Preliminary Findings and Recommendations on Ethiopian Cookstoves Market
Introduction

- This Market Assessment was conducted by Accenture Development Partnerships (ADP), the not-for-profit arm of the global management consultancy, Accenture, on behalf of the Global Alliance for Clean Cookstoves (the Alliance).

- It is intended to provide a high level snapshot of the sector that can then be used in conjunction with a number of research papers, consumer surveys and other sources (most published on the Alliance’s website) to enhance sector market understanding and help the Alliance decide which countries and regions to prioritize.

- It is one of sixteen such assessments completed by the Alliance to:
  - Enhance sector market intelligence and knowledge.; and
  - Contribute to a process leading to the Alliance deciding which regions/countries it will prioritize.

- Full slate of market assessments include studies in: Bangladesh, Brazil, Colombia, East Timor, Ethiopia, Ghana, Indonesia, Kenya, Mexico, Nigeria, Peru, Rwanda, South Africa, Tanzania, Uganda and Vietnam.

- Each assessment has two parts:
  - Sector Mapping – an objective mapping of the sector.
  - Intervention Options – suggestions for removing the many barriers that currently prevent the creation of a thriving market for clean cooking solutions.

- In each Alliance study a combination of ADP and local consultants spent 4-6 weeks in country conducting a combination of primary (in-depth interviews) and secondary research. They used the same Market Assessment ‘Toolkit’ for each country so that comparisons can be made. The Toolkit is available free of charge to all organizations wishing to use it in other countries.

- The Alliance wishes to acknowledge the generous support of the following donors for the market assessments: Barr Foundation, Dow Corning Corporation, Shell Corporation, Shell Foundation, and the governments of Canada, Finland, and Spain.

This market assessment was produced by Accenture Development Partnerships (ADP) on behalf of the Alliance. The findings, interpretations, and conclusions expressed in this work do not necessarily reflect the views of the Global Alliance for Clean Cookstoves or its partners. The Alliance does not guarantee the accuracy of the data.
This presentation will focus on understanding the current issues, their cause and potential solutions. Analysis and planning will be the next steps and will rely on the input received.

**Framework and Approach**

**Focus**

**Next steps**

**Understanding**

**Issues**
- What are the major issues?

**Causes**
- Why do the issues exist?

**Solving**

**Solutions**
- What can be done to address the issues?

**Analysis**
- What are the details of the prioritised solutions?

**Planning**
- How might solutions be implemented?

**Observations and Research**
- Interviews
- Focus groups
- Research

**Workshop and Breakout Session**
- Guidance on desired solutions and implementation approaches
Enabling a Market Based Solution

To reach the 9.4m target in 5 years through a market based solution it is necessary to build and foster all the components required for an efficient and effective market.

- The Ethiopian cookstove market has been able to disseminate 4.4M stoves over the last 5 years. [1]
- To increase dissemination, a focus is needed on building and creating the components required for a holistic cookstoves market.
- The goal should be to develop a market where customer demand ‘pulls’ products through the value chain.
- A joint and coordinated approach is required from multiple stakeholders to achieve this.

Market Components to be Addressed

1. Objectives
2. Products
3. Customer Demand
4. Information and Innovation
5. Government Intervention
6. End-to-End Supply Chain
7. Financing
8. Program Priorities

There are multiple organisations supporting the cookstove market, each with different objectives and approaches that are not always aligned.

<table>
<thead>
<tr>
<th>Diverging Objectives</th>
<th>Aligned Objectives</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Health Office</strong></td>
<td><strong>Energy Office</strong></td>
</tr>
<tr>
<td>• Improve people’s health by reducing smoke, but focus on supporting stoves with chimneys</td>
<td>• Reduce fuel consumption, by developing fuel efficient stoves and new fuels sustainable fuels</td>
</tr>
<tr>
<td><strong>Women’s Affairs</strong></td>
<td><strong>GIZ</strong></td>
</tr>
<tr>
<td>• Not always able to select producers that are most likely to succeed</td>
<td>• Energy support</td>
</tr>
<tr>
<td><strong>NGOs</strong></td>
<td><strong>Agriculture Office</strong></td>
</tr>
<tr>
<td>• Give stoves away for free</td>
<td>• Reduce deforestation</td>
</tr>
<tr>
<td></td>
<td><strong>Small and Micro Enterprise</strong></td>
</tr>
<tr>
<td></td>
<td>• Business support</td>
</tr>
<tr>
<td></td>
<td><strong>Micro Finance</strong></td>
</tr>
<tr>
<td></td>
<td>• Business support</td>
</tr>
</tbody>
</table>

