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Insight

What is the impact of sustainable farming on smallholder suppliers in Ethiopia?

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Overview

GreenPath Food (GreenPath) is a specialty food company in Ethiopia that produces and sources quality organic food products through a network of smallholder farms. By supplying farmers with inputs, financing, and technical support – and then aggregating, purchasing and processing their products – GreenPath integrates farmers into global supply chains and creates sustainable livelihoods for over 250 partner farms.

This Insight study explores GreenPath's impact on its partner farmers in Ethiopia. GreenPath is an investee business of Novastar Ventures.[1] Through interviews with nearly 250 farmers – a combination of GreenPath partner farms and other farms in potential expansion areas – our research explores how GreenPath works with farmers to improve their productivity and livelihoods through a sustainable business model.

Key insights from the study include:

- **Impact:** GreenPath contributes significantly to the livelihoods of its partner farms. In Ethiopia 62 per cent of the rural population, and 53 per cent nationally live on less than $3.20 per person per day (2011 PPP), compared to 46 per cent of GreenPath farmers. According to the study, 97 per cent of farmers reported improvements in their income and quality of life due to working with GreenPath, and farmers also reported a range of positive changes in farming practices.
- **Value proposition:** Farmers are highly satisfied and loyal to GreenPath. The vast majority reported having poor access to market, equipment and training before working with GreenPath, and they find these aspects of its service most useful to their farming businesses.
- **Performance over time:** Over a two-year period, farmers' ratings of GreenPath's social performance have significantly improved. This improvement was likely bolstered by the company's focus on a lucrative crop portfolio, structured farmer training, and improved access to equipment including for irrigation.
- **Suggestions for improvements:** The farmers we surveyed said the most significant challenge they experienced was delayed payments for their produce. Payment delays are exacerbated by infrastructural inefficiencies, such as a lack of mobile money, and addressing this issue is a priority for the company.

Our research highlights some of the features that have enabled GreenPath to have a positive impact on farmers while supporting the company's overall performance. We hope these insights are useful to GreenPath as well as other companies and investors engaging with similar types of models, particularly those looking to boost impact and sustainability in Africa and beyond.

1 CDC committed to the Novastar Ventures East Africa Fund I in 2014.

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97%

97 per cent of farmers reported improvements in their income and quality of life due to working with GreenPath.

Acknowledgements

This Insight was written by Venu Aggarwal (60 Decibels), Sonia Kuguru (60 Decibels) and Julia Tobias (CDC Group). We thank Martina Castro (CDC Group), Jacie Jones (GreenPath), Eric Couper (GreenPath), and Novastar Ventures for their collaboration and input to the study.

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01

1. Context and GreenPath's model

In Ethiopia, the agriculture sector employs more than 70 per cent of the total population of 105 million. The vast majority of growers are smallholder farmers who practice subsistence farming and are relatively disconnected from the global market. Plots of land are small and tended to by family, which often translates into underutilised land and labour, and an untapped production opportunity. Subsistence farmers also face high risks due to uncontrollable weather conditions, crop disease and pests. These risks are magnified when the farmer is dependent on only a small plot of land and a narrow set of crops. Smallholder farmers are encouraged to buy synthetic fertilisers and pesticides, but these inputs are costly and can deplete soil health over time.

GreenPath was established to leverage the competitive advantages of small farms, through the production of high-value crops that benefit from the diligent labour and small plots common to many farmers in Ethiopia, and East Africa more broadly. Increasing global demand for organic, sustainably grown food creates an opportunity for smallholders to participate in international value chains for which they may otherwise be unsuited to compete.

70%

The agriculture sector employs more than 70 per cent of Ethiopia's total population.

GreenPath operates a large, vertically integrated 'outgrower' network, where smallholder farmers are connected to the company's professional supply chain. GreenPath's business model and offering to farmers rests on three farm-to-shelf pillars:

1. GreenPath provides the necessary inputs, financing, equipment, training, and extension support to enable networks of smallholders to adopt regenerative growing practices that increase the productivity, quality, and resilience of their crops and farms.
2. GreenPath manages input-output hubs called Farmer Service Centers. These host the food-safe nursery, packhouse, cold chain, and processing facilities required to distribute inputs to farmers and aggregate and process outputs for market.
3. GreenPath guarantees quality products and professional service to a network of global customers who care about sustainably grown food. These customers are willing to pay premium prices for farm-level traceability and impact, which is ensured through a variety of international certifications.

