It is our pleasure to present to you the Gender Dimensions of the National Export Strategy.

For us to realise the full potential of our country, gender issues which are at play in economic, social, political and other spheres need to be addressed. Many national and international initiatives have been undertaken to address gender-related issues in society, but very little has been done to exploit the opportunities that women and men jointly contribute to national development, when proper gender-sensitive trade related practices are embraced. As a result, many gender gaps still exist, inter alia, in export trade.

As Government, we aim at achieving the Millennium Development Goal (MDG) Number 3, which underscores the need to reduce gender disparity in education, and in access and control of productive resources; reduced discrimination and violence against women and to raise women’s participation in leadership and decision making positions.

The National Development Plan which is being developed to replace the Poverty Eradication Action Plan (PEAP) is critically looking at bringing gender issues into the limelight of the national development agenda. Other policy instruments such as the National Gender Policy and the National Trade and Industrialisation Policy also clearly define the importance of harnessing gender aspects into both social and economic activities of the nation. In line with these, the National Export Strategy sets a centre stage for the development of Uganda’s export trade sector. Therefore, engendering the NES is a worthwhile, relevant, and commendable initiative.

As Uganda targets to achieve annual US$5 billion export revenue and a per capita export ratio of US$200 on both goods and services, it is clear that this will be attained only if the production activity and potential of both men and women is recognised, harnessed and utilised. It is certain that the export sector can play a fundamental role in transforming our country when targeted interventions are made in shaping the minds and actions of Ugandans. There will also be need to shift from producing goods at primary level to high value products and services which offer better terms of trade and cascade value down to the communities.

This document therefore highlights issues that the NES needs to address to achieve its objectives which are elaborately stated on page 3 of the NES document. The overall aim of engendering the NES is to ensure that it fully accommodates both genders so that it is a catalyst for greater and better social and economic development. This will be achieved by pursuing the following specific objectives:
To unlock the untapped potential of Ugandan women and increase their contribution in export trade. This will in turn contribute to the economic and social transformation of Uganda.

To add greater value to the current NES initiatives and yield competitiveness and developmental benefits beyond the set targets.

To facilitate the achievement of the Millennium Development Goals which emphasize gender equality, in particular MDG Number 3.

To create gender sensitive export support policies and to improve and strengthen the capacity of export support institutions to provide relevant, targeted support services to women engaged in the export sector.

We appreciate the efforts of both the public and private sectors in working together to formulate the Strategy which will form the basis for the implementation of the NES. The Government of Uganda will render its full support to implement the recommendations of the Strategy. We are also convinced that the lead implementing agency, the Uganda Export Promotion Board (UEPB), has sufficient momentum and thrust for implementing the Strategy.

We thank the development partners who continue to support trade for development and request them to lend all the necessary support towards effective implementation of the Engendered Export Strategy. We particularly wish to thank the International Trade Centre (ITC) for providing financial and technical assistance in formulating the Strategy. We also thank the following organisations/Institutions for their technical inputs in the formulation process of the strategy: Council for Economic Empowerment of Women in Africa (CEEWA), Makerere University Gender Department, Uganda Women Entrepreneurs’ Association Ltd (UWEAL), Enterprise Uganda, Uganda Investment Authority, Private Sector Foundation Uganda (PSFU) and National Planning Authority.

We now have the pleasure of endorsing and forwarding the Strategy for implementation.

Hon. Major General Kahinda Otafiire,
Minister of Tourism Trade and Industry,
THE REPUBLIC OF UGANDA.

Hon. Gabriel Opio,
Minister of Gender, Labour and Social Development,
THE REPUBLIC OF UGANDA.
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# Abbreviations

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<th>Description</th>
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<tbody>
<tr>
<td>BOU</td>
<td>Bank of Uganda</td>
</tr>
<tr>
<td>CBI</td>
<td>Netherlands – Centre for Promotion for of Imports, Netherlands</td>
</tr>
<tr>
<td>CEEWA</td>
<td>Centre for Economic Empowerment of Women in Africa</td>
</tr>
<tr>
<td>COBATI</td>
<td>Community Based Tourism Initiative</td>
</tr>
<tr>
<td>DDA</td>
<td>Dairy Development Authority</td>
</tr>
<tr>
<td>EDF</td>
<td>European Development Fund</td>
</tr>
<tr>
<td>EU</td>
<td>European Union</td>
</tr>
<tr>
<td>GOU</td>
<td>Government of Uganda</td>
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<tr>
<td>ICTs</td>
<td>Information Communication and Technology</td>
</tr>
<tr>
<td>IFC</td>
<td>International Finance Cooperation</td>
</tr>
<tr>
<td>ITC</td>
<td>International Trade Centre</td>
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<tr>
<td>MDG</td>
<td>Millennium Development Goals</td>
</tr>
<tr>
<td>MGLSD</td>
<td>Ministry of Gender, Labor and Social Development</td>
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<tr>
<td>MOES</td>
<td>Ministry of Education and Sports</td>
</tr>
<tr>
<td>MOF</td>
<td>Ministry of Finance</td>
</tr>
<tr>
<td>MoL</td>
<td>Ministry of Lands</td>
</tr>
<tr>
<td>MTTI</td>
<td>Ministry of Tourism, Trade and Industry</td>
</tr>
<tr>
<td>MUBS</td>
<td>Makerere University Business School</td>
</tr>
<tr>
<td>NAWU</td>
<td>National Association of Women in Uganda</td>
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<tr>
<td>NES</td>
<td>National Export Strategy</td>
</tr>
<tr>
<td>NPA</td>
<td>National Planning Authority</td>
</tr>
<tr>
<td>PSFU</td>
<td>Private Sector Foundation Uganda</td>
</tr>
<tr>
<td>R&amp;D</td>
<td>Research and Development</td>
</tr>
<tr>
<td>UCDA</td>
<td>Uganda Coffee Development Authority</td>
</tr>
<tr>
<td>UDB</td>
<td>Uganda Development Bank</td>
</tr>
<tr>
<td>UEPB</td>
<td>Uganda Export Promotion Board</td>
</tr>
<tr>
<td>UNBOS</td>
<td>Uganda National Bureau of Statistics</td>
</tr>
<tr>
<td>UNCCI</td>
<td>Uganda National Chamber of Commerce and Industries</td>
</tr>
<tr>
<td>UNBS</td>
<td>Uganda National Bureau of Standards</td>
</tr>
<tr>
<td>USSIA</td>
<td>Uganda Small Scale Industries Association</td>
</tr>
<tr>
<td>UDB</td>
<td>Uganda Development Bank</td>
</tr>
<tr>
<td>UWEAL</td>
<td>Uganda Women Entrepreneurs Association Limited</td>
</tr>
<tr>
<td>WCO</td>
<td>World Customs Organisation</td>
</tr>
<tr>
<td>WEF</td>
<td>World Economic Forum</td>
</tr>
<tr>
<td>WTO</td>
<td>World Trade Organisation</td>
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Executive summary

With the country’s National Export Strategy (NES) satisfactorily completed and launched in October 2007 under the patronage of H.E. the President, Yoweri Kaguta Museveni, Uganda presented an appropriate and opportune case for piloting the guidelines for strategy makers to incorporate gender dimensions into national export strategies. In the late 2007, the International Trade Centre (ITC) finalized its methodology (the ‘gender guidelines’) and complimentary material on gender sensitizing national export strategies to allow export strategy makers integrate a gender dimension into their export development efforts. Uganda was privileged to be chosen to pilot this methodology with the support of the International Trade Centre. In order to fulfill the dual objective of greater competitiveness and lasting socio-economic development, the implementation of the NES required a gender sensitive approach to unlock the untapped potential of Ugandan women and make their participation in the export sector more effective.

The process towards integrating gender into the NES took a multi-stakeholder consultative effort which included public, private, civil society actors and academia as well as development partners. Uganda Export Promotion Board (UEPB), being the premier institution in export development, led the process and worked closely with other national stakeholders and gender sensitive trade and business support networks. The Gender Strategy Team which included representatives from the NES priority sectors and cross-sectoral support services validated the processes at wider consultative sessions with technical and financial support from the International Trade Centre. Collaborating institutions provided valuable inputs to the strategy development through a highly consultative and collaborative approach that led to the selection of four sectors (coffee, tourism, commercial crafts and dairy) which will form the basis of the pilot projects. Detailed gender sensitive value chain analyses were undertaken and key cross-sectoral issues were identified and strategies designed to support the realization of the potential of women in these sectors.

The following are the existing cross-cutting sector constraints which were identified and have limited women’s participation in exports:

- Lack of access to affordable energy
- Unequal land accessibility
- Unfair commercial environment
- Lack of access to credit finance
- Lack of access to information
- Lack of export competence among women

These are some of the strategies which have been designed to address these issues at cross sector and sector levels:

- Expand export management and related skills
- Business counseling programmes for women by concerned agencies, ministries, private sector, associations, build women’s competences in financial management so that they can produce bankable projects and run their businesses with better financial literacy.
- Continuation of sensitization and affirmative support towards women entrepreneurs by empowering them in business through hand holding programmes, business coaching, mentoring and training programmes

The identified initiatives will be implemented by various agencies in line with the rolling out of the NES 3-year action plan.
Part 1

Introduction and rationale

1.1. The International Context

The issues of gender and women’s empowerment are receiving increasing attention internationally. Globally, gender equality is increasingly recognized as a key economic growth and competitiveness factor. The Millennium Development Goals (MDGs), in particular MDG 3 (reduce gender disparity in education, in access to and control of productive resources) provide a solid pillar on which to rally calls for gender empowerment.

“It is indeed very likely that there is a strong and positive correlation between Africa’s economic growth and the unleashing of female talent.”

Augusto Lopez-Claros, Chief Economist, World Economic Forum (WEF).

Furthermore Uganda ranks 50th out of 128 countries in the World Economic Forum (WEF) Global Gender Gap Index for narrowing the gender gap, behind South Africa (20), Lesotho (26), Namibia (29), Tanzania (34) and Mozambique (43), but ahead of Malawi (87), Zimbabwe (88) and Zambia (101).

Although there is limited disaggregated data by gender in economic activity and business operations in Uganda, it is generally acknowledged that women’s share in the ownership and control of productive resources is far less than men’s. Engendering of the NES, therefore, is a step in the direction of making exports work for the good of all; men and women alike. Some work needs to be done to put this goal into context relevant to gender issues and concerns of national plans such as the NES and to mobilize relevant stakeholders to ensure that the role of exports in development covers all sectors of the society. There is also need for in-depth integration of specific policies to ensure that gender needs are clearly addressed.

1.2. The Benefits of Engendering the National Export Strategy (NES)

With gender considerations more specifically addressed in the NES, new benefits are bound to accrue to the country. These will include:

• Increased real income for women, higher standard of living, higher export receipts and employment creation with the associated secondary and multiplier benefits for family life, health and education.

• Creation and strengthening of reliable partnerships for poverty reduction, especially in rural areas where over 80% of the poor live.

• Improved operating environment with enhanced productivity and more efficient functioning of the value chain, leading to reliable supply of inputs.

• Expansion of access to productive assets and economic opportunities for the marginalized groups.

• Mainstreaming of women and other marginalized groups into global value chains and multilateral trading systems.
1.3 Uganda’s Gender Profile: Key Facts

Uganda has an estimated population of 30 million people with women constituting almost 51%. There are numerous actors and institutions of relevance and substantial research has been undertaken at the micro, meso, macro and meta levels. Current evidence indicates that in Uganda the untapped potential is sizeable; for example:

- Of the economically active women, 88.2% are self-employed or unpaid family workers.
- Women own about 40% of private enterprises, mostly at the micro-enterprise, informal level.
- About 29.5% of women in business are already exporting.

Unfortunately, cultural influences have confined women’s role in development activities to the periphery. Their enormous contribution to economic development is not proportionately reflected in either the income gains or ownership and control of wealth. Available statistics show that women in Uganda are employed mainly in the agricultural sector which represents 72% of all women employed; 90% of all rural women work in agriculture compared to 53% of rural men. Women are also responsible for 90% of the total food production in Uganda and 50% of cash crop production. In addition, it has been revealed that women work longer hours (12-18) a day as compared to men (8-10). To make matters worse there are more women than men living on less than US$ 1 a day. Anecdotal evidence also indicates that more men than women are successful in credit application with women getting smaller credit amounts.

Women tend to face a wide range of systemic inequalities, including constraints to accessing income earning opportunities, access to education, information and training, remuneration of effort, as well as participation in decision-making. The current Land Act provides for women land rights in terms of ownership, inheritance and acquisition. However the level of access to and control over and use of productive land is still very low with only 7% of women owning registered land.

1.4 Current Government Policy and Strategy in Support of Export Development

The law in Uganda has endeavoured to make the ground even for both men and women. For instance, the Land Act provides for women land rights in terms of ownership, inheritance and acquisition, even though the reality is that only 7% of women own registered land. There is an affirmative action in education which has resulted in equal enrollments to primary and secondary education for boys and girls, although there is an increased dropout rate with girls. This has increased the number of female enrollment from 29.2% in 1990-91 to 45.2% in 2005-6 and led to females getting better jobs than they would ordinarily have, enabling the emergence of a cadre of women holding big management positions in both private and public companies. The country also has made concessions in political representation by setting aside vacancies for women in parliament and this has boosted their public image and contributed to better income to support their families, and greater participation in National development debates and programmes.

There exists an elaborate institutional support structure in the country which can be tapped to drive a vibrant gender empowerment process comprising public, private and civil institutions. There is even a fully fledged Ministry of Gender, Labour and Social Development that has, among other things, developed a National Gender Policy. What are lacking perhaps, are coherent approaches and strategies to pinpoint the specific needs of women. This is the gap this process seeks to fill with

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1 The Uganda Strategic Gender Assessment (National Gender Policy 2007)
2 Uganda Bureau of Standards (UBOS)
regard to export development. Other initiatives have included studies on gender and trade as well as capacity building efforts mainly supported by development agencies.

