

Agribusiness Portfolio

Toward Sustainable Clusters in Agribusiness through Learning in Entrepreneurship



2SCALE consortium:







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Business as Unusual

2SCALE is an agribusiness platform with a difference. We connect business firms with African smallholder farmers, and provide technology, training and support services to make these relationships work.

The 2SCALE model is inclusive business — viable, equitable agribusiness partnerships that meet financial as well as social development goals.

This document is an overview of the project portfolio, comprising 48 agribusiness partnerships in eight countries. Each partnership involves multiple players — farmer groups, buyers, entrepreneurs (mostly small-scale) selling seeds, fertilizers and other inputs, and service providers offering training, transport, tractor rental, crop insurance...

Banks and microfinance agencies are crucial, given that agricultural credit for small-scale farmers is usually unaffordable or unavailable.

Some partnerships are 'local', for example a farmer cooperative selling to a local processor.

Others are much broader; activities with East West Seed involve more than 40,000 farmers in four countries.

2SCALE is funded by the Directorate General for International Cooperation (DGIS) of the Netherlands Ministry of Foreign Affairs and implemented by a three-member consortium: the International Fertilizer Development Center (IFDC), Base of the Pyramid Innovation Center (BOPInc.) and the International Centre for development oriented Research in Agriculture (ICRA). Activities cover Benin, Ethiopia, Ghana, Kenya, Mali, Mozambique, Nigeria and Uganda.

The project was launched in June 2012. Halfway through the program, we've connected 332,000 farmers — of whom 30 percent are women — with 1,200 agribusiness firms. By December 2017, we aim to reach 500,000 farmers and 2,500 agribusinesses.



BENIN

Promo Fruits, pineapples. Promo Fruits, the largest juice processor in Benin, purchases pineapples from smallholder farmers to produce juice for West African markets. The partnership involves 7,700 farmers and laborers. Promo Fruits has cut production costs, introduced a range of package sizes and, with a loan from Oikocredit, substantially expanded capacity. A strong growers' association has been established. Farmers have cut harvest-and-handling damage by half, and are using new technologies and better coordination to ensure year-round harvesting. A pilot program is test-marketing fresh fruit juice to school children.

East West Seed International & Rijk

Zwaan, vegetables. This partnership addresses the long-standing shortage of high-quality, locally adapted vegetable varieties. More than 23,000 small-scale producers now use modern varieties of cabbages, chilies, onions and other crops. Last season, 2SCALE farmer groups sold nearly 9,000 tons of

the EWIT tomato variety Padma. Producer groups have been linked to wholesale buyers. Microfinance partner ALIDé has disbursed farm loans of 220 million FCFA. A pilot program has introduced *kangkong* (water spinach), a nutritious vegetable that can be produced and sold at low cost.

SOCIA, maize. SOCIA aggregates maize from more than 3,300 farmers to produce grits for the national brewery, SOBEBRA. This partnership, implemented jointly with the national farmers' association FUPRO, has two main components: farmer training and support (e.g. credit linkages, insurance) to expand production and technical support to establish a traceability scheme. SOCIA is continually upgrading quality and has changed its business model from selling non-traceable grits sourced from large traders, to selling high-quality traceable grits sourced from farmer organizations.



UniRiz, parboiled rice. UniRiz has improved output and profits for the 2,500-member women's cooperatives that produce parboiled rice, and the 9,000 smallholder farmers who supply the cooperatives. New technologies such as fertilizer deep placement have boosted rice yields. Upgraded stoves have cut processing costs and improved quality. The cooperatives now have strong distribution networks in Benin and Nigeria, including supermarkets in every major city in Benin. In December 2014, 2SCALE won a special award for its work on rice. The ceremony was broadcast live on national television.

Unions Communales des Producteurs de Soja, soybeans. This partnership has created a value chain driven by women processors linked to 2,000 small-scale farmers. The farmers now use quality seeds, inoculants and other modern production methods. Processors have acquired new equipment and introduced new products such as soy milk, cheese and brochettes. Microfinance partners offer inventory credit, allowing processors to buy in bulk. 2SCALE helped to develop and scale out a new product, soy *goussi*, made from roasted soya cake. *Goussi* is now the main source of protein for 11,000 low-income families.