GreenPath's partner farmers grow a combination of fruit trees, annual vegetables and perennial herbs, as well as herbal tea. By intercropping these products in agro-ecologically complementary growing systems, farmers can harvest year-round, securing regular income and using their farming plots more productively. Through this growing network, GreenPath creates sustainable supply chains for its international customers and positively impacts the livelihoods of thousands of smallholder farmers.

02

Impact on farmers

2.1 Study methodology

The data used for the study was collected and analysed by 60 Decibels, an impact measurement company known for its Lean Data℠ approach, and was based primarily on interviews with 97 of GreenPath's partner farms in Butajira, in the Southern Nations, Nationalities, and Peoples' Region (SNNPR), Ethiopia.[2] The study took place between November and December 2019, and was conducted through phone interviews by a local team of surveyors trained by 60 Decibels. The survey included qualitative and quantitative questions to understand farmer and respondent profiles, their satisfaction and loyalty towards GreenPath, and the changes their interaction with GreenPath is enabling in their farms, livelihoods and overall wellbeing.

This study builds on an earlier baseline study with GreenPath conducted in 2017. This was created to help the company understand the experience, impact, and suggestions for improvement of its earliest cohorts of farmers. The 2019 study was able to resurvey 32 of the farmers involved in the previous study to follow up on a number of these dimensions to understand changes in GreenPath's performance over time.[3]

2 We attempted to reach all 156 farmers with access to phones that GreenPath worked with in 2019. The company collects these numbers as a part of their farmer engagement. We were able to complete interviews with 77 per cent of the 126 farmers with correct phone numbers, but 30 of the phone numbers were no longer valid. To test for representativeness, key metrics from the final study sample were compared to data from GreenPath's internal database of 159 partner farmers. The samples were comparable along two characteristics: total land holding and land farmed with GreenPath. There were two notable differences between our sample and the GreenPath database. First, average weekly earnings in our sample were lower than those in the GreenPath database, potentially due to frequent fluctuations in weekly farmer sales. Additionally, there were fewer joint- or female-led farms in the 60 Decibels sample.

3 The original 2017 Lean Data study interviewed 43 farmers in total.

The current study also included a survey during the same time period of Ethiopian farmers in three areas where GreenPath does not currently operate, in order to understand the potential viability of expanding GreenPath's model to these locations. We interviewed a sample of 154 farmers in the areas of Wolkite, SNNPR; Jimma, Oromia Region; and Gamo, SNNPR (near to Arba Minch).[4] We asked these farmers questions about their home and farms, what they produced and how, and about their access to the type of farm services GreenPath offers. In this report, we refer to this sample as the 'market' or 'market farmers'.

Figure 1: Location of GreenPath's partner farmers in Ethiopia, and target markets for expansion

2.2 Who are GreenPath's farmer suppliers?

Based on our survey sample, the average farmer who works with GreenPath is about 37 years old, and lives with six other people in their household. This is slightly higher than the rural household size for Ethiopia, which is 5.2. They farm on about one hectare of land, just less than the 1.38 hectares farmed by the average Ethiopian farmer.[5]

Using the Poverty Probability Index®(PPI), we estimate that 46 per cent of GreenPath farmers live on less than the World Bank's $3.20 (2011 PPP) per person per day poverty line, compared to 62 per cent of the rural population in Ethiopia.[6] Of these, 18 per cent of GreenPath farmers live on less than $1.90 per person per day (2011 PPP), against a national average of 23 per cent for Ethiopia and a rate of 28 per cent throughout rural Ethiopia.[7]

46%

We estimate that 46 per cent of GreenPath farmers live on less than the World Bank's $3.20 (2011 PPP) per person per day poverty line.

4 This sample was selected randomly from over 12,000 phone numbers received from the GreenPath team, which were collected by GreenPath agents as a part of their sales lead generation exercise. We attempted calls to 761 farmers, of which 88 were wrong numbers. Of 673 correct numbers, we were able to complete interviews with 23 per cent.

