

HANDS-ON INVESTMENT GUIDE

Oromia
Regional
State
Ethiopia

Horticulture
Floriculture and Dairy





“

It is an honour to introduce this practical investment guide of Oromia Regional State.

Though this guide focuses on horticulture, floriculture and dairy, Oromia offers enormous opportunities in other related areas such as poultry, aquaculture, spices/herbs/aromatics, apiculture and agro-processing.

Our region has not only vast fertile land and favourable agro-ecology but also has comparatively good logistical facilities spanning from the centre to different corners of the country. Being the leading foreign direct investment destination among all regions in Ethiopia, we have learned how to serve international investors. Above all, we are always eager to improve.

Come and take part in the big opportunity!”

Mr. Muktar Kedir,
President of Oromia Regional State

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Fast facts

Geography: Oromia Regional State covers an area of 363.346 square kilometres. It is the largest region covering over one-third of the nation.

Population: Oromia is the most populous region in Ethiopia with 33,9 million people. Of this population 49% is between 15-60 years old while another 48% is below the age of 15 showing strong current and future manpower base.

Climate: Mean annual rainfall varies from 200 up to 2.400mm and annual mean temperature lies between 7,5-27,5°C.

Economy: Agriculture is the dominant sector in the region - with 55,8% share of the regional GDP.

Language: Afan Oromo is the official language while Amharic and other local languages are widely spoken. English is used in schools and international business communication.

Political system: The political landscape of the region complies with a multi-party democracy system of the country.



Geography

Oromia National Regional State is one of nine regions within the Federal Democratic Republic of Ethiopia. It is the largest region covering an area of 363.346 square kilometres, more than the size of Germany. Oromia borders all national regional states of Ethiopia except Tigray in different directions. It also shares international

boundaries with Kenya in the South and South Sudan in the West. The region occupies vast and fertile areas in the East, South East, Central and Western parts of Ethiopia. Administratively, it is divided into 18 zones, 309 districts and 39 urban administrative. The national capital Addis Ababa, known as Finfinne in Afan Oromo, is also the capital city of the region.

Population

Over 33,9 million people live in Oromia Regional State. It is the most populous region in Ethiopia. Of this total population 49,2% are between the ages of 15-64 while another 47,6% are below the age of 15 years implying strong manpower resources. Nearly, 86,27 of the population lives in rural areas. Population density is the highest in South West Shewa zone while it is lowest in Borena Zone. Adama (Nazareth), Bishoftu (Debre Zeit), Jimma, Nekemte, Assela, Ambo and Shashemene are the most prominent cities and towns with population size of over 50.000 people.

Climate

The mean annual rainfall of the region varies from 200 mm to 2.400mm while annual mean temperature mostly lie between 7,5-27,5°C. The region generally receives high rainfall. The region has tropical (49,8%), sub-tropical (42,2%), and temperate (7,5%) climate. Areas in the South and South Eastern part of the region and others in the Great Rift Valley are mostly lowland. The majority of the Central, Western and parts of Bale, Arsi and Harargehe in the Southeast and East are midland or highland. Oromia is home to a number of ecological attractions such as the Bale Mountains, the largest Afro-Alpine forest in Africa. Awash, Wabe-Shebele, Genale, Gibe, Baro, Dedessa and Guder are major rivers in the region. The region has 12 major lakes, which cover a total area of 3.135 square kilometres.

Economy

Agriculture, services and industry are the major economic endeavours within Oromia region accounting for a respective share of 56,2%, 32,9% and 10,9% of the regional economy. Oromia has fertile soils and diverse agro-ecology that makes it ideal for agriculture. Crop production, livestock and forestry account for respectively 49%, 14% and 4% within the sector. The major crops grown in the region are coffee, cereals, oilseeds, pulses, vegetables and fruits. Over 60% of Ethiopia's top export earner commodity coffee comes from Oromia region. About 36% of the livestock in Ethiopia, 37% of the poultry and 50% of the beehives are found in the Oromia National Regional State. Oromia is the leading investment destination in Ethiopia and better positioned in terms of infrastructure.

Language

Afan Oromo is the official language of Oromia National Regional State. It is also the most widely spoken language in Ethiopia. Other local languages as Amharic, Guragigna, Somali, Tigrigna and many more are also spoken within the region. English is the medium of instruction at school and international business communication; many people in government offices and major towns speak the language.

Political System

The political landscape of the region complies with a multi-party democracy system of the country. The regional house of people representative (Chafe in Afan Oromo) is the law making body. All laws made at regional level are aligned with Federal proclamations and strictly adhere to the constitution of the Federal Democratic Republic of Ethiopia.

Fast facts

National business overview:

Ethiopia has 12 major river basins with an annual runoff volume of 122 billion meter cubic of water and an estimated 2,6 – 6,5 billion meter cubic of ground water potential. It is often referred as the water tower of Africa, the country has 4 million hectare irrigable land, over 90 million people, strong peace and stability and favourable investment policies that makes it attractive to international investors in general and horticulture sector in particular.

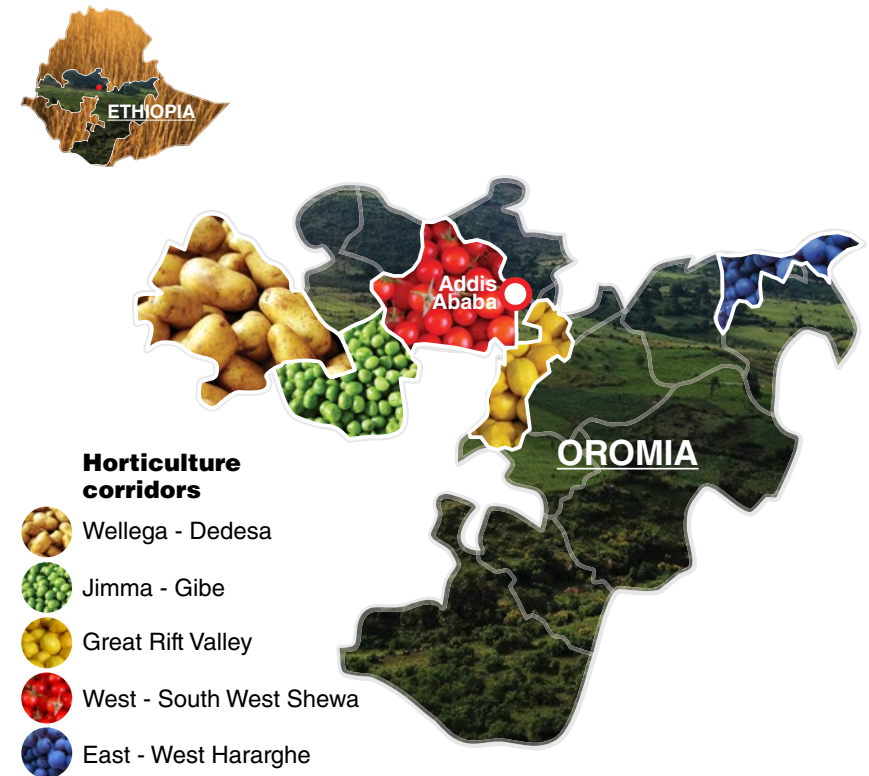
Business within Oromia:

Oromia Regional State produces 42% of the national fruit and

vegetable. Four horticulture potential corridors: Great Rift Valley, East-West Hararghe, Jimma-Gibe and West and South-West Shewa. A special consideration of Welega corridor for fruit production and processing is highlighted.

Specific opportunity products:

Potato, potato crisp, flakes and flour; (cherry) tomato, tomato paste and juice; fresh beans, peas and canning; cabbage, kale and cauliflower, and eggplant; onion and shallots, garlic; grapes and strawberries; chilli, green and red pepper; citrus and juice processing; tropical fruits, vegetable seed; spices, herbs and aromatics.



Horticulture: National Business Overview

Ethiopia has strong potential and competitive edge in agriculture in general and horticulture in particular. The country has 12 major river basins with an annual runoff volume of 122

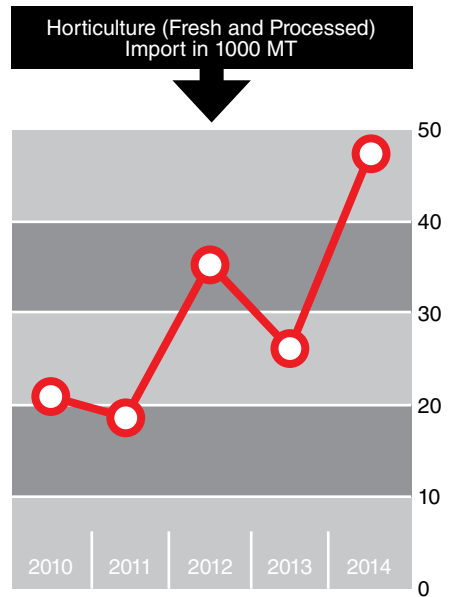
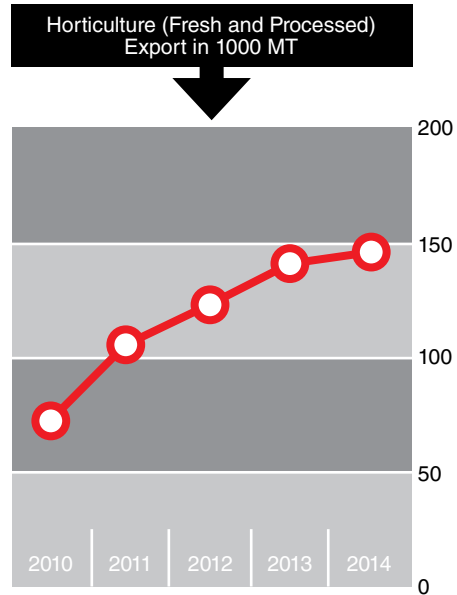
billion meter cubic of water and an estimated 2,6 – 6,5 billion meter cubic of ground water potential. It is often referred as the water tower of Africa. It has 4 million hectare irrigable land.

The horticulture sector has shown rapid growth over the last five years, with cumulative growth of 22%. According to data from Central Statistical Authority (CSA) of Ethiopia fresh fruits and vegetables production in 2013 was estimated to be over 5 million MT.

The Agricultural Transformation Agency (ATA) of Ethiopia estimated that annual domestic market of horticultural products around US \$ 900 Million. Smallholder farmers are the principal suppliers of fruits and vegetables, but the commercial horticultural production focusing on high value products is increasing fast. Fruits and vegetables production in the smallholders sector is mainly rain fed, while most commercial farmers use irrigation. According to a report by Ministry of Agriculture (2009), a total of close 0,8 million hectares land (including out grower schemes) has been identified for commercial investment in horticulture of which less than 10% is developed.

Fruits and vegetables are strategic export commodities for Ethiopia. Over the last five years the country earned a total of US \$ 170 million. Important export markets for fruits and vegetables are the surrounding countries as Djibouti, Somalia and Sudan. The main products to these countries were non-graded fresh fruit and vegetables such as onion, tomato, potato, banana, mango and avocado. High value graded pre-packed vegetables and fresh herbs account for only 11% of the total export. Most of these products are exported to the United Kingdom (UK), United Arab Emirates (UAE) and the Netherlands.

