DAIRY VALUE CHAIN SURVEY

KEBELE QUESTIONNAIRE

January – February 2018

LOCATION

	Name	Code
1. Zone	_____	[__]
2. Woreda	_____	[__]
3. Kebele	_____	[__]
4. Date of survey	a. Day : [__|__]	b. Month : [__|__]
5. Start/finish time	Start time: ____:____	Finish time: ____:____

PLEASE TARGET A COMBINATION OF SMALL AND BIG DAIRY FARMERS FOR THIS SURVEY

NOTE: *: CONSENT FORM TO BE SIGNED BY ALL PARTICIPANTS*

0. BACKGROUND

IT IS SUGGESTED TO HAVE A FOCUS GROUP OF ABOUT 5 ELDER LEADERS/DAIRY PRODUCERS.

Order	1. Name	2. Sex	3. Age	4. Primary occupation	5. Experience
		1.Male 2.Female		1. Dairy farmer 2. Other	Since how many years in dairy business?
1					
2					
3					
4					
5					
6					
7					

I. PLEASE LIST THE NEAREST SERVICES OR FACILITIES

	1. Type of [SERVICE/FACILITY]?	2. Where is the nearest [SERVICE/FACILITY] located? Name Kebele / Town	3. How long does it take to get to the nearest [SERVICE/FACILITY] in the DRY season from the center of this kebele using the most common mode of transportation? (One way) a. HOURS	b. MINUTES
1	Primary Agricultural Cooperative		[__|__]	[__|__]
2	Bank		[__|__]	[__|__]
3	Microfinance Institution		[__|__]	[__|__]
4	All weather road		[__|__]	[__|__]
5	Dry weather road		[__|__]	[__|__]

II. PLEASE LIST ALL OF THE DAIRY SALES MARKETS (excluding milk) USED BY HOUSEHOLDS IN THIS KEBELE.

1. MARKET CODE	2. NAME OF MARKET	3. How often does the market operate? Every day……..1 Every 2-4 days…2 Every 5-6 days….3 Once per week….4 Less than once per week……..5	4. What dairy products are regularly sold on this market		4. How many traders [collectors] are active on a single market day (the largest one) on that market that buy dairy products?		5. Is there a cooperative that buys up dairy in this market in the last 12 months?	6. From the center of this kebele, how long does it take to get to the ["MARKET"]? (using most common mode of transportation, one way)	
			a. Butter Yes…1 No…2	b. Cheese Yes…1 No…2	a. Fasting season (in the middle) Number	b. Non-fasting season Number	Yes…1 No…2	a. HOURS	b. MINUTES
1								[__|__]	[__|__]
2								[__|__]	[__|__]
3								[__|__]	[__|__]
4								[__|__]	[__|__]
5								[__|__]	[__|__]
6								[__|__]	[__|__]

III. MILK COLLECTION IN THE KEBELE

Please list all the liquid milk buyers in this kebele (exclude buyers who buy only small quanities per day (less than 50 liters) for local consumption in kebele, like households, hotels/restaurants etc.)

1.Milk buyer	2.Name milk buyer (name of the person/agent)	3. What type of buyer? 1. (Agent of) processing company 2. (Agent of) independent milk collector >> q6 3. (Agent of) Cooperative >> q6 4. Other >> q6	4. Which company?	5.Code dairy processing company See code	6. How many collection points does this buyer operate in this kebele?	7. In your opinion, how many dairy producers supply (approximately) daily to this buyer in this kebele?	8.What is the price that (s)he offered (in the last non-fasting week)? Birr/l	9. Does this buyer buy up during the fasting periods? 1. Nothing 2. Same quantities 3. Lower quantities 4. Higher quantities	10. What was the price offered during the Christmas fasting (Gena) period? Birr/l
1									
2									
3									
4									
5									
6									
7									