5 National figures are from the World Bank's Central Statistical Agency and Living Standards Measurement Study for Ethiopia in 2017 and Integrated Surveys on Agriculture Ethiopia Socioeconomic Survey (ESS) 2015-2016.

6 The Poverty Probability Index (PPI®) is a poverty measurement tool developed by Innovations for Poverty Action. It asks survey respondents questions about their household's characteristics. Based on these responses across the customer sample, the likelihood that proportions of GreenPath partner farmers live below different income levels per day can be estimated. The PPI uses Purchasing Power Parity and therefore is not comparable to local currency expenditure, consumption, or income data.

7 Innovation of Poverty Action's Poverty Probability Index was the measurement tool used to estimate the poverty probability of this sample and to compare it to the poverty headcount ratio for Ethiopia nationally and its rural population.

Over the past 12 months, the average GreenPath partner farmer utilised half of their land for the avocados, herbs, and speciality vegetables they sell to GreenPath, suggesting the company is an essential contributor to farmers' livelihoods.

We also compared our sample of GreenPath's partner farmers to the market sample (See Table 1). Compared to the average farmer in our market sample, GreenPath's partners farm on smaller plots of land (average land size of 1.0 hectare vs. 1.5 hectares), live in slightly larger households (seven vs. six household members) and are comparable in terms of socioeconomic status (18 per cent living below $1.90/person/day compared to 21 per cent as shown in Figure 2). Overall, the groups appear to share similar underlying characteristics.

Metric	GreenPath farmers[8]	Market sample farmers
Land holding	1 ha	1.5 ha
% living below $1.90	18%	21%
% living below $3.20	46%	49%
Household size	7 members	6 members
Average age	37	35

Table 1: Characteristics of GreenPath and market sample farmers

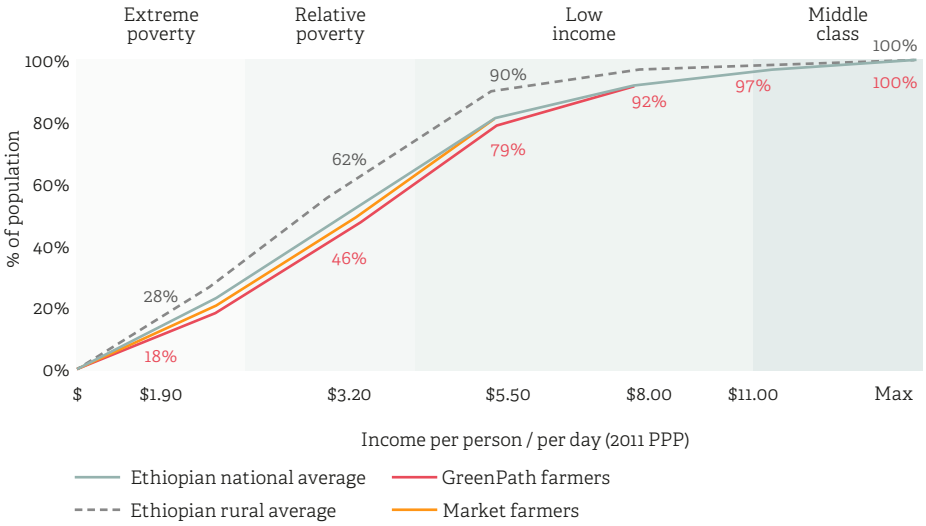


Figure 2: Income distribution of GreenPath farmers and Market farmers relative to Ethiopia's national and rural averages (% living below $xx per day (2011 PPP))

GreenPath provided further insight into some of the characteristics it looks for when recruiting new farmers. Because the company has historically been limited by facility and operational constraints, only a subset of farmers who express interest in partnering with the company are selected for each new cohort of partner farms. Based on GreenPath's experience, candidates who are likely to have the most success working with the company, and are most likely to benefit from its value proposition, tend to possess many of the characteristics listed in the table below, which are considered during GreenPath's selection process:

50%

Over the past 12 months the average partner farmer utilised half of their land for produce they sell to GreenPath.

8 We were only able to reach two women farmers associated with GreenPath and seven women farmers in the market sample (men tended to pick up the phone and respond to our questions). We hope that gaining more insight into female farmers and their experience with GreenPath will be a priority for future research.