During the last five years Ethiopia imported a total of over 148.000 MT processed horticultural products; import has shown a cumulative average growth of 33%. Tomato juice (35%), mixed juice (18%) and pineapple juice (18%) are the top three imported juices to Ethiopia.



ATA Horticulture Matrix

Corridor	Primary Sub-corridor (Region)	Other high production crops	Nearby zones and high production crops
Addis Oromia	<ul style="list-style-type: none"> East Shewa (Oromia) North Shewa (Oromia) 	<ul style="list-style-type: none"> Fava bean Snow peas Hops Strawberry 	<ul style="list-style-type: none"> West Shewa (Oromia): potato, pepper and fava bean South West Shewa (Oromia): fava bean, pea and pepper Arsi (Oromia): fava bean, pea and garlic
Bahir Dar	<ul style="list-style-type: none"> South Gonder (Amhara) 	<ul style="list-style-type: none"> Onion Potato Shallot 	<ul style="list-style-type: none"> Western Tigray (Tigray): fava bean, pepper and hop Wag Himra (Amhara): onion, tomato and potato North Gonder (Amhara): tomato, onion garlic, potato
Hawassa-Arbaminch	<ul style="list-style-type: none"> Gamo Gofa (SNNP) West Arsi (Oromia) 	<ul style="list-style-type: none"> Sweet potato Potato Cabbage Fava bean 	<ul style="list-style-type: none"> South Omo (SNNPR): enset, banana and sweet potato Wolayita (SNNPR): sweet potato, potato and cassava Sidama (SNNPR): enset, sweet potato and potato Kembata Timbaro (SNNPR): potato, sweet potato and banana
Mekele	<ul style="list-style-type: none"> South Tigray (Tigray) 	<ul style="list-style-type: none"> Orange Mango Onion Potato 	<ul style="list-style-type: none"> North Wollo (Amhara): onion, potato and tomato Central Tigray (Tigray): fava bean, garlic and pepper Eastern Tigray (Tigray): fava bean, pea and onion
Dire Dawa-Somali	<ul style="list-style-type: none"> Dire Dawa (Dire Dawa) Shinile (Somali) 	<ul style="list-style-type: none"> Lemon Mango Sweet potato 	<ul style="list-style-type: none"> Jijiga (Somali): onion and tomato East Hararge (Oromia): sweet potato, banana and onion West Hararge (Oromia): sweet potato, onion and pepper

The Business within Oromia Regional State

The Oromia Regional State produced 42% of the total national horticultural products in 2013. The diverse agro-ecology, large surface and ground water potential and highly fertile land makes Oromia suitable for almost any type of fruit and vegetable products. Currently, the leading vegetable products in the region are onion, potato, tomato, cabbage and garlic. However production of high valued vegetables such as lettuce, eggplant, cherries, strawberry, fresh beans and peas is increasing with an increasing investment by international and domestic companies. The fruits produced in the region include citrus, grapes, mango, papaya, banana, guava and avocado. Apple is a recent introduction in the highlands of North Shewa, West Shewa and Oromia Special Zone.

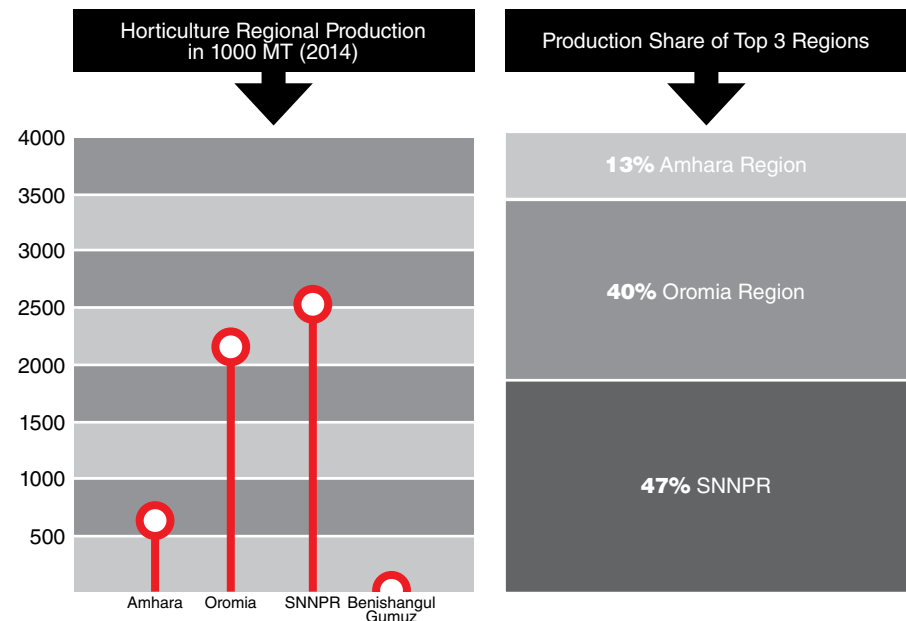
Though the majority of Oromia Regional State is suitable for investment in horticulture four distinctive corridors are identified by the study: Great Rift Valley, East-West Hararghe, Jimma-Gibe and West and South-West Shewa areas. These corridors are parts of the bigger horticulture corridor identified by the Agricultural Transformation Agency (ATA). The specialized corridor of Welega belt for fruit, namely mango, is highlighted.

The Great Rift Valley area is one of the major horticulture corridor feeding Addis Ababa and the central markets. It is an area that hosts a number of local and international investments supplying to domestic as well as export market. This corridor includes a vast track of fertile land that extends from Bishoftu (Debre Zeit) city (47 km from South East of Addis Ababa) to Hawassa city (270 km) in the South West and to Adama (Nazreth) city and lower Awash town in the East. The Awash River, Koka, Langanano and Zeway lakes are the major sources of water but there is also high potential for ground water. The daily average temperature of the area is 20-25°C and the soil is fertile and rich of minerals. This area harbours the leading horticulture and floriculture companies such as Upper Awash Agro-Industry, Syngenta, Sher Ethiopia and Castle Winery. The Great Rift Valley corridor is suitable for a number of vegetables such as onion and shallots, tomato, berries, table grapes, green beans and peas. Fruits namely mango, citrus, papaya and banana can be grown particularly in the upper awash area. The areas along the Modjo-Batu (Zeway)-Hawassa route are suitable only for shallow rooted fruits due to the high deposit of calcium carbonate underneath.

The East-West Hararghe corridor includes areas East of Awash to the border with Somali and Afar Regional States. The area has one of the largest ground water potential in Ethiopia. Also many parts can be reached by the Awash River. Dire Dawa city can serve as export hub for this corridor. The city is located at a strategic position to port Djibouti with access to a railway station and international airport. However, the airport doesn't have cold room facilities as of now. The East-West Hararghe corridor is suitable for range of fruits and vegetables such as potato, mango, banana, beans, peas, cherries, berries, tomato and onion. The area has a good mix of highland and lowland agro-ecology that enables to grow range of horticultural products. Upon the completion of the high-speed railway line, it only takes about five hours to reach port Djibouti from Dire Dawa city. This makes the

East-West Hararghe corridor ideal for bulk export to Middle East and EU is possible.

The Jimma-Gibe corridor is recently identified by Ethiopian Horticulture Development Agency as strong alternative to the Great Rift Valley corridor. This corridor covers areas along the Gibe Valley extending further west of the Gibe River. Gibe River can serve as a main source of water but there are also several other perennial rivers in the area. This area has one of the highest annual rainfalls in the country and hence water storage and ground water are also viable options. Jimma town has passengers' airport facility but for export cargo most parts of this corridor can utilize Bole International Airport in Addis Ababa. The area is well connected to Addis Ababa by asphalt road. The second phase railway expansion project passes

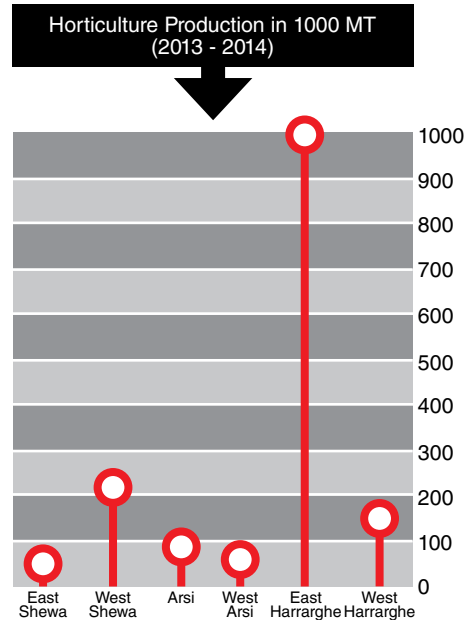


through Jimma.

The agro-climate of most parts of this corridor is lowland or midland suitable for range of fruits and vegetables such as mango, banana, avocado, beans and berries. In addition, Jimma corridor including parts of Kaffa from SNNPR is highly suitable for spices, herbs and aromatics such as ginger, cardamoms, garlic and pepper.

The West and South-West Shewa corridor refers to areas West and Southwest of Addis Ababa. The area is mostly mid- and highland altitude with smaller portion of lowland areas in the Gibe Valley. Three highways, going to different parts of the country from Addis Ababa, serve the West and South-West Shewa corridor. Awash River, Wenci Crater Lake and to some extent Gibe River could be key sources of water but ground water and water harvesting are options. Most parts of this corridor are appropriate for highland fruits and vegetables such as apple, potato, beans, peas, garlic, carrot and beetroot.

The Welega-Dedesa corridor is a niche corridor for production and processing of tropical fruits namely mango. It includes West Welega, Qelem Welega, Illuabor zones of Oromia and parts of Benishangul and Gambela regions have high potential for mango. The area receives one of the highest rainfalls in Ethiopia. Besides, there are several rivers including Dedesa one of the major tributaries of the Nile. A new airport facility is under construction at Nekemte city for passengers. Export cargo can use Bole International Airport, which is 350 km from Nekemte.



Specific Opportunity Products

Potato, Potato Crisp, Flakes and Flour

Business opportunities in potato lie in both production and processing. The International Potato Institute, based in Peru, estimates that Ethiopia has the highest potential for potato production than any country in Africa, with 13,5 million hectares of its arable land suitable for potato cultivation. Production has grown by twofold over the last five years; though highly inconsistent average productivity has gone up by 30%.

Production and export of fresh non-graded potato to neighbouring countries (Djibouti, Yemen, Somalia and Sudan), and graded, sorted and packed potato to Middle East and EU during off-season is possible. The domestic market of over 90 million people is another viable market for potato. Ethiopia exported 59.300 MT of potato in 2013. At processing level tangible opportunities exist in potato chips, flakes and flour. Currently, there are few crisp processing companies in Ethiopia (Arif, Enrich and Hello), other than home or roadside frying. Options for potato flour and flakes are also possible - both for the domestic and export market. The fact that there is an increasing young population throughout major cities in Ethiopia means that snacks and chips have a big market potential. French fries are another opportunity both for export and rapidly increasing domestic fast food market.