1	**Shola** wetet plc/lame dairy	4	Nuredin hasen milk company	8	Genesis milk processing plc	12	Yakila milk company	16	Etete wete milk company
2	Pingwin international plc	5	Mb plc /family milk company	9	Holand dairy plc	13	Timiret agro-industry plc	17	**Elemitu** integrated wetet akision mahiber
3	Chuye milk company	6	Ada dairy cooperative union	10	Addis milk processer industry plc	14	Loni agro-industry plc	18	Awash melkasa agro-industry plc
		7	Sebeta aro-industry /**mama** wetet/plc	11	Life agro-industry	15	Selale dairy cooperative	19	Other

1.Milk buyer	11. Does this buyer pay a premium for quality milk? Yes...1 No…2	12. Does this buyer test milk (by lactometer or alcohol test)? Yes...1 No…2	13. Does this buyer pay a premium for large quantities? Yes...1 No…2	14. How regularly does this buyer pay? 1. daily 2. weekly 3. twice a month 4. monthly 5. other	15. Does this buyer provide training/advice on milk production? Yes...1 No…2	16. Does this buyer also distribute inputs (e.g. cross-bred cows, medicines, vaccinations, feed, cans)? Yes...1 No…2	17. Does this buyer provide loans/credit to farmers? Yes...1 No…2	18. People sell to this buyer because (rank in importance): 1. Purchases in the fasting periods 2. Higher prices 3. Access to loans 4. Buyer goes around in the kebele 5. Provide advice/training 6. Timely payments 7. No other choice 8. No quality checks 9. Other, specify:_____
1								a. _____ b. _____ c. _____
2								a. _____ b. _____ c. _____
3								a. _____ b. _____ c. _____
4								a. _____ b. _____ c. _____
5								a. _____ b. _____ c. _____
6								a. _____ b. _____ c. _____
7								a. _____ b. _____ c. _____

IV. COOPERATIVES

1. Is there a cooperative in this kebele that bought up dairy products in 2009? _____ Yes…1; No…2 >> Section V

2. Since when is this cooperative actively buying up dairy in this kebele? Since Ethiopian year: _____

3. Does the cooperative buy from members only? _____ Yes…1; No…2

4. In the last 12 month, did the cooperative buy up:
   a. liquid milk: _____ Yes…1; No…2
   b. butter: _____ Yes…1; No…2
   c. cheese: _____ Yes…1; No…2

V. PERCEPTIONS IN THIS KEBELE

A. Cross-bred cows

1. Cross-bred cows are not profitable, given common practices in the kebele _____ 1. Strongly disagree; 2. Disagree; 3. Somewhat agree; 4. Agree; 5. Strongly agree
2. Cross-bred cows are more vulnerable to diseases than local cows _____ 1. Strongly disagree; 2. Disagree; 3. Somewhat agree; 4. Agree; 5. Strongly agree

B. Feed

3. Getting access to quality concentrated feed is very hard _____ 1. Strongly disagree; 2. Disagree; 3. Somewhat agree; 4. Agree; 5. Strongly agree
4. Feeding industrial byproducts and concentrated feed to cows is not profitable _____ 1. Strongly disagree; 2. Disagree; 3. Somewhat agree; 4. Agree; 5. Strongly agree
5. Farmers do self-blending of feed as cost of commercial pre-mixed feed is too high _____ 1. Strongly disagree; 2. Disagree; 3. Somewhat agree; 4. Agree; 5. Strongly agree
6. Most farmers only use concentrated feed when a cow is sick or recovering from sickness or giving birth _____ 1. Strongly disagree; 2. Disagree; 3. Somewhat agree; 4. Agree; 5. Strongly agree

C. Manure

7. Manure disposal is a problem for most farmers in this kebele _____ 1. Strongly disagree; 2. Disagree; 3. Somewhat agree; 4. Agree; 5. Strongly agree

