



ASSESSMENT OF PRODUCER ORGANIZATIONS AND CONSTRAINTS IN THE NORTHERN ZONE REPORT

Northern Zone Initiative (IZN)



**COOPERATIVE AGREEMENT
NO. AID-526-A-10-0001**



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EXECUTIVE SUMMARY

In March, 2010, USAID/Paraguay awarded ACDI/VOCA the Northern Zone Initiative program (IZN by its Spanish acronym) through Cooperative Agreement (CA) No. AID-526-A-10-0001. The program's focus was to strategically improve local governance and increase economic security in the targeted areas of northern Paraguay. Successful implementation of the program will be an integral building block for current and future USAID programs in Paraguay.

Under modification seven, USAID requested ACDI/VOCA to compile a Landscape Study of Producer Associations, and a Constraints Analysis/Bottleneck Study in Northern Paraguay, utilizing knowledge and lessons learned from the IZN initiative and ACDI/VOCA's expertise in working with cooperatives across the globe to answer two key questions:

1. Assessment of producer associations and other producer organizations in the northern zone
2. Assessment of bottlenecks for growth in the northern zone for small producers to get their products to the market

These assessments have revealed a number of key findings about the state of small holder farmers, producer organizations, the market, and the general economy in northern Paraguay. Key weakness identified include limited accessibility to technical assistance for producer organization, the majority of which only receive such assistance through internationally supported programs; poor access to improved inputs and production technologies; underdeveloped post-harvest handling and packaging which results in depreciation of the product on route to the market; and a dependency on limited number of buyers and traders. In consequence, these value chains do not support efficient yield generation and return on those yields, holding small holder farmers in a state of poverty. In response, a portion of the small holder farming population have turned to production of Illicit crops, which further degenerates the principal value chains, bringing social, economic, and political conflict between those engaged in the licit economy and those in the illicit economy. This general division has significant impact on the health and stability of the social, political, and economic state in northern Paraguay.

A separate, but equally significant challenge is the issues of land tenure. The vast majority of small-holder farmers inherit land passed down from one generation to the next, without acquisition of appropriate documentation such as titles and deeds. This forms a major barrier to smallholder farmer's access to credit. Furthermore, without recognized ownership by the state, farmers lack the disincentives to farming illicit crops as they are not held accountable to the state's laws for land usage. In addition, income generated through licit activities on the land does not generate any additional funding for community or district development, facilitating further degradation of the social infrastructure.

It is recommended, therefore, that any response to work with small-holder farmers in Northern Paraguay include a focus on strengthening agricultural productivity through increasing the capacity of farmers and farmer households in production, as well as a significant effort in enterprise development across the value chain, focusing on both the demand end, such as strengthening of producer groups, associations, and cooperatives,

and the supply end, the input suppliers, technical assistance to providers, traders and buyers, of the value chains.

Another recommended area of focus should be on the importance of strengthening the capacity of critical local level, district, and regional institutions to resolve issues of land tenure, as well as developing and putting into place incentives and support needed for smallholder farmers to obtain proper documentation for to their land.

BACKGROUND

Paraguay's Agricultural Economy

Paraguay is a small landlocked country with a population of 6.6 million. According to Paraguayan census data, one-fifth of the population lives in extreme poverty, the majority of which lives in rural areas.

Paraguay is predominantly an agricultural economy. Agricultural activities represented about 22.3 percent of GDP in 2009. The agricultural sector employs nearly a third of the country's population, and more than 200,000 families depend on subsistence farming. The country's main exports are grains (primarily soybeans and corn) and beef, making it highly susceptible to climate change events and world price fluctuations. Paraguay's economic outlook is strongly influenced by the economic performance of its neighbors, particularly its larger Mercosur partners, Brazil and Argentina. Paraguay's real GDP growth rates have varied widely in recent years, from growth of 5.8 percent in 2008 to minus 3.8 percent in 2009, a rebound to 15 percent in 2010, 3.8 percent in 2011 and an estimate minus 1.5 percent in 2012. The robust performance of Paraguay's agricultural sector in 2010, as well as strong performances in construction and manufacturing drove a positive rebound from the recession in 2009.

The cooperative sector is particularly strong in Paraguay; in 2010 there were more than one million cooperative members, or around 20 percent of the population. Cooperative development represents an effective means to improve the livelihoods of those one million smallholder members, especially since a market exists for increased production. Agricultural cooperatives serve as an important mechanism for improving the living conditions of the farmers.

The Northern Zone

The livelihood of farmers is at the center of much of the political, social, and economic strife in the Northern Zone. Constraints and limitations within existing and promising value chains, in an area where agricultural based livelihoods drive the economy, contributes to widespread poverty, sustains weak institutions and a weak enabling environment. The opportunity to engage in illicit crop production, particularly in Canindeyú and Amambay-compels many rural families in the area to engage in illegal activities to generate income, which only furthers the degradation of local governance and social, political, and economic institutions. As the need for health, education, transportation and other basic services continue to be unmet, farmers turn further to illicit and informal economic activities to generate income and strengthen their livelihoods. A political, social, and economic division is then formed between farmers who continue to operate in the licit economy and those who operate in the illicit economy, resulting in further conflict. This cycle of conflict which has the livelihoods of farmers at the center has had an immeasurable impact both on social cohesion and rural governance, as well as on productive rural economies as a whole.

Furthermore, there has been a longer standing historical conflict around land tenure between different farmer populations in Paraguay who are engaged in two separate but coexisting agricultural models. On one side is the large-scale agricultural producer-exporters model, which makes intensive and extensive use of land, supported in their

ability to access credit and international markets, and also by favorable government policies. On the other side are small-scale traditional farmers, grouped in weak organizations, historically poor, and who have been dispossessed of their lands by successive previous governments or who do not possess the legal documentation to their land. This issue of land ownership leads to acts of demonstration and in some cases violence including land occupations, closing of roads, marches and more done to demand a comprehensive agrarian reform and reclamation of allegedly ill-gotten lands.

Another important element that has generated violence and conflict in the Northern Zone of Paraguay is the appearance of an armed guerrilla group called "Paraguayan People's Army" (EPP by its Spanish acronym) who defined themselves as "popular", but nevertheless his claim mode (armed struggle) have not found favorable response in the sector of peasant organizations who do not identify with their methods and have even publicly repudiated its existence and practices. The Paraguayan People's Army (EPP) has been awarded a series of acts of violence such as burning facilities, fatal shootings, kidnappings and killings in the name of a popular revolution whose agenda includes radical solutions to the problem of land and agrarian reform.

AGRICULTURAL RURAL ECONOMY IN THE NORTHERN REGION

The Northern Zone's Agricultural economy is focused primarily around the production of a number of principle crops specifically soybean, by middle-age, male farmers. Most smallholder farmers in the northern region divide their land between subsistence crops such as kasava and beans, and crops for income generation such as bananas, dairy, sesame and groundnuts. In addition, farmers in the northern zone are organized across multiple levels of organization, from Neighborhood Committees to large-sized Cooperatives. However, 62 percent of all organized farmers fall into Producer Committees, followed by 19 percent in cooperatives leaving a large gap at the producer association level.

SMALLHOLDER FARMERS PROFILES IN THE NORTHERN REGION

While there is diversity in the profile of smallholder farmers in the Northern Region, there are some general characteristics and important distinctions which have been identified by the IZN program. The average family size of a smallholder farmer family is around five members speaking Gurani as their primary language. Literacy and numeracy is a challenge with most farmers, but particularly older farmers who average three years of primary level schooling. The younger generations of farmers have higher levels of education, most having completed primary level education.

According to the 2011 Household Survey conducted by the Department of Statistics and Census Surveys (DGEEC by its acronym in Spanish), the age structure of the population reveals a predominantly young sector, with 57.5 percent of the population under 30 years old and 6.8 percent within the 65 and older age group. The nationwide distribution shows an equal proportion of men and women (49.8 percent male versus 50.2 percent female), showing some difference in rural areas slightly male dominated.

Most youth in a smallholder family household are divided between different demands: Staying at home and contributing to the household livelihood as farmers, seeking higher education and/or employment in the nearest urban center, or leave the household altogether in search of non-agrarian activities. Due to limited job opportunities and living

conditions youth population tend to migrate to cities far more often than the rest of the rural population. The distribution of labor by economic sector where it is inserted indicates that more than half (56.3percent) of the employed labor force serves on companies or establishments belonging to the tertiary sector of the economy (trade, services, transportation and financial institutions), while primary or extractive sector (agriculture) absorbs only 26.4percent of the employed and the secondary sector (manufacturing and construction) 17.1percent.

Land rights and land tenure continue to be a challenge with smallholder families. Most smallholder families inherit land passed down from multiple generations without deeds or documentation of ownership, which in Paraguay proves a significant barrier to access to credit and hence to a low investment capacity. The average size of land is around 10 hectares, half of which is used for subsistence while the other is used for cash crop production.

Many farmers self-organize into a variety of organizational structures, from neighborhood producer committees, to joining larger cooperatives. In general, these structures span from five (the neighborhood committees) to 70 or more members (at the cooperative level), and include both male and female farmers. Key value chain sectors for these groups include large and small cattle herding (less than 50 units) & domestic animals, milk and dairy production, sesame, maize, corn, soybean, wheat, sugar cane, horticulture, banana, pineapple, tobacco, cotton, natural herbs, essence of petit grain, and fish farming among others. Most of these groups are recognized by the council, yet still lack the knowledge, skills, and experience to manage themselves as a business or business-like organization. They also lack the social capital to access economies of scale or credit. Furthermore, most small-holder farmers at this informal level do not have access to technical assistance or extension services through state-run institutions.

FARMERS COOPERATIVES AND OTHER PRODUCER ORGANIZATIONS IN THE NORTHERN ZONE

The National Agricultural Census (NAC) of 2008 reports 23,220 farmers within the Northern Zone who are organized into both informal and formal structures. Table one shows a breakdown of this figure by department.

The majority of these producers fall into three major socio-economic groupings. At one extreme is the first group, making up a minority of the estimated population of the producers in the northern zone, while producing more than 90 percent of all agricultural products, including cattle, soybean, and corn. These producers have the highest capacity in production, with formal education, the knowledge, skills and experience utilizing modern agricultural practices and technologies, as well as access to resources such as capital, credit, technologies, inputs, and market relationships. Most of these producers operate with a high level of organization and infrastructure while abiding by and permitted to operate under government regulations.

Table 1: Breakdown of Farmers Organized in Formal and Informal Structures in the Northern Zone

Department	Total
Concepcion	4,610
San Pedro	13,924
Amambay	642
Canindeyu	4,044

This group consists mainly of traditional local and foreign families, owners of large extensions of land acquired at bargain prices in the early seventies when the first wave of immigration from Brazil took place to populate and develop this area of the country that until then was practically deserted. Over time, these families developed their small enterprises into some of the largest agribusinesses in the country.

At the other extreme is a minority of very small producers who have few resources and skills, lack basic literacy and numeracy skills, many of whom have not completed basic education. The vast majority of these farmers falls in the 40-50 age bracket and live on and cultivate land which has been handed down through families without legal certification and documentation. As a result these groups face issues and challenges around land ownership and title deed.

In between the two extremes lies the vast majority of farmers: farmers who may have fundamental levels of organization and infrastructure but lack the resources and knowledge to improve their farms and run them as profitable businesses. One of the largest challenges these farmers face is the lack of land rights, which is a historical problem that generates conflicts in Paraguay as explained above. Based on the experience of IZN and CDP, it is estimated that only 10 percent of the producers we work with have their property title. According to the National Institute of Rural Development and Land (INDERT) there are 122,000 non-title lots nationwide. Not having a property title limits their ability to access to credit which in turn prevents them from buying equipment, productive infrastructure or the ability of application of technology to improve their production. Likewise, these farmers are also affected by lack of technical assistance which is limited from the government leaving them to depend almost exclusively on the limited presence of international development programs or training programs from private sector companies.

IZN has worked largely with producers falling in the low and middle range, having reached more than 3,000 farmers and 83 producer organizations. Thus, the information presented in this report will speak the experiences of these smallholder farmers and our work with them, the organizations they work with, and the challenges and opportunities they face.

FORMS OF ORGANIZATIONS IN THE NORTHERN ZONE

ACDI/VOCA has worked with a variety of different structures producers have organized within, differentiated by both membership size, as well as level of formal organization and objectives. At the most basic and smallest unit of organization is the *Neighborhood Commission*. This group is generally community based, and composed of up to 12 farmers who intentionally work together to produce a single crop. The neighborhood committee decisions are taken directly by their representative who emerges as a natural leader whom the rest of the people entrusted their power of decision and whom decide the actions which, in his opinion, would benefit to the whole group. These representatives are usually teachers from local schools. The core focus of these groups is getting access to basic services (i.e. water, roads, etc.) and in some cases increased access to inputs and markets through taking advantage of economies of scale. These groups rarely access formal technical assistance and typically have no access to credit or financing for organizational needs. According to the NAC, there are a total of 607 farmers organized in this category within the four departments: 175 in Concepción, 294 in San Pedro, 53 in Amambay, and 85 in Canindeyu.

A larger variation of the Neighborhood Commission is *Producers Committees*, where farmers come together in groups of up to 25 members to produce a same crop in search to get assistance or succeed based on a joint work. Producers Committees were the result of increased efforts to strengthen both economic development, as well as democratic participation in rural areas, the focus of both governmental and international development priorities following the return of democracy in 1989. Producers Committees have more formal organizational structures including bylaws, elected representatives, and boards, though generally the capacity of producers committees to self-manage is very low, though they are required to register with municipalities, departmental governments and the Ministry of Agriculture and Livestock (MAG).