Characteristic	Justification
Existing tree crops on farm	Farms with a history of investing in long-term tree crops are more likely to adopt perennial crop-focused agronomic practices.
Female- or joint-headed household	Participation in training and adoption are better when more household members are actively engaged in the partnership, as most farms rely on labour from several members of the household.
Farm size	Small farms gain disproportionately from GreenPath's production model, which is designed to leverage their competitive advantages of small plots and household labour.
Organic land	When farmers are already practicing limited synthetic input use, it is easier to certify and promote the adoption of organic practices.
Evidence of core practices	While not a selection requirement, farmers who are already practicing composting, mulching, intercropping or crop diversification are valued as 'early adopters' who can be models for others.
Access to water	Farms benefit most from GreenPath when they have year-round access to a water supply that can be leveraged with access to solar irrigation.
Existing crops	Farms that are not already growing high-value 'competitor' crops will disproportionately benefit from the introduction of GreenPath's crop offering.
Market access	Farms that do not already have reliable access to a high-paying market will disproportionately benefit from their partnership with GreenPath.

Table 2: Farmer characteristics used in GreenPath's selection process

2.3 Impact on farmer quality of life and time spent farming

The data suggests that GreenPath plays an essential role in the lives of its partner farmers. A comprehensive 97 per cent of GreenPath farmers reported improvements in their quality of life as a result of working with the company. Breaking this down, 66 per cent said their quality of life had "very much improved" while 31 per cent said it had "slightly improved" as shown in Figure 3. The ability to handle household expenses, particularly related to school fees and improved dietary consumption, were major outcomes noted in their households, alongside improved capacity to save. In particular, 64 per cent of respondents mentioned they had experienced improved income, and 20 per cent cited an improved ability to pay school fees.

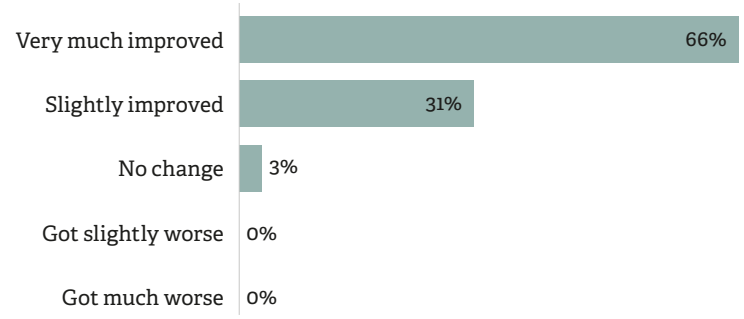


Figure 3: Perceived quality of life change due to working with GreenPath

66%

66 per cent of farmers said their quality of life had 'very much improved' as a result of working with the company.

These numbers reflect considerable gains over the baseline results in which only 42 per cent of farmers working with GreenPath said that their quality of life improved "very much". In both studies, the reasons for improvement were largely the same – improved income and ability to manage household expenses. Payment data from GreenPath's database also support farmers' reports of improved income. In 2019, farmers received an average weekly income of 1164 Ethiopian Birr (ETB) from GreenPath – more than double the average of 513 ETB in 2018.

GreenPath farmer respondents in our study reported spending approximately 40 hours per week on the farm on average, and 95 per cent said they spent less time on their farms before working with GreenPath. Their willingness to put in greater time and effort suggests that GreenPath has helped raise farmers' expectations about the benefits and value they can expect from productive work on their farms.

Roughly 80 per cent of the respondents (almost all of whom were men) reported that the work and decisions related to GreenPath were done by men, which is a finding that needs further exploration. GreenPath has separately observed that as farm revenues grow, the involvement of women in their engagement seems to consistently go down, as male counterparts take over more of the farming activities and the GreenPath relationship. It is, potentially, a concerning finding – one that GreenPath is seeking to understand and address moving forward.

2.4 Changes in farming practices and outcomes

The data collected in our study helps us to understand the difficult situation that many GreenPath farmers started in. It also helps us to consider the ways in which their partnership with GreenPath has enabled them to develop a more productive livelihood, and a healthier home life.

A crucial part of GreenPath's value proposition is to support farmers with the equipment and practices they need to enhance their yields and incomes. GreenPath farmers enjoy certain amenities on their farms that their counterparts don't tend to have, and it sets them apart. As part of their partnership, farmers receive access to organic inputs, technical support, solar irrigation kits and a commitment to purchasing at fair prices. This makes GreenPath's involvement even more significant, as it appears to be meeting a gap in the market.