D. Output markets

9. Are the quality standards that buyers require much higher during the fasting periods and buyers therefore reject more? _____ 1. Strongly disagree; 2. Disagree; 3. Somewhat agree; 4. Agree; 5. Strongly agree
10. In your opinion, is there more adulteration of milk at major religious celebrations? _____ 1. Strongly disagree; 2. Disagree; 3. Somewhat agree; 4. Agree; 5. Strongly agree
11. Dairy farmers sell less liquid milk during fasting periods _____ 1. Strongly disagree; 2. Disagree; 3. Somewhat agree; 4. Agree; 5. Strongly agree
12. Dairy farmers sell more milk informally (not sold to dairy processing companies) during the fasting period? _____ 1. Strongly disagree; 2. Disagree; 3. Somewhat agree; 4. Agree; 5. Strongly agree

VI. DYNAMICS IN PRODUCTION AND MARKETING OF DAIRY

	NOW	TEN YEARS AGO
Production and ownership		
1. What is the share of dairy households that own…. cows? a. Cross-bred b. Local	 a._____% b._____%	 a._____% b._____%
2.What is the (approximate) number of farms that own: a. More than 5 dairy cows and fewer than 10 dairy cows b. More than 10 dairy cows	 a._____ b._____	 a._____ b._____
3. What was the approximate yield of different types of cows in different periods in this kebele? Cross-bred a. Early lactation (birth – 3 months) b. Mid lactation (3 – 6 months) c. Late lactation (6 - 9 months) Local d. Early lactation (birth – 3 months) e. Mid lactation (3 – 6 months) f. Late lactation (6 - 9 months)	 Cross-bred a._____ b._____ c._____ Local d._____ e._____ f._____	Cross-bred a._____ b._____ c._____ Local d._____ e._____ f._____
4. What is the average lactation period (months that the cow produces milk) ? a. Cross-bred b. Local	 a._____ b._____	 a._____ b._____
Sales		
5.What is the most important dairy product sold in this kebele (in value)? 1. Liquid milk; 2. Butter; 3. Cheese; 4. Baadu;		
6. Where is this dairy product mostly sold to (final consumer)? 1. Addis; 2. Local town; 3. Rural area; -88. Do not know		
7. Main immediate buyer ? 1. Consumer; 2. (Agent of) processing company; 3. (Agent of) cooperative; 4. Independent trader; 5. Retail shop; 6. Milk shop; 7. School/institution; 8. Other		
8. Do farmers have choice between traders to sell to ? 1. A lot; 2. A little; 3. No choice		
9. Do farmers sell liquid milk in this kebele? 1. Yes; 2. No >> q14		
10. Is the liquid milk farmers sell mostly eventually pasteurized? 1. Yes; 2. No; -88. Do not know		
11. If the farmers sell better quality milk, farmers get a premium/bonus ? 1. A lot; 2. A little; 3. No premium		
12. When farmers sell milk, is quality checked mostly through a lactometer? 1. Yes; 2. No		
13. When farmers sell milk, is quality mostly checked through an alcohol test? 1. Yes; 2. No		

