ORGANIZING STUDY TOUR TO THE AGRICULTURAL WHOLESALE MARKETS
TA-9218 REG

Draft Final Report

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MERCASA
Paseo de La Habana, 180 – 28036 Madrid (Spain)
www.mercasa.es

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Introduction

As stated in the Terms of Reference, the main objective of the assignment "Organizing Study Tour to the Agricultural Wholesale Markets" was to build the capacity of government officials in selected DMCs (Indonesia, Pakistan and The Philippines) on the development, operation, and management of wholesale markets for safe and fresh food, and their linkages with the producers.

Mercasa conducted a first edition of the Study tour in June (24th to 28th) for Indonesia and The Philippines representatives. In September (23rd to 27th) Mercasa welcomed delegates from Pakistan.

As required by the Terms of Reference, Mercasa:

- Has organized the study tour in two wholesale markets in Spain – Mercamadrid and Mercabarna (June 2019) and Mercamadrid and Mercavalencia (September 2019) – and has managed and arranged travel and logistics for the participants.
- Has also included meetings with and/or visits to agricultural producers and/or their organizations who supply in the wholesale markets: Villa del Pardo producers, cooperatives Actel and Fruit de Ponent (June 2019) and Villa del Prado, Anecoop and Cooperativa Agricola San José (September 2019)
- Has imparted knowledge and skills on the different aspects of wholesale markets to the group of government officials from selected countries and 6 ADB staff.
- Has shared training materials and an information note on the wholesale markets selected for visits with the participants and ADB.

A detailed program of the study tour and the training program was also prepared and submitted by MERCASA for ADB's approval.

This report is a required output, as per the Terms of Reference related to the contract awarded to MERCASA. This document represents the draft final report. Final comments to this report by all parties will be incorporated during a short discussion period following its submission.

The report is structured around the following three headings:

- Mercasa and the Mercas' network of wholesale markets
- Visits to Wholesale markets and production sites
- Conclusions

Appendixes includes:

- Primer on wholesale markets.
- Detailed agenda of the Study Tour (both June edition and September).
- List of delegates of selected DMCs, participants of ADB and Mercasa team.
- Photo albums.

Training materials and presentations are submitted in a separate file.

1. Mercasa and the Mercas' network of wholesale markets

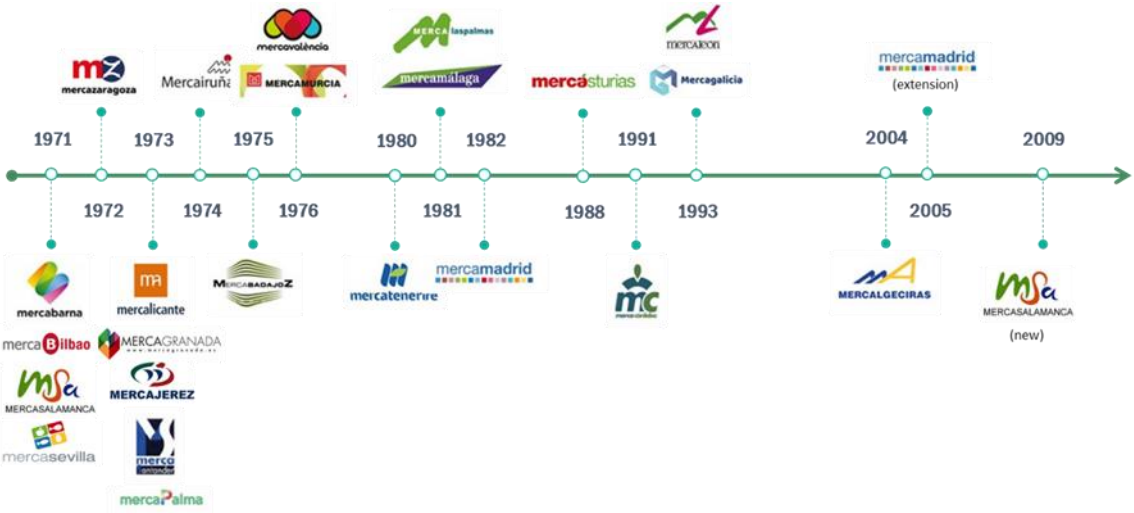
During the Study Tour, Mercasa has had the opportunity to share its experience in the creation and planning of Spanish wholesale markets.

The genesis, conceptual model and evolution of Mercasa are described in the following lines (detailed information on this subject is available in training material distributed during the first day of Study tour)

Mercados Centrales de Abastecimiento, S.A., S.M.E., M.P. (MERCASA) is a state-owned company, whose shareholders are the Ministry of Finance and the Ministry of Agriculture, Fisheries and Food of the government of Spain.

Mercasa was created by Decree in 1966 for reasons of national interest, with the aim to improve the supply and the distribution chain of fresh food. The corporate purpose of Mercasa is the design, construction and management of wholesale markets, the so-called "Mercas".

Figure 1 : timeline of Mercas.



Source: Mercasa.

In the sixties Spain was immersed in socioeconomic changes of great relevance, with strong migratory movements to the cities and rapid development of the urban nuclei that welcomed these rural populations. City markets could not meet the growing demand for products, and being located in city centers with precarious facilities, they were a problem for traffic and supply, a health risk and a bottleneck for growth and entry of new businesses, in addition to the imbalances in prices and volumes.

The mission for Mercasa was to create modern network of commercial infrastructures in order:

- To concentrate in a single place the supply of national and international fresh product (fruits and vegetables, fish and meat) for professional clients (not final consumers), meaning a B2B market.
- To ensure the prices formation under conditions of transparency and free competition.
- To facilitate the development of specialist retail traders in the cities.
- To create a trade channel for local producers: maintenance and development of domestic agriculture.
- To ensure the supply of the cities with quality and safe products at competitive price.
- To ensure traceability and food safety of fresh produce.
- To facilitate the development of complementary industries around wholesale markets (clustering effect) in the medium-long term.

Mercasa developed a conceptual and business model of Wholesale Market, to be locally adapted in different locations in Spain, the so-called "Mercas" being each "Merca" a holistic wholesale market. The main features of this infrastructure are:

- Sustainable: lively market, with the capacity to embrace new activities, operators and clients.
- Adaptable: a structure sufficiently open to be able to evolve and adapt towards each next step.
- Visionary: anticipating the future. Land reserves.
- Multiservice: not only "market" approach but "Fresh food hub" approach.
- Multiproduct: one stop shopping, all kind of fresh foods and non-fresh foodstuffs.
- Professional: business to business model. No end-consumers are allowed to buy.
- Strategically located: far enough but necessarily close to the city.
- Global: country solution approach, covering the whole Spanish geography: 23 Mercas.
- Attractive: appealing and safe space for operators.

The markets were developed in co-ownership with the city council of each city (as the City Councils had and still have nowadays the competence of food supply). Mercasa provided the conceptual model, the technical design and the financial resources for construction and the city council provided the land to establish the market. The majority of the markets were built during the late seventies-early eighties (see figure 1).

Every Merca is designed according to the global concept of a holistic Food Unit, which brings together the Wholesale Markets for Fruits and Vegetables, Fish, and Meat. Furthermore, they include areas called Added Value Areas: large areas for services, including logistics and industry, as well as distribution platforms, cold storage facilities, etc.

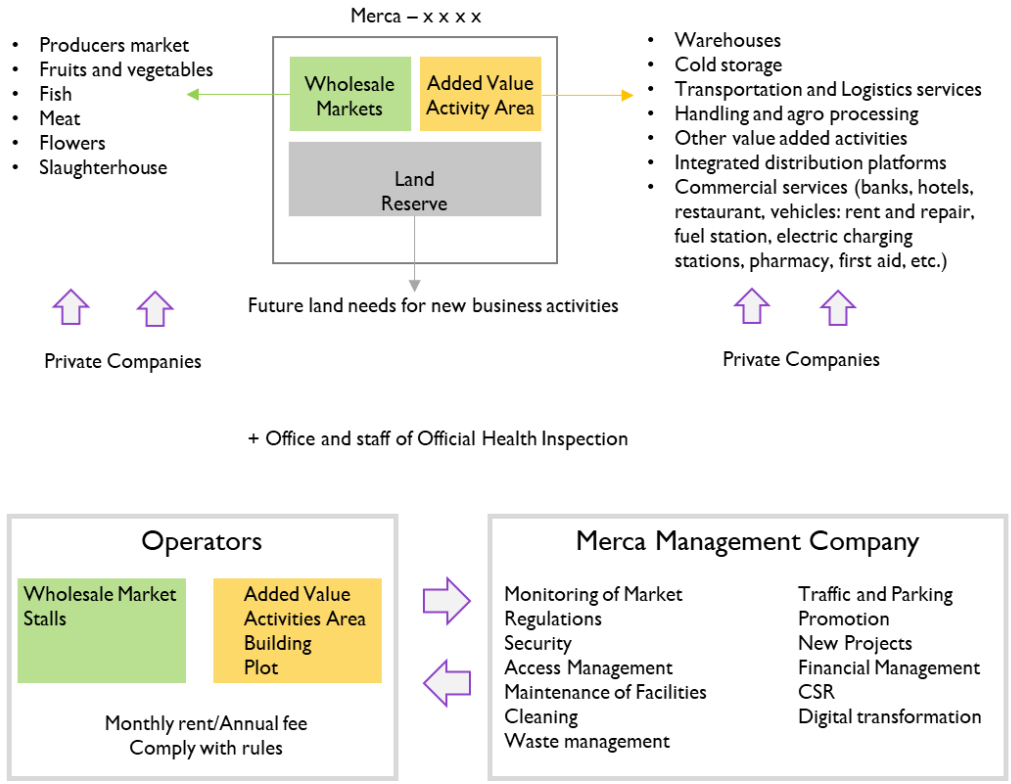
Figure 2 : aerial view of Mercamadrid (Wholesale Market of Mercamadrid)

Source: Mercasa

Each market had (and currently has) the following physical elements:

- Pavilion/s with stalls distribution and common areas for wholesale marketing of fresh products, usually separate pavilion for each type of product (fruits and vegetables, fish and seafood, meat, flowers and others).
- Wide parking areas and roads.
- Warehouses, cold storage facilities and other services (banking offices, restaurant, cafeteria, etc.) for the operation of the wholesalers.
- An extensive zone of free area, destined to incorporate complementary food business in the future.