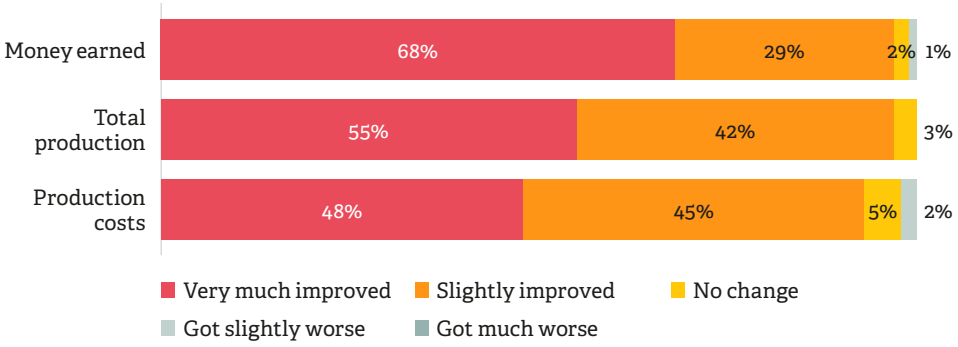


Figure 3: Perceived changes in earnings and farm outcomes by GreenPath farmers

More than 90 per cent of farmers experienced improvements across key farming outcomes (shown in Figure 3). A high percentage of farmers report "very much" improvements in money earned (68 per cent), total production (55 per cent), and production costs (48 per cent).

Now because of GreenPath I am able to sell my yield production easily and get more income to support [my] family in a better way than before.

GreenPath farmer

After I started participating in the GreenPath program, my income has increased, and I have started to deposit money in the bank.

GreenPath farmer

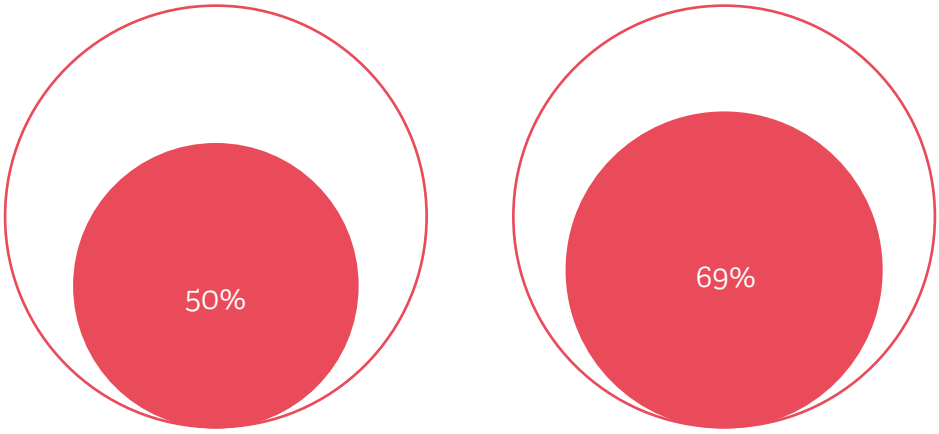
The recommendations provided by GreenPath are useful... within a short period of time we can benefit from good income.

GreenPath farmer

90%

More than 90 per cent of farmers experienced improvements across key farming outcomes.

Farmers reported GreenPath contributing an average of 69 per cent to their overall farm income in the last season, although they utilise only half of their land for crops sold to GreenPath (Figure 4). This shows the higher value of GreenPath produce in comparison to what farmers grow on the other half of their farm, demonstrating the economic value of working with GreenPath.



Proportion of land used for GreenPath crops
Amount of land used for Green Path / total amount of land (n = 97)

Proportion of income related to GreenPath crops
Farmer report on proportion of all household income coming from GreenPath crops (n = 97)

Figure 4: Proportion of farmer land and income related to GreenPath

When GreenPath first started working with farmers, its services were a novelty. In the 2017 baseline study with the first cohorts of farmers, few had access to the services that GreenPath provides. Of those that were surveyed, 75 per cent said they could not find another buyer for their organic crops, 98 per cent couldn't find another company to give them quality training, and no one could find another supplier of organic inputs.