Artificial insemination and cross-bred cows		
14. Availability of cross-bred cows for buying? 1. Very available; 2. Some; 3. Not available; -88. Don't know		
15. Availability of A.I. agent? 1. Mostly available; 2. Sometimes available; 3. Not available		
16. Do farmers here use A.I.? 1. Yes; 2. No		
17. How far do you have to walk to have access to an A.I. agent ? (hours)		
18. Quality of A.I. agent? 1. Very good; 2. Moderately useful; 3. Not useful; -88. Don't know		
19. Availability of cross-bred semen? 1. Mostly available; 2. Sometimes available; 3. Not available; -88. Don't know		
Feed		
20. Availability of communal grazing land ? 1. Mostly available; 2. Sometimes available; 3. Not available; -88. Don't know		
21. Availability of private grazing land ? 1. Mostly available; 2. Sometimes available; 3. Not available; -88. Don't know		
22. Do farmers rent out grazing land in this kebele ? 1. Yes; 2. No		
23. Most common feeding system (dry season) ? 1. Only grazing (free-range/tethered); 2. Only stall feeding; 3. Mainly grazing with some stall feeding; 4. Mainly stall feeding with some grazing		
24. What type of feed do most farmers purchase ? a. Fodder and crop residues? 1. Yes; 2. No b. Wheat bran/frusheka/frushekelo? 1. Yes; 2. No c. Oilseed cake (fagulo)? 1. Yes; 2. No d. Molasses? 1. Yes; 2. No e. Commercial pre-mix brand/mixen ? 1. Yes; 2. No f. Multi-nutrient block (MNB) ? 1. Yes; 2. No g. Salt/salt-bar ? 1. Yes; 2. No	a._____ b._____ c._____ d._____ e._____ f._____ g._____	a._____ b._____ c._____ d._____ e._____ f._____ g._____
25. How far do farmers have to walk to commercial feed seller (of industrial byproducts or concentrated feeds) ? (One way in minutes)		
26. Is there choice between different commercial feed sellers (of industrial byproducts or concentrated feeds)? 1. A lot; 2. A little; 3. No choice		
Animal health		
27. How far is the nearest animal health post ? (One way in minutes)		
28. Availability of veterinary or animal health extension worker? 1. Mostly available; 2. Sometimes available; 3. Not available; -88. Don't know		
29. Quality of advice on animal health related related issues? 1. Very good; 2. Moderately useful; 3. Not useful; 4. Never received advice; -88. Don't know		
30. How far do farmers have to walk to get animal medicines (to clinic or pharmacy)? (One way in minutes)		
31. Availability of medicines at this clinic/pharmacy? 1. Mostly available; 2. Sometimes available; 3. Not available; -88. Don't know		
32. Quality of medicines at the clinic ? 1. Very good; 2. Moderate; 3. Bad; -88. Don't know		

VII. PLEASE PROVIDE THE APPROXIMATE AVERAGE MONTHLY PRICES FOR DAIRY AND FOR TRANSPORT COSTS OVER THE LAST TWELVE MONTHS IN THIS KEBELE

A. PRICES OF DAIRY PRODUCTS IN THIS KEBELE

	a. During Easter fasting 2009 (in the middle)	b. Easter period 2009	c. Between Easter and end of Ginbot 2009	d. Between Sene 2009 and beginning of Christmas fasting 2010	e. During Christmas fasting 2010 (in the middle)	f. Christmas period 2010	g. Between Christmas 2010 and before beginning Easter fasting 2010	h. Currently
1. Liquid milk (Birr/l)								
2. Butter (Birr/kg)								
3. Cheese (Birr/kg)								
4. Yoghurt (birr/l)								

5. **Currently**, what are the market prices for the following categories of butter?
   a. Lega butter: _____ Birr/kg
   b. Mekakalegna/giddu galessa _____ Birr/kg
   c. Besal/bishaata butter _____ Birr/kg

B. CURRENT TRANSPORT COSTS FROM THE CENTER OF THIS KEBELE (USING COMMON MODE OF TRANSPORTATION)

	a. To the capital of the Woreda	b. To Addis
1. Liquid milk (Birr/50l)		
2. Butter (Birr/quintal)		
3. Cereals (Birr/quintal)		
4. Personal transport (Birr)		

C. TRANSPORT TIME FOR COMMONLY USED MODE OF TRANSPORT FROM THE CENTER OF THIS KEBELE (in minutes)

	a. To the capital of the Woreda	b. To Addis
1. Personal transport (minutes)		

VIII. PLEASE PROVIDE THE APPROXIMATE AVERAGE DAILY WAGE LEVELS FOR OVER THE LAST TWELVE MONTHS

Birr/day (including the value of food/drinks provided)	Gender	a. Tir – Megabit 2009	b. Miaza-Guiebot 2009	c. Sene 2009 – Meskerem 2010	d. Tikimt – Tahsas 2010	e. Currently
1. Weeding	Male					
	Female					
2. Harvesting	Male					
	Female					
3. Barn/shed construction	Male					
	Female					
4. Herding cows	Male					
	Female					