Figure 3 : conceptual and business model of a «Merca»



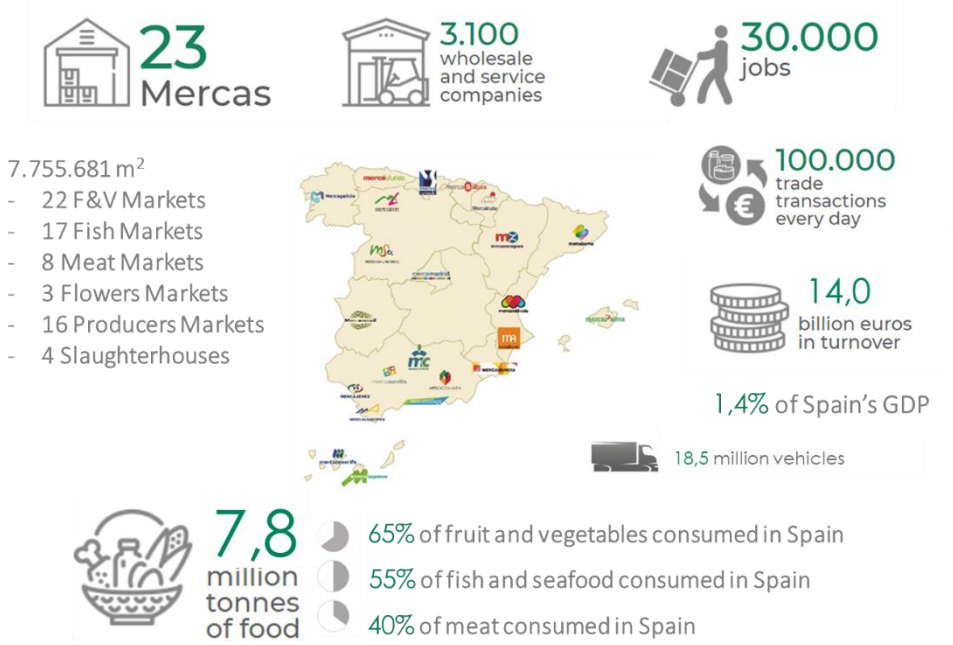
Source: Mercasa.

Today, the Mercas Network is made up of 23 Mercas. It includes more than 7 million square meters of space, with 52 wholesale markets housing more than 3,000 wholesale companies. 2,600 of which sell fruits and vegetables, fish, meat, and flowers, while the other companies are dedicated to complementary and added value services, such as logistics, processing, cold storage, etc. and user services.

The wholesale commercial activity in the 23 markets reached in 2018 a total value of almost 14 billion €, equivalent to 1.4% of the Spanish GDP, and corresponding to a volume of commercialization above 7.8 million tons of fruits, vegetables, fish and meat.

The volumes marketed in 2018 generated an important market share of the Mercas Network: 65% of the total fruit and vegetables consumed in Spain, 55% of the fish and seafood and more than 40 % of meat. These percentages acknowledge the strategic role of the Mercas as a channel for the supply of perishable products.

Figure 4 : Mercasa today



Source: Mercasa.

The growing activity of sales and services developed in the Mercas increasingly generates more movement of all kinds of people and vehicles. 18 million vehicles travel through the 23 Food Units yearly, at a rate of about 65,000 daily. In terms of the influx of buyers, both retail and wholesale, hotel and restaurants or institutions, the average daily attendance is estimated at 90,000 users.

The Mercas' network is a unique model in the world. MERCASA designed all Mercas under same common functional, institutional, and governance criteria, therefore network concept.

Each market is managed by a limited company, i.e. each individual Mercasa facility (one of the 23 Mercas) is a legal joint stock company, therefore a juridical/legal person. Shareholders are public governmental bodies of Municipal level and Mercasa.

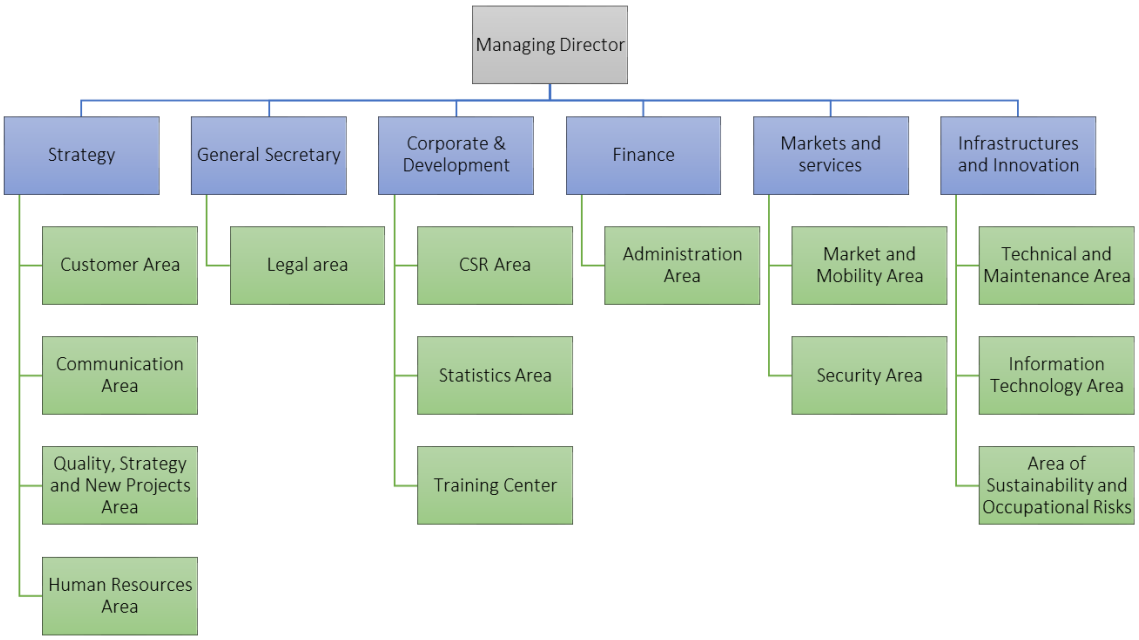
The aim of each limited company is to manage and maintain the infrastructures and to provide services for companies located in the Merca in order for them to develop their activities in the best conditions.

The basic services that the market managing company should offer are:

- Cleaning of the site (public areas).
- Waste management.
- Surveillance and security.
- Access control (toll or/and truck weight).
- Disinfestation and pest control.
- Fire prevention and protection.

- Maintenance of facilities.
- Traffic and parking management.
- Information on prices and volumes (for statistic control and general information purposes).
- Monitoring of compliance with the rules of the market by operators.
- Training (of staff of the market but also of traders in collaboration with associations or other organizations).
- Communication and public relations.

Figure 5 : organization chart of Mercamadrid (Wholesale Market of Madrid).



Source: Mercasa.

On the other side of the relationship, operators must commit to the economic obligations (rents from stalls, land and other facilities, toll fees) and have to comply with market rules related to business hours, maintenance of private facilities, operating rules, etc.

Figure 6 : operating Rules of Mercamadrid (Wholesale Market of Mercamadrid).

- Fruits and vegetables Central Market Operating Regulations
- Fish Central Market Operating Regulations
- Mercamadrid Service Provision Regulation

http://www.mercamadrid.es/informacion-normativa/

Source: Mercamadrid.

In addition, the independent public health inspection is located within the Merca, usually in their own offices and laboratory to monitor on a daily basis quality and procedures regarding handling, manipulation and storage of foodstuffs.

With regard to profitability, Mercas are run following private business criteria of management. As explained before, main sources of income of the management company come from rents, in addition to toll entry fees and other payable services. On the counterpart, the operational costs and wage costs are the bigger expenditure items. The companies are profitable, which implies that funds will be available for reinvesting in new projects or services improvement and also that shareholders receive an annual dividend.

Regarding cost recovering of investment, the Mercas have had a similar timeline. It must be noted that the volume of investments required is very high and the period of recovery of investment is long compared to other types of investments. Nevertheless, the average time for recovery of the investment is between 12 and 15 years depending on the concrete situation and intensity of commercial and business related activity of each market during these first years.

On the role of Mercasa, the company participates in the management of every Merca not only through its presence in the Board of Directors but also -and mainly- through the day-to-day collaboration with the General Manager of the Merca in every management aspect. Mercasa promotes benchmarking within the group of all "Mercas": good practices and lessons learnt, knowledge and expertise are channeled through Mercasa, as umbrella Company, to other Mercas.

In addition, Mercasa leads corporate and pilot projects that could benefit the Mercas (such as ecommerce, branding and promotion of Mercas, improvement in logistics, environmental management, etc.) and also negotiates services contracts acting like a central purchasing body (insurance contracts, supplies, information systems, fairs and exhibitions, etc.).

Another key function of Mercasa is the coordination of prices and volumes discovery in Markets. On a daily basis, Mercasa compiles the prices and commercialization data of main products collected in the 23 wholesale markets, publishes on the website and share with Ministry of Agriculture.

Figure 7 : information on prices in Mercasa webpage.

ÚLTIMOS PRECIOS

DEL 14 al 18 de JUNIO DE 2019

MERCAMADRID	LANGOSTINO 16,50€/kg (14/06) 16,50€/kg (18/06)
MERCABARNA	NECTARINAS 1,50€/kg (14/06) 1,45€/kg (18/06)
MERCABILBAO	CALAMAR 7,00€/kg (14/06) 6,40€/kg (18/06)
MERCASEVILLA	PIMIENTOS VERDES 0,95€/kg (14/06) 0,95€/kg (18/06)
MERCAVALENCIA	CALAMAR 4,65€/kg (14/06) 4,65€/kg (18/06)

FRUTAS	MERCAMADRID		MERCABARNA		MERCABILBAO		MERCAVALENCIA		MERCASEVILLA	
	14/06*	18/06*	14/06	18/06	14/06	18/06	14/06	18/06	14/06	18/06
Albaricoques	1,14	1,00	1,00	1,00	1,10	1,00	1,00	1,00	1,30	1,30
Cerezas	2,09	2,48	2,70	2,40	2,80	2,80	2,50	2,50	3,00	3,00
Fresones	1,21	1,50	2,50	2,50	1,85	2,00	2,00	2,00	2,11	2,11
Melocotones (rojos)	1,15	1,07	1,20	1,20	0,95	0,90	0,75	0,75	1,16	1,16
Melón Piel de Sapo	1,00	1,17	1,35	1,35	1,30	1,20	1,10	1,10	1,33	1,33
Naranja Valencia Late	0,70	0,65	0,95	0,80	0,60	0,60			0,44	0,44
Nectarinas	1,29	1,13	1,50	1,45	1,30	1,10	1,25	1,25	1,22	1,22
Nísperos	2,00	3,00	1,60	1,60	2,00	2,00	1,25	1,25	1,98	1,98
Pera Sanjuanera	2,50	2,34	1,50	1,75	2,25	2,50	2,00	2,00	2,50	2,50
Sandías	0,63	0,53	0,77	0,65	0,75	0,70	0,60	0,60	0,55	0,55

Source: Mercasa

Furthermore, Mercasa implements the Annual Report on Production, Industry, Distribution and Consumption of Food in Spain. This reports shows what, how much and where do Spanish people eat, where do they buy food and how much do they pay. The report is a national reference in the food sector.

Figure 8 : report Food in Spain 2018.