There has been recognition of gender issues in formulating government policy strategies such as the Poverty Eradication Action Plan (PEAP) 2002, which was revised in 2007. Gender-based NGOs and other institutions have been lobbying for mainstreaming of gender issues in national policies and strategies. However, the incorporation and implementation of the gender issues in trade are still in their infancy. Gender issues have not been firmly addressed in trade policy formulation although this could have a profound effect on women and the community at large. UEPB’s effort towards engendering the National Export Strategy is a significant milestone in empowering gender through trade and export development.
Part II
The strategy design: Process and scope

2.1 Key Stakeholders

With the coordination of Uganda Export Promotion Board (UEPB) and with technical and financial support from International Trade Centre (ITC), the participation of the following relevant stakeholders was instrumental and formed the core team:

- Government Ministries and departments, e.g. Ministry of Tourism, Trade and Industry; Ministry of Gender, Labour and Social Development and Ministry of Education and Sports;
- Civil society organizations for women, like Centre for Economic Empowerment of Women in Africa - CEEWA and Uganda Women Entrepreneurs Association Limited - UWEAL;
- Academia, such as Makerere University;
- The private sector and the export community from the twelve priority sectors, e.g. Federation of Uganda Employers, Private Sector Foundation and sector representatives;
- Other trade development support agencies like International Trade Centre.

The formulation of the engendered NES took a period of 5 months. It was launched by Hon. Janet Mukwaya, Minister of Trade, Tourism and Industries after which there was a breakfast meeting to inform the key stakeholders and request them to participate in the drafting of the position paper. A number of working retreats with sector representatives, several stakeholder meetings and a national symposium with key stakeholders to validate the draft document were held.

A larger working group (the Gender Strategy Team), including representatives from the NES priority sectors and cross-sectoral support services validated the processes at wider consultative sessions. These sessions included the private sector and the export community in the NES, Federation of Uganda Employers, Private Sector Foundation and sector representatives and other trade development support agencies like Uganda Bureau of Statistics - UBOS and Uganda Industrial Research Institute - UIRI.

On the basis of a consultative process, an initial gender audit and background analysis was undertaken to determine the current gender equality and competitiveness situation and to confirm the need for integrating a gender dimension. Based on agreed criteria, a few NES priority sectors were selected with the objective of undertaking detailed gender sensitive value chain analyses and identifying key cross-sectoral support services to realize the potential of women in these sectors. The selection of only four of the NES priority sectors was based on resource availability. These are sectors which will bring out the entrepreneurship potential of both women and men. The chosen sectors include: coffee, commercial crafts, dairy and tourism. These are expected to have the highest potential among the NES sectors to ease women’s integration into export business and move up to higher levels of the value chain. The impact and experience will nevertheless benefit and be replicable in the other sectors as well.

2.2 Where We Want to Be - The Vision

The National Export Strategy for Uganda has set as its vision to be:

“A dynamic and competitive export-driven economy for national prosperity and development”
Further to this vision and with respect to gender, the country aspires to achieve:

“A dynamic and competitive export sector with more participation of women”

The overall aim of engendering the NES is to ensure that it fully accommodates both genders so that it causes greater and better social and economic development. This will be achieved by pursuing the following specific objectives:

- To unlock the untapped potential of Ugandan women, and increase their contribution in export trade to contribute to the economic and social transformation of Uganda.
- To add greater value to the current NES initiatives, and yield competitiveness and developmental benefits beyond the set targets.
- To facilitate the achievement of the Millennium Development Goals (MDGs) which emphasize gender equality, in particular MDG 3 (reduce gender disparity in education, in access to and control of productive resources).
- To create gender sensitive export support policies and to improve and strengthen the capacity of export support institutions to provide relevant, targeted support services to women engaged in the export sector.

2.3 The imperative of a Gender-sensitive Approach to Export Development

The full impact of the export strategy is unlikely to be totally realized without the optimum participation of both men and women in Uganda. They have enormous untapped potential which has been impeded by lack of the necessary capacities. Therefore, integrating the gender dimension into the NES is a critical value capture that will enable women to take advantage of export trade as an opportunity for economic empowerment. It will also strengthen NES and make it more effective, leading to greater delivery of socio-economic gains.

The process will require changing attitudes to give more recognition to the role and contribution of women to the export sector in Uganda. To achieve good results, aligning the gender-sensitive NES process with other existing national gender efforts and initiatives is critical, as well as linking organizations which have vital roles to play in the export development process.

2.4 Where are we now? - An assessment

Export Performance (national and sectoral)

The export sector has experienced an annual growth rate of about 19% over the last five years (2002-2007). This is a considerable recovery given the declines experienced in 1990/91 and 1996/97. Merchandise exports which had stagnated for several years before, began picking up in 2002/03, reaching US$ 910m in 2005/06 (UBOS).

The sector’s non-traditional exports have grown with an upward trend and have surpassed traditional exports as the dominant export category. The major non-traditional exports include fish which fetched US$170m in 2004/05 and cut flowers, which rose six-fold from a little over US$5m in 1996/97 to US$32m in 2004/05. Cereals, hides and skins, soap and coco beans, and legumes have also been part of the key non-traditional exports.

The services sector where most women are grew by 13% in 2007/08 compared to 8.8% growth in 2006/07. With a total contribution of 51.5%, the services sector contributed about half of the total GDP in 2007/08. In the tourism sector, transport dominated with an increase of 18.8% in 2007/8 compared to 17.7% in 2006.
2.5 National Competitiveness and Gender Cross-cutting Issues

Many factors affect export competitiveness in Uganda and these factors affect men, women and people with disabilities differently. There are some cross cutting issues that affect the performance of the entire target export sectors. These include: infrastructure, energy, macroeconomic variables (e.g. exchange rates, commercial laws), quality and standards management, export management competence, production and trade finance. With gender mainstreaming being core to this strategy, addressing such issues from a gender perspective is of paramount importance for the success of the export sector.

Even though the above issues affect men and women, the latter are worse off on account of being less mobile and also having particularly demanding obligations which are hard to delegate. Women have faced historically disadvantaging circumstances. The traditional chores they have to handle often leave them more constrained, vulnerable and with their competitiveness compromised, hence the need to look at these issues with a gender lens. The following constraints have impeded gender performance in the export sector:

2.5.1 Border In

Border in issues refer to in-country capacity relating to competences, capabilities, knowledge and environment that enhance women groups in export business.

**Capacity and human capital development** - Women’s capacity relating to capabilities, skills and productivity is compromised by:

- Negative cultural attitudes and social discrimination towards women, which deny them access to vital skills and personal development.
- The traditional courses and training “assigned to women” have tended to be those with lesser rewards and lacking in development of robust and core competences.
- Lack of cumulative knowledge and experience translate into failure to get a good pool of women to manage big businesses and in particular exports.
- Women’s multiplicity of roles leaves them with limited time for continuous training, development, and strategic networking for business insights.
- Affirmative action in education is a recent development; there are many women who have previously been denied an opportunity to go to school.

2.5.2 Border Issues

**Energy** - The existing energy facilities are isolated, unreliable and costly. In addition, the level of rural electrification where most of the production takes place is still limited and not affordable to rural women. This makes it difficult for a woman to achieve productivity and achieve enhanced value options in the value chain.

**Land** - Women have traditionally been excluded from land ownership and control. It is only about 7% of women who own land. This limits their ability to offer collateral and raises the cost of doing business. The existing situation does not offer incentives for women to participate in the lucrative land market in the country and thus limiting their productive investment on land.

**Commercial environment** – In spite of the legal provisions, there is still silent discrimination against women in the regulatory and business environment. Women lack awareness and it is often difficult for them to find time in the midst of family commitments to redress this.
Infrastructure – Poor infrastructure is most noticeable in rural areas. The poor rural transport, the burden of obtaining water, firewood and agricultural labor rests with women. These impede the ability of women to mobilize factors of production and exploit natural resources.

2.5.3 Border Out
Market access issues and entry strategies – Lack of information limits women’s participation in foreign markets. The extent to which bilateral and other trade negotiations make recognition of gender issues is small. With increasing worldwide recognition of the need to mainstream gender issues into business, there is a general lack of gender focused bias. There is limited networking to exploit regional opportunities and international buyer-seller gender interactions.

2.5.4 Client priorities
Export competence - Women often tend to lack specific knowledge and skills in export trade and documentation. This leads to lack of confidence to venture into export markets and especially when coupled with culture and personal attitudes which have tended to make exports a man’s domain. Enterprising women at times have to contend with resentment and hostile treatment by spouses who may view their motives suspiciously. Many women do not always see their talents as tradable skills with business potential to be harnessed. Instead they treat them as God-given attributes and suffer from a form of inertia and/or status quo.

Trade information - Often compounded by low literacy levels and family commitments, women’s access to information is compromised. This affects their ability to respond to opportunities and to match products and services to buyer and market requirements.

Trade finance - Women face peculiar challenges in accessing credit facilities. They often lack collateral to offer to financial institutions. Further lack of competence makes it hard for them to prepare convincing business proposals to support applications. In addition, they are often required to seek spouse’s endorsement when applying for credit. They also tend to be more active in sectors that have traditionally been considered “un-bankable”.

Quality and Standards Management issues – Women’s financial position makes it difficult for them to afford quality and standards certification. It also compromises their ability to acquire appropriate technology to improve their products. There are very few women producers who have effectively integrated quality management procedures for their products, and worse still, since the producers are scattered, coordination and quality control become very hard and costly.

Other support services - Access to branding, packaging and labelling as well as transport logistics often pose greater challenges to women.

2.5.5 Institutional Issues
The existing trade support networks in the country have tried to build capacity of enterprises through lobbying, training and other business development programmes. However, their efforts are limited due to lack of resources, coordination and institutional capacity constraints. Some of the interventions are very costly and therefore not affordable by the women entrepreneurs. Many of the service providers are based in the city. This limits women, especially in the rural communities, to access the programmes. Furthermore, there are very few initiatives directly targeting women entrepreneurs and this has limited their participation in export trade.
The table below depicts the current institutional arrangement in place. It shows the constraints to women’s progress in export development as well as the impact consequential to those constraints:

**Table 1: Constraints to Women’s Progress in Export Trade Development**

<table>
<thead>
<tr>
<th>PERSPECTIVE</th>
<th>CURRENT SUPPORT STRUCTURES</th>
<th>CONSTRAINTS</th>
<th>IMPACT</th>
</tr>
</thead>
</table>
| Policy and Legislation | • Ministry of Gender, Labour and Social Development: The National Gender Policy 2007 is in place to gender mainstream programmes and Activities of Government.  
• National Women Council advocates for women empowerment.  
• The Land Act 1998 provides for increased access to and control of land by women. | • Gender policy has no plan of action and limited resources  
• Many women organizations remain largely as advocacy and lobbying groups.  
• The Land Act of 1998 does not adequately provide for spousal relation in control and consent on land matters at household level.  
• Land Act does not properly define property rights and equality at household level. | • Gender policy not adequately implemented, monitored and enforced.  
• Limited specific programmes exist for empowering women at grass-root level.  
• Cultural practices still prevail and constrain women’s control of land.  
• Where women have benefited, these are predominantly the elite who already have economic power.  
• Most of the reforms provided for in the Land Act of 1998 have remained unimplemented and have not improved women’s control of land. |
| Trade Facilitation   | • Registrar of Companies, UBOS, UIA, URA, UEPB and the Uganda Chamber of Commerce are in place to register companies and names, provide trade information, export competence development, customs documentation, and traders’ representation. | • Registration procedures do not provide for recognition of gender specific data.  
Services provided by these agencies are not tailored to the specific needs of women aspiring to export. | • Women have continued to miss out on export opportunities.  
• Very few women have been able to join export business.  
• There continues to be no deliberate policies to support women’s efforts in export due to lack of information.  
• It is difficult to disaggregate data and objectively measure its impact on women in business. |
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<tr>
<th>PERSPECTIVE</th>
<th>CURRENT SUPPORT STRUCTURES</th>
<th>CONSTRAINTS</th>
<th>IMPACT</th>
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</thead>
</table>
| Skills and export competence development | • UEPB runs a programme on export coaching for export consultants and has a target to ensure gender sensitive capacity development for export trainers.  
• UWEAL and NAWOU train women in Business skills and export.  
• Enterprise Uganda started the Strengthening Women Entrepreneurs Program (SWEP) which is a country-wide initiative to support women to develop their businesses to become more competitive.  
• Uganda Industrial Research Institute supports entrepreneurs in areas of Research and Development and quality management as well as sourcing of appropriate technologies and viable industrial production processes.  
• Affirmative action on education has created greater opportunities for women to access education and training facilities. | • Limited resources are available for conducting tailored training to women.  
• Women have limited time to attend long training programs.  
• Training programs tend to be inflexible and offered mainly in urban settings.  
• The dropout rate of young girls is still unacceptably high. | • Few women have benefited from these training programmes especially those in rural areas.  
• Fewer girls/women graduating with requisite skills.  
• Most women continue to do business without skills on better business management, export specific skills and business expansion. |
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<th>CURRENT SUPPORT STRUCTURES</th>
<th>CONSTRAINTS</th>
<th>IMPACT</th>
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</thead>
</table>
| Trade/Market Information | - UWEAL runs an Information resource centre for provision of trade market information to women entrepreneurs.  
- UWEAL runs information sharing network program through an electronic newsletter.  
- CEEWA opened up Telecentres in peri-urban areas to provide market information to women in the agricultural sector.  
- UEPB market information resource centre provides market information.  
- UWEAL pilots an Access for Information project for training women to use ICTs for trade information | - Information is mainly accessible to urban business women and rural women have not been adequately reached.  
- Resource constraints (to afford communication devices and TV/radios) and illiteracy among rural women.  
- Limited information dissemination capacity to reach rural areas where most women live. | - Limited access to information by women.  
- Many rural women are not able to pick information in good time to utilize it effectively.  
- Many women remain ignorant about opportunities in the export market.  
- Women continue to be exploited in the export value chain due to lack of information |
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<thead>
<tr>
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<th>CONSTRAINTS</th>
<th>IMPACT</th>
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</thead>
</table>
| Trade Finance | • UWEAL runs a small loan scheme targeting women producers and traders.  
• UWEAL runs an investment club and saving scheme which target support to women to invest and expand businesses.  
• PSFU runs a business development grant that targets SMEs from which women can access financing.  
• Enterprise Uganda has Women in Business training centered on business planning, access to trade finances and financial management.  
• Schemes available by financial institutions to lend to women.  
• Financing of exports can also be achieved by women through registration with the Warehouse Receipt System.  
• African Trade Insurance (ATI) provides trade related finance and insurance.  
• International agencies like IFC and other development banks provide guaranteed financing to women organizations.  
• Bank of Uganda provides export lines of credit under the Export Credit Guarantee Scheme (ECGS) | • Banks reluctant to lend to certain sectors e.g. agriculture and handicrafts.  
• Uganda does not have a development bank which is mandated as a special purpose vehicle for lending for development purposes.  
• Women lack collateral to offer banks.  
• Women lack business skills to prepare bankable project proposals.  
• Women lack confidence to approach banks for loans and are often required to take spouses along for endorsement.  
• Women and sometimes their affiliated business organizations lack information on these existing services.  
• Women in rural areas are so fragmented that even where a service exists access remains difficult.  
• Bank of Uganda and International agencies require sound practices in terms of proper books of accounts, credit worthy organizations and companies to access funds. | • Whilst loan financing is available, the uptake is unacceptably low.  
• Women businesses result in slow growth and expansion.  
• The mindset and credibility of women’s potential in business continues to be stereotyped. (Attitudes are slow to change).  
• Women continue to lose out on lucrative export orders of a sizeable demand due to lack of finance. |
Proposed Strategic Responses and Resources
This is a matrix that highlights strategic priorities and consideration for the strategy manager. It identifies objectives, performance targets, measurements and initiatives that have to be mounted to achieve the objectives. It is the management matrix that forms the basis of the Strategy Plan.