IX. PLEASE PROVIDE THE APPROXIMATE PRICES OF CATTLE OVER THE LAST TWELVE MONTHS

Birr/animal	a. Tir – Megabit 2009	b. Miaza-Guiebot 2009	c. Sene 2009 – Meskerem 2010	d. Tikimt – Tahsas 2010	e. Currently
CROSS-BRED CATTLE					
Cows (calved at least once)					
Heifer > 1year (not calved)					
Female calves < 1 year					
Bulls >3 years					
Oxen >3 years					
Immature males 1-3 years					
Male calves <1 year					
LOCAL CATTLE					
Cows (calved at least once)					
Heifer > 1year (not calved)					
Female calves < 1 year					
Bulls >3 years					
Oxen >3 years					
Immature males 1-3 years					
Male calves <1 year					

X. PLEASE PROVIDE THE APPROXIMATE CURRENT COSTS OF DAIRY INPUTS IN THIS KEBELE (LAST WEEK)

INPUTS	a. Available Yes….1; No…2	b. Price
1. Oil cakes (Fagulo)		Birr/quintal
2. Wheat Bran (frusheka/frushekelo)		Birr/quintal
3. Molasses (byproduct of sugar factory)		Birr/quintal
4. Commercial pre-mix (mixin)		Birr/quintal
5. Multi-nutrient block (MNB)		Birr/block
6. Crop residue /masa lay yekere yesebil terefe mert		Birr/quintal
7. Beer byproduct (from modern brewery)/ Bira chimaki		Birr/quintal
8. Beer byproduct (from tella) /Atela		Birr/quintal
9. Hay (grass, alfaalfa)		Birr/Esir
10. Cereal (wheat, barley, teff, rice) straw		Birr/Esir
11. Millet/sorghum stalks		Birr/Esir
12. Maize stover – yebekolo Geleba		Birr/Esir
13. Legume (beans, cowpeas, soya, …) halms		Birr/Esir
14. Root and tuber peelings		Birr/Esir
15. Salt		Birr/Kg

XI. Please provide details on the seasonality of the use of grazing and feeds for an average dairy household for its dairy cows. 1. Yes; 2. No

	a. Tir – Megabit 2009	b. Miaza-Guiebot 2009	c. Sene 2009 – Meskerem 2010	d. Tikimt – Tahsas 2010
Grazing				
1. Communal grazing land				
2. Private grazing land				
Fodder and crop residues				
3. Hay (grass, alfaalfa)				
4.Cereal (wheat, barley, teff, rice) straw				
5. Millet/sorghum stalks				
6. Maize stover				
7. Legume (beans, cowpeas, soya, …) halms				
8. Root and tuber peelings				
9.Crop byproducts				
Industrial byproducts and concentrated feed				
10. Bran				
11. Oilcakes				
12. Molasses				
13.Beer byproduct (modern brewery)				
14. Beer byproduct (tela)				
15. Commercial concentrate feed				
16. Urea mollasses block (UMB)				
17. Salt				
18. Maize				
19. Other grain, specify:_____				
Overall				
20. In your opinion, do cows in this kebele have enough to eat?				

XII. PLEASE PROVIDE THE APPROXIMATE PRICES OF ANIMAL VACCINES IN THIS KEBELE IN the last 12 months

Animal medicines	a. Available Yes….1; No…2	b. Price/vaccination (total cost, including service)	c. Average price/animal (total treatment cost) "How much does it cost to cure one cow from…"
1. …against anthrax/ Aba senga		Birr	Birr
2. … against black leg / Aga gorba		Birr	Birr
3. … against bovine pneumonic pasteurellosis (gororsa loonii)		Birr	Birr
4. … against Foot and Mouth Disease (okolchisa)		Birr	Birr
5. … against Lampi Skin Disease (dhukuba goga)		Birr	Birr
6. … Artificial insemination		Birr/service (all costs included; formal; informal and transport)	