Source: Mercasa

Beyond the primary role of the wholesale markets, the global Mercasa model has contributed to:

- Improving and promoting wholesale commercialization channels.
- Developing labelling, packaging, and handling industries of food products.
- Increasing the productivity of logistics and transport companies by reducing their costs.
- Promoting and supporting specialized retail trade (green grocers, butcher shops, and fish shops, etc.), as well as large distribution companies, by adapting working hours and services to their new needs.
- Increasingly supplying the hotel and restaurant sector, by adapting the offer to the specific needs of the sector.
- Supplying institutional consumption, with the resulting positive impact on school food, hospital food, etc.
- Offering professional training to all the groups of wholesale and retail sale distribution in their different facets: handling of food, business management, application of new technologies, training that is increasingly important throughout the Mercas network.
- Driving environmental sustainability policies by implementing pioneering projects for the management of containers and waste.

Mercasa is a member of reference of the World Union of Wholesale Markets (WUWM), which is a non-profit association that aims to promote the international exchange of information on wholesale and retail markets, with a view to improving their construction, organization and management.

Mercasa is also involved in several work groups set up within the WUWM and dealing with aspects of special interest, such as those relating to EU rules and regulations (European Union Group), and the dissemination and encouragement of good practices in the management of traditional retail markets in the perishable produce distribution chain (Retail Markets Group).

Moreover, Mercasa takes part in various activities for food promotion and consumer information encouraged by the Spanish government, the European Union and the sectorial organizations to promote the consumption of fresh products both through long-term actions and through campaigns. Mercasa also collaborates with sectorial, professional and social organizations for promoting the consumption of fresh food, such as with the Fundación Sabor y Salud and the Asociación 5 al Día.

2. Visits to Wholesale markets and production sites. June edition

The agenda of the Study Tour was organized as follows:

Day 1	Monday, June 24th	Madrid: meeting with Secretary of Commerce. Madrid: training session on wholesale markets in Mercamadrid (Wholesale Market of Madrid).
		Madrid: visit retail market Mercado de La Paz. Madrid: visit retail market Mercado San Antón.
Day 2	Tuesday, June 25th	Madrid: visit MERCAMADRID (Wholesale Market of Madrid).
Day 3	Wednesday, June 26th	Visit Villa del Prado. Production area and post-harvest facilities.
		Train Madrid to Barcelona.
Day 4	Thursday, June 27th	Visit Cooperative ACTEL.
		Visit Cooperative Fruits de Ponent.
Day 5	Friday, June 28th	Barcelona: visit MERCABARNA (Wholesale Market of Barcelona) and wrap-up Meeting in MERCABARNA.

Day 1. Monday, June 24th

First day of Study Tour, delegation was received by representatives of the Ministry of Industry, Commerce and Tourism of the Government of Spain. During the meeting, delegates were briefed on the different tools and public instruments managed by the Spanish Secretary of State for Trade aimed at promoting the Spanish investment in third countries.

On a separate meeting, chiefs of the delegation were received by the Secretary of State of Commerce.

Afterwards, the delegation moved to Mercamadrid (Madrid Wholesale Market) where training session was held by Mercasa representatives. During this session, main aspects of development and operation of wholesale markets were shared and discussed, in particular, Mercasa team made four presentations:

- Wholesale markets at the service of the food chain. MERCASA model: concept and development.
- Wholesale markets operations: how a wholesale market works? 24 hours in the life of a wholesale market.
- Wholesale Markets infrastructures: technical aspects of wholesale markets.
- How to address wholesale markets development projects.

After the training session, the delegation visited Retail Market "Mercado de la Paz", one of the 46 municipal markets of Madrid City (under municipal competence). Mercado de la Paz is the only retail market in the world who works with Amazon through Amazon Prime Now, which is a service that offers market delivery to clients in 1 to 3 hours. Mercado de la Paz is run by the Traders Association.

During the afternoon the delegation visited another municipal market, “Mercado de San Antón”, who was upgraded in 2011 and combines modern distribution (supermarket), traditional stalls of foodstuffs and restaurants.

Day 2. Tuesday June, 25th

The second day of the Study Tour, delegation visited Mercamadrid. Created in 1982, Mercamadrid, the wholesale market of Spain capital city Madrid is the biggest food wholesale market in the country (see Information Note on Wholesale Markets on separate annex).

Figure 9 : plan of Mercamadrid.

Source: Mercamadrid and Mercasa.

Mercamadrid S.A. is the management company of the market. Mercamadrid S.A. is owned by Mercasa (49%) and Madrid City council (51%). The market has a catchment area of 12 million inhabitants and 500 km.

Mercamadrid has a total surface of 221 Ha.

Table 1 : distribution of surface in Mercamadrid

Mercamadrid structure and surface (m^2)	
Fruits&vegetables market	124.400
Fish market	42.600
Meat market	32.600
Complementary Activities Area	421.200
Administrative building and commercial area	31.450
Roads	321.957
Carparks	150.014
Other areas	1.090.347
Total surface	**2.215.060**

Source: Mercasa

The annual turnover of the more than 500 companies operating in Mercamadrid is around 2.7 billion €.

Table 2 : volume of products traded in Mercamadrid.

Annual turnover (2018)		
	Tons	Billion €
Fruits, veg. and potatoes	1.988.782	2,33
Seafood and fish	164.185	1,17
Meat	407.542	1,89
Others	151.876	0,27
Total	**2.712.385**	**5,66**

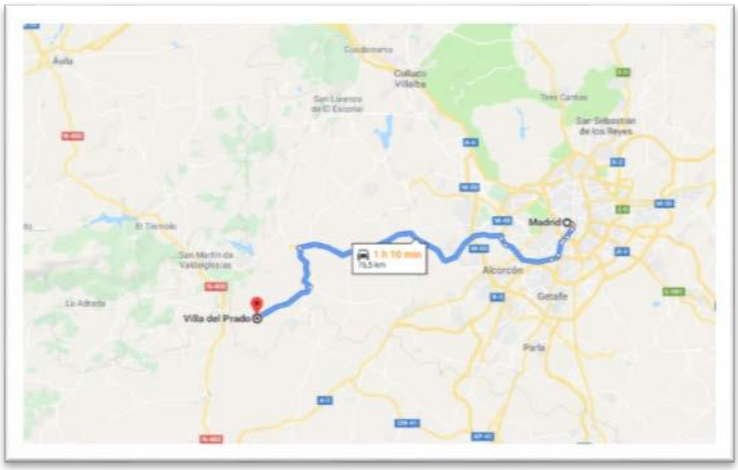
Source: Mercasa.

Delegation visited the fish market, the fruits and vegetables market, the meat market, 3 private companies operating in the Added Value Activities Area (potatoes company "Ibérica de Patatas, fruit company "Eurobanan" and fish company "Atolon"), and the security center of Mercamadrid (see Annexes V and VI: Photo Albums).

Day 3. Wednesday June, 26th

Wednesday, the delegation visited Villa del Prado, the orchard of Madrid. Located in the southwest of Madrid, Villa del Prado currently has 90 vegetables farms in a town of something more than 7,000 inhabitants.

Figure 10 : Villa del Prado location.



Source: https://www.google.com/maps.

Mercamadrid (Wholesale Market of Madrid) is the main destination of the products of Villa del Prado. Approximately 60% of the total production is sold to wholesalers of Mercamadrid. The other 40% is bought by Verduras Curro, a vegetables producer and post-harvest handling company established in Villa del Prado who sells both to Mercamadrid wholesalers and modern distribution. Tomato, cucumber, spring onion and chards from Villa del Prado are very well-known among the Madrid consumers and have excellent reputation. Yearly production is around 10.000 tons per year of each product.

Most of farms are outdoor (170 hectares), although there is also a large area of greenhouses (100 hectares). Villa del Prado Council promotes this agricultural cluster. The City Council owns 150 of the total 270 hectares, which lends to farmers for a symbolic rent of 60 euros per hectare per year.

The town is also wine producer, with 900 hectares of vines that produce between 2 and 3 million kilos of grapes per year. There is a wine cooperative in Villa del Prado that operates at full capacity.

Delegation was welcome at the Town Hall by the Mayor and the Agricultural Counsellor of Villa del Prado and then visited two farms and the facilities of Verduras Curro.

(See Annexes V and VI: Photo Albums).

Day 4. Thursday June, 27th

During day 4, delegates had the opportunity to visit facilities of two second-tier cooperatives of Catalonia region, Actel and Fruits de Ponent.

Catalonia is the most important area for production of sweet fruit in Spain. Catalonia produces more than 50% of the apple and pear of Spain and more than 30% of the peach and nectarine national production.

More than one million tons of apples, pears, peaches and nectarines are yearly produced in Catalonia. Catalonia is also a great exporter of fruit. 25% of the fruit that is produced is sold in foreign markets. France, Italy, Germany, the United Kingdom, Russia and the Netherlands are among the main countries of destination, both for apples and pears and for peaches and nectarines.

Cooperative ACTEL

Actel Grup is a second tier cooperative that brings together 110 cooperatives of Aragon, Catalonia, Castilla y León, Extremadura and the Valencia region.

Main figures:

- 110 cooperatives
- 10.000 families
- 7 working centers
- 191 M€ turnover
- 106.000 tons of fruits/year
- 45.000 tons of alfalfa/year
- 208.875 tons of cereals/year
- 704.191 liters of oil/year

From the field, and throughout the production process, Actel offers comprehensive technical advice to help in the preparation of the technical bulletins, compliance with the rules of integrated production, the preparation of notebooks and the processing of all government aid (Common Agricultural Policy CAP UE). The technical team of agricultural production works to reduce costs and maximize yields.

ActelGrup has acts like a big purchase center of seeds, fertilizers, phytosanitary products and fuels. The great concentration of purchase allows ActelGrup to be the main distributor of major brands within the agricultural sector and, therefore, offer the best price of the products to its members.

The Actel Group Insurance Center manages the contracting of Agroseguro's agricultural insurance.

Fruits de Ponent

Fruits de Ponent is a fruit trading cooperative created in 1992 by 4 fruit production cooperatives. Approximately 180 family units cultivate one of the three most important producing areas of Europe. The farms are located in the regions of Catalonia and Aragon, the valley of the River Ebro, and approximately 175 kilometers from Barcelona.

The gravelly, well drained land of the area and the climate, with over 900 hours of cold weather in winter and constant light in summer, favors the organoleptic qualities of the fruits.

Fruits de Ponent is an organization that supplies to companies on the national and international market. Main figures:

- Cultivated hectares 2.546 hectares
- Production 75.000 tons per year
- Production 75% stone fruit | 25% seed fruit
- Permanent employees: 100

Fruits de Ponent is committed to quality fresh fruit and preserving the environment. FP uses an agricultural system called integrated production, which certifies the product traceability from the field to the consumer, and guarantees the food safety of the fruit by reducing the use of pesticides.

Fruits de Ponent has its own technical team and a laboratory that checks the excellence of the product. The Cooperative invests in innovation and research, together with the University of Lleida, to improve production. It also provides training to all its associates and employees.