Association Béninoise des Cuniculteurs, rabbit meat. Consumption of rabbit meat — almost unknown in Benin 10 years ago — has skyrocketed. This partnership, in collaboration with development agency CEDEC and the University of Abomey-Calavi, has helped create a stable market where producer groups supply under formal contracts. Training and support for vet services and animal husbandry have significantly improved hygiene and animal health. A pilot program, launched in 2015, is providing credit to enable producer groups to expand. The goal is to reach 3,000 producers and 50 small businesses by 2017.

Merry Co., cheese. This woman-headed dairy firm buys fresh milk from more than 800 Fulani women to produce traditional cheese. Seven new women's groups, with 200 members, have been established and produce cheese for resale by Merry; they have increased production from 200 to 700 units per day. The company has also been linked to a milk producers' union to ensure steady supplies. Pilot programs, launched in 2015, are helping to develop product variations for low-income consumers and facilitate access to credit for expanding processing capacity.

DETAREN/Arômes d'Afrique, aromatic herbs. This partnership aims to close the demand-supply gap (27,000 vs 10,000 tons per year) for essential oils in West Africa. DETAREN processes 6,000 tons of *tchayo* (African basil) and lemon grass per year, but relies mostly on imports. To increase local sourcing, contracts are being negotiated between DETAREN and farmer associations. New producers have been mobilized and are being trained on organic production. Other partners are developing credit programs for small-scale producers.



ETHIOPIA

GUTS Agro Industry, maize and soybeans.
GUTS produces a range of foods from cereals to table salt and baby food. It buys maize and soybeans from 20,000 2SCALE farmers to produce fortified corn-soya foods. This partnership has helped GUTS introduce new products and strengthen its supply chain.
Farmer training programs have helped scale out improved crop management methods, fertilizer blends, better post-harvest handling and pest and disease control. New technologies such as moisture meters and row planters have been introduced. A series of grain warehouses is under construction.

Sesame Business Network. This partnership involves 19 farmer unions and over 80,000 smallholders. It has helped scale out production technologies and new rotation crops such as sorghum and pulses, to improve soil health and the sustainability of sesame farming systems in northern Ethiopia. High-yielding sorghum hybrids

have been introduced, and farmer groups connected to large-scale buyers. The program is helping to identify crops that are profitable, environmentally beneficial and could improve food access for the 1 million farm laborers that migrate to the region each season.

Meki Batu Cooperative Union, vegetables. Meki Batu has 8,000 members farming 6,000 hectares, in areas with good soils and irrigation. It aims to expand production of tomatoes, onions, chilies, French and haricot beans for the Addis Ababa market. Training programs, using local-language manuals developed by 2SCALE, have helped introduce new seed varieties and improve irrigation efficiency, soil health, crop management, disease control and post-harvest handling. New customers have been identified, and a new branding and marketing strategy launched. Partners include the Dutch non-profit Agriterra.

Alema Koudijs Feed Factory, animal feeds. This partnership connects a major feed manufacturer (AKF), a dairy processor (Family Milk) and small-scale farmers. AKF specializes in low-cost feeds made from locally available raw materials. Family Milk is scaling out new fodder technologies and providing feed on credit to its 2,000 farmer suppliers. It's also broadening its product range with new yogurt flavors and small-pack milk for low-income households. 2SCALE support has helped Family Milk introduce new quality control methods and ICT tools for supply chain management.

Solagrow, potatoes. Solagrow works with 400 farmers directly and several thousands indirectly, through cooperative unions. The company offers seeds, extension support, training, mechanization services (e.g. tractor rental) and marketing services to smallholder potato farmers. This partnership focuses on promoting mechanization, crop rotation (onions, barley, canola and other crops) and use of the broadbed planting system to combat water logging. Solagrow has established four permanent demo/training centers, with irrigation and infrastructure. Another partner is Heineken, which is interested in sourcing barley.



GHANA

Fruittiland, citrus. Fruittiland buys citrus fruit from more than 3,000 farmers to produce juice concentrate for export. The key partners are Dutch companies Verbruggen Juice and Fair Trade Original, which supply fair-tradecertified juice to supermarkets in Europe. Training programs have significantly improved orchard management and fruit quality. Fruittiland has installed eight new extraction machines, doubling its processing capacity. After struggling with quality issues for two years, the company re-qualified for fair-trade markets in 2015, and rewarded its farmersuppliers with a premium of \$200 per ton.