The Oromia Regional State produced 300.000 MT of potato in 2014, accounting for 38% of the national production. The most prominent potato producing zones are West Showa, South-West Showa, Arsi and East Hararghe. A potato processing plant in Addis Ababa, surrounding Oromia Special zone, Bishoftu (Debre Zeit) or Adama (Nazareth) can easily access supply from all zones. At the same time, it can serve the major markets of Addis Ababa, Adama (Nazareth), Bishoftu (Debre Zeit) and Hawassa as well as export. Over and above processing and production, business opportunities in potato seed multiplications can also be seriously considered. Solagrow (Dutch) and Neerman Seed (Indian) are currently active in potato seed business in West and South-West Showa zones.

(Cherry) Tomato, Tomato Paste and Juice

Fresh cherry tomato, whose production is picking up in Ethiopia, commands a lucrative market in the EU and Middle East. Export of sorted and graded high quality tomato to these destinations is a viable option. Ethiopia exported about 23,000 MT of non-graded tomato worth of US \$ 7,5 million in 2014. The major destination countries were Djibouti (8,800 MT), Somalia (13,500 MT) and UAE (6,600 MT). Within Ethiopia, urban households, restaurants and hotels are consumers of processed and canned tomato, juices, sauces and ketchups. Currently the country imports over 1,300 MT of tomato paste and 1,500 MT of tomato juice to meet the existing supply gap. The Upper Awash Agro Industry is the only tomato paste processor as of now.

The Oromia Regional State produced 29,000 MT of tomato and cherry in 2014 accounting for over 75% of the national production. The major tomato producing areas were East Showa, East and West Hararghe, and West Arsi. The only tomato paste processing plant in the country, Upper Awash Agro Industry, is located in East Showa. In addition there are a number of cherry and high valued tomato farms in the Great Rift Valley area, for example Jitu, Floresis, Luna Farms, EthioVegFru and Almeta. A tomato paste or juice processing plant in Adama (Nazareth) or Bishoftu (Debre Zeit) cities can easily pull products from all of the foregoing zones and at the same time reach the major market of Addis Ababa. Bulk export using the high-speed railway

or road transport to neighbouring countries as well as the Middle East and EU market is also possible. But this demands investment in trucks with cooling systems.

Garlic

Ethiopia is the seventh biggest producer of garlic in the world; with China being the most influential biggest producer. Garlic is mostly produced for domestic consumption; usually used as spice and for flavouring local dishes. However, there is an important export business opportunity exists to Europe and Middle East. The main exporters to these destinations are Asian countries; particularly China and India.

The Oromia Regional State produced 52,600 MT of garlic in 2014 accounting for 33% of the national production. The major garlic producing areas are West Shewa, East Haraghe and South-West Shewa. Possible opportunities in garlic production, processing, canning and export can be noted. The crop is a convenient vegetable for export as it has a shelf life of six to nine months provided it is stored in a regulated temperature and moisture. Garlic can be marketed in dried and/or powdered form aside from the fresh vegetable.

Fresh Beans, Peas and Canning

There is an increasing demand for fresh and chilled green beans and peas in the European market particularly during the Autumn-Winter-Spring period when European production is low. According to Centre for the Promotion of Imports from developing countries (CBI, 2013) the EU market imports over 200,000 MT per annum of fresh beans and peas from developing countries. The main suppliers are Morocco (98,000 tons), Kenya (43,000 tons), Egypt (24,000 tons) and Guatemala (10,000 tons). The market for such products is highly competitive, especially in the retail channel but quality standards are also extremely strict particularly with regard to pesticide residues and other contamination.

Ethiopia exported over 2,000 MT of fresh beans and peas in 2014. The country has the potential to grow range of beans (fine and extra fine beans, runner and bobby beans), peas (mange tout and sugar snaps). Belgium, Saudi Arabia, the Netherlands and the United Kingdom were the major destinations. The Great Rift Valley, West and South-West Showa corridors give a good mix of lowland and highland beans. Currently companies such as EthioVegFru, Almeta and Horizon Plantation are exporting beans and peas from these corridors. In addition to fresh export options for fresh and dried beans canning are possible mainly for the Middle East market. The fact that Addis Ababa is the African Capital hosting a lot of international people added to increasing number of middle-income class in the country means that canned beans and peas can also fetch good domestic demand.

Onion and Shallots

The Oromia Regional State produced 86,400 MT of onion and shallots. The leading producers in the region are East Showa, West Arsi, South-West Showa and East Haraghe. Most of the onion and shallots is currently sold in the main market of Addis Ababa but a smaller quantity is exported to neighbouring countries mainly to Somalia and Djibouti.

A visible onion business opportunity is bulk export to neighbouring countries, graded and high value export to Middle East and seed business to the local market. Ethiopia exported over 12,000 MT of onion in 2014 mostly to Djibouti and Somalia. A smaller amount was also delivered to United Arab Emirates and United Kingdom. A study in 2012 by the Centre for the Promotion of Imports from developing countries (CBI) indicated that the Netherlands is the largest onion exporter in the EU (1,1 million MT in 2008, or 29% of all EU onion imports). However, it is also the second major importer mostly from Peru, Mexico and China. Another possible business opportunity in onion and shallots lies in the seed business. Currently a kilogram of onion seed is sold at a price of about ETB 1000 (US \$48). There is big demand by the smallholders as well as commercial farmers. This type of investment will have a positive spill over impact towards improving cost and quality competitiveness of the onion and shallot producers in Ethiopia.

Grapes and Strawberries

The EU imports over 270.000 MT or € 512 million worth of table grapes from developing countries (DCs). The Netherlands accounted for 50% of the imported volume from DCs. After Germany and France, it is the third importer and therefore an important player in global trading of strawberries. Over one third of strawberry import comes from other European countries namely Poland, Spain and France. The remaining is mostly imported from China, Morocco, Turkey, Chile and Egypt.

Ethiopia has strong competitive edge to export table grapes both to the Middle East and EU, especially during the market window of April and May. In 2013, the country exported over 640 MT of strawberry. Yemen (340 MT), the UK (73 MT) and UAE (63 MT) are the top three strawberry importers from Ethiopia. The Netherlands is ninth with a volume of 10 MT. Areas in the Great Rift Valley and East-West Haraghe corridors are highly suitable for grapes and strawberries. Currently, many companies are producing these products for export market, for example Ilan Tot (strawberries), Red Fox (table grapes), Castle (winery). Alemta Impex and Horizon Plantation are both engaged in grape and strawberry production for export market.

Cabbage, Kale and Cauliflower, and Eggplant

Cabbage grows best under cool conditions. China, India, Russia, Italy, South Korea, Japan and Poland are top countries in cabbage production. Top five African countries producing cabbages are Kenya, Egypt, Ethiopia, Niger and South Africa. Germany is the leading importer of cabbage with annual value of close to US \$160 million followed by the UK (US \$81 million) and USA (US \$79 million). The Netherlands is the ninth major importer with close to US \$34 million. The leading exporters are USA, Spain and the Netherlands.

Apparently, Ethiopia hardly competes with these countries in both quality and cost. Though there is an important window of organic market that can be targeted. In addition the Middle East and other neighbouring countries are important markets for Ethiopia, where it has natural competitive advantage in cost. Ethiopia exported over 8.200 MT of cabbage, cucumber and eggplant mostly to Djibouti, Somalia and UAE in 2014.

The Oromia National Regional State has strong potential for production of cabbages, kale, cauliflower, Swiss chard and lettuce. The region produced over 166.000 MT of these products in 2014. West and South-West Shewa corridor offers strong opportunity for cabbage and kales while the Great Rift Valley and East-West Hararghe corridors are suitable for lettuce, Swiss chard and eggplant. Many companies in the latter corridor are growing lettuce and Swiss chard for export and high-end domestic market.

Chili, Green and Red Pepper

The EU imported over 95.000 MT or € 547 million value of pepper in 2012 (CBI, 2012). Germany (29%, the Netherlands (18%) and the UK (13%) are the top three importers. The main suppliers to the EU market are Vietnam, Brazil and India. Ethiopia exported 1000 MT of crushed red pepper mostly for Ethiopian Diasporas abroad.

Ethiopia produced over 400.000 tons of pepper; 48% of this production goes to the Oromia Regional State. West Haraghe, Illuababor, Qellem Welega are the major producers of chilli and pepper but commercial production is possible in the three corridors above. Fresh graded and sorted green and chilli pepper is a viable opportunity to the EU and Middle East market. In addition, there is large domestic market for both fresh and dry pepper in the Ethiopia. Investment in high yielding seed business targeting smallholder farmers and commercial investors could be another opportunity.

Citrus and Juice Processing

The Oromia National Regional State produces over 10.600 MT of orange and lemon per year. Most of the production is in the Great Rift Valley corridor, particularly areas close to the upper Awash belt. Citrus seed, fresh export and juice processing are tangible business opportunities.

Orange and lemon are important fruits for juice processing as well as fresh consumption. The EU imports over 850.000 MT of orange fruits (worth US \$ 611 million). Within the EU the Netherlands imported over 220.000 MT of orange fruits in 2010. South Africa is the global leader in export of orange fruits with a total of one million MT exported in 2012 season; followed by Egypt, Morocco and Tunisia.

Ethiopia imported 15.400 MT of citrus juice and lemonade. High quality citrus production is viable in the upper Awash areas within the Rift Valley and areas around East-West Hararghe. A juice processing plant in Adama (Nazareth) or nearby areas provides possible business opportunity. However, it is important to note that the existing variety stock of citrus is not ideal for processing. This indirectly shows that there is a business opportunity in citrus seed.

Tropical Fruits

Business opportunities exist in the export and processing of tropical fruits such as avocado, papaya, guava, mango and passion fruit. At the moment there are few players in tropical juice processing, for example Prigat, Meaza, Africa Juice and Yami Juice. The Oromia region is currently producing over 134.000 MT per annum. The major production belts are Jimma, Kellam Welega, and Illuababor. But East Shewa and West Arsi also have favourable agro-ecology and infrastructure for such products.

Besides processing, opportunities exist to export fruits to neighbouring countries and Middle East. A volume of 3.000 MT of papaya, guava and avocado has been exported last year from Ethiopia to Djibouti and Somalia. Demand for such products is also growing in EU market mostly in the healthy food niche market.

Vegetable Seed Business

Most commercial vegetable farmers use imported seed while the smallholder farmers depend on informal seed sources with lesser productivity. The most common imported vegetable seed include onion, carrot, tomato, cabbage, lettuce, beetroot and Swiss chard. The principal countries exporting seed to Ethiopia are the Netherlands, Italy, Germany and France. International and national agencies including ETFruit and AISCO are the major importers of vegetables seed in Ethiopia.

Recently different companies are venturing into the vegetable seed business. Florensis in tomato seed, Neerman Seed in tomato and Onion, SolaGrow in potato seed are a few examples. However tangible business opportunities exist considering the huge unmet seed demand both for the conventional vegetables (onion, tomato, potato, garlic and pepper) as well as high valued export vegetables (berries, lettuce, eggplant and cauliflower). Investors aiming at the seed business can target both the commercial and smallholder farmers.