Table 2: Strategic Priorities and Considerations

<table>
<thead>
<tr>
<th>Objective</th>
<th>Measures</th>
<th>Target</th>
<th>Initiative</th>
<th>Lead Institution</th>
<th>Support Institution</th>
<th>Timeframe</th>
<th>Resources</th>
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<tbody>
<tr>
<td><strong>Border-In: Policy and Legislation</strong></td>
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<td>To mainstream the Uganda Gender Policy (UGP) into export sector.</td>
<td>Number of organizations within NES support and services delivery networks who embrace the principles and spirit of the UGP.</td>
<td>50% of NES focal point offices formally acknowledge tabling of UGP in their institutions by end of year 1 and 100% by year 2. 20% of the institutions commence formulation of their own gender policy in support of UGP by end of year 1</td>
<td>Promotional strategy (literature, website, media, events, etc) on NES and Gender to be compiled and distributed under joint championship of Ministry of Tourism, Trade and Industry (MTTI) Minister of Gender, Labour and Social Development (MGLSD).</td>
<td>UEPB</td>
<td>MTTI</td>
<td>MGLSD</td>
<td>3 Months</td>
</tr>
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<td>Land Act to be reviewed to reflect current realities.</td>
<td>Parliamentary procedures.</td>
<td>By next sitting of Parliament.</td>
<td>Draft legislation to adequately address the constraints that have been identified i.e. defining property rights at household level.</td>
<td>Ministry of Lands (MoL)</td>
<td>MGLSD</td>
<td></td>
<td>1 year</td>
</tr>
<tr>
<td>To effect a cultural attitude change towards women and property ownership rights.</td>
<td>The overall evaluation indicators (OEIs) as outlined in the UGP.</td>
<td>The NES Scorecard to incorporate OEIs directly relevant to export sector by end of year 1 and commence reporting on it.</td>
<td>The guiding principles of UGP to be visibly promoted in all levels of the society. (School, public meetings, etc); Gender equality; cross-cutting; affirmative action; household and family relations; and promotion of Gender and Development (GAD) and Women in Development (WID) approaches. The CICS subcommittee which oversees NES implementation is to play its part in achieving this initiative.</td>
<td>Offices of the President and Prime Minister.</td>
<td>MGLSD, MoL, Ministry of Education and Sports (MoES), CICS.</td>
<td></td>
<td>On-going and to continue for 2 years</td>
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<td>Objective</td>
<td>Measures</td>
<td>Target</td>
<td>Initiative</td>
<td>Lead Institution</td>
<td>Support Institution</td>
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<td>Resources</td>
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| To enhance rural women’s capacity to increase volumes of production with better quality and prices. | Number of product clusters formed in key sectors  
Number of clusters servicing focal export supply centres. | At least four clusters in each district of Uganda with at least 2 per sector of priority within two years. | Initiate cluster formation process with lead women enterprises and lead women groups and associations.  
Encourage women to engage in value addition and branding in order to tap into the growing market and finally compliance with voluntary market standards. | UWEAL            | NAADS, PSFU, CEEWA, CICS, Local governments, NPA, MAAIF, UIRI. | 3 years         | US$150,000 |
| To develop a system of gender equity measurement and representation       | Gender classification                                                                               | All service providers in the commercial environment to establish a system within 2 years. | The institutions involved with key services e.g. licensing, company registration, training, funding to introduce gender classification and reporting. | UBOS             | UEPB, Chamber of Commerce, URA, Registrar of Companies. | 2 years         | US$20,000  |
| To have a streamlined commercial Environment                               | Length of time taken for women to register business, obtain license and commence operations.       | Improvement on the current average time taken by 40%.                                      | Instil a customer relationship management system within the service providers.  
Establish focal points for service provision in the rural areas.  
Partner with the Chamber of Commerce contact offices countrywide to increase district and local authority registration of businesses for women | UEPB             | UEPB, Chamber of Commerce, Registrar of Companies, UIA. | 3 years         | US$40,000  |
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<th>Support Institution</th>
<th>Time frame</th>
<th>Resources</th>
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<tbody>
<tr>
<td>To ensure that women have adequate information in business registration, licensing and commercial justice</td>
<td>Increase information access on business registration</td>
<td>Enhancing linkages and coordination between business registration agencies and women business support organizations,</td>
<td>To provide a range of appropriate business development services (BDS) that are flexible (modular, based on ability to pay, offer different modes of delivery, etc)</td>
<td>PSFU, UEPB, UWEAL, CEEWA, UEFB, NAWOU, PSFU</td>
<td>3 years</td>
<td>US$ 30,000</td>
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**Border In: Client Priorities - Skills and export competence development**

<table>
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<tr>
<th>Objective</th>
<th>Measures</th>
<th>Target</th>
<th>Initiative</th>
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<th>Resources</th>
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<tbody>
<tr>
<td>Develop and strengthen clusters for sectors that present high potential for women to export</td>
<td>Number of product clusters formed in sectors of Coffee, Commercial crafts, Dairy sector and Tourism</td>
<td>At least 4 clusters in each district of Uganda with at least 2 per sector of priority in 2 years</td>
<td>Initiate cluster formation process with lead women enterprises and lead women groups and associations</td>
<td>UEPB, UWEAL, NAADS</td>
<td>NPA, UEPB, Enterprise Uganda, UWEAL, CEEWA, NAWU, MAAIF, PSFU, CICs, Secretariat, Local Governments</td>
<td>3 years</td>
<td>US$ 100,000</td>
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<td>Objective</td>
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<td>To enhance the managerial competitive capability of both women and men in the export markets</td>
<td>Number of women and men exporters that have received export management training. Improved profitability and performance of export companies owned by women.</td>
<td>200 exporters trained in a year with 50% women. One cluster trained per year per region. Survival rate of women companies in the export market over a period of 3 years.</td>
<td>Identify exporters for training and sensitize them on the importance of enhancing their managerial skills. Baseline study carried out in year 1, and thereafter annual assessment studies to measure the gender impact and growth indicators.</td>
<td>Enterprise Uganda</td>
<td>UEPB, UWEAL, NPA, MTTI, PSFU, UNCCI, USSIA</td>
<td>1 year</td>
<td>US$ 100,000</td>
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<tr>
<td>To improve the technical competences along the production value chain</td>
<td>Number of exporters that receive technical training and the proportion of women involved</td>
<td>60% of women involved reporting productivity, profitability and efficiency</td>
<td>Regularize and coordinate practical training programmes addressing export related issues along the value chains.</td>
<td>UEPB</td>
<td>Enterprise Uganda, UWEAL, BSOs, PSFU, UNCCI, USSIA, DDA, DDA, UTB, UCDA, SNV</td>
<td>2 years</td>
<td>US$ 150,000</td>
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<td>Objective</td>
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<tr>
<td>To build entrepreneurial competences among aspiring, potential and existing women exporters</td>
<td>Growth in the number of women joining the export sector</td>
<td>40% of participants in each training programme to be women</td>
<td>Training programmes in basic business management and entrepreneurship development. Introduce an export trade module into the entrepreneurship syllabus in secondary and post-secondary school curriculum targeting young girls and boys. Expand export management related skills and business counselling, mentoring and attitude change programmes for women.</td>
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<td></td>
<td>Improved performance among existing women exporters</td>
<td>Increase the number and value of exports by women by 40%</td>
<td></td>
<td>MOES</td>
<td>MUBS, UEPB, Enterprise Uganda, UWEAL, USSIA</td>
<td>1 year</td>
<td>US$ 50,000</td>
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<tr>
<td>To build capacity through training of more women and men in export quality management</td>
<td>Number of quality assurance managers by gender</td>
<td>For every training, to have a 50/50 representation for men and women</td>
<td>Enabling women organizations integrate quality management training in their businesses. Introduce total product quality management programmes at all levels of the value chains with a strong sector regulator. Set up common facility centers for standardized value addition and quality control in each region in the country, as replicable pilots in each sector.</td>
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<td>Evidence of improved product standards</td>
<td>At least 20 women owned businesses to be certified by UNBS within the year</td>
<td></td>
<td>UNBS, UEPB</td>
<td>UNBS, MAAIF, MOF, DP, DDA, UCDA, UTB, USSIA, Chemiphar, SGS, and other laboratories</td>
<td>2 years</td>
<td>US$ 250,000</td>
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<td>Target</td>
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<td>Support Institution</td>
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<td><strong>Trade and Market Information</strong></td>
<td>Data bank with up-to-date market information</td>
<td>Atleast 50% of business women and support organizations having access</td>
<td>Establish a resource person or desk office for market research</td>
<td>UEPB</td>
<td>MTTI</td>
<td>2 years</td>
<td>US $ 165,000</td>
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<td></td>
<td>Number of established trade information systems that meet the needs of women to export</td>
<td>Regular and instant access to current market information</td>
<td>Harmonize existing information systems for easy utilization</td>
<td>UBOS</td>
<td>UNBS</td>
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<td>At least three international sources subscribed to by women organizations</td>
<td>Link women producers and exporters to RISE and TRACE projects</td>
<td>NPA</td>
<td>URA</td>
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<td></td>
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<td>Two complimentary information systems built for women (CMIS, SMS Price) such as CEEWA Telecentres</td>
<td>Enhance SMS pricing mechanism and enabling women in priority sectors receive information.</td>
<td>PSFU</td>
<td>UCA</td>
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<td>Enter into agreements with information dissemination media and complimentary portals/websites to tailor information package in simple and usable form by women at all levels of the value chain.</td>
<td>UWEAL</td>
<td>CEEWA</td>
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<td></td>
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<td></td>
<td></td>
<td>UEPB</td>
<td>Private Information Service Provider</td>
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<td>Objective</td>
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</table>
| To widely disseminate market information to reach to grassroots producers | Number of women exporters and women producers receiving information       | 4 training events per year targeting 30 women potential and actual exporters with trade information | Establish a training calendar and circulate it to clients and linking it with existing programmes at UWEAL  
Develop a training proposal and seek project financing domestically and from international agencies (1 year)  
Encourage the usage of ICT in trade information, management and dissemination. | UEPB              | MTTI, MFPED, MTTI, BOU Producer Associations MOLE UWEAL USSIA        | 2 years       | US $ 6 000         |
|                                                                          | Number of ICT based information management training seminars conducted for women |                                                        |                                                                                                                                                                                                          |                  |                     |            |           |
| Trade Finance                                                            | Diversity of collateral instruments including group lending favourable to women | At least 3 trade finance schemes accessible to women                  | Promote the use of commodity based instruments and trust amongst cooperative society members  
Enabling women to get certification of suitable warehouses and promoting the warehouse receipt systems to women associations. | BOU              | UDB UWEAL Women Finance Trust, Commercial Banks, PSFU | 3 years       | US $ 20,000        |
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<tbody>
<tr>
<td>To create long-term export financing accessible to women</td>
<td>Exporters receiving long term financing at favourable terms which will allow them to fully develop their businesses</td>
<td>Development finance schemes available to women groups that are operational within 2 years</td>
<td>Strengthen women associations’ financial initiatives and village banks to lend to women borrowers. Such as SACCOS, Rural finance schemes.</td>
<td>BOU</td>
<td>Microfinance Ministry, Commercial Banks, UDB, UEPB, Women organisations</td>
<td>2 years</td>
<td>US $ 50,000</td>
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<td>Diversity of credit facilities that are tailored to women run businesses</td>
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<td>Introduce and encourage commercial lending to women with no collateral.</td>
<td>GOU</td>
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<td>Establish loan guarantee schemes for women groups and entrepreneurs in public and the private sector agencies.</td>
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<td>Gender groups to make formal presentations to financial institutions to motivate preferential packages for women exporters- demonstrating women’s potential.</td>
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<td>Support women to access credit insurance through ATI (African Trade Insurance).</td>
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<td>To increase trade finance outreach</td>
<td>Geographical spread of microfinance institutions in the country targeting women producers and entrepreneurs</td>
<td>At least 2 outreach drives per district every year.</td>
<td>Design an outreach plan focusing on specific finance needs of women, providing loan capital to the sector where the potential of women has been identified.</td>
<td>BOU</td>
<td>Microfinance Ministry, Commercial Banks, UDB, UEPB, Women organisations</td>
<td>2 years</td>
<td>US$ 150,000</td>
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<td>Objective</td>
<td>Measures</td>
<td>Target</td>
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<td>To enhance capacity of women to formulate bankable project proposals</td>
<td>Number of project proposals suitable for capitalization</td>
<td>At least 50 women trained in bankable project proposal development every year.</td>
<td>Capacity building and advisory services to producers and exporters. Regional workshops/training on business proposal formulation. Development of new training modules to address specific financial competency issues.</td>
<td>PSFU</td>
<td>MUG, UEPB, Microfinance Ministry, Women organisations</td>
<td>1 year</td>
<td>US $ 200,000</td>
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<tr>
<td>Number of producers and exporters receiving business training</td>
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Part III
The way forward - The export development strategy

3.0 Future orientation and overall focus (gender sensitive weighting of stakeholder perspectives)

The engendered NES will concentrate on four priority sectors which include Commercial Crafts, Coffee, Dairy products and Tourism. These sectors are deemed to have high potential to mainstream gender and vulnerable groups into export trade and were selected depending on the following criteria:

Table 3: Criteria for determining Sectors

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Score (%)</th>
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<tbody>
<tr>
<td>Sectors with contribution and relevance to national socio-economic goals, including greater participation of women in the economy and exporting.</td>
<td>30</td>
</tr>
<tr>
<td>Sectors where women have demonstrated high potential for entrepreneurship\investment but their capacity is hampered by many factors such as finance, information and skills</td>
<td>25</td>
</tr>
<tr>
<td>Sectors experiencing high level of growth in international market, with women’s participation visible in their value chains, e.g. Dairy and Tourism.</td>
<td>20</td>
</tr>
<tr>
<td>Sectors with high potential of value addition and where women have capacity for growth and sustainability.</td>
<td>15</td>
</tr>
<tr>
<td>Sectors where production resources (competitive advantage) are readily available but not equitably shared by men, women and vulnerable groups.</td>
<td>10</td>
</tr>
</tbody>
</table>

3.0.1 Uganda’s Coffee export trends

Coffee exports from Uganda largely go to Switzerland, Germany, Sudan and Singapore. Coffee exports have been growing positively for the last 5 years. This trend is partly due to the opening of the Southern Sudan market and the growing Fair Trade Market in the EU countries such as Germany. With regard to future trends, overall rising global demand for agricultural products, especially foods and beverages, exports are expected to continue growing in the foreseeable future. Uganda’s ability to tap into this growth will largely be dictated by improvement in value addition, branding, tapping into the growing market for organic coffee and finally compliance with voluntary market standards, such as those of Fair Trade and Global-GAPs.

