



Nutrition for Resilience



Micronutrient Forum 6th Global Conference

The Hague, the Netherlands & Online

16-20 October 2023

Large-Scale Food Fortification: Data for Decision Making—Contextual Assessment Methods of Diets, Markets, Industry, and Policy



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Welcome

Introduction to the Session and Objectives

Gwyneth Cotes, Technical Lead for Global Engagement

USAID Advancing Food Fortification Opportunities to Reinforce Diets (AFFORD)



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USAID and Large-Scale Food Fortification

Ingrid Weiss, Senior Nutrition Advisor,
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USAID Bureau for Resilience, Environment, and Food Security (REFS)

Methods to Assess Diets, Markets, and the Diet Cost for Large-Scale Food Fortification (LSFF) Needs Assessment and Design

Monica Woldt, USAID Advancing Nutrition

October 17, 2023



Photo Credit: JSI/SPRING Project

Background

Feb. 2022:
USAID LSFF
Programming
Guide published



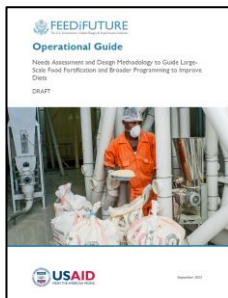
January–June 2023:
Draft guide piloted in
Nigeria and Zambia



Sept. 2023: Methodology
documents published—**USAID
Advancing Food Fortification
Opportunities to Reinforce
Diets (AFFORD)** takes next
steps in use



Aug./Sept 2022:
Literature review and
draft guide completed



July 2023: Small
technical consultation
completed

What questions can the assessment answer regarding diets?

- Which micronutrients are consumed in inadequate amounts?
- Which populations are most affected?
- Which fortifiable foods could serve as a food vehicle for fortification?
- What would be the potential contribution of LSFF to micronutrient adequacy?



Photo Credit: Liam Wright, Smart Food, ICRISAT

What questions can the assessment answer regarding markets?

- What is the domestic supply of potential food vehicles?
- Are they imported or locally produced?
- What proportion of the domestic supply comes from fortifiable sources/producers?



Photo Credit: CFNA

What questions can the assessment answer regarding diet cost?

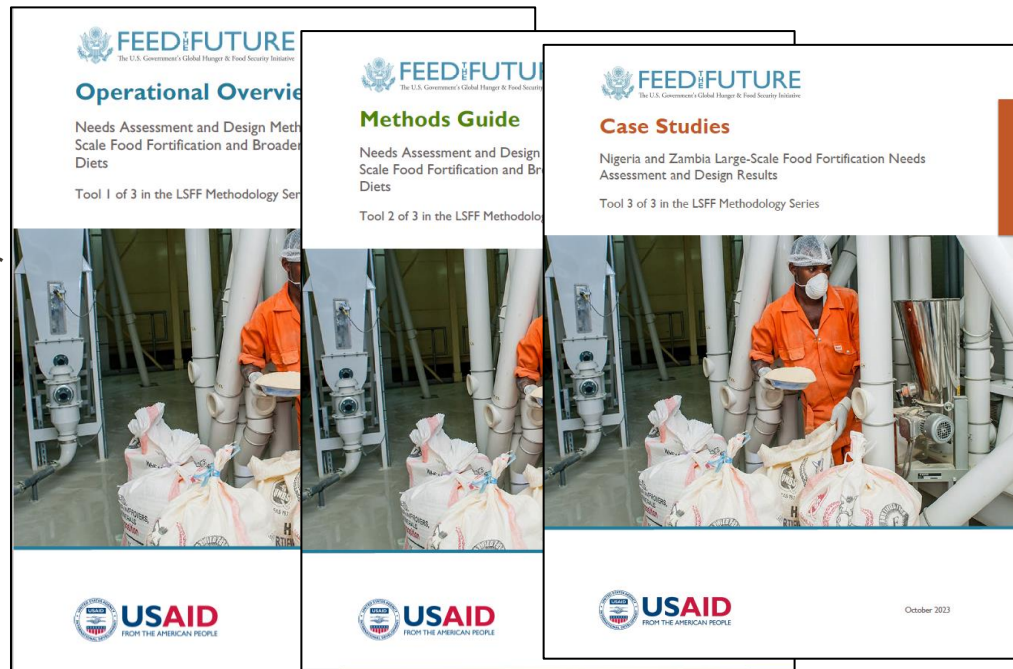
- What is the cost of an adequate diet without and with LSFF?
- What proportion of the population cannot afford an adequate diet, without and with LSFF?