(See Annexes V and VI: Photo Albums)

Day 5. Friday, June 28th

The last day of the Study Tour, delegates visited Mercabarna, the wholesale market of Barcelona. Created in 1971, Mercabarna was the first Merca to be developed and second most important market by surface (90 Ha) and commercialization of foodstuffs (2.2 million tons). Mercabarna S.A. is the management company of the market.

Figure 11 : plan of Mercabarna.

Source: Mercabarna and Mercasa.

Mercabarna S.A. is owned by Mercasa (36.79%), Barcelona City council (50.69%), Barcelona County Council (12.16%), treasury stock (0.36%)

Mercabarna has a catchment area of 10 million inhabitants and it is a highly export-oriented market (35% of F&V commercialized are exported). More than 2.2 million tons of food are commercialized annually (see Information Note on Wholesale Markets on separate annex).

Table 3 : distribution of surface in Mercabarna.

Mercabarna structure and surface (m^2) 2018	
Fruits&vegetables market	80.406
Fish market	25.458
Meat market and slaughterhouse	19.302
Flowers market	44.191
Complementary Activities Area	308.723
Administrative building and commercial area	7.731
Roads	303.472

Mercabarna structure and surface (m^2) 2018	
Carparks	109.150
Other areas	10.430
Total surface	**908.863**

Source: Mercasa.

Table 4 : volume of products traded in Mercabarna.

Annual turnover 2018		
	Tons	**Billions €**
Fruits, veg. and potatoes	2.000.217	1,81
Fish and seafood	197.562	1,51
Meat	38.085	0,19
Other food products	30.941	0,05
Total	**2.226.805**	**3,56**

Source: Mercasa.

Delegates visited fruits and vegetables market, producers' market, fish market, the waste management area, the training center and the construction works of the Biomarket, the first European organic wholesale market (see Annexes V and VI: Photo Albums).

3. Visits to Wholesale markets and production sites. September edition

The agenda of the Study Tour was organized as follows:

Day 1	Monday, September 23th	Madrid: training session on wholesale markets in Mercasa Headquarters.
		Madrid: visit retail market Mercado de La Paz. Madrid: visit retail market Mercado San Miguel.
Day 2	Tuesday, September 24th	Madrid: visit MERCAMADRID (Wholesale Market of Madrid).
Day 3	Wednesday, September 25th	Visit Villa del Prado. Production area and post-harvest facilities.
		Train Madrid to Valencia.
Day 4	Thursday, September 26th	Visit Innovation Center. Anecoop.
		Visit Cooperative "Agrícola San José".
		Visit to the Central Market of Valencia.
Day 5	Friday, September 27th	Valencia: visit MERCAVALENCIA (Wholesale Market of Valencia) and wrap-up Meeting in MERCAVALENCIA.

Day 1. Monday, September 23th

On the first day of Study Tour, the delegation was received by the Director of Business Development at Mercasa Headquarters. Delegates had also the opportunity to meet the Chairman of Mercasa during coffee break.

During the training session, main aspects of development and operation of wholesale markets were shared and discussed, in particular, Mercasa team made four presentations:

- Wholesale markets at the service of the food chain. MERCASA model: concept and development.
- Wholesale markets operations: how a wholesale market works? 24 hours in the life of a wholesale market.
- Wholesale Markets infrastructures: technical aspects of wholesale markets.
- How to address wholesale markets development projects.

After the training session, the delegation visited Retail Market "Mercado de la Paz", one of the 46 municipal markets of Madrid City (under municipal competence). Mercado de la Paz is the only retail market in the world who works with Amazon through Amazon Prime Now, which is a service that offers market delivery to clients in 1 to 3 hours. Mercado de la Paz is run by the Traders Association.

During the afternoon the delegation visited another market, "Mercado de San Miguel", located in the city center of Madrid.

The Mercado de San Miguel was inaugurated on 1916. In 1999 the regional government of Madrid together with European financing and private investment from traders, undertook an integral refurbishment of the building.

Centra su oferta en productos de gran calidad, alimentos de temporada, asesoramiento gastronómico, posibilidad de probar aquello que va a formar parte de la cesta de la compra, comer de picoteo, con la ventaja de horarios flexibles.

The market focuses its offer on high quality products, seasonal foods and a premium food court. The markets is a tourist attraction receiving more than 10 million visits per year.

Day 2. Tuesday September 24th

The second day of the Study Tour, delegation visited Mercamadrid. (See description of the Market in first edition paragraph).

Day 3. Wednesday September, 25th

Wednesday, the delegation visited Villa del Prado, the orchard of Madrid. (See description of the visit in first edition paragraph).

Day 4. Thursday September, 26th

During day 4, delegates had the opportunity to visit the Innovation Center of one second-tier cooperative, Anecoop, and facilities of one first-tier cooperative, Agrícola San José in Vaelncia province.

The region of Valencia is well known for its typical citrus fields and its "Valencian orchard" where different vegetables are grown according to the season of the year.

Spain is the largest producer of citrus in the European Union and fifth in the world with an annual production of more than 5 million tons. The Valencian Region is the main citrus region nationwide, both for the area dedicated to this crop (approximately 182,000 Ha, about 60% of the total national) and for production (more than 3 million tons per year, almost 60% of national production). According to FAO, Spain is the main exporter of citrus in the world, allocating more than half of its production for export.

The "Valencian orchard" covers almost 10,500 hectares from the final stretch of the Turia river valley reaching almost to the Albufera of Valencia.

The products grown in the area are very different, from the classics that were already cultivated in the Roman era (cereals, vineyards and olive trees) to rice, tomato and new vegetables such as eggplant and artichoke.

Field of Experiences "Masía Del Doctor" Anecoop

Anecoop is a second tier cooperative, a "cooperative of cooperatives," with 43 years of experience in the market.

Main figures of Anecoop:

- 70 cooperatives and partners companies with thousands of associated farmers.
- Exports to 70 countries.
- 812,267 tons traded yearly (2017-2018 campaign).
- 702.5 million euros of turnover (2017-2018).

Anecoop's own field of experiences, located near Valencia and with a surface of more than 20 Ha, is the most important private test field in Europe and the only one that combines experimental knowledge with the real application in the field.

The properties of some 500 fruit and vegetable varieties are studied in order to boost activities related to varietal improvement and the development of new products adapted to the tastes of consumers.

Cooperative Agrícola San José (Alcasser, Valencia)

The Cooperative Agrícola San José is located in Alcásser, a few kms from Valencia City. Main products of the cooperative are citrus and pomegranate.

It occupies a facility of about 13,000 m^2 of surface, equipped with the latest technology, and divided into three sections: sorting, storing and packing. In the calibration area, products are selected by size and color. Once they are sorted products are stored. The last operation is packaging where products are packaged according to the client's request. Production is exported throughout Europe, as well as to the United States and Canada.

Central Market of Valencia

The market, located in a modernist building, houses 1200 stalls of foodstuffs in a total surface of 8,160 m^2. It was built in 1914 and was refurbished in 2004. The market is owned by the Valencia city council and managed by the traders association.

All kinds of food such as fish, fruits, spices, meat, dairy and bread are sold both for domestic consumption and to supply restaurants in Valencia.

Day 5. Friday, September 27th

The last day of the Study Tour, delegates visited Mercavalencia, the wholesale market of Valencia. Created in 1976. Mercavalencia has a strategic location for food distribution, with direct access to the V30 motorway, which allows quick access to all routes into and out of the city. It’s 5 minutes from downtown Valencia, seaport, railway freight trains and ten minutes from the airport.

The Mercavalencia area of influence covers about 4.000.000 customers.

Table 5 : distribution of surface in Mercavalencia.

Mercavalencia structure and surface (m^2) 2018	
Fruits&vegetables market	31,272
Fish market	12,518
Meat market and slaughterhouse	13,135
Flowers Market	8,972
Complementary Activities Area	148,487
Administrative building and commercial area	2,090
Roads	107,221
Parkings	68,305
Other areas	106,000
Total surface	**498,000**

Source: Mercasa

Table 6 : volume of products traded in Mercavalencia.

Annual turnover 2018		
	Tons	Millions €
Fruits, veg. and potatoes	267,527	267,1
Fish and seafood	113,245	731,6
Meat	69,875	151,7
Total	**450,647**	**1.151,2**

Source: Mercasa

4. Conclusions and way forward

The last day of the program included a wrap-up meeting in which participants had the opportunity to make any further clarification or still pending questions to the MERCASA team.

In addition, a "tour de table" at which a speaker of each of the countries participating and ADB representatives had the opportunity to highlight their main conclusions, impressions and early thoughts regarding Study Tour that was held throughout the week.

Spokesmen of the countries expressed their satisfaction with the contents, inputs and information received during the week, both in theoretical sessions and in the visits to wholesale and retail market facilities, cooperatives and private companies and also offered their compliments and their sincere thanks to ADB for organizing this study tour.

ADB representatives and Mercasa team expressed their satisfaction with the celebration of the Study Tour too. MERCASA considers that this Study Tour has a highly didactic impact as it combines technical visits to wholesale markets, co-operatives and production facilities, wholesale market companies on one side, and presentations on the other side. It allows governmental officials to have a realistic and comprehensive view of the role of holistic wholesale markets and their linkages downstream and upstream in the food distribution chain.

The main issues raised during the conclusion meeting as well as commented during the Study Tour were the following. This is not a comprehensive list and serves only to provide general ideas. An in deep analysis of each country/territory will be necessary to gain more knowledge about the situation of wholesale markets within the value chain and their institutional and commercial role in the trade of fresh products.

Indonesia

- Complex geography of the country (more than 17,000 islands distributed over more than 5,000 kilometers) with poor transport and communications infrastructures hinder transportation and commerce of fresh food.
- Jakarta is the most populated city concentrating more than 10 million inhabitants in the capital city and around 30 million in the metropolitan area.
- Primitive production and postharvest operations. Subsistence farming. Rice, rubber, cacao, tropical fruits and rubber are the main crops. Low level of associationism.
- Poor post-harvest handling: low degree of technology, efficiency, productivity, with sowing and collection processes traditional and artisanal techniques for the most part.
- Large food losses along the value chain.
- Diet based on rice and fish consumption.
- Increase of population in urban areas demanding safe and nutritious food at fair prices.

- Young population in urban areas is their changing food consumption habits: westernalisation of the diet.
- Wholesale markets at the center of the value chain. High volumes traded daily in markets in Jakarta and main cities.
- Markets located in the city centers mixing wholesale and retail activities: inappropriate location inside urban area. Congested and lack of space to extend activities.
- Mono-product markets, no multiproduct approach.
- Markets run by municipal administration. Lack of procedures and services in the markets.
- Government of DKI Jakarta Province runs more than 150 markets in Jakarta
- Low degree of standardization of products: are sold on bulk directly from the production areas.
- Incipient price reporting and market information system in Jakarta area.
- Markets have lack of primary facilities such as parking, storage and cold storages, packing and picking facilities.
- Awareness of national government and municipalities of the need to improve the food value chain.
- Spanish model of wholesale market combining different products and added value area activities could apply to Indonesia casuistic, adapted lo local circumstances.