3.0.2 Commercial Crafts in exports

Globally, the value of trade in handicrafts has increased from approximately US$ 75 billion in 1999 to about US$ 235 billion in 2005 (Indian Exim Bank, 2000 and Tribune India, 2005), representing a 213% increase in 6 years. The principal export destinations for all handicrafts in the world have been identified as USA, Germany, France, UK, Japan, Italy, Canada and Netherlands with over 31% of export value in 2003-2004 being accounted for by the USA alone. Some of the main export products from Uganda are bags, hand-made dolls, baskets and wall hangings made by women artisans.
3.0.3 Tourism Sector in exports
The total annual number of visitors (citizens and foreigners) to the national parks in Uganda increased during 2007 to about 127,000 persons, compared to about 110,000, in 2006. This reflects an increase of 15.5%. With the new phenomena, education tourism has become one of the number one areas of foreign exchange earnings for the country. The leading tourism foreign market for Uganda is Africa (Kenya, Rwanda and Tanzania) with 74% of the market share. Europe (United Kingdom, Germany, Netherlands, Italy, Belgium, Sweden, Denmark, France, and Norway) is the second largest market with 13% of market share. Other growing markets are USA, Canada, Asia and the Middle East.

3.0.4 Dairy in exports
Trade in milk and other dairy products takes place mainly in the neighbouring markets with Sudan being the major importer of Uganda's milk, followed by DR Congo and Kenya. Sudan presents the highest growth rates and therefore a favourable market for Uganda's milk exports. The world demand for milk and cream stood at US $10.7 billion in 2006 and grew by 11% between 2002 and 2006 (DDA Performance Report February 2008). Trade in volumes grew by 5% in the same period. Netherlands, Algeria, Saudi Arabia, Indonesia and Mexico are the major importing countries of milk and cream.

3.1 Prioritization of Gender-sensitive Strategic Considerations
In order for strategy to be relevant, we must take into account the expectations and priorities of the different stakeholders. This unifies stakeholders around a common vision and helps them to identify all the key issues affecting export competitiveness and shaping development prospects. The four perspectives which have been considered here are the development perspective, competitive perspective, client perspective and institutional perspective, and these have guided us to formulate options which will improve the performance of gender in national exports.

3.1.1 Coffee Sector
Coffee Beans
Coffee is the most essential cash crop in Uganda, playing a major role in the livelihood of poor people in many rural areas of the country. In developing countries over 20 million households produce coffee and it is sometimes the only source of income, contributing to export earnings of more than 55%. Furthermore, The Fair Trade Foundation, 2006, noted that worldwide, about 100 million people depend on growing, processing, trading and retailing coffee for their livelihood. Therefore, in such countries, coffee is not only a source of livelihood to the farmers but also a source of foreign exchange. There are two types of coffee grown in Uganda: Arabica and Robusta which are grown in the ratio of 1: 4. Arabica coffee is more competitive on the international market because of its superior quality. However, Uganda Robusta coffee too has intrinsic quality attributes which even attract a premium on the international coffee market.

Coffee global market
Coffee is grown and exported by more than 50 developing countries including Uganda, but the major consumers are all industrialized countries like USA, EU and, more recently, Japan. Globally, coffee is the second major traded commodity to oil and thus plays a vital role in the balance of trade between developed and developing countries. World consumption of coffee is projected to increase by 0.4% annually. Coffee consumption in developing countries is projected to grow from 1.7 million tonnes in 1998-2000 to 1.9 million tonnes in 2010. World coffee traded volumes stood at approximately 6 million metric tonnes in 2006 with a value of US $15 billion. Trade change indices show an increase in traded volumes by 3% over the previous 4 years with increasing values by 21 % over the same period.
Statistics for world leading importers (see Table 1) indicate positive growth trends in virtually all the top 5 importing countries, reflecting a steady recovery in international coffee prices.

**Table 4: Total world Imports and leading Importers of Coffee Beans – 2006**

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>‘World’</td>
<td>15,040,510</td>
<td>21</td>
<td>6,393,469</td>
<td>3</td>
</tr>
<tr>
<td>‘United States of America’</td>
<td>3,220,454</td>
<td>20</td>
<td>1,320,993</td>
<td>2</td>
</tr>
<tr>
<td>‘Germany’</td>
<td>2,346,024</td>
<td>25</td>
<td>1,045,599</td>
<td>4</td>
</tr>
<tr>
<td>‘Japan’</td>
<td>1,021,725</td>
<td>18</td>
<td>428,302</td>
<td>2</td>
</tr>
<tr>
<td>‘France’</td>
<td>919,395</td>
<td>18</td>
<td>313,647</td>
<td>-5</td>
</tr>
<tr>
<td>‘Italy’</td>
<td>872,800</td>
<td>22</td>
<td>438,862</td>
<td>3</td>
</tr>
</tbody>
</table>

**Graph 1**

Uganda’s Coffee Markets and Export Trends
Coffee exports from Uganda largely go to Switzerland, Germany, Sudan and Singapore (UEPB, 2007). Coffee exports have been growing positively for the last 5 years. This trend is partly due to the opening of the Southern Sudan market and the growing Fair Trade Market in the EU countries such as Germany. With regard to future trends, overall rising global demand for agricultural products especially foods and beverages, exports are expected to continue growing in the foreseeable future. Uganda’s ability to tap into this growth will largely be dictated by improvement in value addition, branding, tapping into the growing market for organic coffee and finally compliance with voluntary market standards such as those of Fair Trade and Global-GAPs.

**Roasted Coffee**
World traded volumes for roasted coffee in 2006 stood at 587 million metric tonnes with a value of US$2.9 billion. Trade change indices show an increase in traded volumes by 12% over the previous 4 years with increasing values by 24% over the same period. Statistics for world leading importers (see Table 3) indicate positive growth trends in virtually all top 5 importing countries. The roasted coffee market is also characterized by relatively stable demand less often affected by fluctuating prices. It is also tightly controlled by leading coffee roasters.
Table 5: Leading World Importers of Roasted Coffee

<table>
<thead>
<tr>
<th>Importers</th>
<th>Value imported in 2006, in USD thousand</th>
<th>Annual growth in value between 2002-2006, %</th>
<th>Quantity imported in 2006</th>
<th>Annual growth in quantity between 2002-2006, %</th>
</tr>
</thead>
<tbody>
<tr>
<td>World</td>
<td>2,898,944</td>
<td>24</td>
<td>587,268</td>
<td>12</td>
</tr>
<tr>
<td>France</td>
<td>446,733</td>
<td>28</td>
<td>89,761</td>
<td>10</td>
</tr>
<tr>
<td>Germany</td>
<td>269,067</td>
<td>31</td>
<td>42,390</td>
<td>15</td>
</tr>
<tr>
<td>Canada</td>
<td>268,227</td>
<td>22</td>
<td>54,559</td>
<td>13</td>
</tr>
<tr>
<td>United States of America</td>
<td>232,129</td>
<td>15</td>
<td>40,325</td>
<td>4</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>144,714</td>
<td>23</td>
<td>36,726</td>
<td>23</td>
</tr>
</tbody>
</table>

Uganda’s Export Performance
Uganda’s export of roasted coffee still remains insignificant due to limited efforts on value addition in the country. However, isolated efforts are visible with different companies attempting to market roasted coffee such as Rwenziro Coffee, Crane coffee with a roaster in China and Source of the Nile Coffee under Fair Trade schemes. There are, however, interesting value addition development efforts that could be supported with large scale investments. As a forecast, growth rates both in value and volumes are expected to continue for the foreseeable future and as such investments towards commercialization of coffee roasting business projects could result into substantial earnings. However, to realize this, it requires that the government continues to negotiate for preferential tariff treatment to guard against tariff escalations for exporters of value-added roasted coffees.

Women in the Coffee Value Chain
In the coffee sector, the role of women is profound as they offer the bulk of coffee producers and they provide all the labour in harvesting and drying. Coffee marketing and sale is done largely by men in a household. Coffee is a key cash crop at household level and men tend to protect this sector for their own benefits. Coffee production requires expansive land and given the limited access to land by most women, this sector has largely remained a benefit of men. An interesting observation from several coffee importers in Europe is that cooperation with women exporters is often much appreciated. Women exporters are often very careful about the documentation, respond quickly to requests, deliver products as agreed and often listen to advice.

Although most women are found at the farm level, strong women are present at all levels of the value chain. For example at Processing: Zigoti- Rose Kato, Ugacof- Rose Karigirwa, Export: Robina of IBERO, Management: Jane Nakandi of UCDA, Roasters: Zicafe Rose Kato, Cafes: Café Pap - Jolly Ngabirano.

Key success factors
In order for women to be successful in the coffee sector, they must get engaged in value addition programmes and brand their coffee in order to tap into the growing market for organic coffee and those of Fair Trade. Other aspects to put into consideration are:

- Quality Management: This ranges from farm level (soils, fertilizers, spacing, weeding, pruning, plucking), processing (drying, sorting) to grading and packing.
- Finances: Trading in coffee necessitates availability of funds at each level of the value chain.
- Access to higher value market.
- Direct link to buyers abroad.
- Inside knowledge of foreign markets.
3.0.2 Current Coffee Value Chain

**COFFEE FARMER**
- Raw, unprocessed or semi-processed (using both dry method and wet method) up to parchment

**BUYING CENTRES** (middlemen)
- Unsorted cherries; mainly dry semi-processed (>98%)
- 3.5 million people depend on coffee for their livelihoods
- Arabica (20%) mainly grown in Eastern Uganda, Robusta mainly grown in the South/Southwest (80%)
- Current production is about 2 million bags, mainly due to poor agricultural practices leading to low yields
- Smallholders planting less than an acre
- Yield estimate 1kg per tree and declining (CSF) Arabica (0.6 to 0.8 kg per tree)
- High incidence of improper picking practices (unripe cherries) Loss of about 5-10% (CSF)
- Rudimentary production methods
- Smallholder has limited access to seedlings (CSF)
- Typically, the farmer sells individually to buying centre
- Associations are non-existent (CSF)
- Cherry size is declining (variety of factors)
- Coffee wilt disease severely impacted robusta production, forcing re-planting interventions

**TRANSPORTER**
- Middlemen solicit bulk coffee from different sources to increase volumes (quality invariably falls)
- Little price information available to farmers
- High price margins vary significantly, depending on who incurs the cost of transportation to the next processing facility
- Middlemen are highly speculative. Their advantage is to find bulk for the companies to buy.
- Middlemen have limited control of the pricing.

**COMPANIES/EXPORTERS**
- Pre-selecting and depulping, fermentation, washing
- Hulling, cleaning, grading, color sorting, standardization
- Export ready green beans

**BROKERS**
- Roasting, brewing, blending, packaging

**ROASTER**

**WHOLESALER**

**RETAILER**

- Expensive and constrained marketing
- Complex distribution channels in the EU and US markets
- Expensive and complex branding options
- Growing specialty coffee segment commanding premium prices

**Challenges and Issues**
- Inadequate access to skilled labour
- Anemic supplies of standard coffee
- Inefficient sourcing supply chain
- Limited number of indigenous sector players. Sector largely characterized by multinationals.
- Limited incentives to roast and pack finished coffee
- Lack of roasting infrastructure
- Little investment in roasting technology
- Price volatility
- Loss rate of approximately 15% - 20% due to waste because of defects, chalky whites, stones, etc (CSF)
- High operating costs (electricity, water etc) (CSF)
3.2.1 Engendered Coffee Value Chain

- Improved women skills in post harvest handling (drying and sorting).
- More women as direct farm owners and coffee producers through cooperatives and women organizations.
- Better land ownership and control at household level with more women participation.
- Improved women’s access to finance to invest in coffee, acquire land and access modern production methods (from hand-hoe to tractor).
- Increased women access to seedlings and high yielding varieties.
- Re-established producer groups run by women (co-operatives) to sustain high levels of production.
- Intensified and sustained re-planting initiatives and sensitisation of women on the coffee wilt.
- Accessible market and price information for farmers.
- Increase organically certified land.
- Introduce good traceability practices.

- More women in bulk through the commodity exchange (warehouse receipt system) to ensure quality and supply and better sources of trade finance.
- Women accessing skilled labor.
- Improved sourcing and coffee supply chain.
- Women intensively engaged in investment in coffee roasting and processing.
- Increased branding initiatives for women produced coffee and acquisition of packaging technology.
- Improved modern processing and roasting technology for women.
- Supported certification of production systems especially organic and Fair-Trade Coffee.
- Facilitated women access to market, product information and capital finance.

- Increased export promotion and marketing by women groups.
- Women engagement in distribution channels in the EU and US markets (partnerships with supermarket chains and wholesalers).
- Aggressive brand promotion in the EU and the US by women exporters.
- Emphasis is on specialty coffee (Fair Trade, organic, etc.) to cater for a growing segment of organic and specialty consumers.
The selection of sectors for the strategy was largely based on their performance in international markets and the participation of women in the value chain. However these sectors present significant gaps for effective participation of women to the higher levels of the value chain, and these gaps are taken as the key considerations that need to be addressed based on different perspectives as below.