Photo Credit: USAID NEAT

Assessment Approach and Tools

- Start with the **Operational Overview**.
 - The overview responds to the “**what.**”
 - What questions do you want to answer?
 - What are the existing data sources to answer those questions?
 - **Figure I** is a key tool in the operational overview.
- Then use the **Methods Guide** for the “**how.**”
- Refer to the **case studies** document for **examples of results and interpretation.**



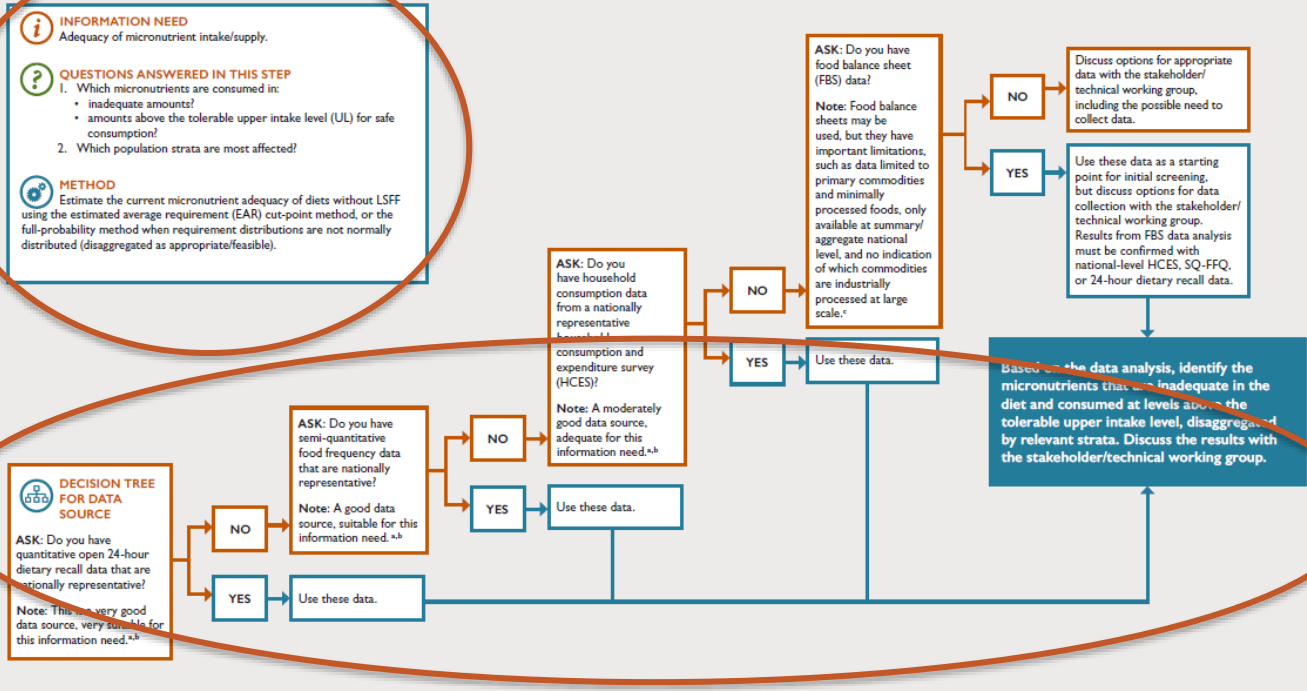


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Assessment Approach and Tools, continued —Figure 1

Step 1: Needs Assessment



USAID Advancing Nutrition 2023. *Operational Overview: Needs Assessment and Design Methodology to Guide Large-Scale Food Fortification and Broader Programming to Improve Diets.* Arlington, VA: USAID Advancing Nutrition.

USAID ADVANCING NUTRITION
The Agency's Flagship Multi-Sectoral Nutrition Project 10

Assessment Approach and Tools, continued—Figure 1

Step 1: Needs Assessment



INFORMATION NEED

Adequacy of micronutrient intake/supply.