Spices, Herbs and Aromatics

Oromia in general the Jimma corridor in particular is suitable for spices and herbs. Jimma, Welega, Bale, and Illubabor are areas in Oromia known for production of korerima and Ginger. Turmeric is another spice grown in the region- specifically in the areas of Jima, Metu, Bebeke, Tepi, Wenago, and Bako. It is one of the highly produced spices in the country since; it is used for a coloring effect for food and also for the same purpose in the textile industry. Cardamom, the highest priced spice in the world market was introduced to Ethiopia in 1972 and conducive areas to grow this spice in Oromia were found to be - Tepi and Bebeke (rain fall of 2000-5000mm). These two locations are also highly favorable for black pepper. Cinnamon is another spice widely grown in the Oromia region. Although the major spice producing region in Ethiopia is SNNPR, Oromia has conducive climate and soil type to grow almost all the above mentioned spices in large scale.

Fast facts

National business overview:

Ethiopia exported over 45.000 MT of cut flowers, generating US \$187 million from the sector in 2014. This makes Ethiopia the sixth largest exporter of flowers only after the Netherlands, Colombia, Ecuador, Kenya and Belgium

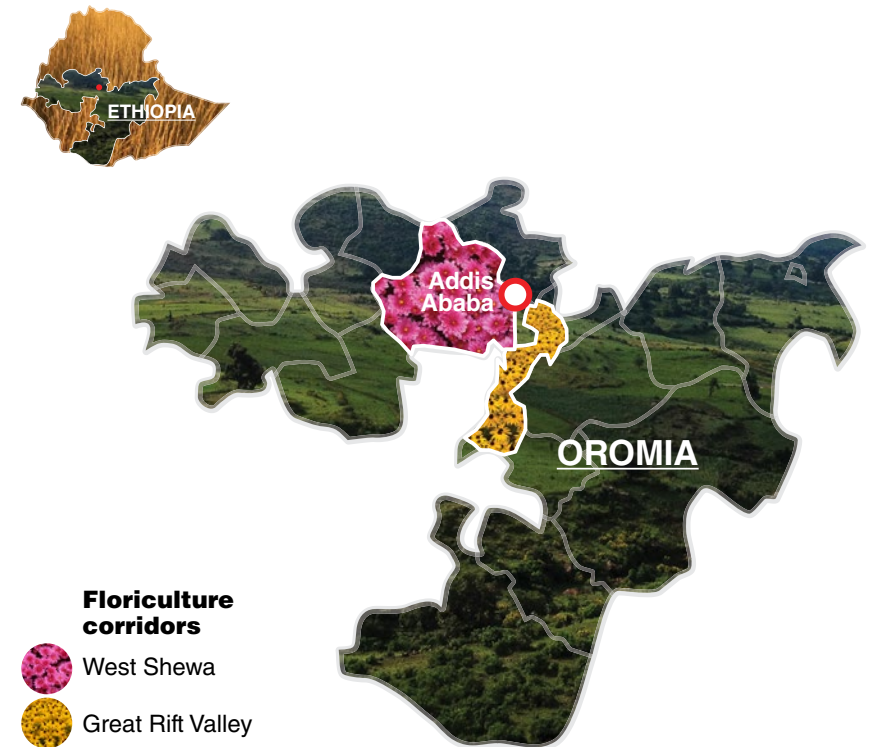
Business within Oromia:

Oromia is the floriculture hub of Ethiopia. Over 95% of the total flower production comes from Oromia Regional State. The region has a

well-developed infrastructure and logistical facilities in and surrounding the national capital, favorable climate, fertile soil and trainable and disciplined workforce.

Specific opportunity areas:

Bishoftu (Debre Zeit) city and surroundings; Koka and surroundings; Batu (Ziway) city and surroundings; Upper Awash Belt; Wonji and surrounding; Oromia Special Zone; East Haraghe surrounding Dire Dawa city.



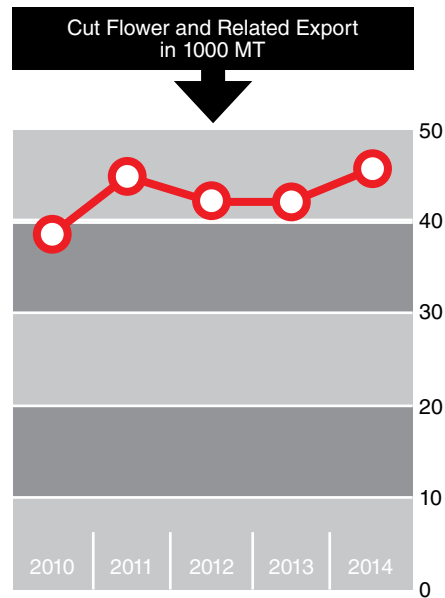
Floriculture: National Business Overview

Although floriculture is only less than 15 years old industry in Ethiopia, it has shown tremendous growth over

the years. The country exported over 45.800 MT of cut flowers, generating US \$187 million from the sector in 2014. This makes Ethiopia the sixth largest flower exporter after the Netherlands, Colombia, Ecuador, Kenya and Belgium. Cut flowers are Ethiopia's fourth largest exported commodity by value and represent 13% of all exports after coffee, oilseed and pulses, and non-edible vegetables as per data from

Ethiopian Customs and Revenue Authority. Flower export earnings are expected to rise to increase over the years with the favourable investment climate the country is offering and strategic attention.

Looking at the fact that Ethiopia was nowhere in the exporters list 10 years ago, the achievement is remarkable. The country still has competitive advantages of fertile soil, cheap labour, committed and strong policy attention by the government and stunning climate suitable for production of high quality roses. To date, there are over 120 flower farms in Ethiopia; employing over 87.000 people. Flower production thus far has concentrated in the surroundings of the capital Addis Ababa and the Rift Valley region mostly for logistical and infrastructural reasons. However, fast infrastructural growth, availability of cheap labour and land in different parts of the country is paving the way for further opportunity to expand production to new spots all over the nation. The Ethiopian Horticultural Development Agency is working to avail over 3000 hectares of additional land in the coming three years. This is more than double of the current area covered by flower farms and will triple the total production.



The Business within Oromia Region

Oromia is the floriculture hub of Ethiopia. Over 95% of the total flower production comes from Oromia Regional State. The region has a well-developed infrastructure and logistical facilities, favourable climate, fertile soil and trainable and disciplined workforce. Many areas within Oromia Regional State are suitable for floriculture but the Great Rift Valley, South-West Showa and Oromia Special Zone are more appropriate. These areas currently host several flower farms with leading companies such as Sher Ethiopia, Red Fox and Syngenta. While the Great Rift Valley corridors offer ideal climate with abundant water and fertile soil for fast growth and hence cheap production, the Oromia Special Zone and South-West Shewa and surrounding areas are appropriate for high quality highland flowers. The Oromia Regional Government has identified 350 ha of land for flower farm development in these three corridors.

Specific Opportunity Areas

Bishoftu (Debre Zeit) City and surroundings Located 47 km from Addis Ababa

Bishoftu (Debre Zeit) city and surroundings is a prominent investment corridor hosting several commercial agriculture, agro-processing and manufacturing companies. It is connected to the Addis Ababa - Adama express road and is situated at a nearby distance to both Modjo and Gelan Dry ports. Electricity, telecommunication and transport are readily available. The altitude of Bishoftu and its surrounding varies between 1500 to 2000 meters above sea level. The soil type of the area is mostly vertisol with PH of close to 7. Labour is available from the surrounding villages as well as there are people coming from different parts of the country in search for a job. The area has abundant water resources that include five crater lakes including Lake Bishoftu, from where the name of the city is derived, and four small and medium rivers: Modjo, Belbela, Wedecha and Dukem. Currently a number of floriculture and horticulture companies are stationed in Bishoftu and surroundings. Bishoftu city is one of the weekend destinations in Ethiopia with a number lake side resorts. It is less than an hour drive from Addis Ababa.

Koka and surroundings**Located 100 km from Addis Ababa and 30 km from Modjo Dry Port**

Koka is a distinctive floriculture investment belt currently hosting over 15 companies including Syngenta, Red Fox, Desa, Florensis and Sher Nursery Site. The altitude of the area is between 1500 and 1700 meters above sea level. Water is available from Lake Koka, which is fed by Awash and Modjo Rivers. Ground water can also be accessed from the Koka Flood Plain. The area is already served by electricity and telecommunication infrastructure for existing investment while labour can be mobilized from Koka town where people from different corridor come to look for daily and permanent jobs. The soil type of Koka is mostly leptosol, which is suitable for shallow root plants.

Batu (Ziway) Town and surroundings**Located at 160 km from Addis Ababa, at the shore of Lake Batu**

Batu (Ziway) town and surroundings has a high concentration of floriculture and horticulture next to Koka. Notable companies in the area are Sher Ethiopia, Castle and AQ Roses. The temperature of Batu (Ziway) and its surrounding is between 22 and 27 °C while the soil type is leptosol, which is suitable for shallow root plants. The major source of water is Lake Batu fed by Meki and Kata Rivers but there is also ground water potential. Electricity and telecommunications are available. Batu is a junction between Oromia

Regional State and Southern Nations and Nationalities Peoples Region (SNNPR) whereby labour comes from both regions. A new express road linking Addis Ababa via Modjo to Hawassa city is under construction and passes by the side of the town. The fact that the area is located between Addis Ababa and Hawassa cities means that it can access both airports once construction of the Hawassa airport is finalized. Modjo dry port is located less than 100 km from Batu. The area is endowed with natural lakes and many recreational sites and lodges are situated along Lake Langano, Shalla and Batu.

Upper Awash Belt**Located at 150 km from Addis Ababa after passing Adama (Nazareth) City**

Upper Awash belt is 20 km off road from Adama - Assela main road or Adama - Djibouti route. It is home for Upper Awash Agro Industry, AfriJuice Tibila Farm and Maraue Flowers. The area has similar agro-ecology to Batu and Koka corridors. The soil type is mostly vertisol. Labour can be mobilized from nearby towns of Awash and Melkasa or even Adama (Nazareth) city. Electricity and telecommunication are available from the nearby farms and towns. A possible challenge for this area could be availability of sufficient water. Areas closer to the banks of the Awash River have already been occupied and it may need some investment to pump water.

Wonji and surrounding**Located at 130 km from Addis Ababa**

The average altitude of the area is around 1.540 m above sea level. A sugarcane plantation occupies this area. Currently there is a discussion between Ethiopian Sugarcane Corporation and Ethiopian Horticulture Development Agency in order to locate some land for flower farms. A total of 6000 ha land is under study. Soil test analyses show the land is salty due to extensive furrow irrigation over the years. However, it can still be suitable with soil treatment schemes. Water is available from Awash River while labour can be accessed from the nearby Wonji town and even Adama (Nazareth) city. There is a road network connecting to Adama - Addis Ababa express highway. In the past many resources were invested in levelling and irrigation of the plots. As a consequence, this area is suitable for many different crops. Considering the low incline of the site the area is very suitable for the building of plastic greenhouse tunnels.

Oromia Special Zone**Located within a radius of less than 30 km from Addis Ababa**

The Oromia Special Zone refers to the surroundings of Addis Ababa and nearby areas in West and South-West Shewa. Most of the area is highland in contrast to the other six. This gives a perfect option for high quality highland roses. Areas such as Holeta and Sebata are already hosting few flower growers. Water source is mostly ground. Infrastructures such as electricity, telephone and logistics are well developed. One main challenge for this area is frost. Companies operating in the area are partially managing this by focusing niche season sales.