The Philippines

- As Indonesia, but to a lesser degree, the country's geography hampers the domestic logistics of foodstuffs, including fresh products.
- Fragmented production: large number of small farmers, subsisting agriculture.
- Insufficient mechanization of agriculture, which translates into obtaining added value and low productivity in the sector: lack of facilities of washing, sorting and grading, packing, and cold storage at production level.
- Lack of cold chain transportation and cold storage facilities.
- Mindanao is the region with the greatest potential for agricultural production. Successive governments have supported the region as "the country's first source of food".
- High diversity of production of fruits and vegetables on a seasonal as well as on a round-the-year basis: rice, corn, coconut, sugarcane, banana, cassava, pineapple, and vegetables.
- High growing potential for fish trade(domestic and export oriented) and industry
- Limited hygiene controls at the different stages of value chain: frequent cases of food intoxication.

- Inefficient wholesale markets. Located in urban areas (city centres) in Manila and Davao, mono-product and with poor hygienic conditions and no space to expand or build new facilities.
- Mixed activities of wholesale and retail trade in markets. Still they have a large market share on total consumption. Nevertheless, supermarkets sector is developing quickly in main cities.
- Markets congested: Traffic jams accessing and exiting markets. Internal flows of peoples and goods are not organized.
- Private companies are developing logistics platforms in strategic areas of the country.
- Instability of prices because of seasonality and losses.
- Manila: very few plots available to develop big infrastructures. Transportation difficulties to enter/exit the city.
- Davao: Mindanao Development Authority is aware of the potential of the region as orchard of The Philippines. Opportunity to become the production and export hub of agricultural products.
- A similar model as the Spanish Merca's could applied integrating farmers into the supply chain through modern markets/hubs.

Pakistan

- Fragmented, primitive and non-organized production and postharvest operations causing low productivities and big post-harvest losses.
- Mostly subsistence agriculture highly dependent (financially and commercially) on commission agents of markets.
- Lack of cold storage capacity, both at production and market level, and cold storage transportation.
- Existing horticultural markets congested and with high commercialization figures.
- Markets with obsolete infrastructures and regulations located in city center.
- Precarious financial situation of markets. Inefficient business model.
- Markets dominated by small group of traders (commission agents) not willing to change the status quo.
- Multitude of operators and retails traders operating informally in the markets.
- Severe price fluctuations of fresh products in the markets.
- (Provincial) government willingness to reform markets. Improvement of the food supply chain is a priority.
- Marketing Act of the Province of Punjab under review.
- Provincial government is acquiring plots for future developments of new wholesale markets.
- Public awareness of the importance of supplying safe, nutritious and affordable food to population.
- Growing quality consciousness of urban consumers.

- Big distribution/retail companies operating in big cities and increasing its share among medium-high class consumers.

In general terms, the three countries are under similar circumstances:

- Atomized production, subsistence agriculture. Producers are the weakest part of the value chain.
- Low degree of post-harvest and transportation technologies: high post-harvest loses, instability of supply and prices.
- High grow of urban areas; exiting markets – mainly mono-product markets - are located in city centers, they are congested and not efficiently managed.
- New players: supermarkets and hypermarkets are taking positions in the fresh food sector.
- Current markets are not meeting the demand for safe, nutritious and fair price food of urban middle-class. Mixed of wholesale and retail trade.
- Potential to play internationally through exports of fresh products.
- Awareness of the public administration who is willing to address food markets development.

As commented in previous pages, the Mercasa model has proved its validity and has been critical for the successful development of the agricultural and food distribution sector in Spain. However, each country should look for its own model. And, of course, besides developing modern market infrastructures, support measures have to be taken all through the value chain to make a decisive impact.

The context for the successful development of the Spanish model was characterized by an uncompetitive, atomized and inefficient agricultural sector, economic underdevelopment, rural migration to the city, cities with a growing population (and consumption) and a lack of market infrastructure. In this context, the role of wholesale markets was crucial to guarantee food supply in conditions of price, quality and variety. Many countries in Asia face a similar situation and many lessons learned in Spain can be valid and useful today.

Nowadays, there are also new challenges arising: the role of supermarket chains, HORECA and food delivery business, export, agroindustry, international logistics, etc. These aspects should be addressed from the very beginning, in the case of promoting and supporting the development of modern wholesale markets.

These interventions developing modern markets should be carried out at the country level, on a long term timeframe, should be coordinated with other policies and sector support programs, and requires a public-public partnership framework (country government, regional and municipal governments) and also a public-private partnership framework to attract private businesses to operate and offer added value services in the wholesale markets.

Annex I: primer on wholesale markets.

Introduction

As stated in the Terms of Reference, this part of the report provides a general roadmap – primer - on how to develop a modern wholesale market. These are general comments that complement the training materials shared with delegates and ADB staff:

- Wholesale markets at the service of the food chain. MERCASA model: concept and development.
- Wholesale markets operations: how a wholesale market works? 24 hours in the life of a wholesale market.
- Wholesale Markets infrastructures: technical aspects of wholesale markets.
- How to address wholesale markets development projects.

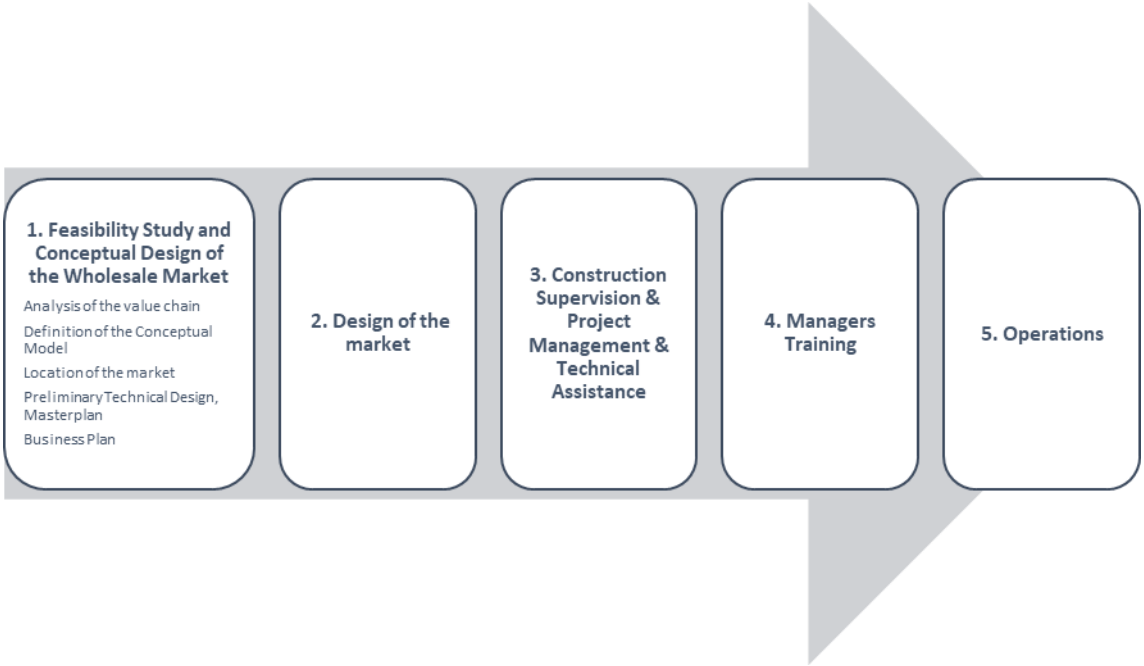
However, a tailor made methodology and mechanism should be carefully designed on a case-by-case basis.

How to address a wholesale market development project

The development of a holistic Wholesale Market is a complex, long-term process that requires covering a series of successive stages for its planning, construction and administration. The scope of such a project requires a long-term logic.

The ultimate objective of a project of this kind is to determine the model and the technical, economic and commercial viability of establishing a wholesale market, which could improve the efficiency of the agro food distribution sector in the area of influence and its foreign trade also, by both upgrading the existing facilities or by developing new premises. The work flow should assess the market demand, its size and alternatives for the location of the market, the main benefits that the market will bring to wholesalers, growers, producers, exporters, retailers and consumers, and the financial requirements and investments needed for the design, construction, staring-up and management of the fresh food wholesale market.

In order to give a project of this nature the greatest chance of success, it is essential to follow a logical sequence of actions, such as follows:



1. Feasibility Study and Conceptual Design of the Wholesale Market

The objective of this phase is to have a primary model of an integrated-holistic wholesale market having analyzed the production, supply, demand and consumption, i.e. the value chain, of fresh products in the area of influence.

Analysis of the Value Chain

This stage will provide quantitative and qualitative information key to the implementation process of the wholesale market.

The analysis is done by two complementary ways:

- Analysis of official data: information and documentation available from the background and studies and projects carried out so far, as well as any other documentation related to horticultural value chain (economic, social, technical and legal characteristics of the agribusiness distribution; demand and consumption trends; current situation and future evolution of production; exports/imports; logistics and transport; food industry; demographic trends;). Other available information and data from public and private institutions should be collected in order to complete knowledge on production, industry, distribution, marketing, export and consumption of fresh products in the area if influence.
- Interviews/Surveys/Workshops: The official information will be complemented by other primary sources, based on direct interviews with stakeholders, such as retailers, producers, wholesalers, logistic and transport companies. The scope of these interviews will be valued based on the available information and official data, as well as the format, number and content of all the workshops, so that all the groups involved and affected are represented and taken into account. The analysis could include a mass survey to farmers, cooperatives, retailers and wholesalers, hotels and

restaurants, super and hypermarkets, exporters, consumers and storage, transportation companies, etc.

Definition of the Conceptual Model

The data gathered will be processed and analyzed to estimate the demand (target volume) for a new modern fresh food wholesale market.

The first figure that needs to be quantified is the food consumption in the catchment area. Secondly, it is necessary to make an estimation of what share of that consumption will be trade through the new wholesale market. To make this estimation it is necessary to take into account the retail structure in the city and in the country, the HORECA sector (hotels, restaurants, and catering companies), import/export channels and consumption habits.

Once this share is estimated, it is necessary to calculate the commercial surface area required based on the following parameters:

- number of operators (traders);
- size of operators (stratification by volumes of trade);
- surface productivity ratios application (tons/m^2/year)
- product rotation rate
- level of product and packages standardization (boxes, pallets) as opposite to sells in bulk .
- Share of sales from truck on total sales.

However, the volume of is not a static item. As a holistic market project is supposed to have a lifespans of not less than 30-50 years, it is necessary to estimate future volume operations. Current figures and estimations has to be projected according to three basic factors: population, income per capita and food habits.