The core focus of these groups is increased access to inputs and markets, taking advantage of economies of scale, as well as strengthening knowledge and skill in managing democratic processes, resource management, and improved productivity through access to new technologies and technical assistance. These groups utilize technical assistance when such assistance is brokered by a third party, and may also have access to finance and credit, again when brokered by a third party. According to the NAC, there are a total of 9,223 farmers organized in committees within the four departments with 2,080 in Concepcion, 6,034 in San Pedro, 173 in Amambay, and 936 in Canindeyu.

Producer Associations in Paraguay are composed of three to four committees working together to achieve common objectives including better management of natural resources and assets; expanding access to natural resources, their basic means of production (ie, access to land, forests, fodder and water resources); improved access to services, credit and markets; and democratic self-governance around issues including policies that effect the context in which they produce, produce, market, process and export their products. Producer Associations are required to register with municipalities, departmental governments, and the MAG. According to the NAC, there are a total of 1709 producers belonging to Producer Associations, with 280 in Concepcion, 979 in San Pedro, 22 in Amambay, and 428 in Canindeyu.

Table 2: Number and Type of Producer Groups in the Northern Zone

Organizational Form	Concepcion	San Pedro	Amambay	Canindeyu	Total
Neighborhood Commission	175	294	53	85	607
Producers Committees	2,080	6,034	173	936	9,223
Producers Associations	280	979	22	428	1709
Cooperatives	239	674	155	337	1405

The *Cooperative* is the form of farmer organization which has the highest level of structure and formality in Paraguay. In Paraguay, the constitution frames the cooperative movement as an organization for social and economic development with the support of the State and the Education Sector. It has its own law called Cooperative Law 438/94, and a decree no. 14052/96. The enforcement authority of cooperative legislation is the National Institute of Cooperatives (INCOOP), functioning as an autonomous and self-governing organization. In terms of structure, primary cooperatives are called first tiers, centrals or federations are second-tiers and the confederation (in this case the CONPACCOOP) is a third-tier. By resolution 499/04 of the Governing Board of the INCOOP dated December 29, 2004 four sectors of cooperatives are set and distributed as follows:

- 1) Production
- 2) Credit Unions
- 3) Other (consumption, employment, education, housing, services)
- 4) Entities for cooperative integration (confederations, federations and central)

Cooperatives are the main source of credit for production in rural areas of the country since the value chains developed in family farms have given the conditions of opportunity and convenience to access to their credits. Within the IZN experience, access to credit through cooperatives was done by the banana producers associated to FECOPROD and CEPACOOOP who gained access to credit to purchase inputs such as seeds, agricultural products, bags and packaging. Also through these cooperatives they were able to export their products to the Argentine market. According to the INCOOP, there are 1,405 registered cooperatives throughout the territory of Paraguay from which 120 are established in the Northern area of Paraguay distributed as follows: 48 percent are located in San Pedro, 24 percent in Canindeyu, 17 percent in Concepción and 11 percent in Amambay. There are 4,019 producers associated to cooperatives and their services, with 323 in Concepcion, 2,628 in San Pedro, 64 in Amambay, and 1,004 in Canindeyu.

Table 4: Percentage Makeup of Producer Organizations Type in the Northern Zone Regions

Organizational Form	Neighborhood Commissions	Producer Committees	Producer Associations	Cooperatives	Total
Concepcion	6%	75%	10%	9%	100%
San Pedro	4%	76%	12%	8%	100%
Amambay	13%	43%	5%	38%	100%
Canindeyu	5%	52%	24%	19%	100%
Average	7%	62%	13%	19%	100%

Analysis across the four departments regions in the Northern Zone show some trends around producer organization types. Amambay shows a high level of organization at the Cooperative Level with 38 percent of all producer organization types being cooperatives in the region, but very little organization at the intermediary levels, namely the Producer Committee and the Producer Association Levels in comparison to other regions. Canindeyu shows similar trends to Amambay in that they have the second highest percentage of Cooperatives in terms of total producer organizations, but differ from Amambay in that they have a relatively high percentage of Producer Organizations, and Relatively low percentage of Neighborhood Commissions. San Pedro and Concepcion show similar trends, with relatively low levels of Neighborhood commissions, and the highest percentage of producer committees at 76 percent and 75 percent respectively, but lower percentages of Cooperatives then Canindeyu and Amambay.

In review, the departments of Amambay and Canindeyu show a lack of capacity and organization at the intermediary levels, likely indicating that they are using cooperatives as the primary organizing body for Neighborhood Commissions, skipping the managerial structures of the Produce Committees and Producer Associations, and thus the skills development around strengthening democratic participation, decision making, and resource management afforded by these intermediary organizational structures.

San Pedro and Concepcion, on the other hand, show a higher level of intermediary organizational structures, but a lower percentage of cooperatives supporting these structures. This begs the question as to what extent the fewer number of cooperatives are able to effectively provide support to all of the Producer Committees and Associations.

MARKET IN THE NORTHERN ZONE

Within the Northern Zone, there are a number of different value chains in which cooperatives currently engage and which have both local and export markets. IZN has prioritized the banana, sugarcane, vegetables and fruits, corn, watermelon, essential oils, sesame, cassava and milk and dairy value chains. These value chains, with pro-poor characteristics were selected taking into account the initial term of the program (18 months) and their greatest near-term economic stabilization potential through training, technical assistance and small grants of equipment and productive infrastructure.

Milk and dairy and the banana value chains are some of the most promising value chains IZN have work with due to i) these value chains are in the expansion phase due to a steady increase in the demand for their products; ii) their buyers or sale markets have expanded their investments in industrial infrastructure, trade and services and are ready to insert associated smallholders into the value chains; iii) the products in these value chains are already known by the smallholder producers and are suitable to their farms dimensions. As per our experience with IZN, we can speak directly to the market potential, challenges, and opportunities within these value chains, and will focus the bulk of the remainder of the report in terms of assessment of strengths, weaknesses, and bottlenecks from our experience with these two value chains.

However, additional value chains in which IZN is not currently involved but are also significant agricultural products for farmers and their families, and thus important products for smallholder farmers include Cassava, Sesame, Peanuts, Beans, Spurge, and Sugarcane.

Cassava: one of the most important items for human consumption in the country also used as animal feed in fresh. From the total production 65 percent of it is for human and animal consumption, 30 percent is sold in the domestic market and only 5 percent is industrialized. In the north of the country processing industries were installed to transform cassava into starch for domestic and foreign markets. The departments with the highest growth in terms of cultivated area in the periods referred between 1991 and 2008 are San Pedro 6,878 additional hectares (30.2 percent +) and Canindeyú with 6,852 additional hectares (101 percent +).

Sesame: an item resistant to drought and pest attacks that requires little use of agrochemicals. It promotes the commercial relationships between the small farmer and private companies as it has a growing demand for export markets being Japan the main destination. According to the National Agricultural Census of 2008, San Pedro is the department with the largest cultivated area with 33,362 hectares followed by Concepcion 19,370 hectares and Canindeyú with 4,993 hectares. Growth is expected to continue in area cultivated, production and performance of this relatively new crop in Paraguay.

Peanuts: typically used as an item of human consumption. Its main markets are for export to Bolivia. The department of San Pedro is one of the leading producers of peanuts with a total of 2.362 hectares cultivated.

Beans: is the second most important item of consumption behind cassava. It has an attractive domestic demand and potential demand for foreign markets given the interest shown in these organic products in the U.S. and Europe. Departments with highest growth (1991/2008) of the cultivated area in the in the north of the country are San Pedro and Canindeyú with percentages of 75.3 percent and 78.7 percent respectively.

Spurge: a product that has several industrial applications in the textile area, also pharmaceutical and other products for tanneries, paper and paints among others. The main market for the northern zone is Brazil, where there are various industries who require this product from Paraguay. Although the spurge has declined in importance in the share of the economy which was represented by the decrease of hectares dedicated to this area, the Departments of Concepción and San Pedro are still the most productive in the country.

Sugarcane: product used for the production of renewable energy (bioethanol) and for the production of sugar, being the organic one the most required by markets in the United States and Germany. The north of the country present an interesting market for producers of sugarcane due to the existence of bioethanol production plants as well as sugar plants. Nevertheless, the performance of this product in Paraguay is still being one of the lowest in the Mercosur, due to the use of obsolete varieties, the effects of climate change, lack of infrastructure and technology. Departments of San Pedro and Canindeyú are among the largest producers in the country.

Milk and dairy value chain

Overview: The dairy industry is one of the most important items of domestic production due to its implications for employment generation, food security and rural producer rooting through income generation. This value chain is dominated by cooperatives and private sector companies engaged in the production of milk, cheese, butter, yogurt, ice cream, and other products. These companies are located primarily in the Central Chaco Region and the central and southern areas of the Oriental Region of Paraguay.

Currently, Paraguay has the second highest growth rate in milk production in Latin America and the Caribbean, with an average of six percent annually over the past six years. Paraguay also ranks first in volume of milk industrialized by cooperatives. The level of expansion of the production has exceeded the expectations of industrialists, with the growth range of 15 percent, from 798 million liters of production recorded in 2011, to more than 900 million liters in 2012. Regarding to

Table 5: Milk and Dairy Cooperatives in the Northern Region

Cooperative	Location	Size
Cooperativa Py'a Guapy, Tacuatí	San Pedro	40 Members
Comité Cristo Rey, Azotey	Concepción	25 producers
Asentamiento Jepayrá, Azotey	Concepción	6 producers
Escuela Manfred Kander, Azotey	Concepción	15 families
Asentamiento Jepayrá, Azotey	Concepción	6 producers
Escuela Manfred Kander, Azotey	Concepción	15 families
Comité de productores San Agustín, Jasý Kañý	Canindeyú	71 members

the level of industrialization, the amount of liters went from 513 million in 2011, to 588 million liters in 2012.

Traditionally, IZN target Departments of Concepcion and San Pedro has had beef cattle rearing as its main economic activity, with agriculture as a close second as a source of income in the region. Conversely, as milk and dairy production are closely related to meat production in terms of cattle management, many small farmers of the region have tried to develop this activity as a regular source of income. Small farmers, however, try to use the same cows for milk and beef production rather than maintaining a dairy herd and focus on milk production. Because of this, as well as a lack of infrastructure, systems for feed production, appropriate equipment and technical assistance, yields are generally low and highly variable throughout the year in the northern zone of the country.

Challenges and Opportunities within the Value Chain: The IZN program conducted a value chain mapping study in November-December of 2010 to determine if these incipient milk production activities have enough potential to become an integrated and profitable value chain that would provide a stable income for hundreds of small farmers, and thus become a strategic intervention for stabilizing the regional economy and strengthening the local governance. The main findings of the mapping exercise were:

- Public and private stakeholders do not have enough information for sound decision making at all levels
- Producers are not using improved cattle breeds for dairy production, but are using traditional breeds used for beef and thus obtain low yields per animal
- Producers do not have appropriate knowledge, systems, and equipment for feed production
- Producers do not have an adequate management of sanitation and nutrition of the herds
- Producers act by in large individually without focusing on the productive activity as a sustainable collective business opportunity
- Based on public and private donations, some small farmers' groups have received milk processing storage equipment, but still lack cooling capacity and technical assistance because they remain disoriented in terms of the potential of milk as a business, the volumes that can be achieved and the management required
- Better practice and technologies for fodder production and veterinary care are critical in increasing the amount of milk produced
- The quality of milk distributed through the market would be strengthened, increasing demand through the use of dairy jars specially made for the effect to transport it from the producer's farm to the collection center
- The primary suppliers of these basic facilities (fodder machines, milk jars) are in Asunción.
- Many wholesalers and traders lack appropriate storage technologies, from Milk jars to Cooling Tanks
- Suppliers were found in San Pedro that can produce cooling tanks for milk preservation at a more convenient cost and which have greater presence in the area in case you need for repairs or maintenance
- Paraguay currently exports the product to Bolivia, Brazil, South Africa, Tunisia, Ghana, Haiti and the Dominican Republic, and is about to enable the Iranian market
- Despite all the exports done, there remains a glut of unprocessed raw milk, which leads us to seek suppliers who process milk products

- In the northern region four major milk buyers were identified: 1) "Lacteos Norte" who produces cheese, 2) "Granja Guarapi" producer of yogurt and ice cream, 3) "Cooperativa Friesland" producer of milk and milk candy, 4) "Cooperativa Rio Verde" which produces milk and yogurt

A core aspect of the mapping exercise was focused on the identification of buyers and processors within the value chain. The exercise identified a small number of formal buyers in the northern region, demonstrating that the primary market for dairy as of 2010 was the informal market. One of the largest buyer in the Northern Region is Lacteos Norte SRL, a company dedicated to the production and distribution of soft unripened (fresh) cheese for supermarket chains and restaurants, as one of the few private investments in the Department of Concepcion that deals with small farmers for its milk supply.

Dairy Processors and Buyers	
Lacteos Norte	Buyer/Processor
Granjas Guarapy	Buyer/Processor
Cooperativa Friesland	Buyer/Processor
Cooperativa Rio Verde	Buyer/Processor

Lacteos Norte's facilities include suitable buildings for the reception, storage and processing of milk as well as thermal mobile tanks and cooling chambers. It is a well-established company with stable markets and strong growth projections, mainly thanks to its very personalized management of a small network of milk suppliers consisting of local farmer-owned microenterprises.