Source: Based on qualitative analysis from interviews Government and NGOs
To get support from multiple organisations and effectively use resources, it is necessary to have common and agreed objectives.

<table>
<thead>
<tr>
<th>Objective</th>
<th>Potential Solutions</th>
<th>Initiatives</th>
</tr>
</thead>
<tbody>
<tr>
<td>Common and aligned objectives</td>
<td>1. Develop joint planning committees</td>
<td>• Organize regular meetings with stakeholders at national level to discuss cookstoves and agree on directions</td>
</tr>
</tbody>
</table>
| | 2. Develop program guiding principles | • Understand key requirements of each stakeholder  
• Understand the priorities and trade offs |
| | 3. Revise product designs to cater to multiple stakeholders | • Include women in design of products  
• Understand the requirements of each stakeholder |
Preliminary analysis reveals that there are approximately 8.2M households without injera stoves. Hence, focusing on injera stoves alone will not be sufficient to reach the 9.4M target.

**Current State of Injera Stoves**

- Total injera stoves disseminate (M) \(^\text{[2]}\) = 3.8
- Households without injera stoves (M) = 8.2

- This number will only reduce when non injera cooking households are considered
- This number does not consider broken or replacement stoves

**5 Year GTP Target**

- Total stoves (M) = 9.4

- Target was calculated based on the total current capacity/volume

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[2] RHEEIP report, 2011, 1.7M Mirt, 0.2M Gonzye, 1.9M Closed stove
[3] RHEEIP report, 2011, 181k Opesi, 11k Daily cooker, 57k Laketch, 343k, Concrete, 64k Tikikl
A detailed understanding of the market share and product penetration is required. However, ultimately there needs to be a focus on a variety of stoves and fuels.

<table>
<thead>
<tr>
<th>Govt Objective</th>
<th>Potential Solutions</th>
<th>Initiatives</th>
</tr>
</thead>
</table>
| Disseminate 9.4m stoves in 5 years | 1. Complete market breakdown analysis | • Collect detailed data on each segment and product to analyze market share  
• Develop detailed targets for products and regions |
|  | 2. Focus non-injera cookstoves as well as injera | • Charcoal cookstoves  
• Wood cooking stoves |
|  | 3. Include alternative fuels | • Ethanol  
• Electricity  
• Solar |
|  | 4. Include traditional closed stoves in program | • Using best practice examples, develop a standardised recommended design |
## 3. Customer Demand

There is mixed demand for clean cookstoves as some customers either do not want them, cannot access them, or cannot afford them.

<table>
<thead>
<tr>
<th>Issues</th>
<th>Observations</th>
<th>Causes</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Value</strong>&lt;br&gt;Do customers want it?</td>
<td>• Products do not meet customer needs&lt;br&gt;• Customers do not understand the product’s benefits</td>
<td>• Products can save more than 50% in fuel costs&lt;br&gt;• Stove pay back period is only a few months&lt;br&gt;• 71% of people collect wood</td>
</tr>
<tr>
<td><strong>Price</strong>&lt;br&gt;Can customers afford it?</td>
<td>• Customers state that stoves are too expensive&lt;br&gt;• However, many have purchased stoves at current prices</td>
<td>• Price range from 60 to 170 Birr&lt;br&gt;• Customer suggest prices should be between 50 to 100 Birr&lt;br&gt;• 60% of households earn more than 6,000 Birr pa</td>
</tr>
<tr>
<td><strong>Access</strong>&lt;br&gt;Can customers get it?</td>
<td>• Many customers do not have access to clean cookstoves and fuels</td>
<td>• Focus on small scale, decentralised producers&lt;br&gt;• Improved charcoal stoves are not widely distributed</td>
</tr>
</tbody>
</table>

Source: Based on qualitative analysis from interviews with customers, producers and institutions

Increasing demand should focus on improving the customer value proposition and communicating it more effectively.