XIII. LAND PRICES

1. Do people rent out grazing land in this kebele? _____ 1. Yes; 2. No >> Section XIII
2. If so, what is the current approximate rental rate for **grazing** land in this kebele? _____ Birr/ha/year
3. What is the current approximate rental rate for **crop agriculture** in this kebele? _____ Birr/ha/year

XIV. CHALLENGES IN DAIRY

1. In your opinion, what are the most important challenges in the dairy sector in this kebele?

   a. _____

   b. _____

   c. _____

   d. _____

   e. _____

XV. AVERAGE CURRENT PRICES FOR PRODUCTS DURING LAST WEEK FOR CROPS THAT ARE PRODUCED IN THIS KEBELE

CROP	Birr/quintal	CROP	Birr/quintal	CROP	Birr/quintal
01 Teff		24 Tobacco		47 Field Peas	
02 Barley		25 Pineapple (Ananas)		48 Fenugreek (Abish)	
03 Wheat		26 Avocado		49 Beet Root (Key Sir)	
04 Maize		27 Onions (Shinkurt)		50 Carrot	
05 Sorghum		28 Spinach (Quosta)		51 Ginger (Jinjibel)	
06 Zengada		29 Garlic (Nech Shinkurt)		52 Selata (Lettuce)	
07 Oats (aja)		30 Yam		53 Tikl Gommen	
08 Horse Beans (Bakela)		31 Fasolia		54 Pumpkin (Duba)	
09 Linseed (Telba)		32 Mango		95 Other	
10 Groundnuts (Lew)		33 Hamicho			
11 Sesame (Selit)		34 Chick peas (Shimbra)			
12 Black Pepper (Kundoberbere)		35 Cow peas (Ater)			
13 Lentils (Mesir)		36 Orange			
14 Chat		37 Godere			
15 Enset		38 Adenguare			
16 Bananas		39 Sweet Potatoes (Sekuar Dinich)			
17 Grass		40 Tomato			
18 Gesho		41 Guaya (Vetch)			
19 Shieferaw / Haleko		42 Niger (Nueg)			
20 Millet (Dagussa)		43 Cabbage (Gomen)			
21 Sunflower		44 Paddy, Rice			
22 Potatoes		45 Sinar / Gerima			
23 Sugarcane		46 Haricot Beans (Boloke)			

FOR THIS SET OF QUESTIONS, TARGET THE DA MOST KNOWLEDGEABLE ABOUT LIVESTOCK/DAIRY

XVI. FARMERS AND LAND IN THE KEBELE

0. What is the number of farmers in this kebele (both who own land and landless)? Number:_____
1. What is the total crop land in this kebele? _____hectares
2. What is the (approximate) average farm size in this kebele? _____ ha/farm
3. Is there communal grazing land in this kebele? _____1. Yes; 2. No >> Section II

If yes, what is the approximate area of communal grazing land in this kebele? _____ hectares

XVII. EXTENSION SERVICES IN THIS KEBELE

1. How many DAs [of all types] are currently assigned and present in this kebele?_____
2. How many DAs [of all types] were assigned and present in this kebele last year (E.C. 2009) (on average)?_____
3. We would like to learn about the Development Agents who work in this kebele (list up to four)

		Livestock Development Agent 1	Crop Development Agent 2	NRM Development Agent 3	Cooperative Development Agent 4
1.	Working in this kebele? 1. Yes; 2. No >> Next Column				
2.	How many kebeles do you cover?				
3.	Gender: *1. Male; 2. Female*				
4.	How old are they?				
5.	For how many years has the DA worked in this kebele?				
6.	Does this DA take care of dairy related activities ? 1. Yes; 2. No >> q9				
7.	What % of his time is spent on dairy related issues ?				
8.	How many years of experience does this DA have on dairy related activities ?				
9.	How many trainings on dairy did he get after he started as a DA ?				