These calculations allow reaching the sizing for the launching wholesale markets, in the strict sense, not including other complementary or logistic activities. The determination of what logistic and complementary activities must join to the complex, is a result principally of a qualitative analysis of the needs of the wholesale companies, and the interests of other private companies to establish themselves at the holistic new complex. In addition, it is necessary to check with public authorities their willingness to offer some services in the market in a subsidiary way to private business (as, for example, cold storage services or equipment for washing and sorting).

Therefore, the main parameters that will define the sizing of the wholesale market and its functionality are, mainly, the global volume of operations (target volume to be traded), the characterization of the operators, the types of products that are commercialized, as well as the typology of activities to develop - marketing, logistics, processing-. After analyzing these parameters, an analysis of the optimum commercial area of the wholesale market is carried out.

The study and calculation of the number of pavilions, stalls and their dimensions is made based on internationally accepted values of commercial productivities (considering productivity as the ratio of volume traded per ton/m^2/year). The calculation methodology is based on linear

programming tools, taking into account the values of commercialization in the present moment and the projections of future growth.

As stated before, the sizing of the wholesale market refers not only to its main component (pavilions and size of stalls) but also to those other complementary services that the concept of modern-holistic wholesale market integrates and surface needs for roads, parking and reserve area.

Although logically each market responds in its composition, dimensioning, functionality and business model to the specific needs of each territory and population nucleus to which they are serving, they normally consist of the following elements:

- Fruit and Vegetable market, including potato warehouses and banana rippeners. In addition, within it, there are normally spaces and installations specifically designed for the farmers of production areas and the horticultural belts of the cities to be able to sell their produce directly to wholesalers and retailers. For the conservation of goods there are usually refrigerated chambers for daily reservation and in certain cases, general fridges.
- Fish Wholesale Market, equipped with a reception warehouse, conservation chambers, display and sale points and complementary facilities for loading and unloading, handling and internal transport.
- Slaughterhouse and Meat Market, with cutting and handling rooms, they used to be accompanied by an abattoir, but nowadays thanks to technological advances with cold storage, conservation and improved communications, the meat is generally slaughtered at origin and transported to the food Hub for cutting up and distribution.
- Trading halls for non-perishable foodstuffs.
- Freezers and Cold Storage, individual and shared.
- An Added Value Activities Zone which includes classification centers, storage, cash and carry and all services which facilitate the activities of the users, packaging, sorting, and separation of loads and related industries, distribution companies,
- Administrative and Commercial Area, which includes management services, banks, catering, different types of agencies and other services required and generated by the activity itself.
- Carparks, green zones.
- Sewerage, Water supply, Electricity supply, IT, Fire protection, General lighting.
- Main (and secondary) toll/entrances/exits of the market

Location of the market

In parallel to the development of the conceptual model, a work is carried out to analyze the location of the future wholesale market. The location is a crucial issue that affects de preliminary design and it is a key element for the success of a market. Typically an analysis of a maximum of two / three alternative areas proposed by the project promoter is carried out, analyzing the benefits and constraints of each alternative to locate the future wholesale market in each of them.

Location of the market is a crucial aspect for the market success. There is a plurality of factors and criteria in order to choose the location. Some of them shall influence mainly the efficiency

of the market operations (qualitative), and some other shall influence mainly the economic cost of the project (quantitative).

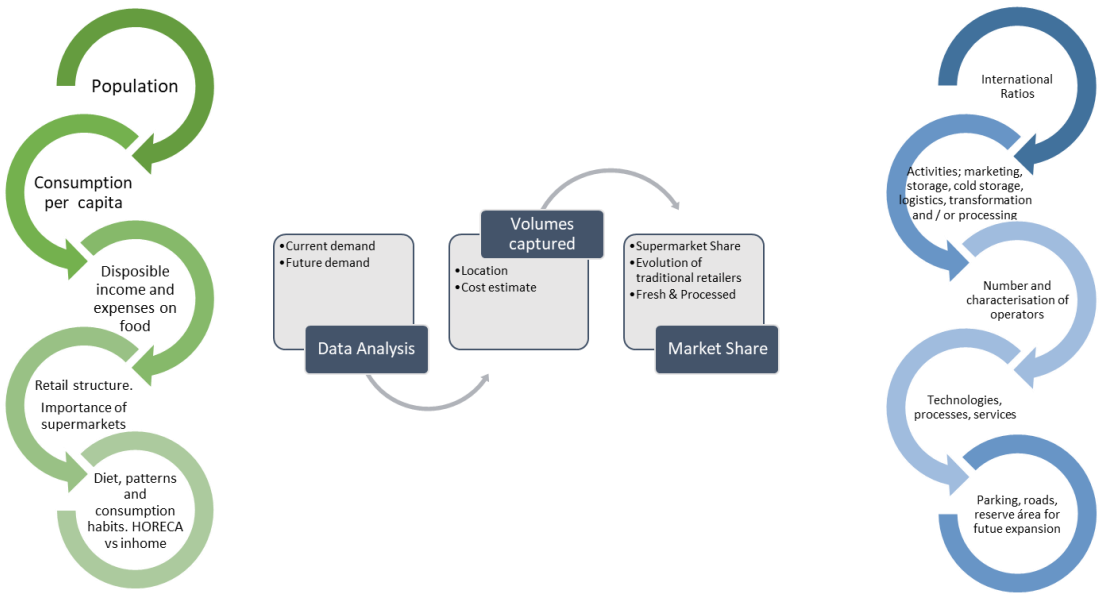
Qualitative factors are:

- Links with other routes of transport, especially with rapid routes of high capacity.
- Minimization of the cost of transport for the merchants (distances and times). Minimization of the impact in the urban traffic.
- Availability of ground enough for the current needs and to eventually future expansions.
- Regular geometry of the land plot, to allow efficient distribution of spaces and activities –layout-.
- Legal status of the land plot, to allow commercial or industrial uses, certain volume construction, working hours 24/7, etc.

Quantitative factors are:

- Cost of acquisition of the land plot.
- Topography of the land, in order to avoid levelling and land movement over costs (topographical study).
- Geotechnical characteristics of the lad plot, in order to build without expensive constructing solutions (geotechnical study).
- Connections of the land plot with supply networks: energy, water supply, sewage, length of collectors or depuration, telecommunications.

Figure 12 : key data/inputs necessary to define a wholesale market



Source: Mercasa

Preliminary Technical Design of the Market (Masterplan)

The result of the previous activities, i.e. tons of products to be commercialized, stalls grouped by size and specialties and exact location of the future wholesale market, are the parameters needed for the implementation of preliminary technical design. The preliminary designs should contain, at least, the followings documents:

- A proposal of general plan (layout) of the wholesale market, initial phase and expansions, including the distribution of built-up areas, roads, carparks, free and reserve areas.
- Narrative of the project: concise and rigorous description and justification of the solutions adopted for the project of the wholesale market.
- Floor plan, elevation and section plans of each building (For guidance: Administrative building, Market pavilions, Entrance porch, Laboratory, rest of buildings resulting from the study, Water tank, Residual water treatment plant, etc.)
- Based on the above documentation, the corresponding estimated budget for the construction cost of the wholesale market.

During this phase, the technical studies necessary for the execution of the work are carried out: topographical, geotechnical, hydrological, environmental and pluviometric studies.

Master Plan of the Market

A Master Plan of the Wholesale Market should be prepared at this stage, including, but not limited to the following issues:

- Type of market ownership, management, and design of a market management structure.
- Organizational structure of the management.
- Operations and services of the market.
- Business Plan:
    - Profit and loss draft sheet and projections.
    - Business Cases: Level of minimum and sustainability tariffs and rent policies, including subsidies and incentives.
    - Expected returns and break-even analysis.
- Market rules and legal relations with operators.
- Plan for the transfer of wholesale operators from other markets, if applicable: a relocation plan should be defined to be carried out in successive phases of the project: communication plan, legal and financial aspects of relocation, attract new operators.
- Training plan for future managers and staff of the market.
- Economic study, analysis of the indirect benefits of the wholesale market in terms of socio economic and environmental impact, including food security, reductions in wastage and deterioration, training and professionalization of the sector, transport and handling cost reductions, income generation for local growers and cooperatives, business and employment creation, gender, etc.

2. Detailed Design

The objective of this phase is to develop the technical project of construction of the wholesale market.

In this phase, the following activities would be carried out:

- Final design of the project: The technical documentation of the project will be drawn up, reflecting all specifications, descriptions, characteristics and quality measures necessary for a third party to carry out the construction.
- Constructive plans approved by the Official Association of Engineers and Architects of the country and/or other competent authority.
- Plans of urbanization: Plans of land movement, clearings and embankments, compaction, plotted road construction, construction sections, materials, finishes and signage. Development of urbanization facilities (lighting, water supply to urbanization and plots, storm water and wastewater sanitation, electricity, fire protection, landscaping and telecommunications).
- Building plans for each building: foundation plans, forged, beams, pillars, stairs and construction details, plumbing, hot water production, water evacuation, electricity, lightning protection, industrial refrigeration, air conditioning, gas, telecommunications, fire protection, construction details, finishes and qualities.
- Manual with technical specifications of the project and Calculation Report.
- Detailed budget: a disaggregated budget will be made resulting in the estimated cost of the construction as a whole. The prices will be decomposed and unitary, that is that each line item will contain a breakdown of its impact on materials, labor, auxiliary means and imputable indirect costs.
- Preparation of the technical documentation necessary for the tender procedures.

3. Construction Supervision, Project Management, Technical Assistance

Construction Supervision: This phase would consist of guarantee good-quality implementation of the construction project of the market with optimal costs pursuant to the contract agreement, technical standards and norms.

Project Management: Project Management will be needed in order to coordinate the Designer (Architects), Constructing Company, Local Authorities and the owner. Project Management and construction Supervision should be practically done by the same team. Claim Management and Risk Management would be also part of the scope of work.

Technical Assistance to the client will guarantee a proper assistance and assessment to the client/ promotor of the project in all technical and economic issues like Standards, Payment, Quality and Quantity checks, contracting and legal issues, assistance in the overall coordination of the project, for the Claim Management and the Risk Management.

4. Training of Managers of the market

The aim of this phase is to train technicians to develop an adequate management of the market, providing them with the theoretical tools and necessary criteria to undertake the functions assigned as administrators and managers of these infrastructures.

The training methodology should adapt to the circumstances but basically consists of theoretical expositions and practical activities of the most critical points of each of the areas and the interrelations between them. The training should be not only theoretical, but also being coached in a "learning by doing" process, by a Manager to be provided by experienced professionals, if possible, both in new markets facilities and in an existing modern market operating elsewhere (in the country or abroad).

5. Startup and operation of the market

One of the most important phases of the startup of Markets is the relocation of existing wholesalers, if any. During this period it is crucial that the market authority and administrations involved lead the relocation in a coordinated way.

A professional technical assistance during the starting up operations of markets is highly recommend, by means of putting into disposition an interim Manager or a group of experts that might assist, supervise and monitories the local national operator and his management team during the first months of operations.