**Objective**

1. Reduce stove prices
2. Modify and/or create products
3. Modify marketing messages
4. Use social marketing
5. Use the NGO support to distribute stoves

**Potential Solutions**

- Offer subsidies to selected customer and regions
- Focus on flexible payment terms
- Introduce new stoves that meet different regional and customers needs
- Modify products to have different attributes
- Focus on product benefits not product awareness
- Include indicative prices and fuel savings on ads and posters
- Target stoves to a few select influencers to build new markets
- Align products to ‘social status’
- Encourage NGOs to find ways to bring down costs for clean cookstoves to those that cannot afford the market price
Enhanced sharing of information between different organisations and different layers of government, would promote innovation and help better meet customer needs.

**Issue and Cause**

4. Information and Innovation

**Innovation not Shared**

- **Govt**: Established Joint Planning forums
- **Manufacturers**: Invented new injera stoves
- **Manufacturers**: Invented new cement cookstoves

**Unfulfilled Customer Needs**

- **Customer**: Preference for traditional stoves
- **Customer**: Requested chimneys for Mirt stoves
- **Customer**: Tikikl too small for pots and appears unstable
- **Customer**: Removes dual cooking function from Mirt stoves

**Observations**

Source: Based on qualitative analysis from interviews
**Potential Solutions**

4. Information and Innovation

Improved frameworks, tools and processes can capture information from customers and producers and allow for more informed decisions on the direction of the market.

<table>
<thead>
<tr>
<th>Objective</th>
<th>Potential Solutions</th>
<th>Illustrative Interventions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create feedback loops to generate new ideas and improvements</td>
<td>1. Implement a product management framework</td>
<td>• Products managers&lt;br&gt;• R&amp;D capability&lt;br&gt;• Pilot programs for new markets and/or products</td>
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<tr>
<td></td>
<td>2. Introduce a rewards and recognition program</td>
<td>• Financial incentives for new concepts&lt;br&gt;• Preferred Govt support for innovative producers</td>
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<td>3. Introduce product and producer standards</td>
<td>• Marketing support for those producers that meet standards&lt;br&gt;• Annual quality checks</td>
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<td></td>
<td>4. Introduce tools to support information flow</td>
<td>• Include observations and ideas in reports&lt;br&gt;• Introduce web-based reporting tool&lt;br&gt;• Mobile phone reporting</td>
</tr>
</tbody>
</table>
Overlap among many of the same functional activities among government organizations can result in duplicated efforts and coordination gaps.

- Cookstoves Market Activities -

<table>
<thead>
<tr>
<th>Organisation</th>
<th>Design/ R&amp;D</th>
<th>Carbon Finance</th>
<th>Funding</th>
<th>Training</th>
<th>Produce</th>
<th>Transport</th>
<th>Sell and Install</th>
<th>Marketing &amp; Coms</th>
<th>Stove Testing</th>
<th>Reporting</th>
</tr>
</thead>
<tbody>
<tr>
<td>Energy Office</td>
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<td>Women's Affairs</td>
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<td>Micro and Small Ent.</td>
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<td>Microfinance</td>
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<td>Health Office</td>
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<tr>
<td>GIZ</td>
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<td>Private Business</td>
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</tbody>
</table>

Source: Based on qualitative analysis from interviews with producers
There needs to be increased coordination between Organisations, and more consideration of needs of stove businesses.