**Table 6: 3.2.2 Key Considerations for the Coffee Sector**

<table>
<thead>
<tr>
<th>Perspective</th>
<th>Issues/Gaps</th>
</tr>
</thead>
<tbody>
<tr>
<td>Development Perspective</td>
<td>1. Development perspective</td>
</tr>
<tr>
<td><strong>Poverty alleviation and employment</strong></td>
<td>Promoting gender equality in the coffee value chain will contribute to poverty eradication especially of women who are estimated to contribute more than 60% of production. Developing specific programmes for them will be one of the avenues of empowering and enhancing their ability to transform their capabilities by lifting their status in the value chain.</td>
</tr>
<tr>
<td><strong>Regional development</strong></td>
<td>About 70% of economically active women work in rural areas, especially in agricultural related activities like coffee farming. Most of the women work as unpaid workers or as domestic housewives without any pay. There is need for designing initiatives which directly address rural challenges, especially at household level where women own no land.</td>
</tr>
<tr>
<td><strong>Environmental Sustainability</strong></td>
<td>Women in the coffee sector work long hours and sometimes under unsafe environmental conditions with exposure to environmentally hazardous effects like pesticides. Working conditions for women in the coffee sector include open fields and dusty environments during the sorting stage.</td>
</tr>
<tr>
<td>Perspective</td>
<td>Issues/Gaps</td>
</tr>
<tr>
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<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Competitiveness</td>
<td>2. Border-in gear</td>
</tr>
<tr>
<td></td>
<td>• There are limited efforts geared towards developing women’s capacity relating to production capabilities and skills with regard to productivity, volume, quality and value addition.</td>
</tr>
<tr>
<td></td>
<td>• Capacity diversification for women is still limited. Cultural attitudes towards a woman’s role are still strong with men dominating and taking decisions to trade and manage wealth on behalf of the family. This has limited women’s ability to produce new products by adding value to them.</td>
</tr>
<tr>
<td></td>
<td>• Human capital development is another critical issue which has limited women’s participation in the sector. There is biased human resource development, social discrimination, lack of self awareness and self confidence among the women forcing them to be employed in the menial jobs like picking and sorting which command small wages.</td>
</tr>
<tr>
<td></td>
<td>3. Border gear</td>
</tr>
<tr>
<td></td>
<td>• Transport and expeditious business procedures affect women’s involvement in the business. Women producers are fragmented and individualized and the cooperative unions are dominated by men who take decisions.</td>
</tr>
<tr>
<td></td>
<td>• Trade facilitation issues involving regulations, administrative procedure and documentation requirements affect women a lot due to their numerous tasks (production, reproduction, and community work) and technical knowledge.</td>
</tr>
<tr>
<td></td>
<td>• The cost of doing business is sometimes too high for an ordinary woman to survive in a business environment. For instance, wet processing of coffee is expensive and needs expertise and technology which is not readily available.</td>
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<tr>
<td></td>
<td>4. Border-out gear</td>
</tr>
<tr>
<td></td>
<td>• Market access for women is still weak due to the fact that they are fragmented and therefore lack opportunities to network since they stop at farm level.</td>
</tr>
<tr>
<td></td>
<td>• There is limited gender sensitive efforts to cater for and promote the preparation of women to enter the coffee sector by giving them trade information and facilitating them to make initial contacts with potential buyers.</td>
</tr>
</tbody>
</table>
## Perspective | Issues/Gaps

### 5. Sector and client priorities
- Currently, at the primary level, coffee farmers are mainly women who do the actual production. At the secondary processing level, women do the hand picking to remove defects. The export level is mainly dominated by men with only one woman out of 20 exporters.
- There is great need to develop specific programmes for current exporters and other potential and aspiring women as one of the avenues of empowering and enhancing their ability to engage into coffee exports.

### 6. Business Competency
- Generally, women are more entrepreneurial than men. However, in the coffee sector, women have challenges of confidence and lack of skills to negotiate with potential partners.
- Since women are found at lower levels of the value chain, the illiteracy levels are very high. Also, centres of training/support services are very far and limited, impeding women’s chances of gaining skills.

### 7. Trade information
- There is limited access to information on standards, quality management and packaging. Family burden constraints limit women’s time and resources to gain information and useful networks.

### 8. Trade finance
- There is lack of trade financing for women due to lack of collateral. Even though women are better credit worthy than men, a lot of women are still financially illiterate and therefore can’t manage large finances which are needed in the coffee sector.
- Although coffee is one of the sectors which have national emphasis, there is lack of government support for specific development fund for women entrepreneurs. Also, women lack the competence to develop bankable projects.

### 9. Quality Management
- Quality is one of the key success factors for the coffee sector ‘from seed to cup’. However, due to dry processing, the coffee aroma reduces. Also, since women are the majority at the drying and sorting stage, they control the quality of the coffee; however, most of the coffee is dried on the ground, leading to contamination. There are also challenges for storage facilities at husbandry level.

### 10. Other support
- Since, currently, women mainly stop at lower levels of the value chain within the coffee sector, issues of research and development, packaging, labelling, document handling and customs don’t affect them much. However, there is need to develop competences and provision of support to existing, aspiring and potential coffee exporters in these areas.
### Perspective

#### Institutional perspective

<table>
<thead>
<tr>
<th><strong>Issues/Gaps</strong></th>
<th><strong>11. Strategy support network</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• There are several institutions which directly support the coffee sector, some of which are Coffee Development Authority and East African Finer Coffee Development Association. However, there is lack of targeted support for women since they are a minority in the sector. There is also lack of institutional support to reach out to rural communities where coffee is grown.</td>
</tr>
</tbody>
</table>

|                | **12. Service delivery network** |
|                | • Numerous organizations offer business development services to build capacity in enterprises through training, counselling, mentoring and market access programmes. However, there are limited programmes specifically done for women in the coffee sector. Another challenge is the fact that most of the providers are urban based and therefore the programmes don’t benefit the rural communities where coffee is produced. Furthermore, because of limited financing, the women cannot afford the services. This has led to stagnation or failure of their businesses. |

### 3.3 Commercial Handicrafts

Handicraft production in Uganda is predominantly a cottage industry activity engaged in by the rural youth of both genders but largely by the women folk to supplement household incomes. Women contribute over 70% of export revenues in handicrafts in Uganda and they make over 90% of handicraft producers. The village producers who are mainly women sell their wares to domestic buyers or directly to domestic users and tourists. The domestic buyers serve as market intermediaries who sell on the local markets or to exporters or trade directly on the export market. Uganda’s handicraft export trade is largely informal, marked by inconsistent and ad hoc market entry approaches and inadequate market distribution networks. Many handicraft exporters have burnt their fingers while testing the market because of the constraints at production and marketing.

The sub-sector is characterized on the production side by low production levels, fragmented, unstructured, individualized production systems, inadequate supply system of raw materials, lack of specialization, inconsistent product standardization, design and quality, and inadequate design skills. At the organizational and marketing levels, the sub-sector is constrained by lack of vibrant national industry associations, inadequate support for marketing and promotion, insufficient market information and dissemination, high freight charges and inadequate capitalization. The artisans have access to very little or no technical and artistic advice for product design, standardization, development and marketing. Capacity building is minimal.

Handicrafts have become one of the key internationally traded goods but mainly by women entrepreneurs. Handicrafts are products produced by artisans, either completely by hand, or with the help of hand tools or even mechanical means, as long as the direct manual contribution of the artisan remains the most substantial component of the finished product. (UNESCO/ITC Symposium on “Crafts and the International market: Trade and Customs Codification.” Manila 1997).
Global Markets
Trade in handicrafts is classified under the World Customs Organization (WCO) Harmonized System (HS) code 97. Globally, the value of trade in handicrafts has increased from approximately US$ 75 billion in 1999 to about US$ 235 billion in 2005 (Indian Exim Bank, 2000 and Tribune India, 2005), representing a 213% increase in 6 years.

Promoting handicraft exports in Uganda is critical towards export diversification and poverty alleviation and is very timely since world demand for handicrafts is currently valued at 235 US $ billion (est..2006) and has increased by over 213% since 2000.

The principal export destinations for all handicrafts in the world have been identified as U.S.A., Germany, France, U.K., Japan, Italy, Canada and The Netherlands with over 31 per cent of export value in 2003-2004 being accounted for by the U.S.A. alone. The prominent EU countries listed above together accounted for another 30 per cent of the export value. As single country destinations, U.S.A., Germany and U.K., among themselves, accounted for one half of exports by value.

The largest chunk of Uganda’s handicraft is sold to export markets or to tourists within Uganda because the internal demand for handicraft is limited mainly by the low purchasing power. In the export markets, handicrafts were perhaps the first product marketed internationally with the explicit goal of increasing the income of local producers.

Women in Commercial Crafts
Handicraft is a sector which has proved to be favourable to most women entering the export trade due to being a field where culturally women possess the necessary skills and at the same time capital requirements are not very high. Women have also demonstrated significant level of entrepreneurship and investment in handicrafts.

Key Success Factors
- Variety in production: Gift articles which vary with seasons, for example, some articles are used for Christmas decorations. These therefore call for timely delivery of such products as there will be no market for delayed supply into the market.
- There are series in production. Some products supplement each other both in terms of design, colour and function.
- Availability of raw materials to sustain production.
- Formation of cluster organizations to boost production and improve bargaining.
- In terms of quality standards, the crafts must be well constructed with a professional finish, and with a decorative and functional appeal free from any hazards to the user.
- Government support: To organize trade fair exhibitions in order to support women to enter new markets.
- The uniqueness and possibility of ‘niche’ status in production and marketing.
3.3.2 current commercial handicrafts VCA

Raw Material Suppliers
- Harvest from nature, plantations and gardens
- Processors
- Production accessories (glue, dyes, wax, varnish, nails, clips, etc.)
- Filletor
- Skinner
- Trimmer
- Packer
- Storage

Producers Artisans, carvers, carpenters etc.
Activities:
- Weave
- Carve
- Paint
- Dye
- Assemble
- Dry
- Mould
- Sew
- Glue
- Fire/Bake
- Sand
- Wax
End products:
- Baskets
- Textiles
- Mats
- Bags
- Furniture
- Jewellery
- Paintings
- Tie & dyes
- Batiks
- Leather products
- Carvings
- Ceramics and Pottery

Middlemen/ women
- Consolidate products from producers
- Transport products to exporters

Domestic Retailers & Exporters
- Domestic retailers:
  - To act as outlets to the domestic market
  - To sell products to tourists, nationally and internationally

Exporters:
- Fumigate
- Label
- Pack
- Packaging
- Export documentation
- Shipping
- Act as a link between producers & international markets
- Promote and market national products

Limited international market awareness and competency in international marketing
- Lack of technical skills in packaging, labelling and packing
- Limited knowledge in export documentation
- High shipping costs
- High reject rate
- Complicated and costly certification procedures
- Barriers to obtaining export finance

- Lack of appropriate infrastructure for selling points
- Lack of proper display skills
- Insufficient Uganda products stocked (vs neighbouring countries products)
- Limited availability of quality Uganda products

- Lack of technical skills
- Rudimentary production equipment
- Fragmented production units
- Poor quality management systems
- Lack of standards and Research and Development
- Inadequate financial resources
- Poor credit access
- Limited capitalisation to support investment promotion
- Inadequate infrastructure
- Limited e-commerce enabling equipment
- No innovation clusters & systems

Lack of domestic suppliers for production accessories
- Environmental/regulatory limitations
- Poor harvest methods lead to environmental degradation
- Inadequate infrastructure (roads)
- Poor harvest methods leading to wastage
- Rudimentary processing equipment
- Packaging accessories in quantities not affordable for most SMEs
- Lack of standards and Research and Development
- Lack of appropriate infrastructure for selling points
- Limited capitalisation to support investment promotion
- Limited availability of quality Uganda products
- Insufficient Uganda products stocked (vs neighbouring countries products)
- Limited international market awareness and competency in international marketing
- Lack of technical skills in packaging, labelling and packing
- Limited knowledge in export documentation
- High shipping costs
- High reject rate
- Complicated and costly certification procedures
- Barriers to obtaining export finance
3.3.3 Engendered Handicrafts Value Chains

- Controlled harvests from forest reserves
- Train in better harvesting methods
- Establish collection centres for women weavers and artisans to overcome infrastructural constraints
- Enabled women to secure equipment through leasing schemes

- Growth in women artisan groups capable of producing for the market
- Women tailor-made training programmes in place to improve women technical skills
- Increased use of energy and time saving precision tools and equipment among women artisans (either made locally or imported)
- Common facility centres established for value addition for women
- Tax incentives offered for women investment in craft sector
- Design centres established to improve innovation among women in crafts through Research and Development
- Women producers and traders have pre-requisite access to internet
- Women clusters for craft producers established

- Women specifically trained for the tasks
- Women earning realistic commissions

**Retailers:**
- Permanent exhibition and selling centres established
- Trade fairs and exhibition training targeting women
- Women trade associations formed
- Umbrella body established to oversee development of sector

**Exporters:**
- Export support desk (at UEPB) established to cater for women needs in exports
- Women trained in quality standards and assurance
- Women group to attain certification in international standards
- Clusters formed in the handicraft sector
- Export finance scheme established
- Widespread application of ICT and internet
- Women trained in market research and surveillance
<table>
<thead>
<tr>
<th>Perspective</th>
<th>Issues/Gaps</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Development</strong></td>
<td><strong>1. Development perspective</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Poverty alleviation and employment</strong></td>
</tr>
<tr>
<td></td>
<td>The craft sector is one of the sectors which, when well nurtured, will lead to poverty eradication among women. Since women already have a competitive advantage in the sector, developing specific programmes for them will enhance their competitiveness which will bring real income to them.</td>
</tr>
<tr>
<td></td>
<td><strong>Regional development</strong></td>
</tr>
<tr>
<td></td>
<td>A lot of crafts are produced in rural areas. However, the production is fragmented and individualized, limiting proper quality and quantities. Organizing of women into clusters will lead to the development of disadvantaged rural areas as a result of improved production systems.</td>
</tr>
<tr>
<td></td>
<td><strong>Environmental Sustainability</strong></td>
</tr>
<tr>
<td></td>
<td>Currently, women who are engaged in the production of crafts work under harsh environments. There is no protection since most of the women have limited skills. Some women work with chemical dyes and paints without any protective masks or gloves and others work with harmful tools.</td>
</tr>
<tr>
<td><strong>Competitiveness</strong></td>
<td><strong>2. Border-in gear</strong></td>
</tr>
<tr>
<td></td>
<td>• Women’s capacity in the crafts sector is still very low with no visible efforts to support them to meet the international demand in terms of volumes and quality.</td>
</tr>
<tr>
<td></td>
<td>• Product diversification for women is still limited due to lack of value addition competences and exposure. Women are not aware of the latest market trends which determine size, colours and quality of the products.</td>
</tr>
<tr>
<td></td>
<td>• A lot of women in the crafts sector do not do it as a business and therefore treat it as a mere talent or social activity which doesn’t require enhancement. There are limited efforts geared at developing women’s competence in the crafts making and exporting.</td>
</tr>
<tr>
<td><strong>3. Border gear</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Since most of the raw materials are procured from rural areas, the cost of transportation of products greatly affects women’s business.</td>
</tr>
<tr>
<td></td>
<td>• Women are affected by the trade facilitation issues involving regulations, administrative procedure and documentation requirements which are laborious and complicated.</td>
</tr>
<tr>
<td></td>
<td>• Because most women don’t own land and other property, the cost of doing business is too high due to rented premises where production processes take place and hired equipment.</td>
</tr>
<tr>
<td><strong>4. Border-out gear</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Women in the crafts sector are still strained on market access issues due to lack of exposure to foreign markets. Also, there is the problem of poor policies to enable access to markets.</td>
</tr>
<tr>
<td></td>
<td>• There are still limited gender sensitive efforts to cater for and promote the preparation of women to enter international markets by giving them trade information and facilitating them to make initial contacts with potential buyers.</td>
</tr>
</tbody>
</table>
### Client Perspective

#### 5. Sector and client priorities

- In crafts, women contribute about 80% of handicraft exporters and production is mainly done by women from peri-urban areas. There is high potential to enable more women join the export sector. Some of the main crafts are: Basketry products, Beads, Bags, Wall Hangings and other decorative crafts.