IZN Cooperative	Location	Size	Production	Needs
Cooperativa Py'a Guapý, Tacuatí	San Pedro	40 Members	21,000 liters/month	4,000 liters tank
Comité Cristo Rey, Azotey	Concepción	25 producers	18,000 liters/month	2,000 liters tank
Asentamiento Jepayrá, Azotey	Concepción	6 producers	6,000 liters/month	1,000 liter tank
Escuela Manfred Kander, Azotey	Concepción	15 families		1,000 liter tank
Asentamiento Jepayrá, Azotey	Concepción	6 producers	6,000 liters/month	1,000 liter tank
Escuela Manfred Kander, Azotey	Concepción	15 families	11,000 liters/month	1,000 liter tank
Comité de productores San Agustín, Jasý Kañý	Canindeyu	71 members	20,000 liters/month	4,000 liter tank

As part of its supply strategy, Lacteos Norte has started provision of production advice and technical assistance as well as its mobile milk storage tanks on a door-to-door basis to the small producers in the Concepcion area.

In May, 2011, IZN and Lacteos Norte formed a strategic alliance to increase the supply base of the company by providing milk cooling equipment and accompanying technical assistance for selected beneficiary communities mentioned below. IZN provided the cooling tanks and Lacteos Norte the technical assistance and commercial relation. The activity resulted in the direct benefit of 116 producers that supply milk to Lacteos Norte, creating a dynamic economy in the area, giving them storage capacity and thereby generating benefits to other families in the surrounding areas. Production increased from 24,000 liters of milk per month to 54,000 representing approximately \$ 10,000 per month of additional income for these families.

Following the success achieved by the project in the area, farmers saw the production of milk as a viable and profitable way to increase their income given that, among other things, this is not subject to climatic conditions that may affect their crops. This situation led to a significant expansion of the number of associations of milk producers in the area with intent to supply their products to market.

Since September 2012, IZN has been working with 16 associations or committees composed of approximately 350 small producers in municipalities of Tacuatí, Azotey and Yby Yau in the Department of San Pedro and Horqueta in the Department of Concepción, with an average current production of 250,000 liters of milk per month, equivalent to \$78,000 of monthly stable income for farm families.

Banana Value Chain

Background: In comparison to the Milk and Dairy Value Chain, the Banana Value Chain in the Northern Region is export focused, seizing a 25percent incremental price across Paraguay, helping to regulate prices in the national market.

Banana production - Guayaibi Unido	
Hectares of banana production	263
Banana producers	70
Annual banana production (boxes)	263,000 ¹
Exported boxes / year	63,000 ²
Boxes sold nationally	200,000

The primary cooperative of banana producers is the Guayaibi Unido cooperative is located in the municipality of Guayaibi (department of San Pedro) 182 kilometers northeast of Asuncion.

Banana farms of the members of the cooperative are dispersed (e.g. on a two-km corridor, there are approximately 20 farms, of which six to eight grow bananas independently, without any connection between one farm and the other). On average, each farm is 100 meters wide by 1,000 meters long, forming approximately 10-hectare farms, which could present an advantage to start grouping banana production in blocks.

Average prices for bananas in the Buenos Aires market		
Origin	Price	
	Gs.	\$USD
Ecuador	45.000	9,53
Bolivia	39.000	8,26
Brazil	25.000	5,30
Paraguay	19.000	4,03

While some cooperatives have exported banana boxes in the past, the price received per box in Argentina is the lowest in the market. Due to poor agricultural practices and harvesting techniques, Paraguayan banana is below in terms of quality and price than bananas from Brazil, Bolivia and Ecuador. Prices paid for Ecuadorian bananas in Argentina are 137percent higher than those

paid for Paraguayan bananas. In the case of Bolivian fruit, the price differential is 105 percent higher and Brazilian bananas have 32 percent higher prices than those coming from Paraguay.

Price differential in the Buenos Aires market		
Origin	\$USD	percent

¹ Yield: 1,000 boxes/hectare. Source: CEPACOOOP Manager

² Net box weight 20 Kg., Source: CEPACOOOP Manager

Paraguay – Brazil	4.03 to 5.3	32%	Brazilian production displaces Paraguayan product through better quality and more quantity of supply. The highest priced bananas in the Argentine market are the Ecuadorian
Paraguay – Bolivia	4.03 to 8.26	105%	
Paraguay – Ecuador	4.03 to 9.53	137%	

bananas, followed by Bolivian, Brazilian and lastly Paraguayan.

Challenges and Opportunities: The lack of block production makes management of the crop difficult and ultimately affects productivity due to loss of efficiency and taking advantages of economies of scale that a block production system would support. Specifically, the lack of effective management and block production affects pest and disease control, wrapping of banana bunches, tagging for maturity control, use of wind-breaking barriers, irrigation, efficient harvesting, homogenous selection of damaged fruit, transport, and appropriate packaging.

Additionally, and due to the isolated and disperse management of the plantations, the following important on-farm tasks are not being performed:

- Leaf control of the banana tree
- De-budding
- Elimination of bad units
- Deflowering

The lack of implementation of these activities results in fruit of a lesser quality, ultimately affecting final price.

In summary, of the five main components of banana production: establishment, cultural practices, harvesting, post-harvest handling and marketing, marketing is the most developed as evidenced by the insertion and positioning of the cooperatives product in the Argentinean market. Areas where additional support and improvements need to be focused include establishment, cultural practices, harvesting and post-harvest handling.

Throughout a strategic alliance with umbrella organizations to improve banana production in the municipality of Guajaibí (San Pedro), IZN has provided comprehensive technical assistance, innovative and replicable harvesting and packing infrastructures and training to banana farmers. Through 11 months of structured technical assistance modules and training through farmer-field-schools, the project has introduced crop management best agricultural practices, increased production and improved the sales of the producers.

COOPERATIVE ACTIVITIES, CHALLENGES, AND OPPORTUNITIES IN THE NORTHERN ZONE

Cooperative Activities

Cooperatives have long been seen as a catalytic instrument in economic growth and social advancement in the developing world. Cooperatives help low income developing individuals economically by improving incomes and creating value and investment opportunity along product supply chains, democratically by providing firsthand experience

with democratic governance, transparency, and member participation, and socially by increasing trust and solidarity leading to stability in the face of adversity and conflict.

Through the work of IZN, ACDI/VOCA has been a facilitator of these transformational changes through the work of cooperatives, as well as a first hand witness to the various activities, challenges, and opportunities for cooperatives in the northern zone. The following section provides general findings and observations of the roles and activities that cooperatives and other producer organizations are playing in the northern zone in terms of economic, democratic, and social development, as well as specific examples of ACDI/VOCA's approaches and work with cooperatives in the IZN program.

Paraguayan Context of Cooperatives

The Paraguayan context includes profitable agricultural opportunities. Most cooperatives emphasized that good markets now exists for increased production. Their problems arise in cultivation, processing and all other key stages of commercialization. There are specific areas of assistance depending on the products involved.

The context also includes a cooperative movement with many small groups that lack real commitment to cooperatives, though also boasting many large and solid operations. Small cooperatives often seem disinterested in the larger cooperative movement, through they remain very concerned about their own economic interests.

The Federation of Production Cooperatives (FECOPROD) and the Paraguayan Center of Cooperatives (CEPACOOOP) are major second-level organizations. Both describe the cooperative movement as fragmented. Since many saving and loan cooperatives now have agricultural production departments and some agricultural groups have started their own saving and loans cooperatives, early distinctions are clearly eroding. A strong Paraguayan cooperative movement depends on continued integration of agricultural cooperatives and saving and loans cooperatives.

Members of individual rural cooperatives exhibit evidence of earlier cooperative education, but have clearly settled into relatively passive involvement with the movement. Expanded cooperative education is essential for reviving the groups and increasing member participation.

Strengthening cooperatives in the Northern Zone requires increased business education and training. There is inadequate understanding of the investment process, including 1) how to develop an investment idea; 2) how to prepare resulting proposal; and 3) how to estimate feasibility and profitability. Business education can be encouraged immediately, because much of it is independent of particular commodities.

Production needs to be improved by strengthening the capacity of the cooperative members in cultivation and processing. Cooperatives members need to understand international standards and adopt best practices to avoid losing market share.

The choice of priority crops and/or products is a critical decision when a strategy is implemented with producer association or agricultural cooperatives. The choice of priority commodities depends on both the prospective contribution to profitability and the likelihood that other activities necessary for intervention effectiveness will occur. Commodity selection can also be influenced by the desire to focus on targets of opportunity.

The cooperatives need to be more competitive and to adapt their systems to improve the best practices among their members. In order to achieve impact and results is important to link the agricultural cooperatives to public and private sector to facilitate the provision of capital and technical training.

Lack of leadership in Paraguayan cooperatives is an obstacle to continued community development. Leadership and poor management practices bring about governance problems, which translate into internal conflicts and loss of strategic direction for the cooperative enterprise. In order to achieve a sustainability, institutional capacity development is crucial.

ACDI/VOCA's experience with the Paraguayan cooperative sector indicates that planning in general is not a practice utilized in the majority of cooperatives. Many cooperative institutions do not establish strategic planning as a priority and tend to invest efforts and resources without concrete results that could benefit the institution. Training on general planning is essential to achieve results in the long-run with cooperatives.

Provision of Credit

The main problem for small farmers to access credit is the lack of land titles that serve as collateral to access bank loans so they are forced to seek other sources of funding.

Besides the Cooperatives mentioned above in this report, some alternatives for funding are:

- a) Private companies (the market for producers) that provides financing to the producers taking the production obtained as payment of the credit.
- b) Financial institutions, lately these institutions have created specific products for the small producer but with the problem that the rates that apply to their loans almost double the bank rates.
- c) Village banking: financial institutions that are focused on small producers and include the provision of technical assistance to them.
- d) NGOs and the International Cooperation.

Partnerships with Local and Departmental Governments

In regards to partnering with local departmental governments, within the productive area, the municipalities and governor offices have little or in some cases no relationship at all with producers given that all the support to the productive area is provided through centralized level institutions located in Asunción with certain regional offices which are managed entirely independently from the local governments.

Their priority is the provision of basic services to their community and support to producers is given in very specific cases, when based on requests from the community, they perform certain grants or co-finance the purchase of equipment or production infrastructure to help them improve their quality of life. However, they do not have staff assigned or sections dedicated to conduct training or technical assistance to them.

Gender Specific Support and Integration

Achieving gender equity and female empowerment are core development objectives and key to sustainable and effective outcomes. When women and men have equal opportunities and resources, societies are more likely to thrive.

In Paraguay, women represent 49 percent of the population. More than half of female-headed rural households have fewer than 5 hectares of land, only 14 percent receive technical assistance and 13 percent access to credit. The birth rate is high with an average of five children per family. Women have the double burden of domestic and agricultural production duties.

Men primarily own property certificates, make decisions about the use of land and control the production resources (farm, equipment, inputs). Men are the primary beneficiary to agricultural assistance and access to credits and resources.

ACDI/VOCA's experience in Paraguay has shown that agricultural cooperatives serve as an important mechanism for improving the living conditions of women in the country. By participating in the collective framework of cooperative, women can overcome what they lack on an individual basis to access improved farming inputs, technical assistance, business networks and markets.

Across the value chain the traditional stereotypes persist, with men working in the productive sphere and women working in the domestic sphere. However, women constitute an "invisible labor force" as they contribute to labor but are not recognized for doing so.

ACDI/VOCA's experience working with female farmers in cooperatives it is important to define the role of women at the production level and identify the constraints and stereotypes to carry out effective and accurate actions.

Agricultural cooperatives are important to the economic growth in Paraguay, they are operated by a male majority on their board of directors (BOD), and women vaguely represent 15 percent of the decision-making positions in the board of directors. In some cooperatives there are women's subcommittee's that concentrate on women's income generation activities. These sub-committees often do not receive the promotion or support of the cooperatives BOD and are considered insufficient to meet the needs of women or the cooperatives, in some cases they even tend to disappear.

Having adequate representation on BOD is crucial to ensure women's interests and needs are adequately accounted for in decisions on cooperative activities and resource allocation. There are multiple reasons to take into consideration for this lack of representation:

1. Institutional barriers: Cooperatives by-law are discriminatory (implicitly or explicitly)

1. Lack of Leadership and Management Skills: Female farmers are less likely to have these skills compared to men
2. Lack of Soft Skills: It is confirmed that promoting soft skills to increase self-esteem helps to improve the motivation and engagement of female farmers in new roles such as cooperative leaders.
3. Dominating Perceptions: There perceptions among women and men that women should not be included in leadership positions
4. Women's Time burden: Having to balance work and responsibilities with child and homecare responsibilities limits the time women can devote to participation in groups.

According to experience working to improve gender integration and has found that cooperative leaders respond best to the "business case" for incorporating women. This led to more members registered and involve in productive activities, both female and male, means more income for the cooperative.

Throughout the implementation of IZN, ACDI/VOCA has put an emphasis on the idea that development cannot be sustained unless there is equitable inclusion of traditionally underrepresented groups. IZN has promoted equitable access to program opportunities and benefits for all members of the community, including women, youth, people with disabilities and indigenous groups. IZN understands the various dimensions of vulnerability that these groups suffer in Paraguay and has used this knowledge to inform program design and engage each group so that all may reap the benefits of the project activities.