### Potential Solutions

#### Government Intervention

<table>
<thead>
<tr>
<th>Objective</th>
<th>Potential Solutions</th>
<th>Initiatives</th>
</tr>
</thead>
<tbody>
<tr>
<td>Government and NGOs to cover capability gaps in the market</td>
<td>1. Set up a coordination mechanism</td>
<td>• Regular meetings with all key stakeholders at each level of Government to plan and coordinate activities</td>
</tr>
<tr>
<td></td>
<td>2. Specialisation of functions</td>
<td>• Define roles, responsibilities and relationships</td>
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<tr>
<td></td>
<td>3. Introduce functional business roles in Government offices</td>
<td>• Encourage organisations to focus on activities where they have the most skill and ability</td>
</tr>
<tr>
<td></td>
<td>4. Modify training and recruitment to focus on business skills</td>
<td>• Introduce people responsible for Marketing, Distribution, and Sales, Product Management and R&amp;D</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Train government official on business skills</td>
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<td></td>
<td></td>
<td>• Hire experts in marketing or outsource to professionals</td>
</tr>
</tbody>
</table>
There has been a heavy emphasis on developing manufacturing capacity, but limited focus on the end-to-end supply chain, namely sales, marketing and distribution and retailing capabilities.

**Issue**
- A market based solution requires each stage of the supply chain to function most effectively

**Cause**
- Emphasis on production and technical aspects
- Limited distribution infrastructure

**Enablers**
- Technology
- Product Management
- Finance
- Labour
- Marketing

**Fuel**
- Raw materials
- Production
- Distribution (△)
- Retailing (△)

**Stoves**
- Raw materials
- Production
- Distribution (△)
- Retailing (△)

**Charcoal and Tikikl stoves have limited distribution**

**Merchants do not transport improved cookstoves**

**Lack of promotion and marketing - Reliant on Govt or GIZ for marketing - limited capabilities**

**Below capacity - lack of demand**

Source: Based on qualitative analysis from interviews

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### Potential Solutions

#### 6. End-to-End Supply Chain

To build a self sufficient market there needs to be support across all areas of the supply chain.

<table>
<thead>
<tr>
<th>Objective</th>
<th>Potential Solutions</th>
<th>Initiatives</th>
</tr>
</thead>
</table>
|           | 1. Less focus on training new producers and more on support for existing producers | • Limit the number of new Mirt producers until demand increases  
• Provide more business training to producers |
|           | 2. Leverage existing distribution networks | • Energy Experts to collaborate with Development and Health Ext Workers to distribute stoves |
|           | 3. Provide additional support to distributors and retailers | • Encourage Mirt producers to stock and sell other stove models  
• Offer commissions to customers that sell stoves to neighbors |
|           | 4. Increase marketing and promotions | • Increase product demonstrations  
• Give a few free or subsidised products to new communities to increase ‘word of mouth’ |
|           | 5. Co-develop stove and fuel supply chains | • Targeted support for advanced and clean fuels |
The expansion of the current market has relied on Government and Donor financing, with some carbon financing being explored.

### 7. Financing

**Issue and Cause**

### Major Contributor

<table>
<thead>
<tr>
<th>Government</th>
<th>Micro-finance</th>
<th>Donor</th>
<th>Owner Investment</th>
<th>Carbon Finance</th>
<th>Domestic Investment</th>
<th>Foreign Investment</th>
</tr>
</thead>
<tbody>
<tr>
<td>• World Bank loans</td>
<td>• Cookstove revolving fund</td>
<td>• Direct</td>
<td>• Limited due to small scale</td>
<td>• WFP and Agriculture Dept</td>
<td>• Not observed</td>
<td>• Not observed</td>
</tr>
<tr>
<td>• Shortage of funds</td>
<td>• Indirect</td>
<td>• Additional finance will need to be found to implement initiatives</td>
<td></td>
<td>• World Vision</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Cause

- Small scale producers
- Shortage of funds

*Source: Based on qualitative analysis from interviews*
**Potential Solutions**

## 7. Financing

Additional funds could come from increased donor support, international investment, or carbon finance. However, there will likely need to be multiple funding sources for the program.