- There is however great need to improve efficiency by connecting women groups to international markets, organizing them into production clusters, access to information (sensitization of the women on market trends) and training women with presentation skills and self confidence.

#### 6. Business Competency

- Women in crafts are from poor communities. This does not only reduce their confidence but greatly negatively affect their businesses. Moreover, people’s attitude towards crafts as a low grade profession makes it even harder for more women to aspire for it. Innovation is still low with numerous groups producing similar products.

#### 7. Trade information

- This is one of the key constraints for women entrepreneurs in the crafts sector. Due to high illiteracy levels and family burdens, women’s access to information is limited. This affects the quality, quantity and times of production and leads to poor needs assessment to determine which crafts can easily be marketed, to whom and when.

#### 8. Trade finance

- Crafts not being a traditional business, there is lack of trade financing in the sector since financial institutions cannot fully understand and assess business plans.

- A lot of women are not aware of other existing sources of financing which may be within their reach and may not need collateral.

#### 9. Quality Management

- The quality of the Uganda crafts is still poor and unstable. There are very few producers who have put quality management procedures for their products, and worse still, since the producers are scattered, coordination of production becomes very hard and costly.

#### 10. Other support

- Women in the crafts sector clearly lack support in the areas of research and development, packaging, labelling, document handling and customs. The development of such competences and provision of support to existing, aspiring and potential crafts exporters will greatly raise availability of Ugandan crafts on the international market.
11. Strategy support network

There are no institutions which directly support the crafts sector apart from UEPB and Uganda Small Scale Industries Association (USSIA) which have provided support in areas of technology enhancement.

12. Service delivery network

Numerous organizations like UWEAL offer business development services to build capacity in enterprises through training, counselling, mentoring and market access programmes. However, there are limited programs specifically done for women in the crafts sector. Another challenge is the fact that most of the providers are urban based and therefore the programmes don’t benefit the rural communities. Furthermore, because of limited financing, the women can’t afford the services. This has led to stagnation or failure of their businesses.

3.4 Tourism sector

Tourism in Uganda focuses on natural and cultural resources and can provide a range of alternative economic activities in areas of a country where other commercial activities are limited. Uganda has a variety of animal and plant species with prolific and attractive populations capable of creating indelible impressions on tourists. Tourism in Uganda has developed into a “green profile” mainly focusing on sustainability. Leisure, Recreation and Holidays, Business and Professional, Visiting friends and relatives, and for other reasons, such as, health or religion, comprise the major opportunities of tourism in Uganda. Most visiting tourists coming into the country, especially those from Europe are predominantly seeking holiday experiences to relax and rejuvenate their minds. South Africa is the major source of visitors from African region of which 20% are seeking holiday experiences.

Leading source of tourists to Uganda

The leading tourism foreign market for Uganda is Africa with 74% of the market share where Kenya, Rwanda and Tanzania are the main markets. Europe is the second largest market with 13% of market share where United Kingdom leads, followed by Germany, Netherlands, Italy, Belgium, Sweden, Denmark, France, and Norway. United States of America is the third largest market with 7% of the market share focusing on United States of America and, followed by Canada. Asia with 4% is the fourth major market mainly focusing on India, China, Pakistan and Japan. Other growing markets are Middle East (1%) and Oceania (1%) focusing on Australia and New Zealand.

Table 8: Tourist Arrivals by Purpose of Visit (000’s)

<table>
<thead>
<tr>
<th>Purpose of visit</th>
<th>2003</th>
<th>2004</th>
<th>2005</th>
<th>2006</th>
<th>2007</th>
</tr>
</thead>
<tbody>
<tr>
<td>Leisure, recreation and holidays</td>
<td>77</td>
<td>86</td>
<td>9</td>
<td>30</td>
<td>140</td>
</tr>
<tr>
<td>Business and conference</td>
<td>67</td>
<td>81</td>
<td>31</td>
<td>72</td>
<td>110</td>
</tr>
<tr>
<td>Visiting friends and relatives</td>
<td>52</td>
<td>71</td>
<td>35</td>
<td>90</td>
<td>272</td>
</tr>
<tr>
<td>Others</td>
<td>110</td>
<td>274</td>
<td>393</td>
<td>347</td>
<td>120</td>
</tr>
<tr>
<td>Total</td>
<td>306</td>
<td>512</td>
<td>468</td>
<td>539</td>
<td>642</td>
</tr>
</tbody>
</table>

Markets
According to the World Trade Organisation (WTO), the annual average growth in outbound travel is expected to be approximately 4.1% per annum until 2020. East Asia, South Asia, Africa, the Middle East and the Pacific are forecasted to record growth at rates of over 5%, compared to the world average of 4.1%. The more mature regions, Europe and the Americas, are anticipated to show lower than average growth rates of 3.0% and 3.9% respectively. Long-haul travel worldwide will grow faster, at 5.4% per year during 1995-2020, than intra-regional travel, at 3.8%. Consequently, the ratio between intra-regional and long-haul travel will shift from around 82:18 in 1995 to close to 76:24 in 2020.

Women in Tourism sector
From a gender perspective, women constitute the majority of those running tour and travel services, hospitality workers and managers and creative and souvenir shops in tourism resorts. The sector has a 20% growth trend, with women leading the sector. Women’s contribution ranges from tourism products, rural women provide food and accommodation to backpackers, handicrafts to tourists, local dances and other entertainment as well as providing beauty and massage services.

Key Success Factors
- Influx of tourists in the country due to good publicity.
- High returns particularly from foreign tourists.
- Political stability, hence attracting investment in service sectors such hotels.
- Emergence of the middle class with disposal income that can be spent on leisure and recreation.
- Institutional and policy framework that has to be put in place by government.
- Quality service management and exceptional customer care.
- Emergence of new tourist attraction products like community tourism, folklore and cultural tourism.
3.4.0 Tourism current value chain

Major Attractions: Scenery, Gorillas, Other Wildlife, Culture, Lakes and Rivers

- Tourists were about 350,000 in 2005, fluctuating exchange rates, limited research and development, poor conservation and poaching.
- Poor services/no value for money.
- Underdevelopment of attractions (CSF) currently approximately 10 game parks.
- Poor infrastructure (roads, electricity, telecommunication and water in some areas) (CSF)
- Lack of strong accommodation providers’ association (CSF)
- Lack of affordable finance services.
- Poor hotel billing, limited marketing of hotel industry in Uganda (CSF)
- Limited use of credit cards.
- Reliance on imported supplies (packed food, building materials)
- Lack of standard unit of sale for raw foods (heaps rather than kgs etc.) (CSF).
- Poor waste management by local governments (adverse effects on sanitation) (CSF)
- Rampant Malaria and other sicknesses.
- Lack of an early warning system for safety assurance for tourists (MoH).

- Uganda attracts mainly the low budget tourist (CSF)
- Uganda has limited knowledge about different cultures (Japanese and Chinese).
- Limited use of credit cards.
- Uganda lacks an international country brand identity.
- Poor perceptions of Uganda in general.
- Low awareness of the Uganda tourism product.
- Limited international carriers in number.
- No Ugandan airline flag carrier (CSF).
- Insufficient publicity of Visa acquisition process.
- High air taxes.
- Insecurity.
3.4.1 Engendered Tourism Sector Value Chain

**ATTRCTIONS**
- Increased women participation in tour guiding.
- Increased community tourism projects manned by women.
- Integration of tourism attraction with cultural activities that are performed by women.
- Enhanced training of women in management of tourism product.

**ACCOMMODATION**
- Increased employment opportunities of women to senior levels in hotel and hospitality.
- Increased number of women trained in hotel services.
- Uganda’s hotel industry aggressively marketed.
- Growth of women investors in the tourism facilities, especially hotels and tour services.

**TOUR OPERATOR/TRAVEL AGENT**
- Better access to business finance affordable to women.
- Increased e-commerce facilities and practices.
- Intensive training of skilled tour operators and tour guides with more women participation.
- Improved public transport to upcountry tourist areas to tap into community tourism where more women take part.

**PRODUCT and HANDICRAFT SUPPLIERS**

**TOURISM SUPPORT SERVICES**
Table 9: 3.4.2 Key considerations for Tourism sector

<table>
<thead>
<tr>
<th>Perspective</th>
<th>Issues/Gaps</th>
</tr>
</thead>
<tbody>
<tr>
<td>Development</td>
<td>1. Development Perspective</td>
</tr>
<tr>
<td></td>
<td><strong>Poverty alleviation and employment</strong></td>
</tr>
<tr>
<td></td>
<td>Tourism is one of the key sectors through which poverty eradication among</td>
</tr>
<tr>
<td></td>
<td>women can be achieved. The tourism sector is so diverse, consisting of many</td>
</tr>
<tr>
<td></td>
<td>areas in which women can be engaged as tour operators or employees.</td>
</tr>
<tr>
<td></td>
<td><strong>Regional development</strong></td>
</tr>
<tr>
<td></td>
<td>About 60% of tourism activities and businesses are in rural areas, for</td>
</tr>
<tr>
<td></td>
<td>instance, national parks and game reserves. Rural people act as guides for</td>
</tr>
<tr>
<td></td>
<td>tourists, provide them with accommodation, security, food, entertainment and</td>
</tr>
<tr>
<td></td>
<td>sell to them souvenirs to take back home.</td>
</tr>
<tr>
<td></td>
<td><strong>Environmental Sustainability</strong></td>
</tr>
<tr>
<td></td>
<td>There are no major environmental threats for women in the tourism sector</td>
</tr>
<tr>
<td></td>
<td>apart from effects of global warming e.g. change of weather patterns.</td>
</tr>
<tr>
<td>Competitiveness</td>
<td>2. Border-in gear</td>
</tr>
<tr>
<td>Perspective</td>
<td>• There are limited efforts to developing women’s capacity and skills</td>
</tr>
<tr>
<td></td>
<td>geared at raising them higher into the value chain.</td>
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<tr>
<td></td>
<td>• Innovation of the value and variety of tourism activity is still a</td>
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<tr>
<td></td>
<td>challenge with all operators offering the same services. This may be</td>
</tr>
<tr>
<td></td>
<td>attributed to lack of product development initiatives, lack of market</td>
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<tr>
<td></td>
<td>research and weak predisposition towards Research and Development in</td>
</tr>
<tr>
<td></td>
<td>Uganda.</td>
</tr>
<tr>
<td></td>
<td>• Human capital development is another critical issue which has limited</td>
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<tr>
<td></td>
<td>women’s participation in the sector. There is biased human resource</td>
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<tr>
<td></td>
<td>development, social discrimination, lack of self awareness and self</td>
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<tr>
<td></td>
<td>confidence among the women leading them to be employed as waitresses,</td>
</tr>
<tr>
<td></td>
<td>cabin crew and as cleaners who command small wages. There is also</td>
</tr>
<tr>
<td></td>
<td>inadequate tourism training in general with the centres of training/support</td>
</tr>
<tr>
<td></td>
<td>services being very far and limited.</td>
</tr>
<tr>
<td></td>
<td>3. Border gear</td>
</tr>
<tr>
<td></td>
<td>• Trade facilitation issues involving regulations, administrative procedure</td>
</tr>
<tr>
<td></td>
<td>and documentation requirements are not gender sensitive and therefore</td>
</tr>
<tr>
<td></td>
<td>affect women’s businesses.</td>
</tr>
<tr>
<td></td>
<td>• The cost of doing business is too high for an ordinary woman, for instance,</td>
</tr>
<tr>
<td></td>
<td>to install internet, purchase computers or own a fleet of vehicles.</td>
</tr>
<tr>
<td></td>
<td>4. Border-out gear</td>
</tr>
<tr>
<td></td>
<td>• Market access for women in the tourism sector is high. However, there is</td>
</tr>
<tr>
<td></td>
<td>need for more innovation and network as a result of participation in</td>
</tr>
<tr>
<td></td>
<td>international fairs which will expose Uganda’s potential as a tourist</td>
</tr>
<tr>
<td></td>
<td>destination.</td>
</tr>
<tr>
<td></td>
<td>• The government, ministry of tourism trade and industries and other</td>
</tr>
<tr>
<td></td>
<td>relevant institutions have not prioritized tourism in their budgets and</td>
</tr>
<tr>
<td></td>
<td>planning. This has led to limited tourist inflow into the country and has</td>
</tr>
<tr>
<td></td>
<td>increased the cost of doing business for individual entrepreneurs who have</td>
</tr>
<tr>
<td></td>
<td>gone out to market Uganda on their own.</td>
</tr>
</tbody>
</table>
5. Sector and client priorities

- The tourism sector is one of the fastest growing sectors with 20% growth trend. Women are the leading entrepreneurs in the sector. They are mainly found in tour and travel – issuing tickets, customer service, in beauty and massage parlours and serving as waitresses. Women dominate jobs but are paid low wages, while men in the field earn much more.

