	Soap
	25	Cream	26	Jam	27	Dry Fruit
Coffee Beans	28	Coffee Beans				
Tourism	29	History	30	Adventure	31	Nature
	32	Urban				

Q9. What sort of image have you had concerning the country of Ethiopia, before you came?

1. Very good image	2. Good image	2. No particular image	4. I don't know
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Q10. After you visited Ethiopia, did the image you had concerning Ethiopia change?

1. Very much so	2. A little	3. No change	4. I don't know
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Q11. What are the reason of your answer Q10?

Q12. Please write if you have any other comments or opinions concerning Ethiopia and Ethiopian products?

Please tell us about you

- Sex? 1. Male 2. Female

-Age? (Pls circle on the number)

1. under 18	2. 19-24	3. 25-34	4. 35-44	5. 45-54	6. 55-65	7. over 65
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-Nationality? _____

-How long have you been stayed in Ethiopia? _____

-You are a _____? (Please circle on the number)

1. personal consumer	2. potential buyer or retailer	3. other
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Thank you very much for your time!

Appendix 9

6th Ethio Chamber International Trade Fair CPA ブース

来場者アンケート分析

(By Ms. Kidist, Junior Economist, MOI)



6th Ethio Chamber International Trade Fair Champion Products Booth Visitors Survey Result

2014

1

Introduction

Champion Product Approach (CPA) is a unique approach for promoting export of the high quality of Ethiopian products and it is mainly focus on how to bring unique and only one products of Ethiopia to premium markets.

A champion product is defined as a product that embodies the uniqueness of the Ethiopian culture or historical background and is of the highest quality in Ethiopian products. It targets the premium markets such as Western countries and Japan; however, it is necessary to consolidate a domestic supporting structure to maintain the CPA.

Additional to focusing foreign market The CPA needs to appeal Ethiopian people who are involved in international trade and manufacturing. The 6th Ethio Chamber International Trade Fair (27th Nov. ~ 3rd Dec. 2013) was a perfect opportunity for this purpose.

As it can be seen from the survey Result it was a nice opportunity to Ethiopians to get information about unique and high potential products of their country and almost all of the visitors like the CPA booth.

2

1. Purpose And Method of the survey

The objective of this survey is to know which product is more liked by Ethiopian peoples and foreigners as well and to evaluate the general knowledge of visitors about the potential champion products of Ethiopia.

The survey was conducted both in Amharic and English version questionnaire at the CPA booth set for the 6th Ethio Chamber International Trade Fair, organized by Ethiopian chamber of commerce at Addis Ababa exhibition center from 27th Nov. ~ 3rd Dec. 2013.

In this survey 215 CPA booth visitors are selected and both male & female, Ethiopians & foreigners and also a variety of age groups were included.

3

2. Summary of The Findings

- ✚ In terms of attractiveness of the products Coffee beans and Opal attract the largest number of the respondents.
 - ✚ Most of the respondents replied that they did not know about CPA and the competitive quality of Ethio products displayed in the CPA booth
 - ✚ Quality/design/test is the most concerned aspects of the respondents when they buy the products
 - ✚ Most of the respondents are Males and Personal consumers.
-

4

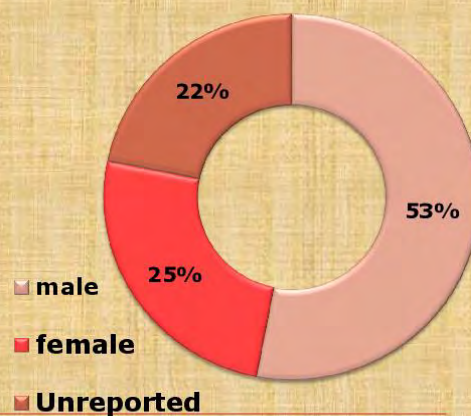
3. Survey Results

5

3.1 Gender

More than half of the respondents are Males.