<table>
<thead>
<tr>
<th>Objective</th>
<th>Potential Solutions</th>
<th>Initiatives</th>
</tr>
</thead>
</table>
| Funding for vital initiatives and ongoing operational activities | 1. Government Finance | • Increase allocation of funding from National Government  
• Increase Woreda budgets |
| | 2. Donor Support | • Increase international media coverage  
• Marketing of program benefits across people and producers |
| | 3. Microfinance | • Increase max loan amount  
• Support broader range of businesses  
• Extend microfinance to customers |
| | 4. Carbon Financing | • Leverage existing programs  
• Partner with a carbon implementer  
• Pilot carbon finance |
The Ethiopian cookstove market can grow in a variety of ways, through new regions, new customers, new products, and new fuels. Hence, it is critical that priorities are understood.

8. Program Priorities

**Issue and Cause**

- **Key Growth Options** - NOT EXHAUSTIVE

<table>
<thead>
<tr>
<th>Depth</th>
<th>Breadth</th>
</tr>
</thead>
<tbody>
<tr>
<td>Increase number of products and product variations</td>
<td>Expand operations to more customers and regions</td>
</tr>
<tr>
<td>Support ethanol for urban</td>
<td>- Not identified -</td>
</tr>
<tr>
<td>Develop traditional mud stove for rural segments</td>
<td></td>
</tr>
<tr>
<td>Develop new stoves for new regions</td>
<td></td>
</tr>
<tr>
<td>Enhance existing injera stoves</td>
<td>Increase distribution of charcoal stoves</td>
</tr>
<tr>
<td>Develop cement cooking stove for Mirt producers</td>
<td>Increase distribution of Tikikl stoves</td>
</tr>
<tr>
<td>Modify Tikikl for rural segments</td>
<td></td>
</tr>
</tbody>
</table>
To achieve the 9.4M target it is important that strategic priorities are set and pilot programs are used to explore different options before mass implementation.

<table>
<thead>
<tr>
<th>Objective</th>
<th>Potential Solutions</th>
<th>Initiatives</th>
</tr>
</thead>
</table>
| Effectively use resources to reach the 9.4M target | 1. Run pilot programs | • Test different strategies in different regions  
• Support the most successful |
| | 2. Target specific customers | • Collect additional information about customers and their needed  
• New products/fuels or product versions  
• Targeted marketing |
| | 3. Phased Implementation | • Regional implementation of program activities  
• Prioritise solutions that address the biggest issues |
Conclusion

- Recommendations -

• Encourage cooperation and collaboration between participants

• Understand guiding principles and priorities

• Support innovation in products, distribution channels and business models

• Focus on understanding the customer and use this information to guide product and marketing strategies

• Build capabilities and capacity across all stage of the supply chain

• Enhance business skills and knowledge
The GTP direction should drive the approach for cookstoves

**Emphasis on road infrastructure**
- Proportion of areas further from 5km of all weather roads from 64% to 29%
- Road density from 0.64 to 1.54 km/1000 people

**Centralized production and distribution channels is possible**

**Emphasis on electricity**
- Electricity coverage from 41 to 75%
- Power generating capacity from 2,000 to 8,000 mw

**Greater potential for electric stoves**
## Key Market Statistics

Basic calculations reveal the following about the Ethiopian Cookstove Market:

<table>
<thead>
<tr>
<th>Current production</th>
<th>Current sales</th>
<th>Current market size</th>
<th>Target stoves</th>
</tr>
</thead>
<tbody>
<tr>
<td>• 2.6M stove over 5 years [^1]</td>
<td>• Ave 21 stoves per person per year</td>
<td>• 12M households [^3]</td>
<td>• 80% of households buy one stove or</td>
</tr>
<tr>
<td>• 1.9M stoves last year</td>
<td>• 76 stoves per person last year</td>
<td>• 3.8M injera stoves sold [^1]</td>
<td>• 40% of households buy two stoves or</td>
</tr>
<tr>
<td>• 25,000 people trained [^1]</td>
<td>• Max production capacity of 11.6M stoves over 5 years</td>
<td></td>
<td>• 20% buy two stoves, and 40% buy one stove</td>
</tr>
<tr>
<td>• 30 – 300 stove per month per producer [^1]</td>
<td>• Excludes other products</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• 600 Mirt producers [^2]</td>
<td></td>
<td>• 8.2M household without injera stoves</td>
<td></td>
</tr>
<tr>
<td>• 45 Tikikl producers [^2]</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

