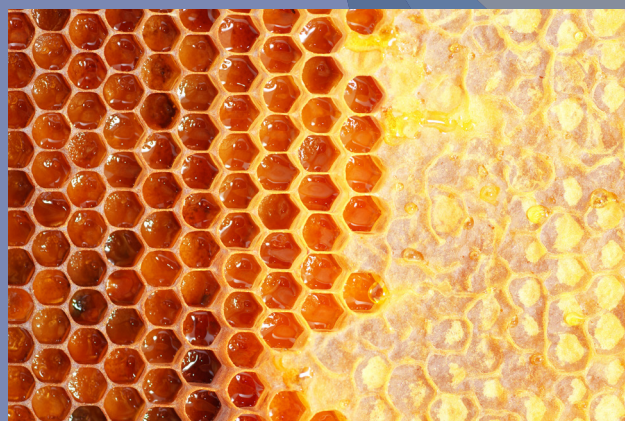




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AGRO-INDUSTRY INVESTMENT OPPORTUNITIES DIRECTORY ETHIOPIA

INCLUSIVE AND SUSTAINABLE INDUSTRIAL DEVELOPMENT



UNITED NATIONS
INDUSTRIAL DEVELOPMENT ORGANIZATION

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FOREWORD

This publication is an outcome of the ongoing collaboration established between the United Nations Industrial Development Organization (UNIDO) and the Ministry of Trade and Industry (MOTI) in the ambit of the Programme for Country Partnership (PCP) for Ethiopia. The PCP for Ethiopia brings together development partners, UN agencies, financial institutions and the business sector under the leadership of the national Government to help achieve the goals set out in the country's industrial development strategy and Growth and Transformation Plan II (GTP II, 2015-2020).

It is expected that sector development will continue to act as a springboard for the transformation of Ethiopia's economy from one based on agriculture, to one driven primarily by light manufacturing industry. In this context, the Government of Ethiopia called on UNIDO to support mobilizing international investors through UNIDO's global network as well as to support organizing international investment forums in 2016 and 2018, with the ambition to substantially increase public, private and public-private investments in food, leather and leather products and textile manufacturing and other sectors in Ethiopia.

MOTI is pleased to note that immediate follow-up project activities to the investment forum events have focused on a series of capacity building interventions earmarked to upscale the capacity of Ministry officials in matters related to investment project profiling and enterprise benchmarking assessment, both themes based on UNIDO's established investment promotion methodologies. Following successful implementation of capacity building activities in 2018, officials from the Ethiopian Food and Beverage Industry Development Institute and the Ethiopian Meat and Dairy Industry Development Institute, under the supervision of MOTI, undertook extensive profiling as well as enterprise benchmarking.

This investment opportunities directory has been prepared to be used in various investment promotion efforts in future PCP Ethiopia events, including but not limited to the upcoming 3rd edition of the International Agro-Industry Investment

Forum. The directory shows that Ethiopia boasts of business opportunities emanating from a private sector which is ambitious to grow and diversify its products and services. We thank UNIDO for its continued support to MOTI for the promotion of investment opportunities in the targeted sectors.



A handwritten signature in black ink, appearing to read 'Teka Gebreyesus'.

Teka Gebreyesus,
State Minister, Ministry of Trade and Industry,
Federal Democratic Republic of Ethiopia

1. INTRODUCTION



As one of the fastest growing economies worldwide, Ethiopia has registered impressive GDP growth for the past several years. With a population of roughly 110 million (source: World Bank Group, 2019), Ethiopia is the second most populous country in Sub-Saharan Africa.

To bring about structural economic change and transform Ethiopia into a middle-income country by 2025, the Government of Ethiopia (GoE) follows an integrated 5-year development plan, the Growth and Transformation Plan (GTP) II. The industrial sector, and more precisely agricultural development-led industrialization, is expected to play a catalytic role towards this goal. Finite land and a growing population require that larger amounts of food are produced by fewer people, thereby increasing the importance of off-farm livelihoods. Structural

transformation therefore becomes crucial, if agriculture is to endure as a source of economic growth for Ethiopia.

Agricultural production currently constitutes the backbone of Ethiopia's economy. The agricultural sector directly supports more than 75 per cent of the population. Some 85 per cent of export earnings are derived from it. With diverse agro-climatic zones, a long growing season and water availability for irrigation and arable land, Ethiopia is ideal for commercial farming. The growing demand of agricultural output both locally and internationally makes the agricultural sector particularly attractive to investors. An abundance of raw materials, low wages and low energy costs give it a comparative advantage over other countries.

Agro-industries are the link between agriculture and industry. Agro-industries already account for the largest share of manufactured goods in Ethiopia. Its share in industrial value addition is 46.2 per cent (source: UNIDO INDSTATS 2018). The development of the agro-industrial sector is critical given its economic contribution to Ethiopian livelihoods and the employment opportunities offered by the sector with a share of 33 per cent (source: UNIDO INDSTATS 2018). The strong linkages to other sectors and the use of abundant agricultural products as inputs create a positive climate for the development of agribusiness.

To attract the necessary capital for the desired structural transformation, the Government of Ethiopia is actively improving the current investment climate through the adoption of more efficient bureaucratic processes in the areas of business registration, logistics and tax administration. The country is engaging investors with tax incentives, low-cost labor and improved transport infrastructure. The revised Investment Code of 1996, as well as the Investment Proclamation of 2012 provide incentives for development-related investments and have gradually removed most of the sectorial restrictions on investment. Furthermore, the 2014 amendment to Ethiopia's Investment Proclamation introduced provisions for the establishment of industrial development zones, both state-run and private, with favorable investment, tax and infrastructure incentives. Other measures include the revision of regulations for potential investors, standardization of appropriate accounting practices, increased protection for shareholders, provisions for bankruptcy filings and the modernization of trade and registration processes. The Government of Ethiopia is also implementing measures to further privatize and liberalize the trade regime and, in turn, to create a safer and more attractive investment environment.

than 1 per cent in 2000. The share of FDI in GDP has increased as well and now stands at 23 per cent.

Ethiopia has been one of the first countries to benefit from UNIDO's Programme for Country Partnership (PCP), initiated in 2014. Directly in line with the GTP II, PCP Ethiopia focuses on three priority sectors: agro-food processing, textiles and apparel, and leather and leather products. The Programme also includes several cross-cutting interventions in the areas of investment and trade facilitation, environment and energy, and institutional capacity-building. Multiple investment promotion projects have been implemented over the past years under the general umbrella of the PCP Ethiopia. Among others, these include the First and Second Agro-Industry Investment Forums, organized in Addis Ababa in 2016¹ and 2018², respectively. Complementary to these events, UNIDO has published a first Investment Opportunities Directory for Ethiopia for the first forum, which was updated by the time of the second forum. Its aim was to provide prospective foreign direct investors with an overview of investment project opportunities linked to domestic enterprises, notably those operating in the agro-food sector.

Origins of this Directory

This document is the result of a collaboration between the Ministry of Trade and Industry and UNIDO, aiming not only to highlight investment potential in Ethiopia, but also to build the capacity of the Ministry in terms of identifying and assessing investment project opportunities in domestic enterprise and preparing profiles accordingly. It has been prepared in anticipation of the upcoming Third International Agro-Investment Forum as well as ongoing investment promotion activities supported by UNIDO.

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