East Hararghe surrounding Dire Dawa**Located at 400 km from Addis Ababa, but less than 50 km from Dire Dawa Airport**

East Hararghe surrounding Dire Dawa is a new prospect for floriculture and horticulture. It is located at border between Oromia and Somali Regional States. The soil type is mostly sandy. It has one of the highest ground water potential in Ethiopia. There is an international airport and the city is a main station to Addis Ababa-Djibouti high-speed railway. However, the Dire Dawa International Airport currently doesn't have cold facilities. Dire Dawa is one of the major industrial corridors in the country and possibly with best competitive edge in terms of logistics and transport for sea freights.

Fast facts

National business overview: Ethiopia has the largest livestock population in Africa and among the top eight countries in the world. The country produces 3,5 billion litres of milk per annum. The value of milk and milk products in the country is over US \$ 1,3 billion.

Business within Oromia: Oromia is the leading milk producer with annual production of 1,4 billion

litres. This accounts for over 40% of the national milk production. Though many corridors within the region are suitable for dairy investment, Adama-Bishoftu, Selale-Fitche, West Showa and Borena-Guji corridors stand out.

Specific opportunity products: dairy farming; pasteurized milk and yoghurt; milk powder; fattening and slaughter house; commercial fodder productions.



National Business Overview

Ethiopia has the largest livestock population in Africa and among the top eight countries in the world.

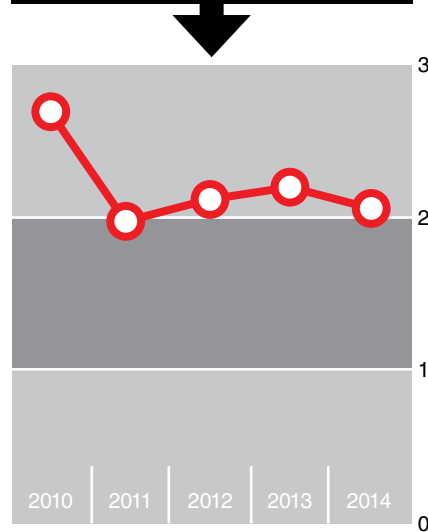
The country has 52,1 million cattle, 24,2 million sheep, 22,6 million goats, 987.000 camels, 44,9 million poultry and nearly 5 million beehives. Livestock and related products account for over 11% of the national export earnings. Leather, meat and live animals are the principal exportable livestock products.

Ethiopia produces 3,5 billion litres of milk per annum. The value of milk and milk products in the country is over US \$ 1,3 billion. More than 63,3% of the national milk supply comes from rural small-scale mixed farms in the highlands. Pastoral and agro-pastoral producers in the lowlands and small urban and peri-urban farms contribute for 22% and 14,3% respectively. Cattle account for 83% of the total milk and 97% of the cow milk comes from indigenous breeds. An estimated 10 million cows are kept primarily for milk production.

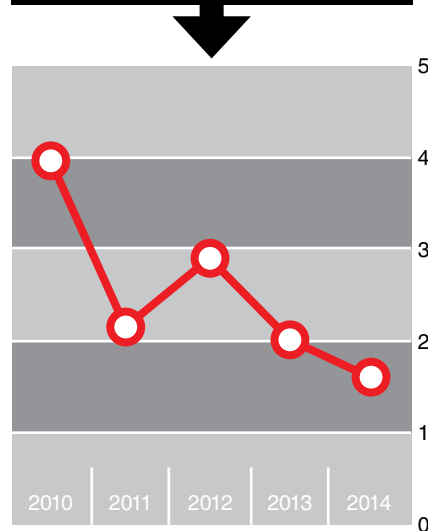
Despite large number of animals, the dairy sub-sector in Ethiopia is operating far below its potential. The sector suffers from low productivity, poor management and lack of access to feed, new breeds and stable market. Average milk productivity per cow is less than 1,5 litre/day. 98% of the dairy cows are indigenous breeds based on traditional management practices. The country generated a negligible amount of less than US\$ 90.000 by exporting butter and cheese mostly to neighbouring countries. On the contrary, it imported over US \$12 million worth of milk and milk products.

In Ethiopia, per capita milk consumption is about 19 kg of milk per year - compared to 98 kg/year for Kenya - and WHO recommendation of 200 kg/year. Milk consumption is low for economic and cultural reasons such as large number of fasting days and high price of milk and milk products. During peak production in the wet seasons, rural farmers face challenges in marketing their milk as most regions experience a surplus, which is usually processed at the home into local cheese or butter.

Dairy and Related Export in 1000 MT



Dairy and Related Import in 1000 MT

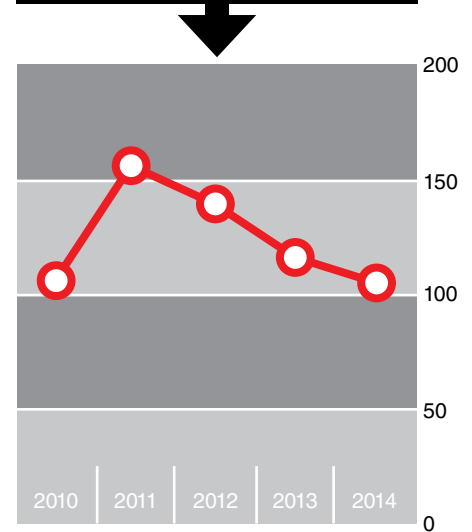


Despite the low per capita income and seasonal variation in demand, the market for dairy products is on the rise because of population growth and increase of income level. There are about 30 dairy processors in the country. These processors have daily capacity of close to 300.000 litres. The main individual players are Loni, Family, Lame, Sebeta Agro Industry, Holland Dairy, Alema and Genesis Agro-Industries.

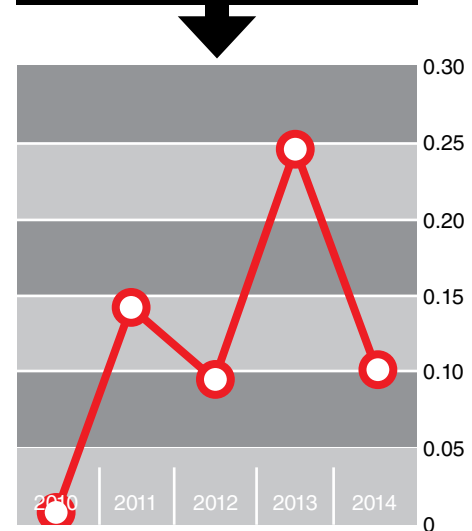
Live animals and meat production is another investment area within the livestock sector. It offers opportunity to serve a vast export market to the Middle East as well as the domestic market. Ethiopia earned US \$250 million from export of meat and live animals in 2014. Lowland pastoralists produce the largest share of meat and live animals for export: they account for 90% of all such production in Ethiopia. Nearly all of the meat exported from Ethiopia comes from lowland sheep and goats (20% sheep and 80% goats) due in large part to the preferences of the international market for these animals that have developed over the years.

Ethiopia has one of the lowest per capita consumptions of meat in Africa (5,3 kg per person, of which 3,1 kg is beef, 1,4 kg mutton and goat meat, and 0,7 kg chicken). Reasons for this low consumption include low per capita incomes, high domestic meat prices and the fasting days by the Orthodox Christians. The price of a kilo of good quality beef at supermarkets in Addis is about US \$ 10. Import of low-fat, packaged and labelled meat targeting big hotels and international residents is increasing.

Live Animals and Meat Export in 1000 MT



Live Animals and Meat Import in 1000 MT



The Business within Oromia Region

Oromia Regional State had about 40% of the country's total livestock population. As per CSA data in 2009, the region has about 22,5 million cattle, 9,1 million sheep, 7,4 million goats, 1,2 million horses, 185.000 mules, 2,4 million donkeys and 255.000 camels, 14 million poultry and 2.8 million beehive.

Oromia is the leading milk producer in Ethiopia with annual production of 1,4 billion litres. This accounts for over 40% of the national milk production. More than 95% of the milk produced in the region comes from smallholder farmers but there are also several commercial milk producing belts. The leading commercial milk producing zones within the region are North Showa, East Showa, Arsi, West Showa and Oromia Special Zone. Oromia Regional State offers tangible business opportunities for international investors aiming at the dairy sector. Though many corridors within the region are suitable for dairy investment, Adama-Bishoftu including the Arsi highland, Selale-Fitche, West Showa and Borena-Guji corridors stand out.

The Adama-Bishoftu corridor includes areas in East Showa, Arsi, parts of West Arsi and Oromia Special zone. It currently hosts several dairy farms and processing companies such as Holland Dairy, Alema, Genesis, Alfa Farms and Agro Industries. It also has many small-scale commercial farms and urban and semi-urban

households, who are delivering to milk processors. Several feed processors such as Alema Koudjts are found in this corridor. Companies such as Alfa fodder have started commercial fodder feed business. The agro-ecology of the area is suitable for green feed and good access to water. The Adama-Bishoftu corridor has bigger home market in the two cities with a combined population of over 350.000 people and yet very close to the Addis Ababa market. The area is served by Addis-Adama express road.

Selale-Fitche (North Shewa) corridor includes North Showa and parts of Oromia Special Zone. It is the leading commercial milk supplier to Addis Ababa. The agro-climate is predominantly highland. Most milk processing companies based in Addis Ababa and surrounding Oromia Special zone source milk from this corridor. Selale-Fitche corridor offers tangible business opportunity in milk processing as well as large-scale commercial dairy farming. Alike the Adama-Bishoftu corridor it is close to Addis Ababa, which is the main market.

West Showa corridor includes areas in West Showa zone, parts of Oromia Special zone and other surrounding zones of Horroguduru and East Welega. The agro-climate is a mix of highland and midland. Horo, one of the most productive local breeds in Ethiopia, are found in this area. Aside from the large number of small smallholder farmers, few commercial farms as Gadisa Gobena Farm in Ambo and Anno Farm in Bako are operating in the area. The West Showa corridor offers strong opportunity in milk production

Specific Opportunity Products

Dairy Farming - with focus on breeds

and processing. The area has good access to feed where green feed is readily available. The Dutch company Grazeland has recently set up grassland management in this area. Gadisa Gobena Farm is setting up commercial feed processing as well. In addition to dairy, the area has viable potential for feed processing whereby key feed ingredients such as soybean, maize and oilcake can easily be sourced from the local farmers. A base in Ambo town can easily reach Addis Ababa and nearby markets.

Borena-Guji corridor refers to the lowland parts of South East Oromia. The agro-climate of the region is arid and semi-arid. It is mostly pastoralist-based agriculture. Borena breed is one of the most prominent local breeds in terms of milk productivity. The Borena bulls are highly suitable for fattening as they are rarely used for draft purpose. In addition to cattle, the area has large population of camels and goats. A major advantage of Borena-Guji corridor is its location along the Ethiopia-Kenya highway, where possibilities to access the Kenyan market is open. However, competition from the Kenyan side might be high particularly for dairy. Yebelo, the capital of Borena zone is located at 600 km from Addis Ababa and 330 km from Hawassa city. Modjo-Moyale railway line to be constructed in the period between 2016 and 2020 will pass through the area. The Oromia Regional Government gives attractive investment package to encourage investors to Borena-Guji corridor.