Management audits - semi-annual or annual- are highly advisable during the first 3 to 5 years in order to assess, monitor and adjust the performance of the market.

Annex II: Agenda. Study Tour first edition (June, 24th -28th, 2019)

Sunday, June 23rd	
15:30 h	Arrival to Madrid. Pick up at the airport and transfer by minibus to Hotel NH COLLECTION MADRID COLÓN (Calle Marqués de Zurgena, 4, 28001 Madrid).
	Free day.

Monday, June 24th	
08:15 h	Pick up at Hotel and transfer by bus to Ministry of Industry, Commerce and Tourism (Paseo de la Castellana, 162, 28046 Madrid).
08:30 h-08:45 h	Arrival to Ministry of Industry, Commerce and Tourism and registration.
09:00 h-10:00 h	Meeting with Secretary of Commerce, Mrs. Xiana Méndez (also attending DG of International Trade and Investment, and Deputy DG of Asia, Europe (non EU) and Oceania), Room E, 1st floor.
10:00 h - 10:30 h	Transfer and arrival to Mercamadrid (Avda. de Madrid Mercamadrid, s/n 28053 Madrid - M-40, salida 20).
10:30 h – 11:00 h	Opening and brief introductions: – Chairman of MERCASA, Mr. José Ramón Sempere (5 minutes). – Vice-president of the Asian Development Bank for Private Sector Operations and Public–Private Partnership Mr. Diwakar Gupta (10 minutes). – Chief of Rural Development and Food Security (Agriculture) Thematic Group. Sustainable Development and Climate Change Department. Asian Development Bank, Mr. Akmal Siddiq (10 minutes). – Agriculture and Natural Resource Specialist. Sustainable Development and Climate Change Department, Mr. Abul Basher (5 minutes).
11:00 h -11:20 h	Presentation: Wholesale markets at the service of the food chain. MERCASA model: concept and development. María González Pastor, Head of Institutional Cooperation of Mercasa.
11:20 h- 11:40 h	Presentation: Wholesale markets Operations: How a wholesale market works? 24 hours in the life of a wholesale market. Vanessa Moreno Vincent, Head of Coordination of Mercasa's Network of Markets.
11:40 h – 12:00 h	Coffee break
12:00 h – 12:20 h	Presentation: Wholesale Markets infrastructures: Technical aspects of wholesale markets. José Ramón Espada, Deputy Director of Projects Area of MERCASA.
12:20 h – 12:40 h	Presentation: How to address wholesale markets development projects.

Monday, June 24th	
	Antonio Sartorius, Senior Consultant, Projects Area of MERCASA.
12:40 h – 13:30 h	Questions and Answers Session.
13:30 h – 14:00 h	Transfer to Retail Market "Mercado de La Paz".
14:00 h – 15:30 h	Visit of the Market. Free time at the Market (delegates can buy food and/or have lunch[1] at restaurants of the Market).
15:30 h – 15:40 h	Transfer to Hotel by walking.
15:40 h – 19:00 h	Free time.
19:00 h	Pick up at the Hotel.
19:00 h -19:20 h	Transfer to Mercado de San Antón by walking.
19:20 h – 20:30 h	Visit Mercado de San Antón (delegates can buy food and/or have dinner[2] at restaurants of the Market).
20:30 h – 20:50 h	Transfer to Hotel by walking.
	Free evening.

(Program for VP Mr. Diwakar Gupta and ADB representatives who are accompanying)

17:00 h	Pick up VP Mr. Diwakar Gupta at the hotel and transfer by taxi/by waking to Ministry of Finance (Paseo del Prado, 6, 28014 Madrid).
17:30 h -18.30 h	Meeting at the Ministry of Finance VP Mr. Diwakar Gupta and Mr. Carlos San Basilio, Secretary-General of the Ministry of Finance.
18:30 h	Transfer to Hotel by taxi/by walking.

Tuesday, June 25th	
06:00 h	Pick up at Hotel and transfer by bus to Mercamadrid.
06:30 h – 06:45 h	Welcome and greetings in Mercamadrid offices.
06:45 h - 07:20 h	Visit Fish Market.
07:20 h – 07.30 h	Transfer to Fruits and Vegetables Market (by walking).
07:30 h - 08:15 h	Visit Fruits and Vegetables Market.
08:15 h – 08:30 h	Transfer to Meat Market (by bus).
08:30 h – 08:50 h	Visit Meat Market.
08:50 h – 09:15 h	Coffee break Cafeteria Narcea (Meat Market).
09:15 h – 10:00 h	Visit EUROBANAN (Fruits and Vegetables company).
10:00 h – 10:45 h	Visit IBERICA DE PATATAS (Potatoes processing company).
10:45 h - 11:30 h	Visit ATOLON (Fish company).
11:30 h – 11:40 h	Transfer by bus to Mercamadrid offices.
11:40 h – 12:00 h	Visit Mercamadrid Security Control Centre.
12:00 h – 13:00 h	Presentation of Mercamadrid (by high management, TBC) and Questions and Answers Session.
13:00 h	Transfer to Hotel.
	Free afternoon.

[1] Under DSA
[2] Under DSA

Wednesday, June 26th	
08:30 h	Pick up at Hotel.
08:30 h – 09:45 h	Transfer by bus to Villa del Prado.
10:00 h – 15:00 h	Visit Villa del Prado: Production areas, post-harvest facilities and meeting with council representatives and farmers. – Councilor of Agriculture of Villa del Prado, Mrs. Laura Gálvez. (VP Mr. Diwakar Gupta. Transfer to airport from Villa del Prado by car)
15:00 h – 16.00 h	Transfer to Madrid Atocha Train Station.
17:00 h – 19:30 h	AVE (high speed train) Madrid – Barcelona (Travel time: 2 h 30 m).
19:25 h	Arrival and transfer to Hotel NH SANTS Carrer de Numància, 74, 08029 Barcelona

Thursday, June 27th	
08:00 h	Pick up at Hotel.
08:00 h – 10:15 h	Transfer to Cooperative ACTEL, Ctra. C-13, km 19 - 25670 TÉRMENS (Lleida).
10:30 h – 11:45 h	Visit ACTEL Infrastructures and meeting with high management of ACTEL: – Director General, Fernando Chocorro. – Director of Operations, Jaume Martí. accompanied by Mercabarna delegation: – Deputy Director General, Lidia Redon. – Strategy Area Director, Pablo Vilanova.
11:45 h – 12:15 h	Transfer to Cooperative Fruits de Ponent (Central de confecció). Camí de les Coves, s/n, 25180 Alcarràs (Lleida).
12:15 h – 13.30 h	Visit Fruits de Ponent Infrastructures and meeting with high management of Fruits de Ponent Cooperative: – Director General, Josep Presseguer. – Director of Communication and External Relations, Santi Bonet. accompanied by Mercabarna delegation: – Deputy Director General, Lidia Redon. – Strategy Area Director, Pablo Vilanova.
13:30 h – 14:00 h	Transfer to restaurant.
14:00 h – 15:00 h	Lunch at Bon Àrea Restaurant (Àrea de Guissona).
15:00 h – 17:15 h	Transfer by bus to Barcelona (NH Hotel Sants).
	Free afternoon.

Friday, June 28th	
09:00 h	Pick up at Hotel and transfer to Mercabarna.
09:30 h – 09:50 h	Welcome and greetings in Mercabarna offices.
09:50 h – 10.30 h	Presentation of Mercabarna (Director General of Mercabarna) and video.
10:30 – 12:15 h	Visit Fruits and Vegetables Market. Visit Multipurpose pavilion (cash&carry). Visits construction works of BioMarket. Visit waste collection and recycling Area “Punt Vert”.

Friday, June 28th	
	Visit Training Center.
12:15 h - 13:00 h	Wrap-up Meeting and next steps: – Mercasa – Representative of each country delegation – Akmal Siddiq – Ahsan Tayyab – Abul Basher Closing by Director General of Mercabarna.
13:00 h	Transfer to Hotel.
	Free afternoon. Mercasa delegates AVE (high speed train) Barcelona – Madrid at 15:25 h (Travel time: 2 h 30 m).

Saturday, June 29th	
13:00 h	Pick up at the Hotel for transfer by minibus to Barcelona Airport.

Annex III: Agenda. Study Tour second edition (September, 23rd - 27th, 2019)

Sunday, September 22thd	
15:30 h	Arrival to Madrid. Pick up at the airport and transfer to Hotel NH COLLECTION MADRID COLÓN (Calle Marqués de Zurgena, 4, 28001 Madrid).
	Free day.

Monday, September 23th	
08:30 h - 09:00 h	Pick up at Hotel and transfer to Mercasa Headquarters (Paseo de La Habana, 180).
09:00 h – 09:30 h	Opening and brief introductions: Chairman of MERCASA, Mr. José Ramón Sempere. Business Development Director, Mrs. Silvia Llerena Muñoz.
09:30 h -10:00 h	Presentation: Wholesale markets at the service of the food chain. MERCASA model: concept and development. María González Pastor, Head of Institutional Cooperation of Mercasa.
10:00 h- 10:30 h	Presentation: Wholesale markets Operations: How a wholesale market works? 24 hours in the life of a wholesale market. Vanessa Moreno Vincent, Head of Coordination of Mercasa's Network of Markets.
10:30 h – 11:30 h	Coffee break
11:30 h – 12:00 h	Presentation: Wholesale Markets infrastructures: Technical aspects of wholesale markets. José Ramón Espada, Deputy Director of Projects Area of MERCASA.
12:00 h – 12:30 h	Presentation: How to address wholesale markets development projects. Antonio Sartorius, Senior Consultant, Projects Area of MERCASA.
12:30 h – 13:00 h	Questions and answers session.
13:00 h – 13:30 h	Transfer to Retail Market "Mercado de La Paz".
13:30 h – 15:00 h	Visit of the Market. Free time at the Market (delegates can buy food and/or have lunch[3] at restaurants of the Market).
15:00 h – 15:20 h	Transfer to Hotel by walking.
15:20 h – 19:00 h	Free time.
19:00 h	Pick up at the Hotel.
19:00 h -19:20 h	Transfer to Mercado de San Miguel by walking.
19:20 h – 20:30 h	Visit Mercado de San Miguel (delegates can buy food and/or have dinner[4] at restaurants of the Market).

[3] Under DSA
[4] Under DSA

Monday, September 23th	
20:30 h – 20:50 h	Transfer to Hotel by walking.
	Free evening.