\[^1\] Ethiopian – Stove Dissemination Performance
\[^2\] GIZ discussion
\[^3\] World Bank, 2010, with total population = 83m and average household size = 7
The current 9.4M target was based on existing sales/production and used to forecast out for the 5 years. At this rate every household in Ethiopian will have an injera stove in 2014.

Forecast sales per year are based on per 2010 (current year)
This method was used to forecast the 9.4 M GTP target
Stove: Closed 0.9 M, Gonzye 0.1 M, Mirt 1.2 M
Impact on Wood Consumption

The 9.4m target would result in a very large decrease in wood consumption, which may be difficult to achieve – it is necessary to understand the exact composition of the 9.4m target.

**Issues**
- This is a very dramatic decrease that may be difficult to realise
- It is necessary to understand how the 9.4m stoves will be distributed in terms of what stoves, regions, and fuel usage to ensure that targets are achievable

**Assumptions**
- Use of wood consumptions increases proportional to population growth, which is 2.2%
- 85% of people use wood and 85% of stoves sold will use wood
- 7 people per household
- Baseline is 8.5m³ of wood used per household per year
- 1.8m stoves disseminated per year
- 50% saving in fuel per stove
- No change in behaviour or usage of different fuel types
- Assumed existing data includes stoves already sold
The 9.4M 5 Year target is based on multiplying the current stoves sales/production (2010) by 5 years.

<table>
<thead>
<tr>
<th>Stove</th>
<th>2010</th>
<th>x 5 years →</th>
<th>Plan</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mirt</td>
<td>1.2</td>
<td></td>
<td>5.8</td>
</tr>
<tr>
<td>Gonzie</td>
<td>0.1</td>
<td></td>
<td>0.6</td>
</tr>
<tr>
<td>Opesi</td>
<td>0.1</td>
<td></td>
<td>0.7</td>
</tr>
<tr>
<td>Daily Cooker</td>
<td>0.0</td>
<td></td>
<td>0.0</td>
</tr>
<tr>
<td>Laketch</td>
<td>0.1</td>
<td></td>
<td>0.3</td>
</tr>
<tr>
<td>Concrete</td>
<td>0.3</td>
<td></td>
<td>1.7</td>
</tr>
<tr>
<td>Tikikl</td>
<td>0.1</td>
<td></td>
<td>0.3</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>1.9</strong></td>
<td><strong>9.4</strong></td>
<td></td>
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<tr>
<td><strong>Closed</strong></td>
<td>0.9</td>
<td></td>
<td>4.7</td>
</tr>
<tr>
<td><strong>Total (including Closed)</strong></td>
<td><strong>2.8</strong></td>
<td><strong>14.1</strong></td>
<td></td>
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</tbody>
</table>
The implementation model should aim to build capabilities, with each capability comprised of a series of activities and initiatives.

<table>
<thead>
<tr>
<th>Year 1</th>
<th>Year 2</th>
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<tbody>
<tr>
<td>Establish federal coordination mechanism</td>
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<tr>
<td>Establish regional coordination mechanism</td>
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<tr>
<td>Establish Zonal and Woreda regional coordination mechanism</td>
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<tr>
<td>Establish product management capability</td>
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<tr>
<td>Develop targets for products, regions and customers</td>
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<tr>
<td>Set up carbon financing</td>
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<tr>
<td>Develop new products</td>
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<td>Develop marketing capability</td>
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<td>Develop monitor and evaluation capability</td>
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<td>Develop distribution capability</td>
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