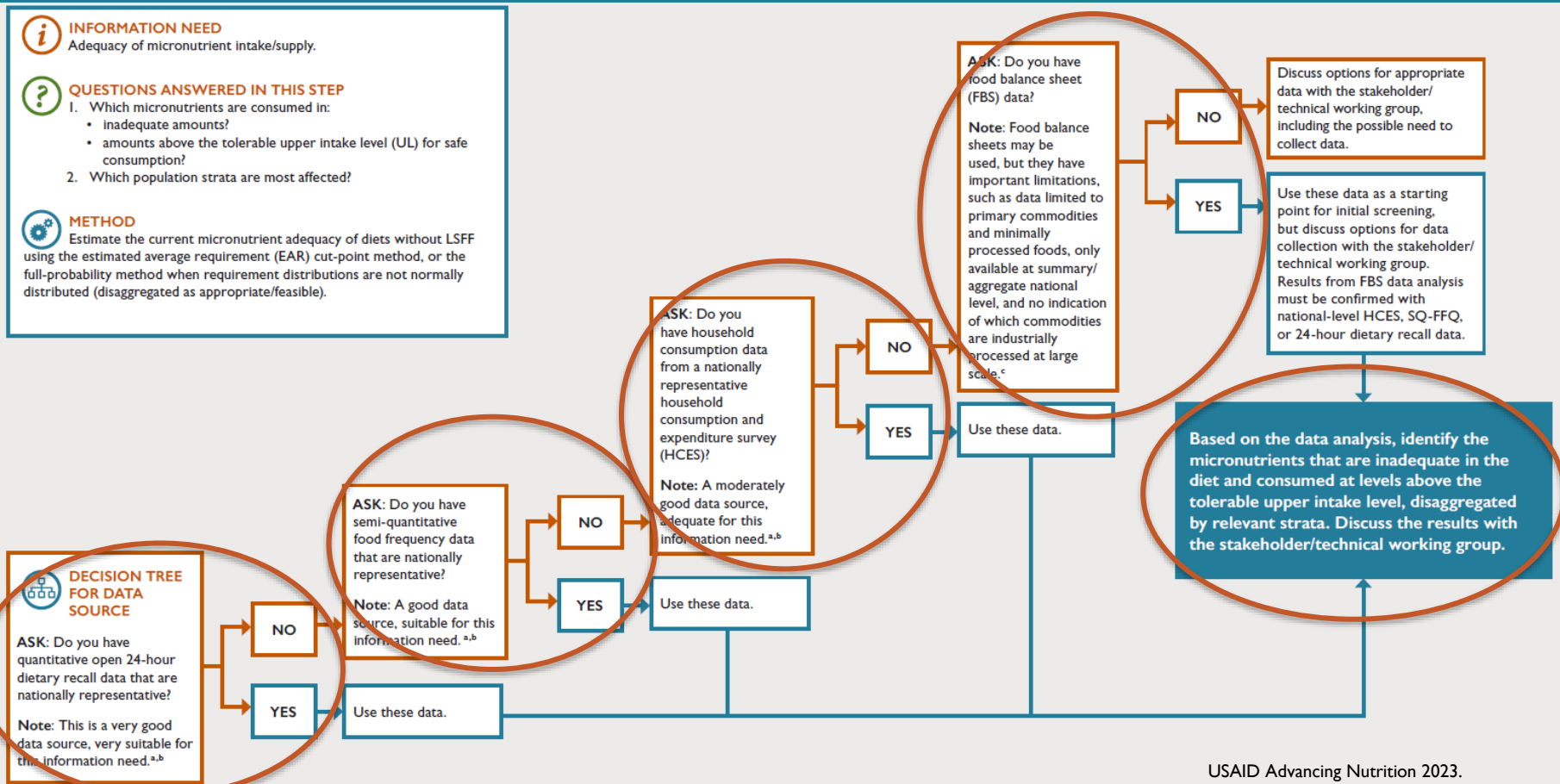
QUESTIONS ANSWERED IN THIS STEP

1. Which micronutrients are consumed in:
 - inadequate amounts?
 - amounts above the tolerable upper intake level (UL) for safe consumption?
2. Which population strata are most affected?



METHOD

Estimate the current micronutrient adequacy of diets without LSFF using the estimated average requirement (EAR) cut-point method, or the full-probability method when requirement distributions are not normally distributed (disaggregated as appropriate/feasible).



Estimates of Cost, Time, and Technical Expertise

Type of Data/Analysis	Cost (USD)	Time	Technical Expertise
Diets: Micronutrient adequacy without LSFF, fortifiable food consumption, and modeling the contribution of LSFF to micronutrient adequacy	100,000–120,000	~ 6 months	High to relatively high (e.g., senior level staff with high level of specialized training, capacity and experience with the data sources and analysis methods).
Markets: Availability of fortifiable foods in markets	40,000–60,000	~ 3 months	Moderate (e.g., staff with general background in nutrition, public health, and/or markets; some knowledge and experience in use of the data source).
Cost and affordability of the diet without and with LSFF	100,000–120,000	~ 5 months	Relatively high (e.g., senior and mid-level staff with training, capacity, and experience in use of the tools and data sources).

Lessons Learned

- LSFF and nutrition stakeholders in country are critical—we could not have conducted the pilot activity without them. Stakeholder group meetings are an opportunity for learning and exchange for all.
- The steps in the methodology need to link to the industry assessment earlier in the process:
 - Conduct the needs assessment to estimate micronutrient adequacy.
 - Assess fortifiable food consumption.
 - Link to industry assessment and feasibility for industry.
 - Model the contribution of LSFF to micronutrient adequacy considering industry feasibility.