Focusing on access to market, partners, financing, training and equipment, we asked our sample of other farmers from the Ethiopian market about their access to critical services. None of these farmers had access to a non-governmental organisation (NGO) or company for farm services. While 64 per cent reported having access to government services for farm support, only a third of farmers had access to financing, training, and equipment for their farm, and two-thirds had access to inputs. Direct purchasing from farms, GreenPath's most important offering, was reliably available to only 66 per cent of these farmers. Of all the farmers in the market survey, 73 per cent rely on local markets as their place of sale, while 24 per cent rely on individual buyers. By comparison, GreenPath's offering of guaranteed and farm-gate access to international markets should help its partner farmers experience improved stability of income.

98%

98 per cent of farmers said they couldn't find another company to give them quality training.

2.5 Satisfaction and Challenges

Using Bain's Net Promoter Score® (NPS) methodology, we tested for farmer satisfaction and loyalty to the company. GreenPath scored an NPS of 57, a score which is considered excellent in any industry (Figure 5). It also significantly outperforms 60 Decibels' Agriculture benchmark of 31 for similar companies.[9] The score reflects a high number of farmers who count themselves as 'promoters' of the company (61 per cent), with only 4 per cent considered 'detractors'.

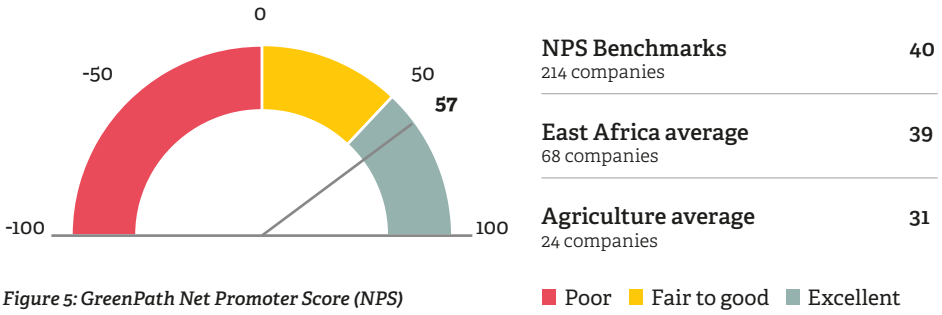


Figure 5: GreenPath Net Promoter Score (NPS)

The Net Promoter Score® is calculated by asking customers to answer this question: On a scale of 0 to 10, how likely are you to recommend GreenPath to a friend or family member, where 0 is least likely and 10 is most likely? Customers rating 0-6 are 'Detractors', 7-8 'Passives' and 9-10 'Promoters'. The NPS is calculated by subtracting the percentage of Detractors from the percentage of Promoters. The score can be anything from -100 to 100 with 100 being the highest. Global averages sit around 45.

GreenPath's NPS of 57 reflects notable improvement over its score of 5 in 2017. That earlier score is most likely attributed to farmer challenges with payment processing and a large number of passive farmers who may have been too inexperienced to have reaped all the benefits of working with the company at that time.

Farmers were asked to explain the reasons for their ratings to provide insight into what was driving these scores. The top reasons farmers cited for their satisfaction included the increase in income they experienced and the high-quality inputs and training provided. More than 90 per cent of farmers reported quality of inputs, crop choices, and on-farm training support as satisfactory, with over 70 per cent reporting each of these to be "good" or "very good" (Figure 6). Farmer perceptions of the company suggest that they see GreenPath as a facilitator for both their financial goals and their farm needs, indicating that the company is fulfilling an important promise to farmers, as reflected in the high loyalty score.