East West Seed International, vegetables. High-yielding, tropically adapted varieties from EWIT have helped more than 3,000 smallholder farmers ramp up production for urban markets. Farmer groups are using the new varieties and innovations such as plastic mulching and trellising to produce onions and tomatoes that successfully compete with imports. For example, new fungi-resistant

varieties have made it possible, for the first time, to grow onions in the rainy season. Producer groups now have the technical skills and the market linkages to deliver consistent volumes, even in the off-season.

HPW Fresh & Dry, mangoes and pineapples. HPW purchases fruit from smallholder producers for processing and export to Europe. This partnership has helped resolve constraints — inconsistent supply, poor quality, lack of traceability — that threatened to make the business unviable. More than 1,700 mango and pineapple farmers now use modern methods for orchard management and post-harvest handling. HPW is expanding its processing lines. A program launched in 2015 in collaboration with CropLife has created a pool of trained technicians who offer crop spraying services at affordable rates.

Mushroom Growers and Exporters Association of Ghana. Technologies and market linkages through this partnership



have helped revive the mushroom industry in Ghana. Producers are beginning to work collectively. The association has been linked with research centers that supply mushroom spores. Production has grown from 50 tons to 750 tons per year in two years. Standards of hygiene have improved dramatically, and orders are flowing in from Brazil and several European countries. A pilot program is helping to promote sales in and around Accra with better packaging and marketing.

Farmer cooperatives, soybeans. This partnership links several producer and processor cooperatives, targeting three markets: soya food products (e.g. kebabs, milk) made by women's groups, cake for animal feed, and oil for the paint industry. Yields have increased sharply, with farmers using Rhizobium inoculants and best-practice management. 2SCALE support has helped create local entrepreneurs who supply agro-inputs or provide crop spraying services. Training and credit linkages have strengthened processor cooperatives. A pilot program is helping to market soy-based foods to low-income families.

Noyine Naturals & Unity Processing, groundnuts. Both companies are headed by women. They purchase raw groundnuts from small-scale farmers to produce paste, oil and other products. Project linkages have helped reduce costs and increase reliability of supplies. Unity Processing now trades about 50 tons per year through outlets in Bolgatanga, Tamale and Accra. A new pilot program with Noyine Naturals is testmarketing groundnut paste in small polythene sachets for low-income families. The product, approved by the Ghana Standards Board, is 25 percent cheaper than the competition.

Wienco (Ghana) Ltd., rice. This Dutch-Ghanaian firm is expanding from fertilizer distribution to commodity trade. It has acquired a rice mill and is developing outgrower schemes in two regions. Wienco will provide 2SCALE rice clusters with free extension services and inputs on credit, and buy back the harvest for packaging and resale. Seven clusters have been established, more are planned. This partnership will also expand Wienco's work on cost-saving fertilizer deep placement technology. Other partners include government agencies GIDA (irrigation) and GCAP (infrastructure support).

Atibire Enterprise, guinea fowl. This partnership links processing firm Atibire to 2SCALE clusters that produce guinea fowl chicks. Atibire processes 15,000 birds annually and operates seven retail outlets in Bolgatanga and Accra. A key partner is the national Guinea Fowl Farmers Association, which is coordinating the supply of eggs and keets. This is a relatively new value chain in Ghana, therefore credit is a major challenge. A pilot program, launched in 2015, is helping to link the company and its suppliers to banks and microfinance agencies.



KENYA

Agrico, potatoes. Dutch potato varieties, bred with specific traits for specific uses, are creating new opportunities in Kenya. New high-yielding Agrico varieties have been successfully field-tested by 2SCALE clusters. More than 1,200 farmers have been trained on improved production methods. Low-cost potato storehouses are being scaled out with co-investment by traders and processors. A variety catalog has been prepared, jointly with the National Potato Council, as a first step to creating a national database. Another partner, Kevian Ltd, is building a new processing plant to make fries and crisps.