Photo Credit: TechnoServe

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- Heather Danton
- Noni Alexander

Stakeholder Group Members

- Nigeria Stakeholder Group
- Zambia Stakeholder Group

Thank you again so very much!



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USAID Advancing Nutrition is the Agency's flagship multi-sectoral nutrition project, addressing the root causes of malnutrition to save lives and enhance long-term health and development.

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Contextual Assessment Methods of Industry

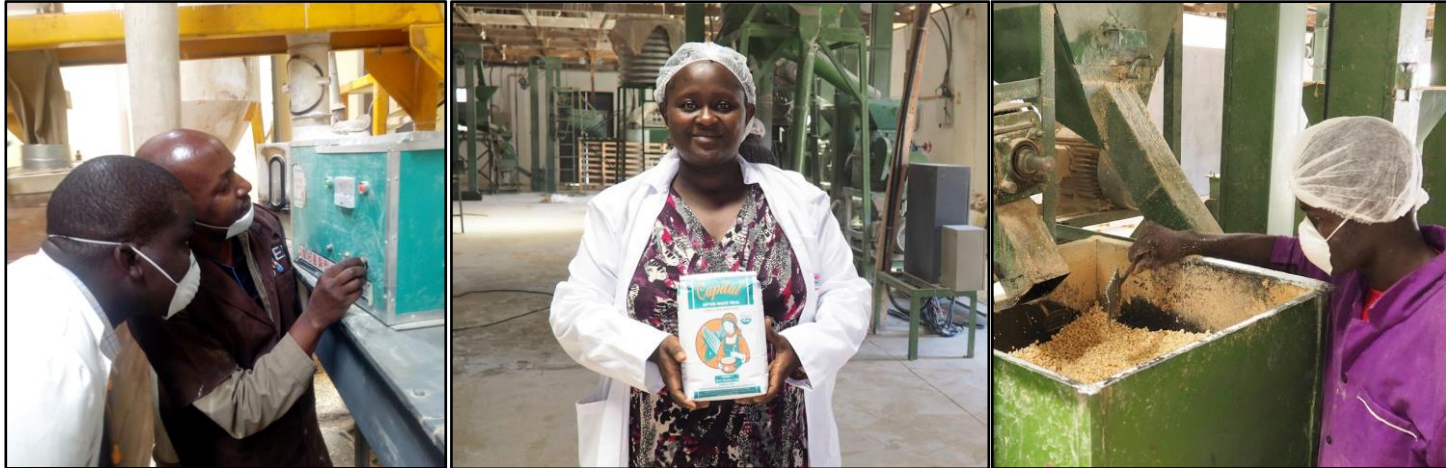


Photo Credit: TechnoServe

Chrissy McCurdy, TechnoServe
Feed the Future Market Systems and Partnerships Activity (MSP)
October 17, 2023



Background: Industry Assessment

USAID LSFF Results Framework—Intermediate Result 2 (IR2):
LSFF in compliance with national fortification standards expanded and sustained by private sector

IR2.1 Business development, technology, quality control, and marketing guidance

IR2.2 Improved access to finance and financing terms



Rationale for IR2:

- Essential role of **industrial-scale** staple processors to LSFF
- Higher compliance of processors via **whole-of-business approach**



Purpose of Assessment:

- **Evaluate capacity** of industrial-scale staple processors to fortify
- **Identify context-relevant strategies** to engage processors in LSFF, aligned with IR2

What questions can the assessment answer?



In country X, what are the greatest opportunities to introduce/expand LSFF of staple foods & condiments *in collaboration with the food industry?*

Which staple foods/condiments present the *greatest opportunity* for impact, given—

- key market dynamics
- food industry structure
- processor capacity?

What do industrial-scale processors require to be able to introduce/improve fortification?

What *actions* are likely to address challenges commonly shared by processors?

Assessment Approach

Potential foods/condiments for exploration

- 2° research
- Expert input

High-level landscape analysis for a *broad set* of staple foods/condiments
Status of mandate; compliance; % domestic processing; industry structure; trends in demand

- 2° research
- 1° research

Deep dive into a *subset* that exhibit dynamics conducive to LSFF
3 levels of analysis: market, processor capacity/interest, enabling environment

- Expert input
- Validation meeting

Prioritize foods/condiments with *highest impact potential*

Identify LSFF program activities with greatest estimated value-add

Assessment Tools

1. Output Template:

- Defines the critical data points & insights to be generated
- Provides structure to translate data points & insights → LSFF activity recommendations

2. Research Protocol:

- Guides gathering of critical data points & insights
- **3**-level analysis: market, industry, enabling environment
- **7** components of an LSFF program:



1. Nature of the market
2. Technical feasibility



3. Commercial viability for processors
4. Technical viability for processors
5. Processor access to finance



6. Government & regulatory role
7. Monitoring & enforcement procedures

3. Interview Guides

- Food processors and importers
- Industry/professional organizations
- Premix suppliers
- Retailers
- Finance providers
- Regulatory/enforcement agencies and international institutions

Assessment Application: Zambia (1 of 3)

% Share industrial scale: share of local processing done by industrial/large-scale processors

High-level market landscape analysis:

- 7 foods/condiments explored
- 5 shortlisted for a deep-dive assessment

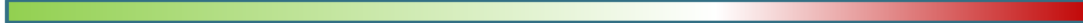
	Sugar	Salt	Maize flour	Wheat flour	Edible Oil	Rice	Pasta/Noodles
% Households consuming	60%	>80%	>80%	45%	60%	20%	<20%
% Processed in Zambia	99%	10%	100%	67%	33%	33%	75%
% Share industrial scale	90%	NA	40%	100%	70%	33%	100%
Daily food supply (kcal/capita/day)	115	NA	1089	64	186	23	0
Domestic food supply(000MT)	235	0	2818	119	161	56	0
Food supply growth %	2%	0%	1%	-1%	3%	-2%	60%
LSFF program feasibility	50%	50%	50%	50%	50%	0%	0%

Assessment Application: Zambia (2 of 3)

Deep-dive assessment:

- 2° research + 40 stakeholder interviews
- 3 foods/condiments prioritized for LSFF programming

- * Sugar compliance: (2017 study)
- 11.3% samples met 10 mg/kg requirement
 - **Median:** 3.1 mg/kg
 - **25th-75th percentiles:** 1.8–5.5 mg/kg
 - **Range:** 0.2–29.9 mg/kg

LSFF Program Feasibility 

	Salt	Sugar	Wheat flour	Edible oil	Maize meal
Consumption (% HH)	> 80%	60%	45%	60%	> 80%
LSFF Regulation	Mandatory	Mandatory	Voluntary	No standard	Voluntary
Estimated Compliance	89%	11% <i>at retail</i>	-	-	-
% Processed in Zambia	10%	99%	67%	33%	100%
% Industrial Scale	N/A	90% (3-4 players)	100% (7-10 players)	~70% (8-12 players)	40% (~30 players)
LSFF Capabilities of Processors	Limited technical capacity of importers	Strong technical & commercial capacity	No FF experience. Strong core commercial capacity. Lack of FF marketing experience	No FF experience. Strong core commercial capacity	<i>Some FF experience. Strong core commercial capacity for industrial processors, weak for small</i>
Interest Among Processors	-	Low estimated compliance highlights <i>delivery problem</i>	See potential. Barrier is <i>consumer demand</i>	Appears contingent on <i>mandatory regulation</i>	Require <i>regulation & consumer demand</i>

Assessment Application: Zambia (3 of 3)

	Sugar	Wheat flour	Edible oil
Technical Strategy	Explore issue of low estimated compliance at retail. Strengthen processor & enforcement capabilities; Micronutrient Fortification Index to create positive incentives between brands	Support processors with efforts to drive brand differentiation via fortification, while supporting shifts in regulatory environment	Verify feasibility & stability of vitamin A in locally-produced oil; Support development of standards and a shift in the regulatory environment toward mandatory fortification
Support to Processors	<ol style="list-style-type: none"> 1. Technical assistance (TA) to address fortification delivery challenges, resulting in low estimated compliance at retail 	<ol style="list-style-type: none"> 1. TA to introduce fortification line and build fortification into brand narrative 2. Support on commercial and sourcing adaptations in light of business impacts from Russian War in Ukraine and exchange rate volatility 	<ol style="list-style-type: none"> 1. TA to introduce fortification line, build fortification into brand narrative, improve packaging of small containers (UV-opaque), and ensure low peroxide levels 2. Support on commercial adaptations to mitigate high raw material costs and reduce fear/risk of pricing products out of market
Improvements to Enabling Environment	<ol style="list-style-type: none"> 2. Investment in monitoring agencies, quality assurance/quality control (QA/QC) systems, labs outside Lusaka, and improving operational processes 3. Introduce brand/marketing indices to boost industry compliance 	<ol style="list-style-type: none"> 3. Investment in monitoring agencies, QA/QC systems, labs outside Lusaka, and improving operations 4. Consider aligning fortification standards of wheat flour with standards in South Africa so that trade reinforces policy 	<ol style="list-style-type: none"> 3. Explore policy opportunities to increase competitiveness of domestic product and to reduce prices of raw material 4. Collaborate with World Health Organization leading the process to develop normative guidance for an oil standard 5. Work with regional edible oil associations as they evaluate fortification of edible oil
Changes to Enabling Markets	<ol style="list-style-type: none"> 4. Support shift in pre-mix economics: long-term pricing arrangements and stimulation of local premix production 	<ol style="list-style-type: none"> 5. Stimulate local production of premix to drive-down premix costs 	<ol style="list-style-type: none"> 6. Stimulate local production of premix to drive-down premix costs