Gender	Percent	Frequency
Male	53.0	114
Female	25.1	54
Unreported	21.9	47
Total	100.0	215

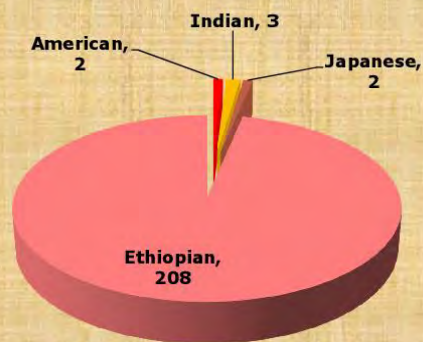


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3.2 Nationality

☀ *More than 95% of the respondents are Ethiopians.*

Nationality	Frequency	Percentage
American	2	0.9%
Indian	3	1.4%
japanese	2	0.9%
Ethiopian	208	96.8%
Total	215	100

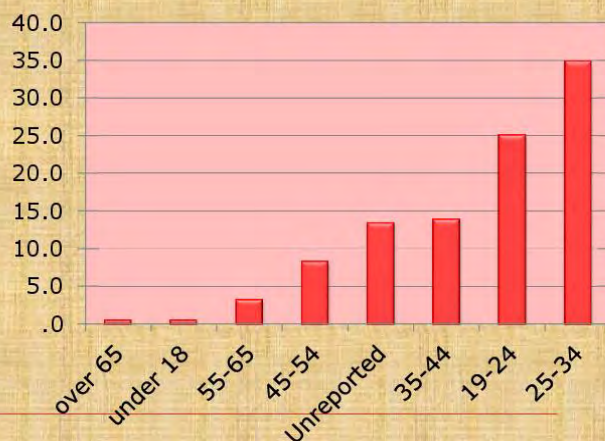


7

3.3 Age Distribution

☀ *Most of the respondent's age is lying between 19-24 and 25-34 which shares 25% and 34% respectively. This replied as many of the visitors were youngsters.*

Age	Percent	Frequency
under 18	.5	1
19-24	25.1	54
25-34	34.9	75
35-44	14.0	30
45-54	8.4	18
55-65	3.3	7
over 65	.5	1
Unreported	13.5	29
	100.0	215

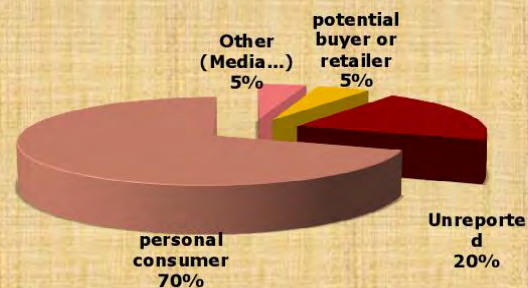


8

3.4 Type Of Visitors (Buyer/Non buyer)

- *About 70% of the respondents are personal consumers.*

Type of Visitors	Percent	Frequency
potential buyer or retailer	5.1	11
personal consumer	69.8	150
Unreported	20.5	44
Other (media...)	4.7	10
Total	100.0	215



9

3.5 Respondents General knowledge And Their impression On CPA

10

Did you know about Ethiopian potential Champion Product Concept Before ?

Only 15% of the total respondent knows the product but 60% of the respondent did not know about CPA and the competitive quality of Ethiopian products displayed in the CPA booth.

	Frequency	Percent
Yes	32	14.9
No	130	60.5
Unreported	53	24.7
Total	215	100.0



11

How do You Like This new product Concept?

80% of the respondents are very interested about the new CPA concept and also the Exhibition.

	Frequency	Percent
I am very interested	172	80.0
I am slightly interested	27	12.6
Neutral	-	-
I am mostly Uninterested	-	-
unreported	16	7.4
	215	100.0



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3.5 Attracted Items

More than 50% of the respondents are attracted by coffee bean ,about 47% and 40% of the respondents select opal and dress respectively. Also Most of the items like jewelry and cotton products as well as leather products attract the respondents.