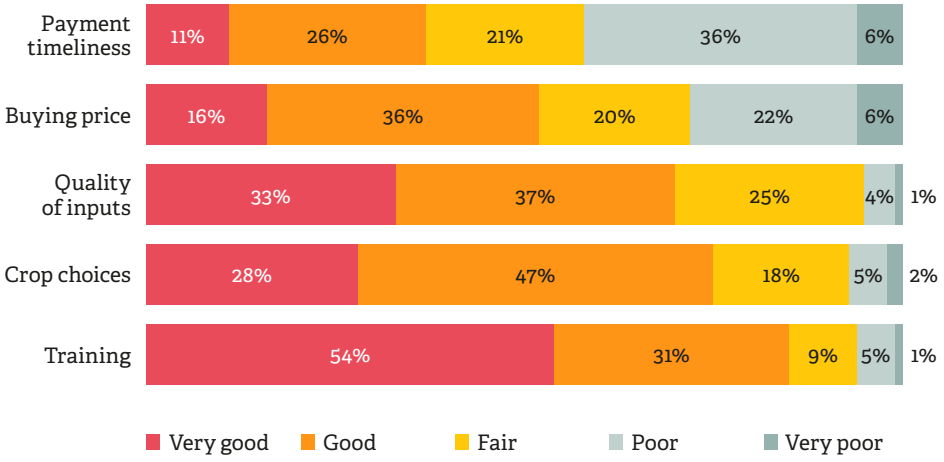


Figure 6: Farmer ratings on satisfaction of core GreenPath services

9 The 60 Decibels Agriculture benchmark is based on interviews with over 3,000 farmers who supply to 24 agribusinesses and farmer producer organisations in Asia, Africa and Latin America.

Working with GreenPath helps farmers to produce more crops. This is because they deliver seeds and give technical support.

GreenPath farmer

Now I have good income and better understanding about new varieties of crops that could help me to have sustainable income.

GreenPath farmer

While the overall feedback on GreenPath's service is overwhelmingly positive, 33 per cent of farmers said they had experienced a challenge in their engagement with GreenPath – and in most cases, the issues they reported remained unresolved. The main suggestions for improvements that farmers shared include wanting better prices for their crops and more timely payments (Figure 7).

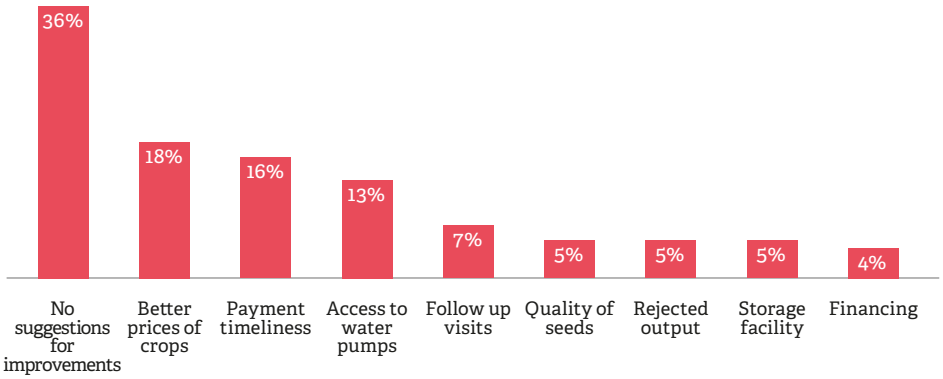


Figure 7: Top suggestions for GreenPath improvement from farmers

While wanting better prices for their crops is a common desire from farmers everywhere, it is worth noting that GreenPath does track local market prices and typically aims to pay 20 per cent above market prices.

Payment issues are another common challenge faced by business models like GreenPath's. Although the company consistently disburses funds to farmers bi-weekly, the local banking infrastructure can often be slow. Mobile money is not yet ubiquitous in the Ethiopian market, and bank platforms tend to be manual and time-consuming. Farmers often are unaware of when their payment has been processed as telecommunication challenges in Ethiopia often interrupt their bi-weekly text message update on payments. In addition, farmers' visits to the bank often coincide with their visits to the bigger town or market and are not necessarily in sync with the payment disbursal frequency. GreenPath is working to prioritise this issue, as discussed in the concluding section.

Finally, it is important to note that the prevalence of challenges decreased significantly compared to 2017, when 52 per cent of farmers experienced a challenge with the company, most commonly with late payments. Though late payment was again one of the main challenges mentioned in 2019, its regularity was markedly reduced to 16 per cent.

The payment should be on time and I prefer if GreenPath could support financially in terms of credits.
GreenPath farmer

There should be improvement in terms of regular follow-ups and quality seed in future by GreenPath.
GreenPath farmer

2.6 Organic farming and climate resilience practices

GreenPath works with smallholder farmers to improve both their land and their livelihoods. By introducing regenerative farming practices, GreenPath farmers can invest in soil health, improve water retention, promote biodiversity, and sequester carbon. The company supplies the organic seeds and solutions farmers need to establish 'food forests' that diversify risk and increase climate resilience, while providing a sustainable source of revenue for the long term.