Rijk Zwaan, vegetables. 2SCALE farmers in central Kenya have substantially increased profits with high-yielding, disease-resistant vegetable varieties (tomatoes, cabbages, kale and others) developed by Rijk Zwaan and sold through its agent, Kenya Highland Seeds. Another partnership (with the same farmer groups) focuses on bananas, in collaboration with Dutch firm Stokman Rozen,

which provides tissue culture technology. A microfinance partner has provided loans to over 600 banana farmers, with repayment terms tailored to the crop cycle. The Kirinyaga county government has signed an agreement with 2SCALE, aiming to replicate this approach with vegetable cooperatives across the county.

ARM Holdings, rice. Fertilizer company ARM is helping to scale out enhanced fertilizer formulations and deep-placement (FDP) methods for rice farmers. The company produces FDP briquettes, provides free extension services and runs training and demonstration programs. Farmers bought more than 60 tons of briquettes last season, increasing yields by 30 percent while using substantially less fertilizer, and preventing environmental damage from fertilizer run-off. Fertilizer is part of a 2SCALE 'package' that includes new rice varieties, row-planting and a seeding machine that cuts labor costs by half.



PureCircle Kenya, Stevia. The leaves of this plant are processed into a low-calorie natural sweetener. PureCircle, the world's largest processor, purchases Stevia from 5,000 smallholder farmers for export. Cultivation has expanded from a single region in the Rift Valley to 10 counties across Kenya. Partners include government agencies (Stevia has been added to the national fertilizer subsidy program), finance institutions and fertilizer manufacturer ARM Holdings, which is promoting blended fertilizers for Stevia. A number of small local firms have emerged, providing aggregation and other services.

Eldoville Dairies. Eldoville buys milk from 1,500 small-scale dairy farmers to produce cheese, yogurt and flavored whey. The partnership has helped scale out new forage hybrids, quality-based payment systems, and innovations such as biogas plants and solar-powered milk coolers. Eldoville has built a new plant, increasing capacity ten-fold. Farmers have increased milk yields by 50 percent. The company has improved its milk-to-cheese conversion efficiency by 30 percent. This partnership is being used as a model for broader linkages with commercial processors and dairy cooperatives.

Shalem Investments, sorghum.
Shalem buys sorghum and other crops from 9,000 smallholder farmers. This partnership has created more than \$ 3.5 million in wealth for small-scale farmers, and diversified the commercial sorghum market from beer brewing to flour and animal feed. Training programs have helped promote new hybrids and improved crop and soil management methods. A pilot program has developed affordable, nutritious sorghum-soya blended flour for low-income families. Partners include SoilCares for soil testing, software developers for supply chain management and Faulu Bank for farmer credit.



Mali

East West Seed International, vegetables.

EWIT provides technology and training. The partnership is driven by linkages between women wholesale traders in Kati and Bamako, a trading company and a large-scale processor. More than 11,000 smallholders — of whom 40 percent are women — now use improved farming methods, sell collectively, and coordinate their production schedules to optimize profits. 2SCALE farmers have switched to new EWIT varieties of onions, tomatoes, pepper, greens and pawpaw. Last year, a cooperative with 1,020 members (860 women) earned 120 million FCFA from EWIT onions.

SONAF, yellow maize. SONAF sources maize from 6,600 farmers for resale to flour and animal feed producers within Mali, and wholesale traders exporting to neighboring countries. The company has stabilized its supply chain by progressively replacing imports with locally grown maize. This partnership has transformed more than

100 farmer organizations through training, new fertilizer products and linkages with fertilizer suppliers and finance agencies.

Nearly 128 million FCFA has been disbursed as fertilizer credit under a package deal where farmers purchase index-based drought insurance through another partner, PlaNet Guarantee.

PROSEMA (Society for Promotion of Sesame in Mali), the country's largest sesame processor, was able to source barely 10 percent of its requirements locally. Today, it buys from 13,000 smallholder farmers. The partnership has helped transform an unstructured market dominated by spot purchases and fluctuating prices, to a stable market based on transparency and contracts. Several farmer groups now use irrigation to harvest two crops per year instead of one. A stakeholder platform has been established, linking six producer unions with marketing firms, traders, transporters and banks.



Benkadi Yiriwaton, Cimporoco & Benkadi

Ton, rice. Three rice-farmer cooperatives, with over 3,700 members, are expanding production and connecting to women processors who make and sell parboiled rice. This partnership has strengthened both production and processing. Farmers now use best-practices to improve yield and quality, and are able to obtain microfinance loans. Women's groups have improved record keeping and financial management, and are buying paddy rice collectively, in bulk. A new pilot program is test-marketing affordable, nutritious parboiled rice to low-income households.