Lessons Learned



HIRE THE RIGHT TALENT TO LEAD THE ASSESSMENT

- *Expertise:* food science/food technology/food processing; business advisory/analysis
- Familiar with local food processing landscape; well-networked across local food sector; local presence



OPTIMIZE THE ASSESSMENT PROCESS

- Avoid conducting assessment during stakeholders' busiest months
- Obtain support from key stakeholder groups *from the beginning*
- Hold periodic check-ins between the implementing partner and main stakeholder organization
- Organize a validation session(s) with key stakeholders to confirm the accuracy of assessment findings



CONDUCT EFFECTIVE AND EFFICIENT INTERVIEWS

- Conduct *interview requests and interviews* in-person
- To avoid interview fatigue: a) trim # of questions; b) validate vs. collect key data points
- For ease of analysis and comparing across orgs: a) use structured questions; b) record responses digitally
- Save sensitive financial questions for the *end* of interviews



COORDINATE RESEARCH AND SHARE INFORMATION

- **Researchers:** nutrition studies targeting the same processors → research weariness
- **Projects:** lack of data sharing → inefficient research processes, use of resources
- **Regulatory agencies:** limited information sharing → lack of collaborative regulation



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Bethesda, MD, USA

The Feed the Future Market Systems and Partnerships Activity is advancing learning and good practice in market systems development and private sector engagement within USAID, USAID partners, and market actors.

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Method to Assess the Policy Enabling Environment for Large-Scale Food Fortification (LSFF)

Veronique Theriault, Lilian Kirimi, Ayala Wineman, Ephiphania Kinyumu, and David Tschirley

October 17, 2023

Background

The success of LSFF programs depend heavily on the policy enabling environment.

But what exactly is a policy enabling environment for LSFF?

We define and develop a simple, logical, and cost-effective method to assess the policy enabling environment for LSFF and then apply it to Kenya.

What questions can the assessment answer?

We understand the **policy enabling environment for LSFF** to be the whole policy landscape that influences and enables or disables fortification activities.

The assessment method sheds light on—

- what makes a policy environment supportive to LSFF
- what is working well and where improvements are needed to ensure successful and sustainable programs.

Assessment Method



Assessment Method

Data collection

- Review of existing documentation
- Key informant interviews
- Online stakeholder perception survey
- Validation workshop

Calculation of the score

- Information is assessed and a four-point Likert scale is used to score each indicator.
- Each indicator is then summed to arrive at an overall score that conveys whether the policy enabling environment is “marginally”, “moderately”, or “highly” favorable for LSFF activities.



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Application to Kenya



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EGERTON UNIVERSITY
TEGEMO INSTITUTE OF AGRICULTURAL
POLICY AND DEVELOPMENT

MICHIGAN STATE
UNIVERSITY

Assessment Application

Literature review

Key informant interviews

- 21 respondents

Stakeholder perception survey

- 46 respondents

Validation workshop

Domains	Elements	Indicators	Scores
Policy agenda setting	Policy prioritization	Major events	4
		Presence of powerful advocates	4
	Policy formulation	Consultation with stakeholders	4
		Existence of laws and regulations	4
		Clarity of legislation	4
		Program meets needs	4
Policy implementation	Stakeholder engagement	Sustained consultation	4
		Effective coordination	2
		Continued support from stakeholders	3
	Capacities	Capacity of industries	2
		Capacity of regulatory agencies	2
		Level of compliance	2
Policy monitoring and evaluation	Oversight and enforcement	Guidelines for monitoring	2
		Guidelines for enforcement	2
		Enforcement of standards/regulations	2
	Evaluation and reform	Existence of assessment data	1
		Program reach and effectiveness	2
		Consumer education and awareness	1

Lessons Learned

The program is on a positive trajectory and has achieved the greatest success around policy agenda setting

Implications for the program to be more successful—

- Investment in data around LSFF

This assessment method is ready to be applied to other settings and over time.