- a. During our baseline data gathering for value chain mappings we integrated social analysis to be able to target vulnerable groups as well as promote increased participation of women.
- b. Inclusion was emphasized mobilizing broad-based participation during the community-driven infrastructure projects cycle, encouraging representation of women in community oversight committees and providing complementary training through social promoters (usually women too, so that they can better empower local women to participate in oversight committees), to promote their roles as community change agents.
- c. Equitable participation of women in governance trainings through the Secretaria de la Funcion Publica was encouraged and attendance was carefully monitored to ensure equal representation of male and female municipal officials.
- d. Training activities have considered logistical constraints specific to women, such as timing, childcare and use of local language (Guarani).
- e. Leadership capacity of women, in particular, has been enhanced through a structured entrepreneur training provided to four women-owned microenterprises through CIRD-EMPLEOJOVEN for four months.
- f. Where applicable, activities supporting women's role in the local economy and enterprise development have been given priority consideration, e.g. the Village Banking for women activity through MEDA-PRODIR.

Paraiso Poty Women's Committee

The Paraiso Poty Women's Committee is an organization formed in 2008 that comprises housewives and female farmers. The organization is located in the District of Guayaibi in the Department of San Pedro, approximately 180 kilometers from the capital of Asuncion.

At formation, the committee started with 7 members a figure has increased to 61 members of whom 52 are women. The average land cultivated per producer is around 1.6 hectares. The organization's main focus is on supporting the production and commercialization of banana and pineapple, both to domestic and international markets. For domestic sales, the Committee has a stand in Asuncion's main wholesale market (the Mercado Central de Abasto) where the products are commercialized and for international sales they export to Argentina, they has successfully exported pineapple in the past year. The committee recently received financial support for the construction of its post-harvest and packing center for banana and pineapple. The Committee understands that the economic participation of women is important not only for lowering the disproportionate levels of poverty among women, but also as an important step toward raising household income and encouraging economic development in countries as a whole.

CONSTRAINTS ANALYSIS/BOTTLENECKS

Assessment of the various producer group organizations, with emphasis on cooperatives, as well as the support system providing technical assistance and other forms of support with these organizations in the Northern Zone reveals a number of important constraints and bottlenecks in growth for smallholder farmers in the northern zone. The primary areas of constraint include: credit, physical Infrastructure (roads), access to producer associations, low productivity and low quality of product, lack of access to technical assistance, lack of capacity in coops and associations, and weak linkages between associations and markets.

Credit

By far the highest demand among small producers is access to credit. As mentioned, a typical family farm covers an average of ten (10) hectares, half of which is for cash crop. The problem arises given that most of them have no title deed over the land. This situation determines a barrier to access credit; hence, to a low investment capacity.

Another barrier is that producers are risk averse due to high rates of interests, which ranges between 17 percent to 21 percent from private banks and financial institutions that have softer requirements, while for National Development Bank (Banco Nacional de Fomento - BNF) stands at 10 percent. The ability to get a loan and fear that one cannot repay the loan generates skepticism and abdication.

Physical Infrastructure

Poor road infrastructure also has a great impact for smallholder farmers. For example, in ACDI/VOCA's experience, many milk and dairy associations linked to Lacteos Norte would have a better price per liter if road access to Lacteos Norte collectors was better. Currently, they pay a higher price since Lacteos Norte has to send collectors to the associations to pick up the milk. Poor road conditions also can impact the transportation of fragile products like bananas which must maintain an unblemished appearance for most markets.

Considering the recent years of drought that have plagued the region, the lack of access to water identified as a major cause of crop losses in the area. The high costs of investment in ground-water irrigation systems means that farmers are constantly dependent on rain-fed agriculture leading to low production when precipitation is low.

Another common problem, especially for dairy farmers, is the lack of a reliable energy supply. Storage containers are required to keep the milk fresh and power outages can cause the loss of an entire day's worth of milk in a matter of hours. With power outages a constant in the north and high cost of generators preventing many associations from buying this as a back-up, these groups are highly dependent on unreliable state power.

Another problem identified is the lack of transportation for harvested products. In many cases farmers have no way to access markets as they cannot afford to transport their products to these markets. They often find themselves victims of opportunistic middlemen who pay a lower price than they could obtain by selling directly to the market.

Lack of technical assistance

Our experience has identified that both the lack of technical assistance and key equipment has a major impact on small holder farmers. While some technical assistance has been provided through other organizations, constant support is needed to ensure that groups progress through the various stages of development and identify key markets for their products. Support must include, in some cases, farm by farm visits for particular and concrete assistance. Training agencies in Paraguay are centralized in Asuncion, with some regional offices with very little budget making them very ineffective when reaching to farmers. Because of this problem the provision of technical assistance by the state is very limited and the producers must rely on international cooperation and private sector to access these services.

Lack of linkages between associations and markets

Generally farmers are grouped around production associations and have identified local collectors or storing centers where production is taken for selling. Nevertheless, this situation benefits middleman instead of producers. Linking producers to markets, either from private companies (as in the case of Lacteos Norte for milk & dairy associations) or to the final consumer (less likely) must be the goal for both sides benefit.

The lack of relationship between associations occurs because organizations are mostly very young, still in the process of consolidating its small association without having a chance to analyze what their peers do. However, this is a task that will be of utmost help to achieve growth based on the positive experiences they can get from associations similar to theirs.

CONCLUSIONS AND RECOMMENDATIONS

The needs of the population in the Northern Zone continue to be dire and require careful consideration for future investment from donor agencies. Yet, there are many opportunities to provide needed assistance. A key aspect to any future investment involves getting the state and private sector to be more involved in this sector, especially in terms of

responding to the needs of smallholder farmers. Under IZN, we have found that even a little capacity building and equipment has greatly increased the yields of producers. A key opportunity for donor agencies is to develop agricultural extension workers who can provide much needed training services to farmers. Under an ACIDI/VOCA alliance with Columbia University of Paraguay, we have collaborated to ensure young students have the necessary knowledge and skills to provide key training to farmers, yet, this needs to be significantly broadened. As is the case in most countries, the Ministry of Agriculture needs to have the capacity to provide extension workers to rural areas which will not only provide knowledge to farmers, but will also provide jobs to young people who have received in-depth training such as those going through the IZN activities in collaboration with Columbia University.

While many of the existing bottlenecks impact both men and women, donor agencies need to be aware of key value chains where women's participation is generally higher (i.e. in dairy production) and also where in the value chain a woman's role may lie (i.e. final production as with the Paraiso Poty Women's Committee rather than actual on-the-farm labor). Women's steady role in organizing and bookkeeping also suggest that they may have an advantage in managing credit.

Just as the need for extension workers to provide capacity building is a key area to be considered for future programming, so is the need to improve access to credit. This area is closely tied to ensuring that farmers have the resources and knowledge needed to register their land. This is also an activity that could be led through an alliance with public educational institutions (through the legal departments). The push for increased access to credit requires even more education to farmers, but more importantly, financial institutions need to lower the barriers to credit, particularly the bureaucracy and the interest rates. Collaboration with the National Development Bank to streamline their credit process as well as getting credit agents to go to rural areas rather than farmers having to go to the cities will greatly improve the communication and trust between the two groups and increase the rate of applications. This is particularly important for women as household responsibilities make long-distance travel to bigger cities even more of an obstacle.

Another key recommendation includes better communication between all levels of producer groups. The current lack of information means that small groups such as producer associations do not know what each other are doing and don't know what groups at the cooperative level are capable of achieving. These barriers could be crossed by increased funding and publication of major conferences in which producer groups of all levels share their experience. In addition, cooperatives members could serve as mentors to members of producer associations. As highlighted in Annex 3, cooperatives come with a variety of experiences which, through careful planning can be used as a learning tool.

ANNEX 1

MAPPING & PROFILE OF ASSOCIATIONS/ORGANIZATION WORKING WITH IZN

	Name of association	Location	Number of members	Product line	Access to credit?	Access to T.A.?	Customers or buyers? Main markets?	Value chain market size	Exports now and potential	Comercial data on production level & opportunities	Work with local municipal governments?	Connect to federations or larger cooperatives?	Gender concerns
1	Camby Pora	Tacuatí, San Pedro	40 to 70 (constantly changing)	Milk & dairy	Not as association. Members may have individual access as	Yes, with IZN	Market is Lacteos Norte	At least 200.000 liters per month with Lacteos Norte	Now: 20.000 liters per month, Potential: market consumes all is produced.	Available from Lacteos Norte	Yes, sporadically, equipment is provided	Potential to formally group around milk & dairy associations related to Lacteos Norte.	At least 50percent of producers are women. Storing centre under a women management.
2	Curuzu de hierro	Azotey, Concepcion	30 to 40 (constantly changing)	Milk & dairy	Not as association. Members may have individual access as	Yes, with IZN	Market is Lacteos Norte	At least 200.000 liters per month with Lacteos Norte	Now: 10.000 liters per month, Potential: market consumes all is produced.	Available from Lacteos Norte	Yes, sporadically, equipment is provided	Potential to formally group around milk & dairy associations related to Lacteos Norte.	At least 50percent of producers are women.
3	Paso Tuya	Azotey, Concepcion	25 to 35 (constantly changing)	Milk & dairy	Not as associations. Members may have individual access as	Yes, with IZN	Market is Lacteos Norte	At least 200.000 liters per month with Lacteos Norte	Now: 45.000 liters per month, Potential: market consumes all is produced.	Available from Lacteos Norte	Yes, sporadically, equipment is provided	Potential to formally group around milk & dairy associations related to Lacteos Norte.	At least 50percent of producers are women
4	Sanja Moroti	Azotey, Concepcion	40 to 50 (constantly changing)	Milk & dairy	Not as associations. Members may have individual access as	Yes, with IZN	Market is Lacteos Norte	At least 200.000 liters per month with Lacteos Norte	Now:10.000 liters per month, Potential: market consumes all is produced.	Available from Lacteos Norte	Yes, sporadically, equipment is provided	Potential to formally group around milk & dairy associations related to Lacteos	At least 50percent of producers are women

												Norte.	
5	Asentamiento San Miguel	Yby Yau, Concepcion	7 to 15 (constantly changing)	Milk & dairy	Not as associations. Members may have individual access as	Yes, with IZN	Market is Lacteos Norte	At least 200.000 liters per month with Lacteos Norte	Now: 3.000 liters per month, Potential: market consumes all is produced.	Available from Lacteos Norte	Yes, sporadically, equipment is provided	Potential to formally group around milk & dairy associations related to Lacteos Norte.	At least 50percent of producers are women. Storing centre under a women management.
6	Maria de Cuenca	Yby Yau, Concepcion	From 7 to 15 (constantly changing)	Milk & dairy	Not as associations. Members may have individual access as	Yes, with IZN	Market is Lacteos Norte	At least 200.000 liters per month with Lacteos Norte	Now: 6.000 liters per month, Potential: market consumes all is produced.	Available from Lacteos Norte	Yes, sporadically, equipment is provided	Potential to formally group around milk & dairy associations related to Lacteos Norte.	At least 50percent of producers are women. Storing centre under a women management.
7	Cristo Rey	Yby Yau, Concepcion	From 20 to 30 (constantly changing)	Milk & dairy	Not as associations. Members may have individual access as	Yes, with IZN	Market is Lacteos Norte	At least 200.000 liters per month with Lacteos Norte	Now: 15.000 liters per month, Potential: market consumes all is produced.	Available from Lacteos Norte	Yes, sporadically, equipment is provided	Potential to formally group around milk & dairy associations related to Lacteos Norte.	At least 50percent of producers are women.
8	Acopio I.n. Yby Yau	Yby Yau, Concepcion	From 20 to 30	Milk & dairy	Not as associations. Members may have individual access as	Yes, with IZN	Market is Lacteos Norte	At least 200.000 liters per month with Lacteos Norte	Now: 25.000 liters per month, Potential: market consumes all is produced.	Available from Lacteos Norte	Yes, sporadically, equipment is provided	Potential to formally group around milk & dairy associations related to Lacteos Norte.	At least 50percent of producers are women.
9	Camby Poti - Arroyito	Horqueta, Concepcion	From 20 to 30	Milk & dairy	Not as associations.	Yes, with IZN	Market is Lacteos Norte	At least 200.000 liters	Now: 10.000 liters per	Available from Lacteos	Yes, sporadically, equipment	Potential to formally group	At least 50percent of