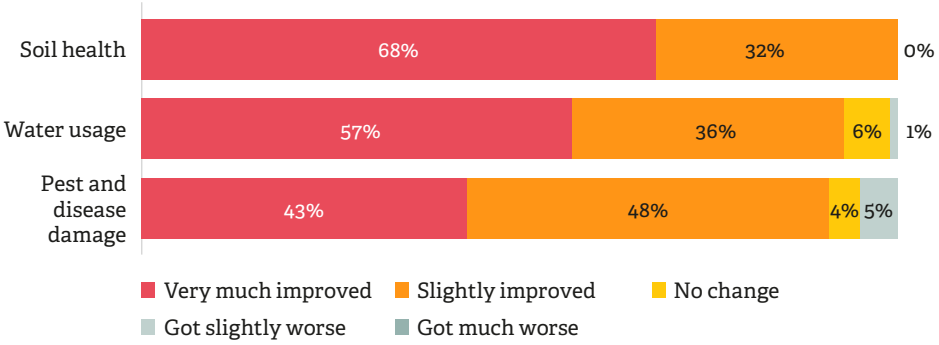


Figure 8: Perceived changes in key farming outcomes reported by farmers because of GreenPath

In our interviews with GreenPath farmers, 68 per cent reported improvements in the soil health on their farms as a result of working with GreenPath, and 56 per cent reported improvements in their water usage and conservation (Figure 8). In addition, 43 per cent reported better pest and disease management, which is a climate-related concern for farmers in Butajira, where GreenPath operates.

GreenPath works with all of its partner farmers to ensure they practice intercropping, crop rotation, and composting in order to maintain the integrity of their soil and improve their yields. These three agricultural practices are key to climate resilience in a country vulnerable to environmental changes. Among the non-GreenPath farmers surveyed in our study, by comparison, we found that while crop rotation was widely practiced, intercropping and composting were practiced by only one-third of farmers.

68%

68 per cent of GreenPath farmers reported improvements in the soil health on their farms as a result of working with GreenPath.

03

The way forward

Our study demonstrates that GreenPath's model is helping farmers to improve productivity and crop diversity, enabling them to earn stable, year-round income. The results provide valuable insights for GreenPath as to which services farmers value most, which agronomic efforts are perceived to be yielding the best results, and which farmers see the greatest value proposition from GreenPath's partnership. The survey also highlights a few areas where there is an opportunity to listen and respond to feedback from farmers, thereby improving the relationship and strengthening GreenPath's impact even further.

The 2019 survey data suggests a deepening of impact over time, with improvements in both quality of life and Net Promoter Score metrics, and a reduction in farmer challenges, when compared against the 2017 baseline. Indeed, many of these improvements appear to be linked to specific changes made by GreenPath since the 2017 study. Now that GreenPath's operations are more established, its partner farmers are benefitting from an improved and more tailored crop offering, enhanced farmer training programs, an additional irrigation offering, and more stable and secure services in general.

In 2017, GreenPath was able to act on insights to improve its farmer engagement strategy and service offering, yielding positive results in terms of productivity, as well as farmer reception and loyalty. GreenPath management found the ability to track and compare longitudinal farmer feedback useful, both in terms of validating the impact of actions taken between surveys (further investment in farmer training, for example), as well as in reinforcing areas of development to focus on (such as considering new banking partners and platforms to further improve payment efficiency and confirmation).

Moving forward, addressing the issue of payment timeliness reported by farmers is a priority for GreenPath as they continue to seek to improve their services and offerings to farmers in a sustainable way. The company is currently exploring ways to address this challenge through new mobile money pilot opportunities, which is a new frontier for Ethiopia. Giving clearer messages that help to adjust farmers' expectations may also help. GreenPath also intends to look deeper into the gender and inclusion dynamics among its partner farmers touched upon in this study.

We hope the learnings captured in this report will be useful for GreenPath, as well as for other players operating within the agricultural space that are working to promote sustainability and improve farmer livelihoods.

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