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Q2. Which items in Ethiopia Potential Champion Product Booth were the most attractive? (Multiple choice)

Items	Percent (out of 215)	count
Cofee Beans	53.5%	114
Opal	46.9%	100
Dress	39.4%	84
scarf&shawl	37.6%	80
Jewlery	37.1%	79
men's shoes	34.3%	73
Gemstone	32.4%	69
ladie's hand bag	28.6%	61
Honey	23.9%	51
Nature	23.0%	49
Tej	22.1%	47
Essential oil	22.1%	47
cushion cover	21.6%	46
men's coat	19.7%	42

Dried petal	18.8%	40
ladie's shoes	17.8%	38
carpet	16.4%	35
ladie's coat	15.5%	33
soap	15.0%	32
porcelain	14.6%	31
Jam	14.6%	31
men's hand bag	13.6%	29
History	13.6%	29
basket	13.1%	28
Adventure	13.1%	28
Cream	9.9%	21
Napkin	9.4%	20
Dry Fruit	9.4%	20
throw	8.9%	19
table cloth	8.5%	18
Urban	8.5%	18
Beeswax	8.0%	17
Total	670.9%	1429

Top Ten Items



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3.5.1 Top Ten Items selected by male & female Respondents independently

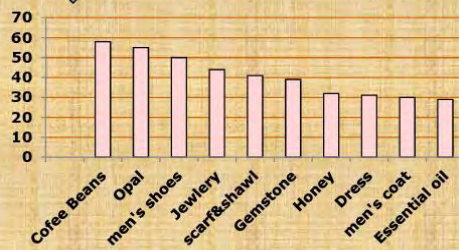
In cross tabulations of attracted items with gender both male and female respondents are more attracted by coffee beans, opal, scarf & shawl and also by jewelry, however there were some basic variations that could be seen from the chart. This suggests that it would be necessary to specify the target group: Female and male, or both.

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No.	Items	Frequency
1	Coffee Beans	58
2	Opal	55
3	men's shoes	50
4	Jewelry	44
5	scarf&shawl	41
6	Gemstone	39
7	Honey	32
8	Dress	31
9	men's coat	30
10	Essential oil	29



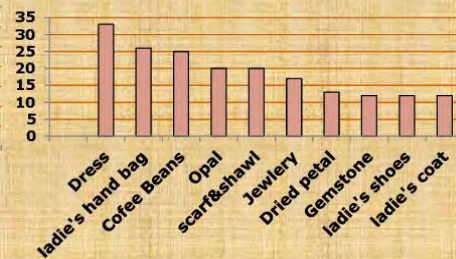
Male



No.	Items	Frequency
1	Dress	33
2	lady's hand bag	26
3	Coffee Beans	25
4	Opal	20
5	Scarf & shawl	20
6	Jewelry	17
7	Dried petal	13
8	Gemstone	12
9	lady's shoes	12
10	lady's coat	12



Female

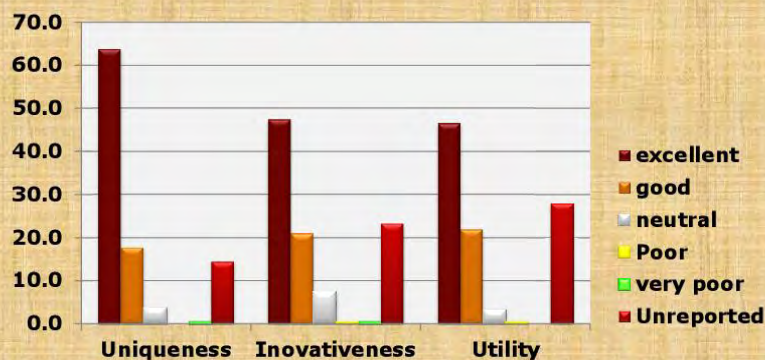


3.6 Products Quality Evaluation by respondents

Q4. Please tell us about what you like most about this product by making evaluation regarding to Uniqueness, Innovativeness & utility.

	Uniqueness	Innovativeness	Utility
excellent	63.7	47.4	46.5
good	17.7	20.9	21.9
neutral	3.7	7.4	3.3
Poor		.5	.5
very poor	.5	.5	
Unreported	14.4	23.3	27.9

from the graph we conclude that Most of the result of respondent evaluation shows that the products in the CPA booth are excellent in their uniqueness, innovativeness and utility. But the respondent comments that much effort is needed in innovativeness by participating half part of Ethiopian young people and by working with micro and small organization and TVET College.