6. Business Competency

- Most of the women in tourism are doing very well. However, they have a challenge of marketing their services. They also lack skills to negotiate with potential partners, lack of information about trends and mainly have family burdens which constrain their time and resources to gain new skills and they work long hours.

7. Trade Information

- Women in the sector generally lack information about tourist seasonal timings, numbers and needs. This hinders their planning and therefore affects their cash flows.

8. Trade Finance

- There is lack of trade financing for women due to high interest rates and lack of collateral. Furthermore, a lot of women are still financially illiterate and therefore can’t manage large finances which are needed in the tourism sector.

- Some tour activities necessitate high capital base and this has limited women’s participation in areas like hotels and travel companies.

9. Quality Management

- Being a service industry, quality management and consistence are still a major challenge. For instance, there is evidence of a number of businesses thriving for years due to excellent services but collapse due to poor food, limited quality, poor customer service and inefficient workers.

10. Other Support

- Although some entrepreneurs have got support in areas of security training, community tourism and international marketing, there is still need for targeted support from the relevant institutions to further support the sector.
### Institutional Perspective

#### 11. Strategy Support Network
- There are some institutions which directly support the tourism sector like Ministry of Tourism, Trade and Industries, Uganda Wildlife Authority and Uganda Tourism Board. However, most of the support is limited and doesn’t reach the disadvantaged regions where most tourism activities are found.

#### 12. Service Delivery Network
- Despite there being various organizations offering business development services to build capacity in enterprises, there are no specific programs targeting the tourism sector. What is offered is not only generic and prescriptive but also very expensive for an ordinary woman entrepreneur.

### 3.5 Dairy sector

#### Global Market
The world demand for milk and other dairy products stood at US $10.7 billion in 2006 and grew by 11% between 2002 and 2006. Trade in volumes grew by 5% in the same period. The major markets for milk and other dairy products are Netherlands, Algeria, Saudi Arabia, Indonesia and Mexico. Global trade in the medium term is forecast to continue to rise mainly due to increasing demand for food. However, many of the major consuming countries have well developed dairy industries, very often with stringent quality and food safety regimes. These are likely to continue to occasion market entry difficulties. Market indices show positive trends in all the major markets. The table below illustrates the world leading importers of milk and other dairy products.

#### Table 10: Leading World Importers of Milk and Cream – 2006

<table>
<thead>
<tr>
<th>Importers</th>
<th>Value imported in 2006, in USD thousand</th>
<th>Annual growth in value 2002-2006, %</th>
<th>Quantity imported in 2006</th>
<th>Annual growth in quantity 2002-2006, %</th>
</tr>
</thead>
<tbody>
<tr>
<td>World</td>
<td>10,781,020</td>
<td>11</td>
<td>5,090,491</td>
<td>5</td>
</tr>
<tr>
<td>Netherlands</td>
<td>849,931</td>
<td>2</td>
<td>449,166</td>
<td>12</td>
</tr>
<tr>
<td>Algeria</td>
<td>640,217</td>
<td>12</td>
<td>249,976</td>
<td>3</td>
</tr>
<tr>
<td>Saudi Arabia</td>
<td>502,147</td>
<td>17</td>
<td>195,903</td>
<td>14</td>
</tr>
<tr>
<td>Indonesia</td>
<td>402,360</td>
<td>28</td>
<td>175,084</td>
<td>17</td>
</tr>
<tr>
<td>Mexico</td>
<td>393,949</td>
<td>12</td>
<td>187,723</td>
<td>2</td>
</tr>
</tbody>
</table>

#### Uganda’s Performance
Trade in milk and other dairy products takes place mainly in the neighborhood markets with Sudan being the major importer of Uganda’s milk, followed by DR Congo and Kenya. Sudan presents the highest growth rates and therefore a favourable market for Uganda’s milk exports as illustrated in table 54 below.
Table 11:  Leading Importers of Uganda’s Milk and Other Dairy Products

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>‘World</td>
<td>87</td>
<td>9</td>
<td>47</td>
<td>10</td>
</tr>
<tr>
<td>‘Sudan</td>
<td>40</td>
<td>120</td>
<td>13</td>
<td>-</td>
</tr>
<tr>
<td>‘Democratic Republic of the Congo</td>
<td>34</td>
<td>-</td>
<td>13</td>
<td>-</td>
</tr>
<tr>
<td>‘Kenya</td>
<td>12</td>
<td>-</td>
<td>21</td>
<td>-</td>
</tr>
</tbody>
</table>

Dairy Sector Performance

The dairy sector has continued to grow at an average rate of 8-10% per annum over the last 10 years. The steady growth is attributed to the favorable macroeconomic environment, policy and institutional reforms as well as specific interventions by government to promote development of the sector. The livestock sub-sector contributes 13.1% to the Agricultural Gross Domestic Product (GDP) and 4.2% to the National GDP (MFPED, 2007). The dairy industry employs many people that are involved in various economic activities such as milk production, collection, transportation, processing, distribution and marketing as well as provision of inputs and support services. There is no up-to-date statistics regarding the number of people involved in dairy value addition and marketing.

The total national milk production has been increasing steadily over the last two decades, from approximately 395 million litres in 1986 to an estimated 1.5 billion litres per year in 2007 due to better farming methods and importation of exotic cattle which give big milk quantities. The infrastructure for rural milk collection is not well developed in most parts of the country. There are 24 insulated milk transport tankers dedicated to delivering milk from the farmers’ cooperative unions and societies to the processing plants with a total capacity of 253,700 litres. There are thirteen operational milk processing plants and mini dairies with a total of 32.88 million litres of fresh milk processed in 2007. There are also many micro-/small-scale processors of value added products particularly yoghurt, ice cream, sour butter, ghee and cheese. Some companies like Sameer Agriculture and Livestock have already registered remarkable progress in export of powdered milk and other Dairy products.

Institutional Support

Dairy Development Authority organised dairy farmers into groups, associations, cooperative societies and unions from the grass-root to national level. Dairy farmer organizations are playing a major role in bulking, transportation and marketing of milk. They also serve as focal points for delivery of extension services as well as implementation of development and capacity building programs.

Key Success Factors

- Exploiting of the existing regional markets and investing in modern technology.
- Improvement in milk handling practices to guard against market entry challenges on account of inferior quality standards.
- Value addition into powdered milk, yoghurt, cheese and chocolates among others,
- Establishment of new dairy processing plants with big capacities to handle orders.
- Joint ventures in dairy processing and marketing.
- Dairy support services along the dairy value chain.
- Good cattle breeding to ensure large milk quantities.
- It is one of the priority sectors under the Prosperity for all Programme.
3.5.0 Current Dairy Value Chain

- 6 million head of cattle
- 80% local breed each producing 2 litres of milk (very low productivity)
- On-farm consumption sales = 40% of total production
- 20% improved breeds each producing an average 7 litres per day
- Milk Production concentrated in South West and central 70%, North and Eastern only produce 30%
- Inefficiency in production (high cost of production, poor breeds, poor management)
- Inadequate extension services
- Unavailability and expensive input supplies
- Poor quality milk

- Low bargaining power by farmers (few organized groups, do not own infrastructure)
- Inadequate capacity to monitor and enforce quality standards
- Poor market information access and flow
- High operational costs (power shortages, fuel scarcity)
- Inadequate infrastructure
- Unfavorable policies
- Poor governance and management for organized groups
- Poor milk handling practices, leading to low quality milk and high losses

- Inefficient processing facilities (40% utilization capacity and 21% losses)
- Majority of ingredients are imported, expensive, not readily available (white sugar – 100% duty, packaging materials for butter at 25% duty) flavours
- Outdated technology in most processing plants
- Infrastructure insufficient, expensive, imported (prime movers taxed at 80%)
- High cost of finance (interest rates at 24-27% p.a.)
- Inadequate investment in cold chain
- High cost of production (irregular and expensive power supply and fuel)
- Limited technical expertise
- Export markets: Rwanda, Burundi, Tanzania, Southern Sudan, DRC, Kenya
- Limited marketing and brand building activities
- Lack of dairy export strategy
3.5.1 Engendered Dairy Sector Value Chain

- Improved commercial dairy farming for women
- Women trained in improved management practices
- Improved access and coverage of extension workers to rural areas to benefit women producers
- Women increased accessibility to affordable inputs
- Improved farm milk hygiene practices by women farmers
- More women dairy farmers involved in cooperatives

- Improved milk handling practices by women farmers
- Improved operation and financial management practices among women
- Improved access to market information by women
- Cooperatives owned by women with milk collection infrastructure (cans, coolers, transportation)
- Ongoing capacity building and strengthening of women producers and entrepreneurs
- Women in the management of processing plants

- Increased number of women processors exporting dairy products
- Women getting involved in product diversification (New products for export markets i.e. flavoured milk, yoghurt)
- Increased marketing and brand building activities by women
- Utilization of modern technologies by women
- Implementation of policies (such as tax breaks, infrastructure development, availability and affordability of utilities) that encourage investment in dairy sector
- Ongoing capacity building and strengthening processors association with women playing central roles.
Table 12: 3.5.3 Key Considerations for the Dairy Exports

<table>
<thead>
<tr>
<th>Perspective</th>
<th>Issues/Gaps</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Development perspective</strong></td>
<td><strong>1. Development Perspective</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Poverty alleviation and employment</strong></td>
</tr>
<tr>
<td></td>
<td>Development of gender sensitive dairy value chain will contribute to poverty eradication especially among women who are estimated to contribute to more</td>
</tr>
<tr>
<td></td>
<td>that 40% of production. Developing specific programs for them will be one of the avenues of empowering and enhancing their ability to transform their capabilities</td>
</tr>
<tr>
<td></td>
<td>by lifting their status in the value chain.</td>
</tr>
<tr>
<td></td>
<td><strong>Regional Development</strong></td>
</tr>
<tr>
<td></td>
<td>About 70% of economically active women work in rural areas, especially in agricultural related activities like dairy farming. There is need for designing</td>
</tr>
<tr>
<td></td>
<td>initiatives which directly address rural challenges especially at household level where most of the production takes place.</td>
</tr>
<tr>
<td></td>
<td><strong>Environmental Sustainability</strong></td>
</tr>
<tr>
<td></td>
<td>Women working in the dairy sector sometimes face un-safe conditions due to exposure to environmentally hazardous effects like pesticides which are used to</td>
</tr>
<tr>
<td></td>
<td>control pests. Promoting safe working conditions for women will encourage more women to participate in the sector.</td>
</tr>
<tr>
<td><strong>Competitiveness perspective</strong></td>
<td><strong>2. Border-in gear</strong></td>
</tr>
<tr>
<td></td>
<td>• Women in the dairy sector have no opportunities for capacity and skills development relating to production volume, quality and value addition</td>
</tr>
<tr>
<td></td>
<td>• Cultural attitudes towards women’s role are still strong and this has hindered their efforts towards capacity diversification and the ability to produce new</td>
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<tr>
<td></td>
<td>products by adding value to them. This has led to men owning most of the large farms and processing plants, leaving the women at farm and trading level where the exploitation of women’s labour is still high.</td>
</tr>
<tr>
<td></td>
<td>• There is biased human resource development and social discrimination towards women with men taking the major role of being at the top of each level of the dairy value chain.</td>
</tr>
<tr>
<td><strong>3. Border gear</strong></td>
<td>• Women producers at the farm level are fragmented and individualized and this makes transport and expeditious business procedures very expensive.</td>
</tr>
<tr>
<td></td>
<td>• Women are currently getting little trade facilitation in relation to regulations, administrative procedures and documentation requirements to enable them</td>
</tr>
<tr>
<td></td>
<td>perform better in their businesses.</td>
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<tr>
<td></td>
<td>• The most profitable levels of the value chain like milk processing are very high capital intensive, limiting women’s involvement.</td>
</tr>
<tr>
<td><strong>4. Border-out gear</strong></td>
<td>• Market access is still limited for women traders due to high competition and low facilitation and protection from the regulatory bodies</td>
</tr>
<tr>
<td></td>
<td>• Women have not received much support to prepare them for export markets.</td>
</tr>
</tbody>
</table>
### 5. Sector and client priorities

- The dairy industry contributes more than 50% of the total output from the livestock sub-sector. It employs many people that are involved in various economic activities such as milk production, collection, transportation, processing, distribution and marketing as well as provision of inputs and support services. The sector has continued to grow at an average rate of 8-10% per annum over the last 10 years.

- The infrastructure for rural milk collection is not well developed in most parts of the country except the south western region and to a less extent the central region.

- There are great opportunities in exploiting the existing regional markets, investing in modern technology and improvement in milk handling practices to guard against market entry challenges on account of inferior quality standards. More opportunities for women lie in value addition into powdered milk, yoghurt, cheese, milk chocolates among others as well as dairy farming and breeding.

### 6. Business Competency

- Since women are found at lower levels of the value chain, the illiteracy levels are very high. This has limited their ability to learn and adapt to new skills and technologies which can facilitate them to grow their businesses and improve productivity. However, at trading level, women are found to be more entrepreneurial than men, with women being better financial managers and administrators.

### 7. Trade Information

- In the dairy sector, there is still low level of access to information among women because they are burdened with family duties in addition to running businesses. Most of the women spend their time at the farm, in the shop or at the processing plant and this limits their chances of interacting and networking.

### 8. Trade Finance

- Even though women are better credit worthy than men, a lot of women are still financially illiterate and therefore can't manage large finances which are needed in the dairy sector. And those who manage to access microfinance funds fail to pay back due to high interest rates.

- Financial institutions are still wary about funding agricultural projects, more especially when they are run by women.
9. Quality Management

- Dairy has very stringent quality standards in the export market. Quality is very hard to maintain because dairy products are perishable. Even though the Dairy Development Authority has enforced better hygiene for milk production, storage and transportation, the women entrepreneurs still depend on men to transport the milk for them in the process of which the milk is adulterated. Another challenge is due to the fact that milk producers are scattered and maintenance of the quality becomes costly and hard to coordinate.