The number of exotic or improved cow breeds in Ethiopia is less than 2% of the total milk cows. Though the two milk corridors identified for prospective investment have better proportion of improved breed, they still have a very small mix. Setting up a model state of the art integrated farming such as Genesis Agro-Industries or Alfa farms have dual purpose. While making good money from sales of milk or related products, they serve as a learning centre for the local community as well as source of breeds. Genesis Agro-Industries have played invaluable role in boasting the dairy industry in Bishoftu and surroundings. Though demand drops significantly during the main fasting period, fresh milk still fetches 10 Birr per litre in both the above corridors. Commercial dairy farms can sell the fresh milk to the local milk processors. Companies who have a long-term ambition of setting milk processing can start with dairy farming and build their good will in the community who can supply them later.

Pasteurized Milk and Yoghurt

Less than 5% of milk produced is marketed as processed fluid milk. Demand for pasteurized milk is growing fast with increasing urban population and emerging middle class. Milk processing plant in Adama-Bishoftu as well as Selale-Fitche corridors can easily serve the central market including Addis Ababa which has an estimated demand of over 65 million litre per year. Price of a litre of pasteurized milk in Addis Ababa is 22 Birr, while fresh milk is sold at 10 Birr at the farm gate. Price of a kilogram of yoghurt is 40 Birr. Despite the fact that most processing companies are based in central part of the country where the two target corridors are found, the demand still is unmet. Existing companies such as Holland Dairy, Family Milk and Lame are scaling up their investment by 25% and more. New companies such as Loni, Elementu Agro Industries and others are introducing new brands.

Milk Powder

Ethiopia imported US \$5.4 million milk powder and related products in 2013. From 2009, import has grown by over 50 times. The major imported milk powder is the leading brands such as NIDO of Nestle. In addition milk powder is widely used for infant formulas. There is no domestic processing company. Milk powder processing is relatively a big investment that requires minimum critical volume. Hence companies need to build a robust milk supply chain to get the needed volume in advance. In addition to the domestic market, export to the neighbouring countries and Middle East is a viable business opportunity. Fortification with vitamins and minerals can be additional winning edge.

Fattening and Slaughter House

Oromia region offers sound opportunity for fattening and slaughterhouses. In particular areas around Adama (Nazareth), and Batu (Zeway) are highly suitable for fattening. The area has good access to infrastructure to set up a slaughterhouse. Most of the export abattoirs (Modjo Modern, Helmix, Organic, Luna etc) in the country are located in this area. In addition big international players, VERDE Beef (USA) and Allana Group (India), are establishing meat processing in Batu (Zeway) area. The main market for meat and button products is to the Middle East countries but the domestic market has also high potential. Bulls and calves for fattening can be acquired from Borena, Bale and Arsi zones within Oromia Region as well as from Omo valley in SNNPR. The Borena-Guji corridor can be another consideration with easy access to good calves and bulls for slaughterhouse, but logistics might be a challenge.

Commercial Fodder Production

Feed is the key input for animal productivity and its cost represents more than 60% of operating costs in a commercial dairy business. The livestock sector is constrained by insufficient quantity of forage produced, insufficient inputs for commercial feeds, lack of quality feed formulation, and the absence of feed testing for analysis. With an increasing number of fattening and dairy farms commercial fodder production seems a good business opportunity. The agro-climate and soil fertility of the Bishoftu-Adama corridor is suitable for fodder crops such as Maize, Alfa Alfa, Sasbania and many horticultural by-products. Currently, Alfa Farm and Fodder is supplying these products to farms around Bishoftu (Debre Zeit). The brand new American firm VERDE is also setting up its own fodder farm, fattening and processing in Batu (Ziway) on 1200 ha land. A Dutch company Grazeland has recently started grassland management business in Ginchi, West Shewa Oromia.

Fast facts

Governance and stability: The Oromia Regional State is peaceful and stable. The different investment corridors highlighted in this guide are located in the central parts of the country where many international businesses are domiciled.

Socio-economy: The Oromia Regional State is the major destination for Foreign Direct Investment in Ethiopia. Over the last two decades, the regional has shown steady economic growth.

Transport and logistics: Oromia can be considered as the logistics and infrastructure hub of Ethiopia with reasonable distance to Djibouti. The region has over 2600 km asphalt road and served by five airports including the Addis Ababa, Dire Dawa and Hawassa airports.

Telecommunication: Mobile phone is the primary medium of communication. Internet access is available in major cities and towns.

Electricity: The investment corridors identified in this guide have 24 hours access to electricity. Cheap and renewable energy sources the primary source. Electricity supply is often interment due to aging transmission lines. Investment is underway in upgrading transmission lines and by the end of 2017, 75% of the people will have access to electricity.

Manpower: The region hosts 10 universities including Jimma and Haramaya Universities well known for their strong education in agriculture.

Governance and Stability

In general, Ethiopia is peaceful and stable country in Africa. Ethiopia has been ranked 55th out of 148 countries by the World Economic Forum (Global Competitiveness Report, 2013-2014), well above most of its regional peers such as South Africa (109th), Kenya (131st), and Nigeria (142nd). The country is ranked 36th and 38th globally in business costs of crime and violence, and organized crime. The Oromia Regional State is one of the most peaceful regions. The different investment corridors highlighted in this guide are located in the central parts of the country where many international businesses are domiciled.

The Regional Government in collaboration with the Federal Government is highly dedicated to improve the business climate based on its practical experience. There are times when key processes such as investment approval and land acquisition are delayed. Reasons for this delay are incomplete files or documents and the government's strict stand to control misappropriations related to land and re-defining the procedures to ensure accountability. The latter has now been finalized and decisions are moving faster. Under the new land administration procedures land permit is granted at regional level.

The regional investment board reviews proposals within one and half months. The land acquisition may take about six months - particularly when farmers occupy the land. In the latter case investors are expected to deposit the lease in advance to facilitate for compensation to the current land users. It is important to note that as the number of farmers to be relocated due to investment increases the time needed to acquire land significantly. The government often prefers to look for alternatives than displacing large number of households.

Foreigners can freely move across Oromia Region with legitimate documents. In the major cities such as Adama (Nazreth) and Bishoftu (Debre Zeit) many people speak English but in the rural areas having translator is needed. Afan Oromo is the principal language though most people also speak Amharic. Hotel and related facilities are readily available in the major cities. Cities like Bishoftu (Debre Zeit) and Batu (Ziway) are weekend destinations with many lake side resorts.

Socio economy

Over the last two decades, the region has shown steady economic growth. The Oromia Regional State is the leading destination for foreign direct investment in Ethiopia. Agricultural development, education, health, infrastructure and SME development received the lion share of the regional budget. The region gives high priority to agro-processing and export-oriented investments. Several agro-parks and industry zones have been reserved in the major cities such as Adama (Nazreth), Bishoftu (Debre Zeit), Jimma and Nekemte.

Inhabitants of Oromia region are hospitable and welcoming. They are respectful and positive people who value good neighbourhood and harmony. People with different religions as well as different nationalities and ethnic background have lived - and still living - with mutual respect.

Transport and Logistics

The region has over 3000 km of asphalt road connecting all the major cities and towns as well as to ports in Djibouti, Sudan and inland borders to Kenya. Oromia can be considered as the logistics and infrastructure hub of Ethiopia. Eastern Oromia is less than 400 km from port Djibouti. Modjo and Gelan dry ports are located at central Oromia.

Five airports including the Addis Ababa-Bole International Airport and Dire Dawa International airports serve the region. The completion of Hawassa International Airport located in the capital city of SNNPR but adjacent to Oromia Region gives additional option for areas in the Great Rift Valley and Southern Oromia. In addition a mega international airport in Oromia Special zone around Addis Ababa is going to be built in the coming years. Plan for another new airport in the town of Nekemte is underway and this will serve Western Oromia.

The high-speed railway from Djibouti-Dire Dawa-Adama-Addis Ababa will be finished in less than two years. The second round railway expansion program will connect Oromia region to both Sudan and Kenya. The Sebeta railway terminal, which is expected to be the largest in the country, lies at the heart of the region. The different investment corridors identified in the opportunity sessions can be reached in less than 3 hours' drive from international airport as well as dry ports.

Telecommunication- Electricity

All major cities in Oromia Regional State are connected through telecommunication network. Mobile phone is the primary medium of communication, while Internet access is available in major cities and towns. Areas closer to Addis Ababa get 3G mobile internet while others still get 2G. In Koka area, horticulture and floriculture companies have invested together with the regional and federal government in fibre optics Internet, which will be functional soon. However, the telecommunication network in general and the internet connection in particular is intermittent - as in any part of the country. At farm and factory sites outside of the cities, there are occasions in which Internet may not work for days. Steps are being taken by Ethio Telecom at national level to resolve this longstanding problem. If things go as planned most of parts of Oromia will have a 3G network. The cost of mobile subscription is about US \$5 while the airtime for local calls is about US \$ 0,036 at peak hours and international call varies from US \$0,35-1 per minute. Monthly unlimited broadband internet fee is around US \$300 per month.

Ethiopia pursues a green economic development strategy and aims to be the power hub of Africa. All the investment corridors identified in this guide have 24 hours access to electricity. Renewable energy sources namely hydro-power is the most prominent source accounting for over 98% of the national supply. The "Low Volt Time of Day" tariff are applied to manufacturing plants in mineral, food, beverage, textile, agriculture, wood, chemical and plastic areas. The cost of electricity per kilowatt-hour is less than US \$0,03 one of the lowest in Africa. The Grand Ethiopian Renaissance Dam (GERD) and other upcoming hydropower projects will be completed in two years. Over time these new power plants will generate over 10.000 MWt of electricity.

Despite this, it is important to keep in mind that there are problems of electric power cuts at peak seasons and damage on transmission lines. Another major challenge in relation to electricity is getting a transformer from Ethiopian Electric Power Corporation. However, the country is spending massive investment to address these problems in the coming few years. A big investment is underway in upgrading transmission lines. Defence Engineering Corporation has started local manufacturing of the transformers. Besides efforts are being made speed up import to meet backlog demand.

Manpower

The majority of the population living in Oromia Regional State is within economically active age range i.e. 15-60 years. The region hosts 10 universities including Jimma and Haramaya Universities, both well known for their strong education in agriculture. Adama Science and Technology University is one of the best technological universities in Ethiopia. In addition, Addis Ababa University and Hawassa Universities have bases in Oromia Regional State. All of the universities have Agricultural Colleges and departments focusing on horticulture and animal science. Besides, there are 103 Technical and Vocational schools, most of them with an agricultural training component.

The Alage, Agrafo and Ardaita technical and vocational schools in agriculture have strong national reputation. The first of the three is based around Batu (Ziway) town and is known for horticulture and livestock trainings. Daily labourers are readily available for a fee of US \$2 to \$3 per day. The fact that Oromia occupies the heart of the country means that people from other regions also come here in search for jobs.

Fast facts

Security of Investment:

Ethiopia is signatory to international investment conventions. It is the seat of African Union and is one of the most stable and peaceful countries in Africa.