Danaya, cassava. This women's cooperative purchases cassava from smallholder farmers to produce *attiéké*, a popular traditional dish made from fermented cassava. The partnership has helped identify additional producer groups, improve processing techniques and link Danaya to traders, transporters and microfinance agencies. A pilot marketing program targets lowincome consumers in Sikasso. Danaya will sell both fresh and dried *attiéké* depending on distances to market (fresh *attiéké* is highly perishable). By 2017, the cooperative aims to process 9,000 tons of cassava per year.

Mali Yiriden & URCEP, potatoes. These two trader cooperatives, which buy from smallholder farmers for resale, aim to increase sales to retailers in Mali and wholesalers in Burkina Faso, Ghana, Nigeria and Togo. This partnership has helped improve competitiveness in several ways. More than 3,000 farmers are using improved production methods, new seed potato varieties and better post-harvest management and storage. Traders are able access credit. Coordination among value chain actors has improved. The goal: by 2017, source from 5,000 farmers, expand trade to 10,000 tons per year.



Mozambique

Dutch Agricultural and Trading Company,

cassava. DADTCO's mobile processing units have dramatically expanded market opportunities for small-scale cassava farmers. The company purchases fresh cassava from more than 6,000 farmers for processing and sale to CDM, the largest brewer in Mozambique. Every month, the business injects 1 million meticals into the local economy. The partnership has encouraged farmers to invest in high-quality planting material and blended fertilizers for the first time. A key partner is the national research center IIAM, which provides new, high-yielding cassava varieties.

Montesco, potatoes. Montesco is a seed potato producer and distributor for HZPC-Netherlands. This partnership has helped introduce new high-yielding varieties, train farmers on crop management, link farmer groups to buyers, and train government regulatory staff on seed certification, quality management and other areas. 2SCALE farmers

in Manica, Sofala and Tete provinces have embraced the technology 'package', even combining their fields into 25-hectare blocks to create economies of scale. Partners include the national seed agency DNSA and the International Potato Center.

Agro Commercial Olinda Fondo, soybeans. ACOF aggregates soybeans from 5,000 farmers for resale to bulk buyers. This partnership has introduced new soybean varieties and Rhizobium inoculants to increase yields, and linked farmers to crop insurance providers. A key partner is Novo Horizontes, a large-scale chicken feed producer which expects to buy 5,000 tons per year. ACOF also works with NOSSARA, a women's cooperative that used 2SCALE training and support to expand its production of soy-based food products for low-income families.

DanMoz, dairy. DanMoz purchases milk from smallholder dairy farmers to produce yogurt and cheese. A joint training program has helped introduce new forage crops, silage production and fodder/forage banks to improve animal nutrition and milk yields. The partnership is also rolling out a livestock insurance scheme, and has developed an innovative marketing model to deliver low-cost yogurt to low-income households. Partners include the local crop and dairy firm AgroMaco, which will supply specially formulated cattle feed and train small-scale farmers on dairy management practices.



NIGERIA

FrieslandCampina Wamco, dairy. FCW is expanding local sourcing of fresh milk, progressively reducing its dependence on imported milk powder. This partnership has brought traditional pastoralists into the commercial dairy sector, with improved husbandry, quality management and other innovations. Fulani producers now have bank accounts and receive payments electronically. FCW has built four collection centers that receive 11,000 liters of milk per day (18,000 liters in peak season). Other partners include Mueller Ltd (chilling equipment), feed suppliers, seed companies (forage crops) and vet services.

Psaltry International & Nigerian Breweries, cassava. This partnership has created a huge new market for cassava. Psaltry purchases cassava from 600 smallholder farmers to produce starch and maltose syrup for sale to Nigerian Breweries (Heineken subsidiary). It has installed a new production line, almost doubling capacity.

Farmers are using new starch-rich varieties and special fertilizer blends, and trialing mechanized planters and harvesters. Partners are now working to reduce transport costs, formalize the price structure and subsequently roll out this model to other Nigerian Breweries factories in West Africa.