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Reflections on Using Data and Data Gaps for LSFF—Zambia Country Experience

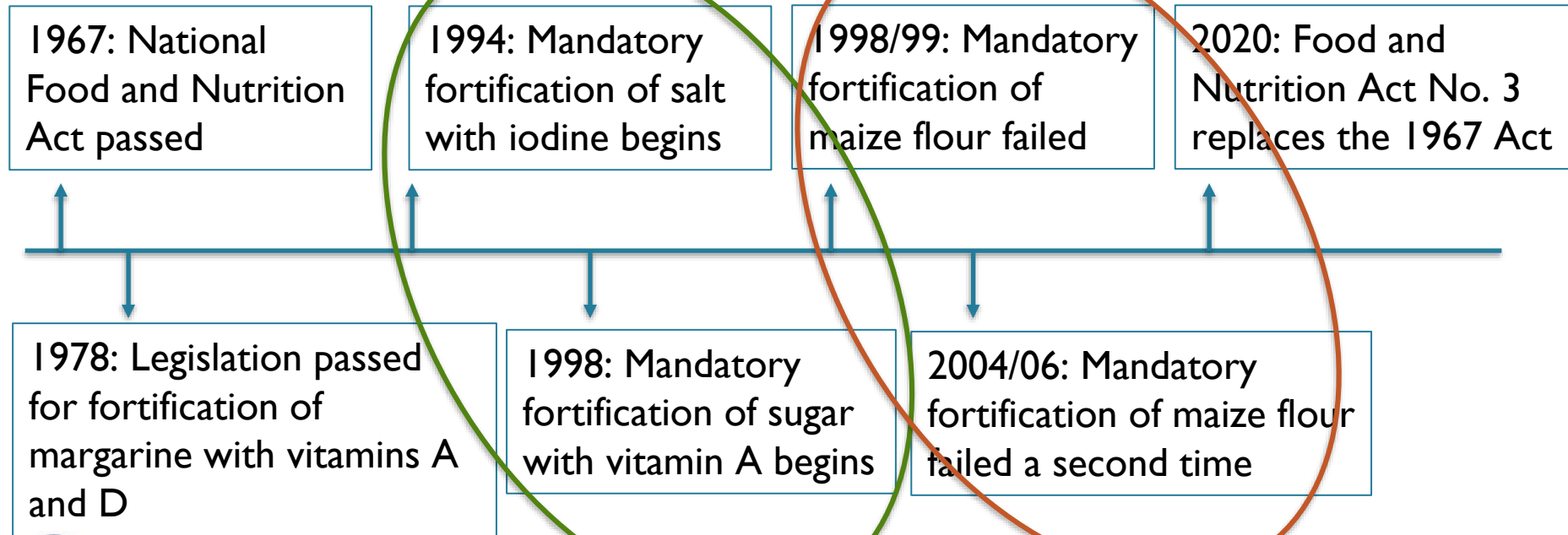
Musonda Mofu

October 17, 2023





Background on LSFF in Zambia



The Data Environment for LSFF in Zambia

- In Zambia, there has been inadequate data availability on—
 - micronutrient deficiencies among different strata of the population
 - food consumption patterns, consumption of specific foods, and micronutrient intake among different strata in the population
 - market data
 - capacity of industries to fortify foods.
- Major challenges associated with filling the above data gaps include **lack of financial and human resources** required to collect and analyze dietary intake, micronutrient status, and market associated data.
- Such limitations have affected the design/redesign of LSFF programs in Zambia.



Photo Credit: SPRING

LSFF Needs Assessment and Design Methodology in Zambia—Filling Data Gaps

- Methodology filled gaps using existing data:
 - **2015 Zambia Living Conditions Monitoring Survey (LCMS)** to assess micronutrient intake, fortifiable food consumption, and modeling the contribution of LSFF to micronutrient adequacy
 - **Food Balance Sheet** data and various **online data sources** to estimate fortifiable food vehicle volume share
 - **2015 LCMS** and **Consumer Price Index** data (adjusted for inflation) to model the cost and affordability of an adequate diet
- New national-level 24-hour dietary recall data from a 2020/21 Food Consumption and Micronutrient Status Survey and 2022 Zambia LCMS not yet available



Photo credit: SPRING

Inadequate Micronutrient Intake

- Based on the analysis using the 2015 LCMS data, the prevalence of inadequate intake was high for all the micronutrients studied—
 - especially in the **lowest socioeconomic status groups** in **rural** and **urban** areas (except zinc in urban areas).

Vitamin A

Thiamine (B1)

Riboflavin (B2)

Vitamin B6

Niacin (B3)

Folate

Vitamin B12

Iron

Zinc

Modeling the Contribution of LSFF to Micronutrient Adequacy

- Current fortification of **sugar** with vitamin A **improves vitamin A intake**
 - improving **industry compliance** and **adding fortified oil** could improve it even more
 - except for the **rural poor**.