					Members may have individual access as			per month with Lacteos Norte	month, Potential: market consumes all is produced.	Norte	is provided	around milk & dairy associations related to Lacteos Norte.	producers are women.
10	OZAE – Calle 10	Horqueta, Concepcion	From 2 to 5	Milk & dairy	Not as associations. Members may have individual access as	Yes, with IZN	Market is Lacteos Norte	At least 200.000 liters per month with Lacteos Norte	Now: 700 liters per month, Potential: market consumes all is produced.	Available from Lacteos Norte	Yes, sporadically, equipment is provided	Potential to formally group around milk & dairy associations related to Lacteos Norte.	At least 50percent of producers are women.
11	Kuña Aty – Calle 10	Horqueta, Concepcion	From 15 to 25	Milk & dairy	Not as associations. Members may have individual access as	Yes, with IZN	Market is Lacteos Norte	At least 200.000 liters per month with Lacteos Norte	Now: 4.000 liters per month, Potential: market consumes all is produced.	Available from Lacteos Norte	Yes, sporadically, equipment is provided	Potential to formally group around milk & dairy associations related to Lacteos Norte.	At least 50percent of producers are women.
12	Cocanor – Calle 9	Horqueta, Concepcion	From 7 to 15	Milk & dairy	Not as associations. Members may have individual access as	Yes, with IZN	Market is Lacteos Norte	At least 200.000 liters per month with Lacteos Norte	Now: 3.000 liters per month, Potential: market consumes all is produced.	Available from Lacteos Norte	Yes, sporadically, equipment is provided	Potential to formally group around milk & dairy associations related to Lacteos Norte.	At least 50percent of producers are women.
13	Pasiño	Yby Yau, Concepcion	From 7 to 15	Milk & dairy	Not as associations. Members may have individual access as	Yes, with IZN	Market is Lacteos Norte	At least 200.000 liters per month with Lacteos Norte	Now: 15.000 liters per month, Potential: market consumes all is produced.	Available from Lacteos Norte	Yes, sporadically, equipment is provided	Potential to formally group around milk & dairy associations related to Lacteos Norte.	At least 50percent of producers are women.
14	Isidoro Lopez	Tacuatí, San Pedro	From 7 to 15	Milk & dairy	Not as associations	Yes, with IZN	Market is Lacteos Norte	At least 200.000	Now: 4.000 liters per	Available from	Yes, sporadically,	Potential to formally	At least 50percent

					s. Members may have individual access as			liters per month with Lacteos Norte	month, Potential: market consumes all is produced.	Lacteos Norte	equipment is provided	group around milk & dairy associations related to Lacteos Norte.	of producers are women.
15	Cooperativa Pya Guaypy	Tacuatí, San Pedro	From 7 to 15	Others and milk & dairy	N/a	Received with IZN	For Milk & dairy, market is Lacteos Norte	(for milk & dairy at least 200.000 liters per month with lacteos norte)	For milk & dairy, at the moment 400 liters per month (those before related to lacteos norte)	Available from Lacteos Norte	Yes, sporadically, equipment is provided	Potential to formally group around milk & dairy associations related to Lacteos Norte.	At least 50percent of producers are women.
16	Asociación de productores de San Vicente	Gral. Resquín, San Pedro	From 35 to 55	cattle & agriculture	Not as association s. Members may have individual access. Equipment provided by IZN	Received with IZN	Production is commercialized by a local collector	Market can buy all is produced	Agriculture : sesame, maize, cotton	Available from IZN and ARP	Yes, as well with the ministry of agriculture	Potential for stronger linkages with ARP, CAP	At least quarter of producers is women.
17	Asociación de productores Nuevo Horizonte	Gral. Aquino, San Pedro	From 35 to 55	cattle & agriculture	Not as association s. Members may have individual access. Equipment provided by IZN	Received with IZN	Production is commercialized by a local collector	Market can buy all is produced	Agriculture : sesame, maize, cotton	Available from IZN and ARP	Yes, as well with the ministry of agriculture	Potential for stronger linkages with ARP, CAP	At least quarter of producers is women.
18	Asociación de productores de Colonia Barbero	Colonia Barbero, San Pedro	From 35 to 55	cattle & agriculture	Not as association s. Members may have individual	Received with IZN	Production is commercialized by a local collector	Market can buy all is produced	Agriculture : sesame, maize, cotton	Available from IZN and ARP	Yes, as well with the ministry of agriculture	Potential for stronger linkages with ARP, CAP	At least quarter of producers is women.

					access. Equipment provided by IZN								
19	Asociación de productores de San Isidro del Norte	Yryvucua, San Pedro	From 35 to 55	cattle & agriculture	Not as associations. Members may have individual access. Equipment provided by IZN	Received with IZN	Production is commercialized by a local collector	Market can buy all is produced	Agriculture : sesame, maize, cotton	Available from IZN and ARP	Yes, as well with the ministry of agriculture	Potential for stronger linkages with ARP, CAP	At least quarter of producers is women.
20	Santa Verónica II	Santaní	8	Mandioca	Supported by Paraguay Productivo	Received with CODIPSA	CODIPSA	Market can buy all is produced	Yield 25.000 kg (2010)	Kg 141.000 (2010)	With the ministry of agriculture within the national plan of mandioca	Potential to group with others related with CODIPSA (no. 1 in the market)	Not specified
21	Santa verónica i	Santaní	5	Mandioca	Supported by Paraguay Productivo	Received with CODIPSA	CODIPSA	Market can buy all is produced	Yield 25.000 kg (2010)	Kg 100.000 (2010)	With the ministry of agriculture within the national plan of mandioca	Potential to group with others related with CODIPSA (no. 1 in the market)	Not specified
22	12 de junio	Santaní	7	Mandioca	Supported by Paraguay Productivo	Received with CODIPSA	CODIPSA	Market can buy all is produced	Yield 25.000 kg (2010)	Kg 95.000 (2010)	With the ministry of agriculture within the national plan of mandioca	Potential to group with others related with CODIPSA (no. 1 in the market)	Not specified
23	Asoc. Distr.- 25 de dic.	25 de diciembre	30	Mandioca	Supported by Paraguay Productivo	Received with CODIPSA	CODIPSA	Market can buy all is produced	Yield 25.000 kg (2010)	Kg 1.000.000 (2010)	With the ministry of agriculture within the national plan of mandioca	Potential to group with others related with CODIPSA (no. 1 in the market)	Not specified
24	Cerro poty	Santaní	3	Mandioca	Supported by	Received with	CODIPSA	Market can buy	Yield 25.000 kg	Kg 100.000 (2010)	With the ministry of	Potential to group with	Not specified

					Paraguay Productivo	CODIPSA		all is produced	(2010)		agriculture within the national plan of mandioca	others related with CODIPSA (no. 1 in the market)	
25	San isidro	Santaní	9	Mandioca	Supported by Paraguay Productivo	Received with CODIPSA	CODIPSA	Market can buy all is produced	Yield 25.000 kg (2010)	Kg 200.000 (2010)	With the ministry of agriculture within the national plan of mandioca	Potential to group with others related with CODIPSA (no. 1 in the market)	Not specified
26	San jorge	Santaní	7	Mandioca	Supported by Paraguay Productivo	Received with CODIPSA	CODIPSA	Market can buy all is produced	Yield 25.000 kg (2010)	Kg 25.000 (2010)	With the ministry of agriculture within the national plan of mandioca	Potential to group with others related with CODIPSA (no. 1 in the market)	Not specified
27	Virgen de fátima	Santaní	6	Mandioca	Supported by Paraguay Productivo	Received with CODIPSA	CODIPSA	Market can buy all is produced	Yield 25.000 kg (2010)	Kg 200.000 (2010)	With the ministry of agriculture within the national plan of mandioca	Potential to group with others related with CODIPSA (no. 1 in the market)	Not specified
28	La esperanza	Guajayvi	8	Mandioca	Supported by Paraguay Productivo	Received with CODIPSA	CODIPSA	Market can buy all is produced	Yield 25.000 kg (2010)	Kg 930.000 (2010)	With the ministry of agriculture within the national plan of mandioca	Potential to group with others related with CODIPSA (no. 1 in the market)	Not specified
29	Santa catalina	Guajayvi	6	Mandioca	Supported by Paraguay Productivo	Received with CODIPSA	CODIPSA	Market can buy all is produced	Yield 25.000 kg (2010)	Kg 200.000 (2010)	With the ministry of agriculture within the national plan of mandioca	Potential to group with others related with CODIPSA (no. 1 in the market)	Not specified
30	Oñondivepa	Guajayvi	9	Mandioca	Supported by Paraguay Productivo	Received with CODIPSA	CODIPSA	Market can buy all is produced	Yield 25.000 kg (2010)	Kg 450.000 (2010)	With the ministry of agriculture within the	Potential to group with others related with	Not specified

								d			national plan of mandioca	CODIPSA (no. 1 in the market)	
31	C. Agr. Tekojoja	Guajayvi	9	Mandioca	Supported by Paraguay Productivo	Received with CODIPSA	CODIPSA	Market can buy all is produced	Yield 25.000 kg (2010)	Kg 259.000 (2010)	With the ministry of agriculture within the national plan of mandioca	Potential to group with others related with CODIPSA (no. 1 in the market)	Not specified
32	Kuña aty jekupyty rekavo	Guajayvi	17	Mandioca	Supported by Paraguay Productivo	Received with CODIPSA	CODIPSA	Market can buy all is produced	Yield 25.000 kg (2010)	Kg 330.000 (2010)	With the ministry of agriculture within the national plan of mandioca	Potential to group with others related with CODIPSA (no. 1 in the market)	Not specified
33	Toro piru i	Guajayvi	5	Mandioca	Supported by Paraguay Productivo	Received with CODIPSA	CODIPSA	Market can buy all is produced	Yield 25.000 kg (2010)	Kg 123.000 (2010)	With the ministry of agriculture within the national plan of mandioca	Potential to group with others related with CODIPSA (no. 1 in the market)	Not specified
34	San rafael	Guajayvi	18	Mandioca	Supported by Paraguay Productivo	Received with CODIPSA	CODIPSA	Market can buy all is produced	Yield 25.000 kg (2010)	Kg 100.000 (2010)	With the ministry of agriculture within the national plan of mandioca	Potential to group with others related with CODIPSA (no. 1 in the market)	Not specified
35	24 de julio	Guajayvi	5	Mandioca	Supported by Paraguay Productivo	Received with CODIPSA	CODIPSA	Market can buy all is produced	Yield 25.000 kg (2010)	Kg 125.000 (2010)	With the ministry of agriculture within the national plan of mandioca	Potential to group with others related with CODIPSA (no. 1 in the market)	Not specified
36	5 de abril	Guajayvi	7	Mandioca	Supported by Paraguay Productivo	Received with CODIPSA	CODIPSA	Market can buy all is produced	Yield 25.000 kg (2010)	Kg 300.000 (2010)	With the ministry of agriculture within the national plan of	Potential to group with others related with CODIPSA (no. 1 in the	Not specified

											mandioca	market)	
37	Co'e poti	Chore	5	Mandioca	Supported by Paraguay Productivo	Received with CODIPSA	CODIPSA	Market can buy all is produce d	Yield 25.000 kg (2010)	Kg 100.000 (2010)	With the ministry of agriculture within the national plan of mandioca	Potential to group with others related with CODIPSA (no. 1 in the market)	Not specified
38	Coop. Guajayvi unido	Guajayvi	5	Mandioca	Supported by Paraguay Productivo	Received with CODIPSA	CODIPSA	Market can buy all is produce d	Yield 25.000 kg (2010)	Kg 100.000 (2010)	With the ministry of agriculture within the national plan of mandioca	Potential to group with others related with CODIPSA (no. 1 in the market)	Not specified
39	Tekojoja3	Guajayvi	4	Mandioca	Supported by Paraguay Productivo	Received with CODIPSA	CODIPSA	Market can buy all is produce d	Yield 25.000 kg (2010)	Kg 80.000 (2010)	With the ministry of agriculture within the national plan of mandioca	Potential to group with others related with CODIPSA (no. 1 in the market)	Not specified
40	Asoc. San marco	Maracana	4	Mandioca	Supported by Paraguay Productivo	Received with CODIPSA	CODIPSA	Market can buy all is produce d	Yield 25.000 kg (2010)	Kg 193.000 (2010)	With the ministry of agriculture within the national plan of mandioca	Potential to group with others related with CODIPSA (no. 1 in the market)	Not specified
41	San antonio	Gral. Aquino	6	Mandioca	Supported by Paraguay Productivo	Received with CODIPSA	CODIPSA	Market can buy all is produce d	Yield 25.000 kg (2010)	Kg 102.000 (2010)	With the ministry of agriculture within the national plan of mandioca	Potential to group with others related with CODIPSA (no. 1 in the market)	Not specified
42	22 de julio	Guajayvi	12	Mandioca	Supported by Paraguay Productivo	Received with CODIPSA	CODIPSA	Market can buy all is produce d	Yield 25.000 kg (2010)	Kg 600.000 (2010)	With the ministry of agriculture within the national plan of	Potential to group with others related with CODIPSA (no. 1 in the	Not specified