Incentive package: The Oromia Regional State gives several incentives aligned with Federal Investment Incentive packages. These includes 100% duty exemption for importing capital goods for the first

time, duty free import of vehicles, one stop-shop service for licensing and registration, 4-5 years tax holidays, loss carry over, capital remittance, export incentive and access to finance.

Keep in Mind: It is important to note that investors need to check the minimum capital (US \$200,000), job opportunities (50 people) and type of investment requirement to be eligible for the various incentive packages.

Security of Investment

Ethiopia is a signatory to the main international investment codes.

For example, it is a Member of the Multilateral Investment Guarantee Agency (MIGA). It is also a signatory of the Convention on the Settlement of Investment disputes between States and Nationals of other States. Addis Ababa is the seat of the African Union and has large number of international people. These added to the robust national peace and stability achieved over the last two decades gives strong confidence to invest in Ethiopia in general and Oromia Regional State in particular. According to World Investment Report 2014, Ethiopia was the third largest recipient of foreign direct investment (FDI) in Africa in 2013, with a 240% increase from the amount in 2012.

Duty Free Import of Capital Goods

To encourage private investment and promote the inflow of foreign capital and technology into Ethiopia, the following customs duty exemptions are provided for investors (both domestic and foreign) engaged in eligible new enterprises or expansion projects such as manufacturing, agriculture, agro-industries, generation, transmission and supply of electrical energy, information and communication technology etc.

- 100% exemption from the payment of customs duties and other taxes levied on imports is granted to all capital goods, such as plant, machinery and equipment and construction materials;
- Spare parts worth up to 15% of the total value of the imported investment capital goods, provided that the goods are also exempt from the payment of customs duties;
- An investor granted with a customs duty exemption will be allowed to import spare parts duty free within five years from the date of commissioning of a project;
- An investor entitled to a duty-free privilege buys capital goods or construction materials from local manufacturing industries shall be refunded customs duty paid for raw materials or components used as in puts for the production of goods;
- Investment capital goods imported without the payment of custom duties and other taxes levied on imports may be transferred to another investor enjoying similar privileges;
- Any investor who exports or supplies to an exporter gets at least 60% of income tax exemption for two years in addition to the exemption privilege.

Duty Free Import of Motor Vehicle

Total or partial exemption of motor vehicle from customs duties is determined by the type and nature of investment projects such as amount of capital invested. Investors are advised to consult Oromia Investment Commission and Ethiopian Investment Commission desks for further information before making decision.

Loss Carry Over

Business enterprises that suffer losses during the income tax exemption period can carry forward such losses, following the expiry of the exemption period, for half of the tax exemption period. For the purpose of calculating a period of loss carry forward, a half-year period shall be considered as a full income tax period. Any loss during income tax exemption period is not allowed to carry forward such loss for more than five income tax period.

Income Tax Holidays

Investors engaged in growing vegetables and flowers as well as farming of domestic animals for milk in areas other than Oromia Special Zone surrounding Addis Ababa are exempted from income tax for four years. The tax holiday for farming of perennial fruits and processing of meat, milk, fruits and others extends to five years except in Oromia Special zone surrounding Addis Ababa.

An investor who expands or upgrades his existing enterprise and increases at least by 50% its production or service capacity, or introduces a new production or service line at least by 100% of an existing enterprise is entitled to the income tax exemption period specified in the first bullet above.

Investors who export at least 60% of their products or services, or supply these to an exporter, will be exempted from the payment of income tax for an additional 2 years.

Access to Finance

Investors targeting export oriented agriculture (floriculture and horticulture) and all agro-processing sectors can get access up to 70% of finance from the Development Bank of Ethiopia and other commercial banks upon presenting a viable project proposal.

Export Incentives

- With the exception of few products (e.g. Semi-processed hides and skins), no export tax is levied on export products of Ethiopia;
- Duty Drawback Scheme: It offers investors an exemption from the payment of customs duties and other taxes levied on imported and locally purchased raw materials used in the production of export goods. Duties and other taxes paid are drawn back 100% at the time of the export of the finished goods;
- Voucher Scheme: A voucher is a printed document having monetary value which is used in lieu of duties and taxes payable on imported raw materials. The beneficiaries of the voucher scheme are also exporters; and Bonded Manufacturing Warehouse Scheme;
- Exporters are allowed to retain and deposit in a bank account up to 20% of their foreign exchange export earnings for future use in the operation of their enterprises and no export price control is imposed by the National Bank of Ethiopia;
- Franco valuta import of raw materials are allowed for enterprises engaged in export processing;
- Exporters can benefit from the export credit guarantee scheme which is presently in place in order to ensure an exporter receives payment for goods shipped overseas in the event the customer defaults, reducing the risk of exporters' business and allowing it to keep its price competitive.

Capital Remittance

A foreign investor has the right to make the following remittances out of Ethiopia in convertible foreign currency:

- profits and dividends;
- principals and interest payments on external loans;
- payments related to technology transfer agreements;
- payments related to collaboration agreements;
- proceeds from the sale or liquidation of an enterprise;

Competitive Land Lease Price

Land ownership is exclusively vested in the state and the people and shall not be subject to sale or other means of exchange. Private investors and any organisations however, have the right to use land on lease or rental basis. Land lease period for urban land ranges between 30 and 99 years while that of rural land is between 20-45 years ears based on the type, magnitude, and location of the project. Land lease price differ depending on type of investment, location and classification between urban and rural land. Rental prices of rural land for agriculture ranges from US \$ 7 to US \$ 3,5 per hectare per year. Most of the investment corridors identified in this report fall in the high land rental range.

Fast facts

Scoping and site selection:

Check Ethiopian Embassy, plan visit to Oromia region, your business mission and site selection

Registration, licensing and land acquisition:

notarized documents, business type and name clearance, legal framework for investment, investment license and TIN certificate, land acquisition, business license and Value Added Tax (VAT)

Keep in Mind: Land acquisition may take time particularly if farmers occupy the selected location and the number of farmers to be relocated is more than 10 households. Investors might be required to pay the lease price in advance to facilitate for the compensation to farmers.

Scoping and Site Selection

Step 1 - Check Ethiopian Embassy

The first step for international investors is to get basic information from the local Ethiopian Embassy or consular offices. The offices will provide the different investment opportunities Ethiopia in general and Oromia in particular can offer investment packages for foreign investors, requirements and steps ahead.

Ethiopia has over 40 embassies and consular offices in different countries across the world (www.mfa.gov.et). Within the EU, Ethiopia has Embassies in Belgium, Paris, Berlin, London, Vienna and Stockholm. The Embassy in Brussels covers the Benelux region. Also it is important to visit Ethiopian Investment Commission and Oromia Investment Commission websites (www.investethiopia.gov.et and www.romiainvest.gov.et) respectively that give up-to-date information to prospective investors.

Investors can also get guidance from Embassy of the Kingdom of the Netherlands in Addis Ababa (www.ethiopia.nlembassy.org). For agricultural initiatives, including agro-processing and agro-logistics you can make an appointment with the Agricultural counsellor (via the Office manager Solomé Ketema and Agricultural officer Betselot Admasu; [see chapter useful contacts](#)). The Agricultural counsellor will give first guidance and if required he will

link you as investor with the Dutch business community (ENLBA, www.enlba.org), the Agri Business Support Facility (ABSF, www.agribiz.net) and/or Ethiopian Federal or Regional authorities.

Step 2 - Plan visit to Oromia Region

Once Ethiopia becomes a viable investment choice the next step is to get first-hand information by visiting the Oromia region. The visit provides opportunity to get detailed understanding of the investment climate, choose specific locations suitable for the envisaged investment and establish a first contact with local resource persons.

Information about visa requirements and applications can be obtained from the local Ethiopian Consular Office or Ministry of Foreign Affairs (www.mfa.gov.et).

Ethiopia is one of the safest countries in Africa and the Oromia region is one of the safest regions within Ethiopia. The people are hospitable, friendly and welcoming to foreigners. Several hotels are listed in the list of [useful contacts session](#) of this guide. Logistics service can be arranged via your respective local consular office in Addis Ababa or using own contacts.

Step 3 – Your business mission in Oromia Region

The national capital is also the seat of Oromia Regional State Government. All federal and regional offices as well as international companies and diplomatic offices can easily be accessed from Addis Ababa. The different corridors mentioned in the sections before, except Dire Dawa, lie within a radius of 200 km or less than 3 hours' drive from Addis Ababa. Alternatively, people can stay few nights in the nearby cities and towns such as Bishoftu (Debre Zeit), Adama (Nazreth), and Batu (Ziway) that have high standard travel and accommodation facilities.

The Oromia Investment Commission (www.oromiainvest.gov.et) can be the principal contact in guiding and advising investors aiming a visit to the region. In addition the office can link them with different regional and federal offices that could provide information about the investment opportunities and the business climate. Some of the most important regional and federal offices that are worth visiting are:

- Oromia Regional Vice President Office, who is chairman of the regional investment board and a courtesy visit helps to facilitate linkage with relevant stakeholders
- Oromia Regional State Livestock Agency for any information about regional livestock resources,
- Ethiopian Horticultural Development Agency for national level information about flower, vegetable and fruit sectors;
- Ethiopian Investment Commission for licensing and registration;

- Ministry of Industry-Food and Beverage Institute.
- Ministry of Agriculture-Livestock Sector and
- Development organisations such as USAID, SNV active in the dairy sector are useful to get sectorial level information.

Their respective consular offices in Addis Ababa can also assist in logistical coordination. Contacts are available in this guide ([Useful Contacts](#)).

Step 4 - Site Selection

The outcome of the first three steps is selection of specific site where you want to invest. The selected site could be part of the areas designated by the regional government for investment or outside that scope. It is also possible that farmers occupy the site. They will be compensated and relocated by the regional government - once the investor acquires an investment permit.

Registration, Licensing and Land Acquisition

The Ethiopian Investment Commission (EIC) has recently been restructured to provide a one-stop shop service for issuing: an Investment Permit, TIN certificate and Business License. For manufacturing or agro-processing Industries to whom investment permit was issued; the agency issues a duty free-, work- and residence permit.

The EIC also provides additional services on behalf of investors' request to process acquisition of land, utilities (water, electrical power and telecommunication services) and bank loan. The steps involved in licensing, registration and land acquisitions are highlighted below but investors should always validate these with Ethiopian Investment Commission (www.investethiopia.gov.et).

Step 5 - Notarized Documents

Investors are strongly advised to appoint an agent authorized to deputize on their behalf. This agent should be someone who has an in-depth understanding of Ethiopian investment laws and procedures. The agent needs a power of attorney that authorizes him or her to sign documents. The power of attorney should be signed by the investor or general manager of the company; stamped by public notary office of the investor's country; validated by Ethiopian Embassy in the home country of the investor; and finally authenticated by Ministry of Foreign Affairs and Document Authentication Office of Ethiopia. The last two steps to be done in Ethiopia will take one day.

Documents needed for the agent:

- Copies of relevant pages of passport of the company's manager/investor;
- Memorandum and Articles of Association signed by all founders and notarized by home country notary service;
- Letter of power of attorney of the agent;
- Many passport size photos of the general manager of the company/investor

Step 6 - Business Type and Name Clearance

There are different types of business organizations in Ethiopia: Sole Proprietor (Investment made in the name of individual); Private Limited Company or Share Company. Details about the different forms of business types can be obtained from the Ethiopian Commercial Code 1960.