3.7 Most concerned aspects by respondent

The next Graph shows Both male and female respondents are most concerned of quality/design/test and background of the products, followed by price and safety/cleanliness.

Q6. When you buy these products, which aspects are you concerned of most? (Multiple choice)



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Summary

The respondents suggests for CPA team:

🌸 To keep this kind of exhibitions because before they visit CPA booth almost all of them were didn't know about CPA and the competitive quality of Ethiopian products displayed but after visit and explanation they have got a good information about it.

🌸 To prepare exhibitions in regional cities in order to create knowledge in all Ethiopian and also to get champion products from different regions.

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● To facilitate additional exhibitions to buy this products that they want to buy. And to think about the price of the products for locals and foreigners independently.

● In addition to these products, much effort is needed to out reach products which are not promoted and under market because of weak market supply chain.

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✿ More promotion is needed on mass Medias in order to attract both local and foreign peoples.

✿ Exchange experience and learn from other African countries would be useful in order to explore uniqueness of the products

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Appendix 10

終了時セミナープログラム

Seminar Program

14:30-14:40	Opening	Mr. Tadesse Haile, State Minister, MOI Ms. Mulu Solomon, President, ECCSA
14:40-14:50	The Review of the CPA activities in 2013	Mr. Noriyuki Nagai, FASID
14:50-15:05	The impact of the CPA	Ms. Nigest Haile, CAWEE
15:05-15:30	Value of Branding for the CPA Exports	Mr. Keiichi Higuchi, Dentsu Inc.
15:30-15:45	Output of the CPA activities in 2013	Mr. Shigeru Fujita, FASID
15:45-16:00	Q&A	
16:00-16:20	Break	
16:20-17:10	Panel Discussion <u>Theme:</u> What should be done for the further development of the CPA, and The role of each Stakeholders	<u>Chair :</u> Mr. Ahmed Nuru, MOI <u>Panelists:</u> Mr. Endalkachew Sime, ECCSA Ms. Nigest Haile, CAWEE Mr. Jacques Dubois, MUYA Ethiopia Mr. Hiromichi Murakami, JICA HQ
17:10-17:20	Wrap-up on the discussion	Mr. Ahmed Nuru, MOI
17:20-17:30	Closing Remarks	Mr. Kimiaki Jin, JICA Ethiopia Office
17:30-18:00	Reception	

Appendix 11
現地調査訪問先一覧

	省庁
1	Ministry of Industry
2	Ministry of Trade
3	Ministry of Culture and Tourism
	政府系機関
4	Ethiopian Competitiveness Facility
5	Ethiopian Kaizen Institute
6	Federal Micro & Small Enterprises Development Agency
	セクター別 政府系機関
7	Ethiopia Leather Industry Development Institute
8	Ethiopia Textile Industry Development Institute
	民間中間組織
9	Ethiopian Chamber of Commerce and Sectoral Association
10	Ethiopian Coffee Exporters Association
11	Ethiopian Coffee Roasters' Association
12	Ethiopian Gemstone Association
13	Ethiopian Honey and Beeswax Producers and Exporters Association
14	Ethiopian Horticulture Producer and Exporter Association
15	Ethiopian Leather Industry Association
16	Ethiopian Textile and Garments Manufacturing Association
17	Ethiopian Tour Operators Association
	NGO
18	Center for African Women Economic Empowerment (CAWEE)
	民間企業
19	Aster Bunna
20	Aster Tej
21	Beza Mar Agro Industry
22	Boston Partners
23	Ecopia
24	Entoto Beth Artisan
25	Ethio International Footwear Cluster Cooperative Society
26	Ethio Leather Industry
27	Ethiopian Spice Extraction Factory
28	MUYA Ethiopia
29	OK Jamaica Shoe Factory
30	Orbit Ethiopia
31	Sabahar
32	Salem's Design
33	Terra
34	ToMoCa Coffee
35	Trio Craft
36	YeFikir Design