³ El nombre de este comité, en el próximo plan de venta su nombre será San Juan Bautista
USAID/Paraguay: Northern Zone Initiative

											mandioca	market)	
43	Hugua mercede	Gral. Aquino	9	Mandioca	Supported by Paraguay Productivo	Received with CODIPSA	CODIPSA	Market can buy all is produced	Yield 25.000 kg (2010)	Kg 350.000 (2010)	With the ministry of agriculture within the national plan of mandioca	Potential to group with others related with CODIPSA (no. 1 in the market)	Not specified
44	San rafael	Gral. Aquino	11	Mandioca	Supported by Paraguay Productivo	Received with CODIPSA	CODIPSA	Market can buy all is produced	Yield 25.000 kg (2010)	Kg 500.000 (2010)	With the ministry of agriculture within the national plan of mandioca	Potential to group with others related with CODIPSA (no. 1 in the market)	Not specified
45	C. Prod. Urundeymi	Gral. Aquino	7	Mandioca	Supported by Paraguay Productivo	Received with CODIPSA	CODIPSA	Market can buy all is produced	Yield 25.000 kg (2010)	Kg 100.000 (2010)	With the ministry of agriculture within the national plan of mandioca	Potential to group with others related with CODIPSA (no. 1 in the market)	Not specified
46	San francisco	Gral. Aquino	4	Mandioca	Supported by Paraguay Productivo	Received with CODIPSA	CODIPSA	Market can buy all is produced	Yield 25.000 kg (2010)	Kg 145.000 (2010)	With the ministry of agriculture within the national plan of mandioca	Potential to group with others related with CODIPSA (no. 1 in the market)	Not specified
47	Ñemityra	Gral. Aquino	5	Mandioca	Supported by Paraguay Productivo	Received with CODIPSA	CODIPSA	Market can buy all is produced	Yield 25.000 kg (2010)	Kg 80.000 (2010)	With the ministry of agriculture within the national plan of mandioca	Potential to group with others related with CODIPSA (no. 1 in the market)	Not specified
48	San blas	Gral. Aquino	4	Mandioca	Supported by Paraguay Productivo	Received with CODIPSA	CODIPSA	Market can buy all is produced	Yield 25.000 kg (2010)	Kg 105.000 (2010)	With the ministry of agriculture within the national plan of mandioca	Potential to group with others related with CODIPSA (no. 1 in the market)	Not specified
49	San antonio	Yryvucua	13	Mandioca	Supported	Received	CODIPSA	Market	Yield	Kg 300.000	With the	Potential to	Not

					by Paraguay Productivo	with CODIPSA		can buy all is produce d	25.000 kg (2010)	(2010)	ministry of agriculture within the national plan of mandioca	group with others related with CODIPSA (no. 1 in the market)	specified
50	Madre central	Yryvucua	11	Mandioca	Supported by Paraguay Productivo	Received with CODIPSA	CODIPSA	Market can buy all is produce d	Yield 25.000 kg (2010)	Kg 85.000 (2010)	With the ministry of agriculture within the national plan of mandioca	Potential to group with others related with CODIPSA (no. 1 in the market)	Not specified
51	Ka'aguy poty	Yryvucua	20	Mandioca	Supported by Paraguay Productivo	Received with CODIPSA	CODIPSA	Market can buy all is produce d	Yield 25.000 kg (2010)	Kg 245.000 (2010)	With the ministry of agriculture within the national plan of mandioca	Potential to group with others related with CODIPSA (no. 1 in the market)	Not specified
52	Gremio de productores	Yryvucua	25	Mandioca	Supported by Paraguay Productivo	Received with CODIPSA	CODIPSA	Market can buy all is produce d	Yield 25.000 kg (2010)	Kg 550.000 (2010)	With the ministry of agriculture within the national plan of mandioca	Potential to group with others related with CODIPSA (no. 1 in the market)	Not specified
53	Chococue	Yryvucua	13	Mandioca	Supported by Paraguay Productivo	Received with CODIPSA	CODIPSA	Market can buy all is produce d	Yield 25.000 kg (2010)	Kg 105.000 (2010)	With the ministry of agriculture within the national plan of mandioca	Potential to group with others related with CODIPSA (no. 1 in the market)	Not specified
54	Cabo cue	Yryvucua	20	Mandioca	Supported by Paraguay Productivo	Received with CODIPSA	CODIPSA	Market can buy all is produce d	Yield 25.000 kg (2010)	Kg 480.000 (2010)	With the ministry of agriculture within the national plan of mandioca	Potential to group with others related with CODIPSA (no. 1 in the market)	Not specified
55	APROC	Concepción	N/a	Sesame	Supported by Paraguay	TA with Paraguay Productiv	Shirosawa co.	Market can buy all is	N/a	Available with Paraguay	Not specified	Potential to group with others	Not specified

					Productivo	o		produce d		Productivo & Shirosawa co.		related with Shirosawa co. (leader exporter)	
56	APAC	Horqueta	N/a	Sesame	Supported by Paraguay Productivo	TA with Paraguay Productivo	Shirosawa co.	Market can buy all is produce d	N/a	Available with Paraguay Productivo & Shirosawa co.	Not specified	Potential to group with others related with Shirosawa co. (leader exporter)	Not specified
57	Asoc. 1 de mayo	Horqueta	N/a	Sesame	Supported by Paraguay Productivo	TA with Paraguay Productivo	Shirosawa co.	Market can buy all is produce d	N/a	Available with Paraguay Productivo & Shirosawa co.	Not specified	Potential to group with others related with Shirosawa co. (leader exporter)	Not specified
58	Asoc. Nuevo horizonte	Gral. Aquino	N/a	Sesame	Supported by Paraguay Productivo	TA with Paraguay Productivo	Shirosawa co.	Market can buy all is produce d	N/a	Available with Paraguay Productivo & Shirosawa co.	Not specified	Potential to group with others related with Shirosawa co. (leader exporter)	Not specified
59	Asoc. 1º de marzo	Capiibary	N/a	Sesame	Supported by Paraguay Productivo	TA with Paraguay Productivo	Shirosawa co.	Market can buy all is produce d	N/a	Available with Paraguay Productivo & Shirosawa co.	Not specified	Potential to group with others related with Shirosawa co. (leader exporter)	Not specified
60	Aso. La victoria	Yasy cañy	N/a	Sesame	Supported by Paraguay Productivo	TA with Paraguay Productivo	Shirosawa co.	Market can buy all is produce d	N/a	Available with Paraguay Productivo & Shirosawa co.	Not specified	Potential to group with others related with Shirosawa co. (leader exporter)	Not specified
61	Consortio canindeyu	Curuguay	N/a	Sesame	Supported by Paraguay Productivo	TA with Paraguay Productivo	Shirosawa co.	Market can buy all is produce d	N/a	Available with Paraguay Productivo &	Not specified	Potential to group with others related with Shirosawa	Not specified

										Shirosawa co.		co. (leader exporter)	
62	Asociación de productores cerro corá - colonia maría auxiliadora	PJC, Amambay	120	Sesame, maize, beans	N/a. Equipment & provisions provided by IZN, ACOM & ADM	Ta with IZN, ACOM & ADM	Production is commercialized by local collector	Market can buy all is produced	19.200 kg (sésamo) 21.000 kg (maíz) 10.600 kg (poroto) (2009)	Own figures	Not specified	Not specified	Project focuses on gender issues
63	Junta de desarrollo de santa clara – colonia santa clara	PJC, Amambay	150	Sesame, maize, beans	N/a. Equipment & provisions provided by IZN, ACOM & ADM	Ta with IZN, ACOM & ADM	Production is commercialized by local collector	Market can buy all is produced	7.000 kg (sésamo) 8.800 kg (maíz) 8.300 kg (poroto) (2009)	Own figures	Not specified	Not specified	Project focuses on gender issues
64	Junta de desarrollo de fortuna guazú – colonia fortuna guazú	PJC, Amambay	143	Sesame, maize, beans	N/a. Equipment & provisions provided by IZN, ACOM & ADM	Ta with IZN, ACOM & ADM	Production is commercialized by local collector	Market can buy all is produced	N/a	Own figures	Not specified	Not specified	Project focuses on gender issues
65	Asociación de productores San Agustín	Jasý kañy, Canindeyú	71 families	Milk & dairy	N/a. Equipment & provisions provided by IZN	Ta with izn	Production is taken by Chortitzer Lta	Market can buy all is produced	40 animals & 10 hectares. 21.000 liters per month	Own figures	Not specified	Working towards becoming a cooperative themselves	50percent of members are women
66	Associations with communal banking format, rural percent urban areas	Chore, Cruce Liberacion, San Pedro	600 families	Enterprising, different activities	Yes, with MEDA PY	Ta with IZN	MEDA PY	Market can buy all is produced	Enterprising, different activities	N/a	N/a	N/a	70percent are women
67	Centro de formación de emprendedores-escuelas integrales –	Belen, Concepcion	N/a	Cattle & minor animals, agriculture, tourism,	Yes, self financed	Yes, provided by themselves	N/a	Market can buy all is produced	Enterprising, different activities	Own figures	N/a	Working for self sustainability	50percent are women

	fundación paraguaya			others									
68	Panadería el progreso	Belén, Concepción	30 families	Bakery	Not as association . Members may have individual access. Equipment provided by IZN	Yes, with IZN & CIRD	Market is local population	Market can buy all is produced	N/a	Own figures	N/a	N/a	50percent are women
69	Comité de mujeres san francisco de asís	Guayaibí, San Pedro	N/A	Broom, nets, swab making from recycled pet bottles	Not as association . Members may have individual access. Equipment provided by IZN	Yes, with IZN & CIRD	Market is local population	Market can buy all is produced	N/a	N/a	N/a	N/a	100percent are women
70	Diversas asociaciones de pescadores bajo la coordinadora de pescadores de antequera	Antequera, San Pedro	238 families	Fishing	N/A. Equipment provided by IZN	Yes, with IZN & CIRD	Market is local population	Market can buy all is produced	N/a	N/a	Support of the municipality of Antequera, in partnership with Plan Nacional de Soberanía y Seguridad Alimentaria y Nutricional – San Pedro	N/a	N/a
71	Comité de apicultores salto del Guairá	Refugio biológico binacional del Mbaracayú de salto del Guairá; Canindeyú	12 families, 60 people	Apiculture – beekeeping	N/A. Equipment provided by IZN	Yes, with IZN	Market is local population.	Market can buy all is produced	70 hectares. Production of at least 50 liters per month	N/A	Developed together with the government of Canindeyú.	N/a	N/a
72	Comité	Distrito de	14	Petit grain	N/A.	Yes, with	Production is	Market	Average of	11.000.000	Project	N/a	Mostly men

	ka'aguy potý,	villa Ygatimí, Canindeyú	families, 70 people	water/essence	Equipment provided by IZN	IZN	taken by local collector	can buy all is produced	10 hectares per associate. 110 kg. Per month	gs year	developed together with the government of Canindeyú.		
73	Comité san José,	Curuguaty; Canindeyú	10 families, 50 people	Fish farming	N/A. Equipment provided by izn	Yes, with IZN	Market is local population	Market can buy all is produced	Fishpond: 3 units. 3,000 fish units of pacú, bagre, tilapia, carpa.	Product is selling at 25.000 gs per kg.	Developed together with the government of Canindeyú.	N/a	50percent are women
74	Asociación de pequeños reforestadores de mandurá	Comunidad de la colonia vysokolán del distrito de jasý kañý, canindeyú	100 associates, 100 families, 500 people	Reforestation	Not specified as associations. Equipment provided by izn	Yes, with izn	Product is material to produce paper	Market can buy all is produced	200.000 units of little plants of eucalyptus, aprox. 170 hectares.	Yet to have fist production in 8 years time. Current price is gs. 50.000/m3. / to 8 m3 per tree. Aprox. 330 trees per hectare. At the moment each little plant is selling at 400 gs.	Project developed together with the government of canindeyú &.	N/a	N/a
75	Asociación de productores de carapa'i	Santa Rosa, San Pedro	From 35 to 55	Agriculture: sesame, maize, cotton	N/A. Equipment provided by izn	Yes, with IZN	Production is commercialized by local collector	Market can buy all is produced	Agriculture : sesame, maize, cotton	N/a	Sporadic support of the Ministry of Agriculture and Livestock	Potential to group with others associations .	At least quarter of producers is women.
76	Asociación de productores de ka'aguy	Distrito de Gral. Aquino, San Pedro	From 35 to 55	Agriculture: sesame, maize, cotton	N/A. Equipment provided by izn	Yes, with IZN	Production is commercialized by local collector	Market can buy all is produced	Agriculture : sesame, maize, cotton	N/a	Sporadic support of the Ministry of	Potential to group with others associations	At least quarter of producers is women.

	pyahú							d			Agriculture and Livestock	.	
77	Comité de productores de la colonia estrellita	Distrito de Gral. Resquín	From 35 to 55	Agriculture: sesame, maize, cotton	Not specified as associations. Equipment provided by izn	Yes, with IZN	Production is commercialized by local collector	Market can buy all is produced	Agriculture : sesame, maize, cotton	N/a	Sporadic support of the Ministry of Agriculture and Livestock	Potential to group with others associations	At least quarter of producers is women.
78	Cooperativa guajaibi unido	Guayaibi, San Pedro	100 associates, 80 men, 20 women	Banana & pineapple	Yes, del Fondo de Desarrollo Campesino	Yes, with IZN	Banana: 63.000 exported to Argentina.	Market can buy all is produced	Banana: 263.000 boxes of banana per year, 66.500 boxes of pineapple.	Data is available. Opportunity to strength linkages with export brokers & traders	Support by the ministry of industry and commerce	Member of CEPACOOOP (central paraguaya de cooperativas), conformed with 9 cooperativas for export & 850 associates	20percent are women
79	Cooperativa guajaibi poty	Guayaibi, San Pedro	70 associates, 60 men, 10 women	Banana & pineapple	N/A. Equipment provided by izn	Yes, with IZN	Banana: 28.000 boxes exported to Argentina	Market can buy all is produced	Banana: 84.000 boxes per year, 35.600 boxes of pineapple.	Data is available. Opportunity to strength linkages with export brokers & traders	Support by the ministry of industry and commerce	Member of FECOPROD (federación de cooperativas de producción), the largest in the country	10percent are women
80	Comunidad indígena mby'á guaraní"	Asentamiento vy'a rendá, Concepción, Concepción	51 families	Best practices for farming diversification for self consumption & profits	N/A. Equipment provided by izn	Yes, with IZN	Production mostly for self-consumption	Market can buy all is produced	Production mostly for self-consumption	N/a	Developed with support of the ARP-Concepcion	N/a	At least 50percent are women
81	Organización campesina tekopyahú"	Loreto, Concepción	100 families	Tomatoes, peppers, others	N/A. Equipment provided	Yes, with IZN	N/a	Market can buy all is	N/a	N/a	N/a	Member of federación de	N/a

					by izn			produce d				cooperativa s de la producción - FECOPROD	
82	Parque industrial de guajayvi - coordinadora de productores de sésamo – COPROSE	Guayaibí, San Pedro	N/a	N/a	Equipment provided by IZ N	Yes, with IZN	N/a	Market can buy all is produce d n/a	N/a	N/a	Promoted by the government of San Pedro	N/a	N/a
83	Central de productores ecológicos del paraguay COPEP	San Pedro & concepción	90 comities around COPEP, 1164 producers are associated	Sesame for profits, for self conception porotos, maíz, frutos, hortalizas, hierbas medicinales.	Not specified as associations. Equipment provided by IZN	Yes, with IZN	Alliance with RENA 4	Market can buy all is produce d n/a	N/a	N/a	N/a	Member of FECOPROD	N/a