Step 7 - Legal Framework for Investment

Once a decision is made on the type of business organization, investors should clear envisaged name of their company-for example "ABC PLC". When going to the commission, it is advised to think of three names and fill name clearing application form in the order of priority. The name clearing will take half up to one day.

Step 8 - Investment License and TIN Certificate

Application will be submitted to Ethiopian Investment Commission. Requirements and forms are available on their website (www.investethiopia.gov.et). Please keep in mind: the location selected should be filled in the form. For a PLC or Share Company the General Manager of the company under formation should submit fingerprints for TIN certificate. For Sole Proprietor business types, TIN Certificate and fingerprints can wait until the Business License Processing stage.

Fully foreign-based investors are expected to demonstrate bank deposit of US\$200.000 in Ethiopian bank account. However, if the investment is in partnership with domestic investor(s), the minimum capital required of him is US\$150.000. To facilitate opening of bank account, the EIA, upon receiving complete application, issues a letter to National Bank of Ethiopia who then write a supporting letter to any commercial bank. Investors can collect their investment license by bringing stamped bank statements and a letter signed by the Branch Manager of their Bank. Excluding the bank transfer; entire process will take half to one day.

Step 9 - Land Acquisition

Land Application can be submitted at Ethiopian Investment Commission directly after securing the investment license. The authority will issue a letter to Oromia Regional State Investment Commission to facilitate for the land acquisition. When submitting the letter, investors are also expected to submit a project proposal that clearly indicate profitability, employment opportunity and new technology. A team of experts from the Regional Government will evaluate the proposal. The outcome will be communicated within six weeks.

If accepted, the Regional Administration for Urban Land and Environmental Protection and the Land Administration office for Rural Land will liaise with city, district (woreda) and village (kebele) authorities to engage current users of the land and process compensation. Making occupied land ready to investors may take up to six months. For dairy and agro-processing where there is already non-occupied land, it can be finalized in one week once the project is accepted.

Step 10 - Business License

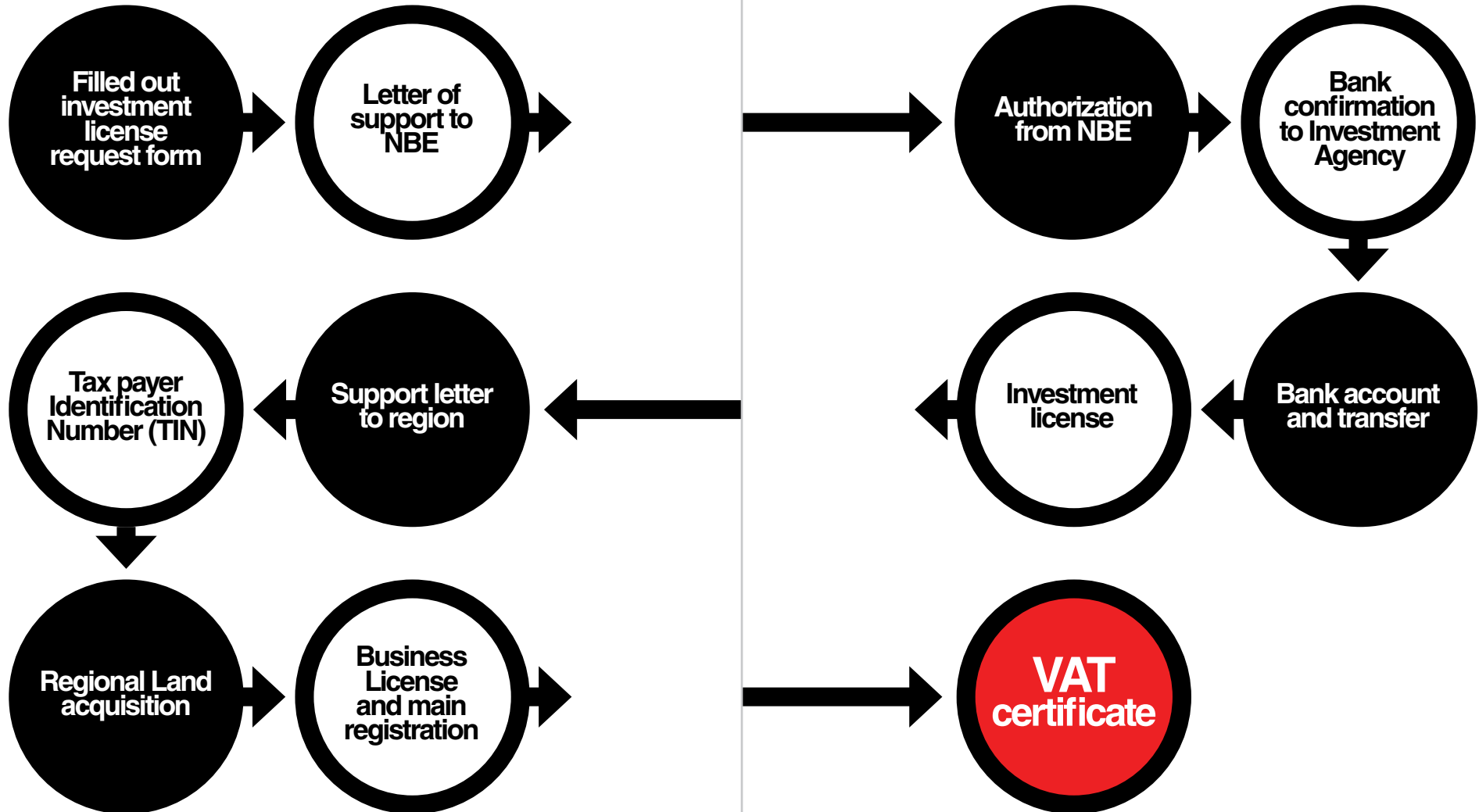
The business License should be processed after acquiring land, but before starting operation. Application to Business License should be made to Ethiopian Investment Commission. Your authorized agent or General Manager of the company in Ethiopia can apply for you. Sole Proprietor business types should apply for TIN Certificate and the owner should be present for fingerprints at this stage. The business license processing can take half up to one day.

Step 11 - Value Added Tax (VAT)

After acquiring business license investors can apply for Value Added Tax Certificate. Application should be submitted at the same place as the business license. Generally, it will take another half to one day to receive the VAT certificate.

How to get started

Overview of steps to be taken
in order to invest in
Amhara Regional State



Entirely owned by a foreign investor

- An application form duly filled and signed by the manager or agent of the business organization;

- When an agent is making the application, a photocopy of his/her power of attorney;
- Photocopies of memorandum and articles of associations. If it is to be newly established, photocopies of the relevant pages of a valid passport of each shareholder, clearance letter from the Ministry of Trade and Industry for the company name and draft memorandum and articles of associations;

- When foreign nationals taken for domestic investors or Ethiopian nationals are among the members of the shareholders, photocopies of certificates evidencing the domestic investor status of the foreign nationals or identity cards (for companies to be established);
- Three recent passport-sized photographs of the general manager.
- Three passport sized recent photographs of the general manager.
- **Note:** If the foreign partner is a business organization, the following documents are also required:
- A copy of the memorandum and articles of associations or equivalent documents of the parent company;
- A photocopy of a document ascertaining the legal personality of the business organization (i.e. registration certificate);
- Minutes of the parent company passed by an authorized body for the establishment of a joint company in Ethiopia, authenticated by the public notary, or a letter written by the owner in case of a one-man company;
- A photocopy of an authenticated power of attorney of the representative of the company and photocopies of the pages relevant of the representative's valid passport or identity card in case the representative is an Ethiopian national.

Joint Investment between domestic and foreign investors

- An application form duly filled and signed by the agent of the business organization;
- Where the application is made by an agent, a photocopy of his power of attorney;
- Photocopies of the memorandum and articles of associations. If it is to be newly established, photocopies of the pages relevant of a valid passport of each shareholder, and draft memorandum and articles of associations
- Where foreign nationals taken for domestic investors or Ethiopian nationals are among the members of the shareholders, photocopies of certificates evidencing the domestic investor status of the foreign nationals or identity cards (for companies to be established);

Oromia Regional State, Vice President Office
www.oromiyaa.com
Vice President of Oromia Regional State: H.E. Ato Abdulaziz Mohammed
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Addis Ababa
www.oromiainvest.gov.et
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Tel: +251 11 553 1521
Email: oic@oromiainvest.gov.et
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Oromia Bureau of Finance and Economic Development,
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Ethiopian Horticultural Development Agency,
Addis Ababa
www.ehda.gov.et
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H.E. Ato Alem Woldegerima
Tel: +251 11 550 2483/5127
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Ethiopian Horticulture Producers Exporters Association (EHPEA),
Addis Ababa
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Ethiopian Investment Commission,
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Ethiopian Revenue and Customs Authority,
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National Metrological Agency, Addis Ababa
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National Bank of Ethiopia,
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Agri Business Support Facility (ABSF),
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Project Coordinator: Gertjan Becx
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Development Bank of Ethiopia,

Addis Ababa
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Tel: +251 15 13120
Fax: +251 15 11606
Email: dbe@telecom.net.et

Ethiopian Airlines,

Addis Ababa
Director ADD-HUB cargo:
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Tel: +251 11 517 8054
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Old Airport Zone, Kifle Ketema –
Lideta, Kebele 02/03
Tel: +251 11 371 1100
Tel: +251 11 371 1577
www.ethiopia.nlembassy.org
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Tel: +32 2 771 3294
Fax: +32 2 771 4914
Email: info@ethiopianembassy.be
Ambassador: H.E. Teshome Toga
Email: etebru@brutele.be

Ethiopian Electric Power Corporation Corporate Communication,

Addis Ababa
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Tel: +251 11 157 1860
Email: eepcocommunication@yahoo.com

Oromia Agriculture Bureau,

Addis Ababa
Tel: +251 11 371 7440

Oromia Rural Land and Environmental Protection Bureau,

Addis Ababa
Tel: +251 11 371 7594
Tel: +251 11 371 7293

Oromia Trade and Industry Office,

Addis Ababa
Tel: +251 11 652 5726

Adaa Wereda Investment Office,

Bishoftu (Debre Zeit) City
Tel: +251 11 433 5417
Mob: +251 91 182 9656

Accommodation

Safari Lodge,

Adama (Nazreth) City
www.safarilodgeethiopia.com
Tel: +251 22 112 2011

Dire International,

Adama (Nazreth) City
www.direinthotel.com
Tel: +251 22 111 7142

Kereyu Hill Resort,

Adama (Nazreth) City
www.kereyuhillresorthotel.com
Tel: +251 22 112 7080

Haile Resort,

Batu (Ziway) Town
www.haileresorts.com
Tel: +251 11 663 0155

Kuriftu Resort,

Bishoftu (Debre Zeit) City
www.kurifturesortspa.com
Tel: +251 11 662 3605
Mob: +251 91 109 1185

Babogaya Resort,

Bishoftu (Debre Zeit) City
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Pyramid Hotel and Spa,

Bishoftu (Debre Zeit) City
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Adulala Resort,

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