10. Other Support

- There has been a lot of support from Dairy Development Authority and other relevant organizations to promote the sector. However, there are no notable programs specifically targeting women entrepreneurs in areas of research and development, packaging, labeling, document handling and customs.

11. Strategy support network

- Dairy Development Authority has organized dairy farmers into groups, associations, cooperative societies and unions from the grass-root to national level. Most of the active dairy farmer associations, cooperative societies and unions are playing a major role in bulking, transportation and marketing of milk. They also serve as focal points for delivery of extension services as well as implementation of development and capacity building programs.

12. Service delivery network

- Numerous organizations offer business development services to build capacity in enterprises through training, counseling, mentoring and market access programs. However, there are limited programs specifically done for women in the dairy sector. Another challenge is the fact that most of the providers are urban based and therefore the programs don’t benefit the rural communities where milk is produced. Furthermore, because of limited financing, the women can’t afford the services. This has led to stagnation or failure of their businesses.

3.6 Monitoring

Regular quarterly and annual assessment of progress and mechanism for addressing constraints shall be put in place. Before implementation proceeds, clear situational analyses will be done to determine the current performance of the selected sectors and will be measured against the targeted indicators to determine growth and performance versus the set objectives. Such indicators will be: number of women who have entered a particular sector, level of exportation, level of participation in the value chain, business capacity growth and human resource skills development.

The comprehensive monitoring frame work will be within the frame work of the National Export Strategy for Uganda.
Part IV

Strategy management

Successful implementation of the strategy depends very much on how this is managed and monitored. The commitment of all stakeholders is necessary, particularly that of the responsible executing agencies in prioritizing their respective activities. One of the major reasons for the unsuccessful implementation of good policy initiatives is the lack of resources, management capacity, monitoring systems and committed lead drivers. Our strategy will seek to identify the least costly, but most effective management mechanism to implement the engendered National Export Strategy. It is imperative that we provide an assessment of the existing machinery.

4.0 Structure

4.1 Existing Government Machinery

The primary focus for implementing the gender sensitive National Export Strategy lies within the existing delivery mechanism, through the appropriate ministries and agencies and other levels of support. Focal agencies and line ministries are allocated necessary resources to implement specific Government policies some of which are gender focused. There are three general categories for the ministries and agencies. These are:

Central Agencies:
Aid coordination to support the strategy is the responsibility of three central Government ministries. These are the Ministry of Tourism, Trade and Industry, the Ministry of Finance, Planning and Economic Development, The Ministry of Gender, Labour and Social Development and Ministry of Justice.

Policy Implementation Agencies:
These are the line ministries and agencies responsible for implementing sector policies in trade, agriculture, tourism, ICTs, public utilities, the financial system, and border management.

Promotional Agencies:
A number of agencies are involved in promoting export development activities and investment. They are the Uganda Export Promotion Board, the Uganda Investment Authority, Uganda Tourism Board, Dairy Development Authority, and Uganda Coffee Development Authority.

4.2 Private Sector-led Machinery

Uganda Women Entrepreneurs Association Limited (UWEAL) is a private sector organization and was established primarily to support women in doing business both local and export business. UWEAL enables women exporters to access inputs, finance, market information and training on business skills and competences. UWEAL was established to encourage women to do business and trade. The membership of this organization is drawn from women in business and companies run by women that export.

Although UWEAL is widely represented throughout the private sector, there are limitations on its scope of operation, and activities due to resource and capacity constraints. Other considerations
include the absence of support for the expansion of the organization’s activities. There are also
certain challenges on financial resources.
Dairy Development Authority was established as a semi-autonomous body under the Ministry of
Agriculture, Animal Industry and Fisheries with the mandate to develop and regulate the dairy industry.
It is responsible for coordination and efficient implementation of all government policies, which are
designed to achieve and maintain self-sufficiency in the production of milk in Uganda. The Authority’s
five-year Strategic Plan highlights the actions that must be undertaken to achieve sustainable growth
of the dairy sector. It describes the major development and regulatory programs, support services
and their outputs. Areas of focus include human resource development, policy and planning, research
and development, quality assurance, dairy financing and the regulatory framework.

To ensure that Ugandans are engaged in dairy farming and earning profits from the enterprise, Dairy
Development Authority carries out training of all stakeholders in the dairy value chain, particularly
farmers who undertake organized milk bulking and marketing. The Authority is currently implementing
the Dairy (Marketing of Milk and Milk Products) Regulations, 2003, which has led to better handling
and transportation of milk. This has resulted in a significant improvement in the quality and safety of
milk and milk products in the country and has improved access to high value markets, both locally
and regionally.
Part V: Resource mobilization

5.1 Priorities

Successful implementation of the engendered NES-export strategy, and its future performance, will depend on the availability of necessary resources, as well as the support of an effective stakeholder’s network. The availability of resources must therefore be given serious early consideration. Projects involving institutional assets will involve the re-engineering of existing institutions in order to implement some of the strategies effectively. This will involve re-prioritization and re-positioning. Specific export programmes will involve issues such as incentives relating to export finance and partnership to be developed to increase access to trade finance schemes and services to women in exports.

Resource mobilization involves not only financial resources provided by Government, but human, and other resources that could be made available by development partners and the private sector stakeholders. In order to appreciate the level of funding required for the successful implementation of all the strategies in the document, effort has been made to group them into four broad categories: financial, institutional, human resource, and export specific.

With regard to financial resources, a clear road map, proper sequencing, and the prioritization of the strategies to be implemented are equally important. Specific and unique action plans are necessary for the selected sectors that are contained in the engendered NES, well linked to the overall NES. In the case of financial resources, this could be provided through the national budget, by the private sector, and possibly by development partners. Financial resources will be specifically targeted to programs or activities earmarked for implementation by executing agencies.

Human resource needs will very much depend on requirements identified in each of the strategies for the selected sectors. While specialized expertise will be inevitable in certain areas, some tasks will be more generic in nature, and can be carried out during day-to-day operations of responsible agencies. With regard to human resource development, the emphasis will be to build up existing capacity to strength competences at UEPB, UWEAL, sector institutions and other relevant agencies. A coordinated approach making maximum use of all available resources from all stakeholders must be encouraged by the Management structure of the Engendered NES Strategy. Resources provided through development partners will take many forms, and will come through either bilateral or multilateral arrangements. Assistance via a bilateral arrangement could be in kind, or a cash grant. Multilateral arrangements could provide technical assistance (TA), for example, or a soft loan. The assistance given must be need driven, flexible and relevant to beneficiaries for the desired results.

One of the identified major challenges is the capacity of government to implement some policy initiatives. It is necessary, therefore, that resources from donors be directed to capacity building in both the soft and hard areas, and making available expertise in problem areas identified by UEPB as the strategy secretariat.

5.2.1 Funding Through the National Budget

Although the country’s budgeting system is moving towards being output based, the allocation of resources is still based on programme budgeting, whereby funds are input based and directed to executing agencies through their respective identified programs. Since most of the strategies are to be made consistent with those of the Strategic Development Plans of stakeholder institutions, it might be assumed that financial resources will be provided through the
normal budgetary process of these institutions. However, for those priorities not covered under the annual budget allocation of UEPB, due consideration must be given to prioritizing separate special projects and funding arrangements.

5.2.2 Funding Through Development Partners
As indicated earlier, cash grants and aid in kind are provided through bilateral and multilateral arrangements and UEPB secretariat will need to tap into these. The bulk of development assistance from bilateral donors is closely governed by the line Ministry of Trade, Tourism and Industry (MTTI) and Ministry of Finance, although we often get direct aid proposals from other donors such as the Irish Aid. Most of the assistance provided will need to be well linked to export development activities and funded through the responsible institution. The assistance should specifically target sectors where the greatest impact on women in exports is expected.

On multilateral arrangements, the European Union provides assistance through well-targeted sectors pre-determined under the European Development Fund (EDF). Borrowed funds from multilateral financial institutions are targeted at major national infrastructure development to support export infrastructure in gender sensitive sectors.

5.2.3 Private Sector Funding
It is very difficult to determine the level of funding that will be directly injected by the private sector into implementing each action plan of the Engendered NES strategy. Private sector funding will be based on individual initiative, and targeted at activities that match with the private sector operational areas and activities. Government will therefore continue to provide the necessary resources to foster the enabling environment for members of the private sector to invest in their own areas of priority that will support export development and in particular, women in export activities. Such agencies include the Private Sector Foundation Uganda (PSFU).

5.2.4 Quantum of Funding
The actual quantum of funding required is also very difficult to assess. Most funding will be provided through the budget allocation to UEPB and collaborating stakeholder agencies of government in respect to export trade. Availability of funding to implement the strategy will very much depend on priorities given by the executing agencies, based on their annual corporate plans and budget submissions to the Government of Uganda.

At the operational level, the implementation of the Engendered NES will either be undertaken within the existing budgetary provision, or additional resources will be requested. Funding for implementation of the strategy should not be looked at in isolation, but considered along with the priorities outlined in the NES Document (2009 – 2012), UEPB strategic plan and National Development Plan (NDP). Although the strategy has indicative figures, these have to be finalized by the executing agency.
Women success stories

Coffee Sector
Mrs. Nakayenga Rose Kato is the owner of Zigoti Coffee works. Zigoti was founded in 1985 and was the number one supplier to the then Coffee Marketing Board before the liberalization of the coffee sector in Uganda. In 1995 the company built a coffee processing plant and started roasting coffee for the local market. The company exports both Arabica and Robusta ground coffee and coffee beans.

Success
Zigoti has been able to rise up the coffee value chain from just selling coffee beans to roasted coffee, thus making headway into the international markets. After successful participation in international trade fairs supported by UEPB, such as the Expo in China (2004) which helped introduce Ugandan coffee into the Chinese market, and in 2005, the company attended another Expo in Japan for over 3 months and this led to the establishment of a coffee shop in Nagoya Sakae, Japan. To-date the company has been able to purchase a coffee hulling machine, 2 roasters and has managed to sustain a brand name and image by promoting quality coffee. Zigoti does not have its own coffee farms or plantations but sources its coffee from local farmers of Bugisu, Budadiri and Kapchorwa districts.

Challenges
The company faces resource constraints such as trade finance which limits its ability to serve international markets efficiently. Another constraint ensues from the increasing macro-economic problems such as inflation which is raising costs of operation, transport and freight charges.

Commercial Handicraft Sector
Ms. Sarah Katebarirwe: Sarah is a proud owner of Marie Sar Agencies, producer and exporter of bark cloth handloom woven banana fibre/leaf and handloom woven raffia products. She owns retail outlets at National Arts and Crafts Association, Crafts Village at National Theatre in Kampala and Exposure Africa. She exports to Germany, Canada, and South Africa and through Fair Trade outlets in Europe. She attended UWEAL Access programme and she noted an increase in her sales by 30% in 2003, then 50% in 2005 and 2006. She has developed her products to a high level after a series of training programmes at UWEAL and UEPB. She has successfully participated in selected fairs to exhibit in Europe by the Centre for Promotion of Imports from developing countries (CBI), Netherlands. She has participated in several trade fairs worldwide, and has attended training in export product development and export marketing.

Success
Sarah has built a brand of exports on the bark cloth which comes from Mutuba tree common in central Uganda. She has passion and knowledge into this specialty to produce bags, wall hangings and other accessories. Sarah says that specialty improves one’s expertise on a product and perfects one’s performance. Sarah says that her fortunes have come due to exporting environmentally friendly products. She had an opportunity to join CBI of Netherlands and UN Habitat which have helped her move ahead. These have helped her to get more exposed in the international market and to link to many possible buyers of her products.
Challenges
The challenge is that her capital is relatively small and that commercial lending is not good for the handicraft sector. She notes that even commercial banks find it difficult to support traders like her. Therefore, trade finance is her key challenge and high shipment costs for export consignments. Sarah also works with few producers and directly employs not more than 5 people due to capital constraints.

Tourism Sector
Community Based Tourism Initiative (COBATI) founder, Mrs. Maria Baryamujura was recognized among the “Ugandans Making a Difference” and received an award of recognition from The New Vision Corporation for the outstanding contribution to improving the lives of others for a better Uganda. The award was presented on 9th June 2008, a day reserved for Heroes in Uganda. With her over 20-year experience in tourism development in and outside Uganda, Maria was aware of the shift in global tourism, as tourists became more independent, environmentally and socially conscious and travellers moved to sustainable models that preserve culture and environment. She saw the socio-economic potential of tourism in bringing opportunities which are especially important in rural areas where few opportunities exist. Local people are trained to understand that Community Based Tourism in its widest form. The training covers all kinds of activities and attractions found in rural areas, which are mainly, or uniquely, for tourism purposes. It is linked to poverty alleviation, and used to promote the diversity of attractions and activities mainly found in rural areas, and to generate income for the local people.

Success
Maria’s approach encourages local participation at homestead and community level, and empowers local people through mentoring and training, linking them to opportunities in tourism. This approach brings about economic tourism -opportunities, which are especially important in rural areas where few opportunities exist. COBATI plans to go beyond mainstream vacations to open up a world of adventure and opportunity. It includes directing tourists to Uganda’s countryside, balancing the biased geographical distribution of tourists and offering opportunity to spread benefits from tourism into the rural economy.

Sustainability strategy
COBATI collaborates with various international and local NGO’s, Government, Private Sector, development agencies, communities and individuals in innovative ideas in sustainable community tourism development through partnerships. Maria has excelled in her business by linking communities to local and international tour operators, mobilizing public opinion around key community tourism development issues and engaging communities in innovative ideas on community tourism through partnerships.

Dairy Sector
Maama Omulunji Dairy Limited is owned by Mrs. Nalubanjawa Justine. Justine started her business in 2000 following training she had received from Dairy Development Authority. She started with one cooler, which handled a capacity of 700 litres a day. Her major clients have been the local residents, restaurants and household families. A year after she opened her business, she was able to purchase a 1500-litre cooler to meet her customers’ demands.
Success
Justine has since 2000 registered tremendous success in her dairy business. She has established other collection centres in Rushere Kiruhura District, with a 4000-litre cooler. Justine currently handles to the tune of 6000 litres a day of fresh milk.

Challenges
The company has a plan to expand and diversify its activities into production of yogurt and pasteurized milk. They have identified and are in the process of acquiring machinery for the expansion. However, capital is still small and commercial lending interest rates are too high.
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