ANNEX 2

COOPERATIVES IN THE NORTHERN ZONE

COOPERATIVES IN AMAMBAY	
1	COMED AMAMBAY Coop. Mult. de Trab. y Serv.
2	LA PEDROJUANINA Coop. A.C.C.y Serv.
3	ZORRO Coop. T., A., C., P., C, y Serv.
4	AMAMBAY Agricola Ltda.
5	26 DE MARZO C. Mult. Ah. Cr. Cons. Prod. y Servicio
6	COOPROAMA Coop. De Pr., C., Ah., Cr. y S. de Profesores del Amambay Ltda.
7	COOPEJUAM Coop. de Producción Cons. Ahorro Cred. y Servicios
8	MBORAYHU C. M. de Producción, Consumo, Ahorro y Crédito y Servicios
9	NORTE PORÁ Ltda.
10	RINCONADA Ltda.
11	HEROES DEL CHACO Ltda. Coop. Mult. De A.y C., Prod. Y Prestacion de servicios.
12	CAPITÁN BADO Ltda. Coop. De Ahorro y Crédito y de Consumo.
13	1º DE DICIEMBRE Ltda. Coop. Mult. de Ahorro y Crédito, Consumo, Producción y Servicios. (COOPRIMDIC)

COOPERATIVES IN CANINDEYU	
1	ESPIGA DORADA Coop. Agropecuaria de Produccion, Consumo, Ahorro y Credito y Servicios Ltda.
2	MINGA SAN JUAN DE PUENTE KYHA Ltda.
3	SAN ISIDRO LABRADOR C.M.A.C.De Produc. Agro-Industrial y S. COOPSIL
4	CARAPA Coop. M.A.C.P.C.S. Ltda
5	NARANJA GUY Coop. de Prod. Agropec. , Cons. y Serv.
6	ZACATECAS Coop. de Prod. Agric
7	DURANGO C. Multiactiva de Servicios, Producción y Consumo
8	CANINDE (COOPECAN) Coop. Mult. de Ah. Créd. Prod. Cons. y Serv.
9	COOPERALBA C. Mult. de Prod. Cons. y Serv.
10	ARANDURA Ltda.
11	LAS RESIDENTAS DE CANINDEYU M. Ahorro, Créd., Produc. y Servicios de Ltda.
12	34 CURUGUATEÑOS Coop Mult de Ahorro, Credito, Produccion, Consumo y Servicios Ltda.
13	SAMU'U POTY Coop. Agropecuaria de Produccion, Consumo, Ahorro y Credito y Servicios Ltda
14	TACUARATY Coop Agropecuaria de Produccion, Consumo, Ahorro y Credito y Servicios Ltda.
15	AKARAPUARA Coop Agropecuaria de Produccion, Consumo, Ahorro y Credito y Servicios Ltda.
16	PERSEVERANCIA Coop. Agropecuaria de Produccion, Consumo, Ahorro y Credito y Servicios Ltda.
17	PASO REAL SIETE MONTES Coop Agropecuaria de Pr., C, Ah y Cr. y Servicios Ltda.
18	RIO APARAY Ltda. Coop. Agropecuaria de Producción, Consumo, Ahorro y Crédito y Servicios
19	MBARACAYU Ltda. Coop. De A y C. Prod. Cons. Y Servicios
20	BRITEZ CUÉ Ltda. Coop. De A. y C. Prod., Cons. Y Servicios

21	FORESTAL CURUGUATY Ltda. Coop. Mult. de Ahorro y Crédito, Comercialización y Consumo.
22	MARAKANA POTY Ltda. Coop. de Producción Agroindustrial, Consumo y Servicios
23	COOPERBIO Ltda. Coop. Mult. Agroindustrial de Ahorro, Créditos, Producción y de Servicios.
24	SALTOS DEL GUAIRA Ltda. (COOPESAL) Coop. Mult. de Ah., Cr., Pr., Consumo, y Servicios
25	ITAMBEY Ltda. Coop. Mult. de Ahorro y Crédito, Trabajo y Servicios.
26	PROLACOOPT Ltda. Coop. Mult. de Producción. Consumo y Servicios.
27	COOTRANE Ltda. Coop. Mult. de Trabajo y Servicios.
28	3 DE MAYO Ltda. Coop. de Producción Agropecuaria e Industrial, Consumo y Servicios
29	SAN MARCOS Ltda. Cooperativa de Producción Agropecuaria, Consumo, Ahorro y Crédito y Servicios.

COOPERATIVES IN CONCEPCION	
1	EDUCADORES DE CONCEPCION Coop. Mult de Ahorro, Credito, Producción, Servicios Ltda.
2	JUI'Y Ltda.
3	INTEGRAL DEL NORTE Coop. M. Produc. Industrial C.A.C.S. "25 de abril" Ltda.
4	RINCON DE LUNA Coop. M. de P. Agríc. Indust. y Serv.
5	COOMCANOR C. Mult. de Prod. y de Serv. de Caleros del Norte
6	COCANOR C. Prod. Agropecuaria y de Serv. Campesina del Norte
7	NORTE PYAHU Coop. de Prod. Agropecuaria Industrial Forestal y de Serv.
8	SOL DEL NORTE Coop de Ahorro y Credito Ltda.
9	COOPROLEC C.M. P.Cons. A.C. y S. de Productores de Leche de Concepcion Ltda
10	JUAJU PYAHU C. de Producción Agroindustrial y Comercialización
11	MOSELDORF Coop. Mult de Produccion, Consumo y Servicios Ltda.
12	EDUCADORES TEKOSA'Y Ltda. Coop. Mult. Ahorro, Crédito, Consumo, Servicio y Producción
13	TAGATIYAMI Ltda. Coop. Agroindustrial, Forestal y Consumo
14	UNICOM Ltda. Coop. M. de Ah., Cr., C., S. y Trabajo Medico
15	YBY YA'U Ltda. Coop. Mult. de ahorro y Crédito, Producción. Consumo, Trabajo y Servicios
16	MERCADO MUNICIPAL DE CONCEPCIÓN Ltda. Coop. Mult. de Ah. y Cr., Consumo, Producción y S.
17	VALLEMI Coop. Mult. de Consumo, Ahorro, Crédito y Servicios COOPEMAVA Ltda.
18	AGRONOR Ltda. Coop. Agropecuaria, Industrial, Hortifruticola y Forestal
19	CAMBY POTY Ltda. Coop. Mult. de Producción Agropecuaria Industrial y Lechera, Consumo y Servicio
20	VIRGEN LA APARECIDA Ltda. Coop. De Producción Agropecuaria e Industrial, Forestal, Consumo y Servicios

COOPERATIVES IN SAN PEDRO	
1	KO'EJU Coop. de Ahorro y Crédito Ltda.
2	FRIESLAND Coop Agricola Ltda
3	VOLENDAM Coop. De Produccion Ltda.

4	GUAJAYVI POTY Coop. P. Agríc. e Industrial A.C.S. del Norte Ltda.
5	DECOS NOR Coop. P. Agroind. C.A.C.S.
6	FARM CREDIT Cooperativa de Ahorro y Cred
7	LA NORTEÑA YCUAMANDYYU Coop. Prod. Agrop. e Industrial
8	CERRO DOS DE ORO C. de Produc. Agro Forestal e Industrial
9	GUAJAYVI UNIDO C. Agro - Industrial y Servicios
10	TACUATI C. de Prod. Agro Ind. Ah. Cred. y Serv.
11	JOPOIRA C. M. de Prod. Agro Ind. Cons. y de Serv.
12	NARANJITO - COMUNA - C. Mult. de Prod. Ah. Cred. y Consumo
13	COOPCRESE Ltda.
14	SANTANIANA Coop. De Produccion Agroindustrial Ltda.
15	AGUARAY Coop. Agropecuaria de Produccion, Consumo y Servicios Ltda.
16	DEFENSOR POTY Coop. De Produccion Agro Industrial Ltda.
17	MORWEENA Coop. Mult de Prodx, Consumo y Servicios Ltda.
18	ECOMONTE Ltda. Coop. Mult. De Prod. Comerc., Cons. Y Servicios
19	PU'ARA Ltda. Coop. de Prod. y Servicios
20	ATYPYAHU Ltda. Coop. Multiactiva de Ahorro, Credito; Producción, Consumo Y Servicios
21	GUAIRAJU Ltda. Coop. Multiactiva de Vivienda, Producción, consumo, Ahorro y Crédito
22	PAI VALE DE SAN PEDRO Ltda. Coop. Mult.: prod., Ah.y Crédito, Consumo y Servicios
23	LIMA Ltda. Coop. Mult. De Ahorro y Crédito, Consumo,, Producción y Servicios.
24	ACRIZO Ltda. Coop. Multiactiva de Ahorro y Crédito, Consumo, Producción y Servicios.
25	LIBERACION NORTE Ltda. Coop. Mult. De Producción, Ahorro y Crédito, Consuo y Servicios
26	PROFESOR FELICIANO CARDOZO Ltda. Coop. Mult. de Prod., Ah.y Créd., Cons. y Serv.
27	UNION AGRICOLA RUTA RÀ Ltda. Coop. Mult.:Producción, Ahorro y Crédito, Cons. y Servicios
28	LA LIBEREÑA Ltda. Coop. De Producción Agropecuaria e Industrial
29	3 DE MARZO Ltda. Coop. Mult. Produccion, Ahorro, Crédito, Consumo y servicios.
30	3 DE JUNIO Ltda. Coop. Mult. Produccion, Ahorro, Crédito, Consumo y Servicios.
31	SAN VICENTE Ltda. Coop. De Producción, Consumo, Ahorro, Crédito y de Servicios
32	TRINACRIA Ltda. Coop. De Ahorro y Crédito
33	CUATRO VIENTOS Ltda. Coop. Mult. De Poroducción, Consumo y Servicios
34	JEJUI GUASU Ltda. Coop. Mult. De Ahorro, Prestamo, Producción y Servicios.
35	GRUENFELD Ltda. Coop. Mult. De Servicios, Producción, y Consumo.
36	LA GRANJA Ltda. Coop. Mult. Prod., Cons.y Servicios
37	23 DE FEBRERO Ltda. Coop. De Producción Agropecuaria, Consumo y Servicios
38	LA GERMANINA Ltda. Coop. Mult. De Producción Agricola, Consumo y Servicios.
39	LA FORTALEZA Ltda. Coop. De Producción Agropecuaria e Industrial.
40	DIOS PROVEE Ltda. Coop. de Producción Agropecuaria e Industrial
41	MAYOR HERMOSA Ltda. Coop. de Producción Agropecuaria e Industrial
42	CHOREMI Ltda. Coop. Mult. de Producción; Consumo y Servicios.
43	ALIANZA PARA EL PROGRESO Ltda. Coop. Mult. de Ahorro, Crédito, Consumo y Servicios
44	NUEVA ALEMANIA Ltda. Coop. de Vivienda por Ayuda Mutua.

45	INMACULADA CONCEPCION Ltda. (CICOLAC) Coop. de Ahorro y Crédito.
46	PY'A GUAPY Ltda. Coop. Mult. de Prod. Ahorro y Crédito, Consumo y Sevicios
47	7 DE JUNIO Ltda. Coop. Mult. de Producción, Agropecuaria, Consumo, Industrial y Servicios
48	MONTE ALTO Ltda. Coop. Mult. de Producción, Ahorro y Crédito, Consumo y Servicios
49	14 de JUNIO Ltda. Coop. Mult. De Producción Agrícola Industrial, Consumo, Ahorro y Crédito y Servicios.
50	ANGATU Ltda. Coop. de Producción Agropecuaria e Industrial
51	MADECOOP Ltda. Coop. Forestal Mult. de Ahorro, Crédito, Consumo y Servicios.
52	GRAL. ELIZARDO AQUINO Ltda. Coop. Mult. de Ahorro, Crédito, Producción, Consumo y Servicios.
53	UNIDAD SAMPEDRANA Ltda. Coop. Mult. de Ahorro y Préstamos y de Servicios.
54	KAMBA YKUA Ltda. Coop. Mult. de Trabajo, Servicios, Ahorro y Crédito, Consumo y Producción.
55	OCHO DE DICIEMBRE Ltda. Coop. Mult. de Producción, Consumo, Servicios y de Ahorro y Crédito
56	COOPMUJOJA Ltda. Coop. Mult. de Producción, Agropecuaria e Industrial, Ahorro, Créditos, Consumo y Servicios.
57	SOStenible Ltda. Coop. Mult. De Trabajo, Servicios Publicos, Produccion, Comercializacion y Consumo.
58	RETAMA POTY Ltda. Coop. Mult. De Produccion, Ahorro, Credito, Consumo, Servicio e Industrial

Source: Listado General de Cooperativas del INCOOP (actualizado a Junio 2011).