Photo Credit: SPRING

Modeling the Contribution of LSFF to Micronutrient Adequacy, continued

- Fortifying **wheat flour**, **maize flour**, and **rice** with **B vitamins** and **iron** contributes to **improved intake**
 - except for **rural populations**
 - Especially the **rural poor (folate, B12)**
 - in some cases the **urban poor (riboflavin, B6)**.



Photo Credit: SPRING

LSFF Industry Assessment in Zambia

- Helped stakeholders better understand the potential for new mandatory fortification vehicles:
 - A stakeholder shared that they never would have considered oil as a fortification vehicle before seeing the study results.
 - Maize flour as a potential fortifiable food still has challenges given in part the low level of industrial production.
 - Rice is a poor candidate for fortification in Zambia.
- Generated important information on quality assurance and the need for transparent data on quality/micronutrient content of fortified foods (e.g., sugar).
- Such results can be used to plan for **policies, review of legislation, incentives to strengthen industry, and improvements to quality assurance.**



Photo Credit SPRING:

Lessons Learned/Recommendations from the Zambia Experience

Supporting country-led efforts

- Disseminate the methods and engage in high-level advocacy and capacity strengthening on how to use the methods to design LSFF investments.
- Publish the results to inform decision-making; engage the Ministry of Planning and other agencies responsible for fortification.

Collaborating at country level to advance data for decision making

- Assessments should always include engaging with country-level LSFF and nutrition stakeholders, focusing on operationalizing the approach.
- Support the application of the methodology at country level when new data becomes available (e.g., in Zambia, when the new 24-hour recall and LCMS data become available).



Photo Credit: TechnoServe

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The Way Forward

USAID Advancing Food Fortification
Opportunities to Reinforce Diets

(USAID AFFORD)

Brent Wibberley, Project Director

October 17, 2023



Photo Credit: TechnoServe

What is USAID AFFORD?

OBJECTIVE

Safely and sustainably reduce micronutrient inadequacies and improve diets, particularly for women and children, via LSFF of staple foods and condiments

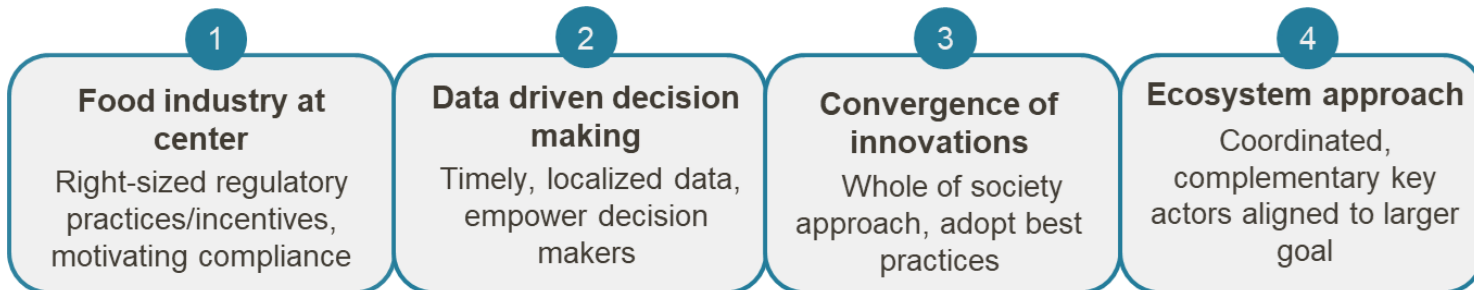
- Five-year USAID funded program, September 2022–2027
- Both global and country level mandate
- Partnership: TechnoServe, Nutrition International, Food Fortification Initiative, ISF Advisors



Photo Credit: TechnoServe

APPROACH—USAID's LSFF Results Framework

1. Strengthen the LSFF enabling environment through the **public sector (IR1)**.
2. Expand and sustain LSFF interventions through **private sector (IR2)** engagement.
3. Strengthen the effectiveness of LSFF interventions and increase public and private sector accountability through **civil society (IR3)** engagement.
4. Mobilize **global (IR4)** commitment, leadership, and investment in support of LSFF



ASSESSMENT TOOLS

USAID AFFORD will incorporate and refine these tools:

1. Proof of concept
2. Refined
3. Package of tools that can be scaled for use
4. Improve data for decision



Photo Credit: TechnoServe

EXAMPLE

Senegal

USAID Senegal: best opportunity to invest in Senegal's LSSF program?

- What are the dietary needs of the population?
- How can they be met by fortification and what would this cost?
- What is the existing enabling environment? What fortification policies and practices are in place?
- What is the industry producing and how feasible is it for them to fortify their products?

USAID AFFORD:

- Adapted, refined, and referred to the latest tools
- Validated data
- Data informed recommendations for the Mission
- In the process helps the local government inform their own fortification strategy



Photo Credit: TechnoServe



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