East West Seed International, vegetables. This partnership initially focused on testing new varieties of vegetables. Today it's driven by business linkages between farmer groups, traders, processors such as AACE Foods, and microfinance agencies such as LAPO Bank. The partnership is helping to scale out not only new varieties but also improved farming practices and low-cost processing methods (e.g. solar dryers) to add value to fresh produce. CropLife Nigeria and the EU organization COLEACP are providing services and training on safe, effective pest control methods.



Farmer cooperatives, maize. This partnership focuses on technical and institutional innovations to eliminate aflatoxin contamination in harvested maize. Two farm cooperatives are involved. Partners include the International Institute of Tropical Agriculture (biopesticides to combat aflatoxin), bulk buyers (Nigerian Breweries, AACE Foods, Sart Partners), banks, microfinance agencies and agro-input suppliers. Interventions are also helping to create new market linkages, improve farmers' access to credit and scale out improved methods for soil fertility management, post-harvest handling and mechanization.

Farmer organizations, rice. Miva, one of the largest rice mills in Nigeria, struggles to source sufficient paddy rice to operate at full capacity. This partnership, launched in 2015, connects Miva with farmer groups in Benue State. The goal is to contract 6,000 smallholder suppliers to supplement production from Miva's 1,000-hectare farm. Farmer mobilization is ongoing. The next phase will promote new seed varieties and improved crop management techniques; in particular, fertilizer deep placement technology to achieve higher yields with one-third less fertilizer.

Farmer cooperatives, soybeans. Four cooperatives, with more than 6,000 members, are involved. Farmers are using Rhizobium inoculants to increase yields, replacing local varieties with industry favorite TGX 1448, and pooling harvests to attract large-scale buyers. 2SCALE interventions have helped improve post-harvest management, warehousing and business planning, enabling farmers to obtain bank loans. Partners include the International Institute of Tropical Agriculture, seed suppliers, financial institutions and several soya processors including AACE Foods, which is developing a soya-maize 'nutrition pack'.

Pampaida groundnut cluster, Nigeria. This partnership is driven by small, mostly women-headed processing firms producing groundnut oil and cake. Business linkages between processors and groundnut farmers, and between farmers and seed producers, have significantly increased yields and output. A pilot program is helping to identify new markets, particularly for Tom Brown, a popular, low-cost flour mix made of groundnuts/soybeans and maize. Ongoing market studies will be followed in 2016 by training for women processors and expansion of producer-processor-retailer linkages.



UGANDA

Nile Breweries & Uganda Breweries,

sorghum. This partnership is helping to streamline supply chains for the two largest sorghum buyers in Uganda — together representing a market of more than 25,000 tons per year. Both breweries work with 2SCALE farmer groups. The partnership focuses on the companies' purchasing agents, building their capacity in technical areas such as crop quality and harvest estimation, and introducing ICT tools (developed by another 2SCALE partner) to improve supply chain management, monitor deliveries, accelerate farmer payments and plan logistics.

Gulu Agricultural Development

Company, multiple commodities. GADC buys sesame, sunflower, cotton and chilies from more than 10,000 farmers for processing and resale. Training programs led by GADC staff have helped scale out improved crop management methods, mechanization, and innovations such as 'drying racks', low-cost moth traps, and tarpaulins for threshing.

Demonstration plots, planted and managed by 2SCALE farmers, have attracted over 7,000 visitors. Sixty new farmer groups have been created in five districts, and the company is investing in new equipment to handle the increased production.

Nyakatonzi Cooperative Union, oilseeds. This 15,000-member cotton cooperative is introducing soybeans and sunflower as rotation crops, and has invested in new oil-processing equipment. The partnership is helping to support this diversification. Market studies have identified potential markets for cooking oil as well as cottonseed cake and husks. New varieties and fertilizer blends are being field-tested. Farmer training programs have helped increase yields, ensure year-round supplies and minimize price fluctuations. A new pilot program aims to promote cottonseed cooking oil to low-income families.

RECO Industries, soybeans. RECO, a manufacturer of processed foods, is keen to expand its soybean supply chain. This partnership, launched in September 2015, will scale out technologies (new varieties, Rhizobium inoculation, optimal planting density) to increase soybean yields, starting with 2,000 smallholder farmers in 100 producer groups. Farmer cooperatives will also be provided support and advice on registration and legal procedures. The goal is to increase farm incomes by 20 percent and RECO's sales of soybean products by 30 percent.











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