ANNEX 3

BRIEF PROFILE OF AGRICULTURAL COOPERATIVES LOCATED IN THE NORTHERN REGION

INTEGRAL DEL NORTE COOPERATIVE

The Cooperative Integral del Norte consists of a group of small farmers whose primary activity is the cultivation of agricultural products, such as pineapple, banana, castor seed plant and sesame. Currently, cooperative members produce pineapples and watermelon for export, but with many difficulties including lack of proper production techniques and low profitability due to poor yields and quality of the fruit. The members are aware of these limitations and they understand that, to increase the yield and quality of the production, improved production techniques are necessary.

The Cooperative “*Integral del Norte, Limitada*” was created on the April 28, 1998 in the city of Horqueta through an initiative of the *Centro de Educación Popular del Norte (CEPN)*, (Popular Education Center of the North). The cooperative was recognized by the National Institute of Cooperativism (INCOOP) on July 10, 1998 by Resolution N° 725/98, under decree N° 283. The organization has its own warehouse for storage of agricultural inputs and product storage. The building also houses the office and the cooperative grocery store, a system that provides basic-needs products for daily consumption, a service offered to both members and non-members at fair prices and weights.

The Cooperative’s vision includes becoming an agro-business exporter of fruit and grains; consolidating the cooperative grocery store and eventually converting it to a major supermarket; and the strengthening of fruit and sesame production and commercialization/marketing among the members and associated committees. The mission of the Cooperative is to organize the small farmers in the area through participation in group work activities and collective commercialization. This involves both the farmers and youth of the community and is intended to provide jobs and markets in the area that create improved economic stability for the people and region. This is done through objectives aimed at strengthening the farms of the rural agricultural producer and preserving the natural environment while serving as a model for sustainable cooperative development.

The Cooperative organizational structure is as follows: the General Assembly of Members, the Board of Directors, Supervisory Committee, and six committees (education, credit, production, commercialization, youth, and women). At this time, the Cooperative is comprised of 132 members located between Horqueta and Arroyito. Approximately 350 families, members and non-members, are direct beneficiaries of the Cooperative’s services. The members of Cooperative Integral del Norte are primarily producers of sesame and fruit, such as pineapple, banana, watermelon, melon, and others. The Cooperative coordinates activities with other cooperatives and small producer’s organizations in the area. The Cooperative already exports its pineapple production to Argentina through a system of collective commercialization with another cooperative in the nearby area of Guayaibi.

The Cooperative Integral del Norte receives the support of the *Federación de Cooperativas de Producción (*FECOPROD)*. The Cooperative also maintains relations and work plans with the *Red de Inversiones y Exportaciones—REDIEX* (Investments and Exportations Network), as well as relations and collaborations with local governments such as the Municipality of Horqueta and regional institutions such as the Departmental Government of Concepción.

GUAYAIBI UNIDO COOPERATIVE

Guayaibi Unido Cooperative is a production cooperative located in Chachi, 2nd Line, in Guayaibi District, San Pedro Department. The main purpose of the cooperative is to channel technical assistance, inputs, credits and marketing services to its associates. The cooperative belongs to a second level cooperative organization, the Paraguayan Center of Cooperatives – *CEPACOOOP.

Cooperative Guayaibi Unido Ltd. is a production cooperative in San Pedro Department and was created on December 17, 1999. The cooperative's objective is to channel technical assistance, inputs, credits and marketing services to its associates. It has its administrative facility that was acquired through its members' efforts. There are currently 100 active members, 20 of whom are women.

The cooperative receives financial assistance from the Farmers Development Fund – *Fondo de Desarrollo Campesino*, and the cooperative serves as a “middle-man,” facilitating access and oversight. In this role, it has access to financial resources, which are then channeled to its associates according to their respective production plans and responsibilities.

The main activity of the Cooperative is the production and marketing of pineapple, banana and melon. The Cooperative is part of the Paraguayan Center of Cooperatives – *Central Paraguaya de Cooperativas CEPACOOOP*, a second-tier cooperative organization considering of small production cooperatives. The key role of this cooperative center is to facilitate product marketing and sales. CEPACOOOP does have a market space in the central market in Asuncion to serve the immediate needs of the local market. Likewise, they do export to markets in Argentina and Uruguay, mainly exporting banana, and in lesser quantities pineapple.

CENTRAL ORGANIZATION OF ECOLOGICAL PRODUCERS OF PARAGUAY- COPEP

The Central Organizations of Ecological Producers of Paraguay (COPEP) currently produces medicinal herbs and sesame. COPEP was founded in 2002. Their mission is to provide excellent services in: integrated technical assistance, marketing, credit, quality, health, social security and education to attain production, processing, marketing and mass consumption of high quality organic products and to improve the living conditions for member families of peasant organizations, members of the COPEP, in the framework of economic solidarity and fair trade. Their objectives are: to improve the production and commercialization of the products of their members, achieving better income for partner families. Their principal activity is the commercialization of its member's products. COPEP is working continuously in the departments of Concepción, San Pedro, Caaguazu, Caazapa and Paraguari. It has hired staff, its Directive Committee has 5 members and their beneficiaries are 2300 families in 12 organizations.

COOPERATIVE RINCON DE LUNA

The Cooperative Rincon de Luna consists of small-holder horticulture producers in the community of Pueblora, Department of Concepción. While the producers focus on a wide variety of crops, the two main crops cultivated by the organization's membership are tomatoes and peppers.

Cooperative Rincon de Luna, founded October 31, 1998 in Pueblora, Concepcion Department, currently consists of 27 members and a small staff which works in

administrative and warehouse operations. The members cultivate a wide variety of horticultural crops both for personal consumption and sale in local and regional markets. These crops include lettuce, parsley, onion, Swiss chard, beets, carrots, tomatoes, peppers, sesame, cassava, sweet corn, beans, sweet potatoes and pumpkins, among others.

The cooperative's office is located on a five-hectare farm that is also used for production. The farm has a rustic irrigation system fed by an artesian well and reservoir, a shade canopy, a warehouse, computers and a motorcycle for transportation. The mission of the Cooperative is to provide services to improve economic conditions of its associates and their families while preserving the environment and meeting the needs of local and regional markets.

AGUARAY COOPERATIVE

Aguaray Cooperative was one of four regional cooperatives that formed a consortium aimed at coordination and collaboration to produce bananas and pineapples for export. Cooperative Aguaray was established 17 December 2004 in San Miguel del Norte Colony, Santa Rosa del Aguaray District, San Pedro Department. The Cooperative's mission is to increase and diversify the production and add value to member production in order to improve member living standards. With this mission, it focuses its efforts primarily on providing production inputs, commercialization management, long-term factories establishment, construction of silos, increase the value added of the production and saving and loans to the members. Currently, the cooperative has 50 active members and 3 permanent staff and the board meets on a weekly basis. It is expected that as the cooperative focuses more in supporting pineapple and banana production, additional producers in the region will begin joining.

APEX ORGANIZATIONS

During the life of our project we have worked with some primary cooperatives in alliance with some of the most important second-tier Organizations in Paraguay:

FECOPROD

The **Federation of Production Cooperatives (FECOPROD)** was founded on August 23rd, 1975 and currently provides common interest support services to member cooperatives, such as technical, administrative and accounting assistance, educational activities, audits, consultancies, and legal advice.

The Federation seeks to constitute itself as an agent of development for the agriculture and agro-industrial sectors within Paraguay, striving for permanent social and economic prosperity for the affiliated cooperatives, their members and their families. Furthermore, the Federation works toward promoting a positive image and conscience related to rural cooperatives, emphasizing the important role cooperatives play in the equitable development of the country. It currently is comprised of 33 associated co-ops.

Through a wide array of technical assistance programs and projects, FECOPROD has promoted the increase of productivity, diversification, the improvement of product quality, the increase in profitability and sustainability and the preservation of natural resources and the environment. Production from agricultural cooperatives supplies Paraguay with much of its food, both unprocessed and processed, saving Paraguayans the expense of importing and generating income from the export of surplus products.

FECOPROD is associated with national and international organizations, such as the Paraguayan Confederation of Cooperatives (CONPACCOOP Limited), the Federation of Industry and Commerce (FEPRINCO), Raiffeisen International (IRU), the International Cooperative Alliance (ACI), the Production Trade Union (UGP), and the National Organism for the Promotion of Competitive Strategy (ONPEC).

FECOPROD also maintains close relations and collaborates frequently with the Uruguayan Federation of Cooperative Entities (CUDECOOP), the Organization of Brazilian Cooperatives (OCB), the European Union (EU), and is an active member of various inter-institutional commissions within the public and private sector related to the interests of production cooperatives.

The institutional vision of the Federation: FECOPROD is that of a common interest organization which offers various services, contributes effectively to the sustainable development of the productive sector, is recognized for its organizational strengths, maintains a positive relationship with the Paraguayan national government, is committed to the community and the Paraguayan cooperative movement and incorporates an international scope. FECOPROD's institutional mission consists in representing the associated members, providing efficient and effective services, contributing meaningfully to the sustainable development of the productive sector, and fostering the formation of leaders and the consolidation of production cooperative common interest groups. The values promoted by FECOPROD consist in: the strategic emphasis being oriented towards the quality of human resources, expressed as a necessity in order to achieve a well-planned and orderly development of the institution, the strengthening of inter-institutional relationships in order to fulfill the trade and social roles of the Federation, the quality of services, and the consolidation of responsibility within society and among the cooperative organization members.

Since its foundation, FECOPROD has worked to promote cooperative ideology, supporting small cooperatives and pre-cooperative groups in their consolidation and completion of steps necessary to achieve official recognition.

CEPACCOOP

CEPACCOOP was founded on June 24, 2002 in the city of Asuncion located within Paraguay's Central Department. The organization was formed under the name *Central Paraguaya de Cooperativas de Produccion, Comercializacion y Servicios* "CEPACCOOP" LTDA or Paraguayan Association for Producer, Commercial and Service Cooperatives. CEPACCOOP operates within its statute of limitations and is in accordance with article 438/94 which was passed into law on October 21, 1994. It also operates in accordance with Decree 14052 passed on July 3, 1996. Because its regulations conform to Cooperative law 438, CEPACCOOP is classified as a 2nd tier institution.

Since its formation at the end of 2001, CEPACCOOP has been through several phases of development each of which has contributed to the organization's unique profile. The initial push to create the organization came from an analysis of Asuncion's system for commercializing fruits of vegetables. The study concluded that a valid form of active participation in this system was for members of an established organization to adopt leading and "recognized" merit-based positions within the commercial drawing board. To accomplish this it was proposed that an organization be formed to begin working at an internal level on the national distribution of products. After gaining experience in the handling and distribution of large product volumes, it was suggested that the organization begin exporting banana and pineapple to other countries in the region. CEPACCOOP has

increased its importance as a player in the local market and has also established a presence in the larger regional market. The organization is currently made up of the following member cooperatives: La Barrerena, Caraguatay Poty, Guayaibi Unido, Petei Chapa, Blas Garay and Pakova Poty de Tembiapora.

A general assembly together with the administrative council and the vigilance committee it oversees form the top of CEPACCOOP LTDA'S organizational structure. The administrative council in turn delegates duties to an executive committee that is headed by three leading members.

The administrative branch of the cooperative is made up of a commercial management team that is in charge of a portfolio of clients and of a group of related business interests. The financial team of the administrative branch is made up of a professional accountant and two supporting officers. Any sales made at the Abasto Market are managed by a cashier and by two to three vendors depending on the time of year. CEPACCOOP fulfills all the obligations required by national legislation.

CEPACCOOP goal, as outlined in its business development strategy, is to become a self-financed entity that can promote the sustainability of its member cooperatives within a period of three years. Its mission is to be an umbrella organization that can efficiently oversee the commercialization of the fruit and vegetable products produced by its members.

By working with APEX Organizations the primary Cooperatives receive technical assistance and access to credit for adequate equipment or infrastructure in order to meet established local and international market requirements for their products and ensure continuity and/or penetration of markets, obtaining the maximum possible price.

RURAL ASSOCIATION OF PARAGUAY - ARP

The Rural Association of Paraguay (ARP) is the country's largest nonprofit cattlemen and agriculture producers' association, dedicated to promoting the improvement of agricultural production and derived industries. ARP is concerned with improving small farmers' agricultural diversification and food supply for self-consumption in targeted areas of Paraguay as part of a security strategy against crime and violence generated by poverty and unemployment. Under the premise that successful small farmers will choose against criminal behavior and activities, ARP has initiated a corporate social responsibility program involving inputs and demonstration plots for agriculture diversification and food security for farmers in the Northern Zone.

According to the NAC, there are a total of 692 farmers associated to the ARP within the four departments analyzed in this study (Concepción 175, San Pedro 297, Amambay 107, Canindeyu 113).