Tuesday, September 24th	
06:00 h	Pick up at Hotel and transfer to Mercamadrid (Avda. de Madrid Mercamadrid, s/n 28053 Madrid).
06:30 h – 06:45 h	Welcome and greetings in Mercamadrid offices.
06:45 h - 07:20 h	Visit Fish Market.
07:20 h – 07.30 h	Transfer to Fruits and Vegetables Market (by walking).
07:30 h - 08:15 h	Visit Fruits and Vegetables Market.
08:15 h – 08:30 h	Transfer to Meat Market (by bus).
08:30 h – 08:50 h	Visit Meat Market.
08:50 h – 09:15 h	Coffee break Cafeteria Narcea (Meat Market).
09:15 h – 10:45 h	Visit Fruits and Vegetables companies.
10:45 h - 11:30 h	Visit Fish company.
11:30 h – 11:40 h	Transfer by bus to Mercamadrid offices.
11:40 h – 12:00 h	Visit Mercamadrid Security Control Centre.
12:00 h – 13:00 h	Presentation by the Mercamadrid management team. Questions and answers session.
13:00 h	Transfer to Hotel.
	Free afternoon.

Wednesday, September 25th	
08:00 h	Pick up at Hotel.
08:00 h – 09:15 h	Transfer by bus to Villa del Prado.
09:30 h – 12:30 h	Visit Villa del Prado: Production areas, post-harvest facilities and meeting with council representatives and farmers. Mayor of Villa del Prado, Hector Ortega Otero.
12:30 h – 14:00 h	Lunch in Villa del Prado.
14:00 h – 15:00 h	Transfer to Madrid Atocha Train Station.
15:40 h – 17:22 h	AVE (high speed train) Madrid – Valencia (Travel time: 1 h 42 m).
17:30 h	Arrival and transfer to Hotel Eurostars Rey Don Jaime (Avda Baleares, 2 Valencia 46023). Free afternoon.

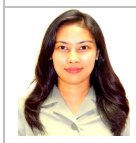
Thursday, September 26th	
08:30 h	Pick up at Hotel. Transfer to Anecoop's field of experiences “Masía del Doctor” Innovation Center. (Partida San Onofre s/n, 46136 Museros, Valencia).
09:15 h – 10:30 h	Visit to “Masía del Doctor” Innovation Center. Anecoop presentation.
10:30 h – 11:00 h	Transfer to Cooperative “La Constancia” (Camí de la Casablanca, 1, 46185 La Pobla de Vallbona, Valencia).

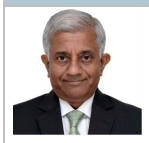
Thursday, September 26th	
11:00 h – 12:30 h	Visit Cooperative "La Constancia". Meeting with managers.
12:30 h – 13:15 h	Transfer to the Central Market of Valencia.
13:15 h – 15:00 h	Visit of the Market. Free time at the Market (delegates can buy food and/or have lunch at restaurants of the Market).
15:00 h	Transfer to Valencia (Hotel Eurostars Rey Don Jaime. Avda Baleares, 2 Valencia 46023)
	Free afternoon.

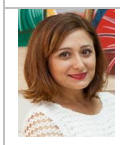
Friday, September 27th	
05:30 h	Pick up at Hotel and transfer to Mercavalencia.
06:00 h	Welcome and greetings in Mercavalencia
06:00 h – 06:30 h	Visit Fish Market.
06:30 h – 07:00 h	Visit "Tira de Contar" (producers market).
07:00 h – 07:30 h	Visit Fruits Market.
07:30 h – 08:00 h	Breakfast at the Mercadelice restaurant.
08:05 h – 09:00 h	Visit Slaughterhouse and Exploded Room.
09:00 h - 09:30 h	Visit Mercaflor.
09:30 h – 10:30 h	Visit to ZAC companies (food handling and processing).
10:30 h – 11:30 h	Presentation by the Mercavalencia management team. Questions and answers session.
11:30 h – 12:00 h	Wrap-up Meeting and next steps: Mercasa Delegates Diplomas Ceremony. Closing.
12:00 h	Transfer to Hotel.
	Free afternoon. Mercasa delegates AVE (high speed train) Valencia – Madrid at 14:10 h (Travel time: 1 h 38 m).

Saturday, September 28th	
07:00 h	Pick up at the Hotel for transfer to Valencia Airport.

Annex IV: Participants

DELEGATES			
INDONESIA			Study Tour edition
	INTI PERTIWI NASHWARI	Deputy Director of Food Distribution Agency for Food Security Ministry of Agriculture	June
	SULISTIYORINI	Head of Subdivision for Cooperation The Agency for Food Security Ministry of Agriculture	June
	ZULFRIANDI	Head of the Sub-Directorate for Agricultural Institutions Ministry of National Development Planning / Bappenas	June
THE PHILIPPINES			
	JOHN MAYNARD GAN	Technical Staff Investment Promotions Division Focal for MinDA Inclusive Agribusiness Business Program	June
PAKISTAN			
	WASIF KHURSHID	Secretary of Agriculture Government of Punjab	September
	MUHAMMAD WASEEM IQBAL	Extra Assistant Director of Agriculture (Economics & Marketing) Agriculture Department Government of Punjab	September

ADB			Study Tour edition
	DIWAKAR GUPTA	Vice President. Private Sector Operations and Public-Private Partnerships	June
	AKMAL SIDDIQ	Chief of Rural Development and Food Security (Agriculture) Thematic Group. Sustainable Development and Climate Change Department	June
	AHSAN TAYYAB	Principle Natural Resource Economist. Environment, Natural Resources & Agriculture Division, CWRD (Central and West Asia Department)	June
	MD ABUL BASHER	Agriculture and Natural Resource Specialist. Sustainable Development and Climate Change Department	June
	HYUNYOUNG SONG	Agriculture and Natural Resource Specialist. Environment, Natural Resources & Agriculture Division, SERD (Southeast Asia Department)	June
	LEONARD H. LEUNG	Natural Resources and Agriculture Economist. Environment, Natural Resources & Agriculture Division, SERD (Southeast Asia Department)	June

Mercasa Work Team			Study Tour edition
	SILVIA LLERENA MUÑOZ	Business Development Director	June and September
	JOSÉ RAMÓN ESPADA GUARNIDO	Deputy Director of Technical and Projects Area	June and September
	MARÍA GONZÁLEZ PASTOR	Head of Institutional Cooperation	June and September
	VANESSA MORENO VINCENT	Head of Coordination of the Mercas Network	June and September
	ANTONIO SARTORIUS SAENZ	Senior Consultant of Technical and Projects Area	June and September
	GLORIA SIERRA ROYO	Institutional Cooperation	June and September

Dr. Inti Pertiwi Nashwari, SP, MSi

Indonesia

Position	Deputy Director of Food Distribution The Agency for Food Security (AFS) Ministry of Agriculture (MoA).	
Work Experience	– Head of Division for Food Distribution, Center for Food Distribution and Reserves.	Now
	– Head of Sub Division of Food Distribution Institution, Center for Food Distribution a Reserves.	Previous
	– Head of Sub Division for Food Vulnerability Analysis, Center for Food Availability and Vulnerability.	Previous
Education	– Doctor Degree in Science of Planning and Regional and Rural Development from Bogor Agricultural University, Indonesia.	Scholarship
	– Master Degree in Agricultural Economic from Bogor Agricultural University, Indonesia.	Self-funded
	– Bachelor Degree in Agribusiness from Bogor Agricultural University, Indonesia.	Self-funded

Sulistiyorini, STP., MSc.

Indonesia

Position	Head of Subdivision for Cooperation. The Agency for Food Security (AFS). Ministry of Agriculture (MoA)	
Work Experience	– Head of Sub Division for Cooperation, in Planning Division	Now
	– Head of Sub Division for Reporting and Follow-Up of Examination Result, in Evaluation and Reporting Division	Previous
	– Head of Sub Division for Food Vulnerability Mitigation, in Food Vulnerable Division	Previous
Education	– Master Degree in Food Quality Management from Wageningen University and Research Center, The Netherlands	Scholarship
	– Bachelor Degree in Food Technology from Bogor Agricultural University, Indonesia	Self-funded

Zulfriandi

Indonesia

Position	Head of the Sub-Directorate for Agricultural Institutions, Ministry of National Development Planning / Bappenas	
Work Experience	– As Head of the Sub-Directorate for Agricultural Institutions, Ministry of National Development Planning / Bappenas	Since 2014 until now
	– As Government Auditor in agriculture, Ministry of National. Development Planning / Bappenas	From 2000 to 2014
Education	– Master in Government Accounting	

John Maynard V. Gan

The Philippines

Position	Development Management Officer III, Investment Promotion Division Organization : Mindanao Development Authority (MinDA)
Work Experience	Mr. Gan currently coordinates program work for Inclusive Business and the Mindanao Collective Trademark (IB-MCT) under the Investment Promotion and International Relations Office on top of his role as lead-facilitator for innovation and entrepreneurship-related development initiatives, and convergence activities for Philippine Ecozones. He was part of a team for a Philippines Mindanao Jobs Report – A Strategy for Regional Development in 2015 particularly in the agriculture component which entailed intensive research and coordination with agribusiness value chain stakeholders. Prior to joining MinDA in 2013, Mr. Gan have been engaged in the cooperative development work under various organizations including MASS-SPECC Cooperative Development Center and a foreign-funded Credit Union Empowerment & Strengthening – Philippines Project since 2001. His roles involved work as an accredited Development Educator, Training Director, and Marketing Analyst for community-based and farmer cooperatives across Mindanao in a span of almost 12 years. Mr. Gan recently completed his Master's degree in Entrepreneurship and Innovation in Swinburne University of Technology in Melbourne Australia in 2018. He earned his Bachelor's degree in Accountancy at the Ateneo de Davao University, Davao Philippines.

Wasif Khurshid

Pakistan

Position	Secretary of Agriculture, Government of the Punjab, Lahore (Pakistan)
Work Experience	I joined the Civil Service of Pakistan on 15.07.1998 and had served on various key positions including foreign postings as Commercial Counselor. I have done my M.Sc in Agricultural Development Economics. Presently, I am serving as Secretary to Government of the Punjab, Agriculture Department. Being head of the Department I have been entrusted to prepare and execute policies, development plans/projects, rules and regulations related to development of Agriculture Sector in the Province. Since joining the Department, I have worked on various initiatives, which include 100 days reforms agenda of Prime Minister of Pakistan preparation of Agriculture Policy and its launching, necessary legislation on Punjab Agriculture Marketing Regulatory Authority (PAMRA) to make the said Authority functional, conceived projects relating to development of model fruits & vegetable markets and sent to the Planning & Development Department for approval and designed various development projects, policies and regulations on food security in collaboration with Ministry of National Food Security & Research as well as with different international donor agencies.

Waseem Iqbal

Pakistan

Position	Extra Assistant Director of Agriculture (Economics & Marketing), in Agriculture Department, Government of Punjab, Pakistan.
Work Experience	– International Network on Participatory Irrigation Management (INPIM): A subsidiary of World Bank Institute, working on water resources, water use efficiency, water User Associations, participatory approaches for water management etc. – UNICEF & UNDP: Different development projects related to healthcare and social welfare i.e. Multiple Indicator Cluster Survey and Strengthening Poverty Reduction Strategies. – Punjab Agriculture Department: involved in diverse assignments related to development projects, performance contracts, Model Markets Initiative, Farmer Markets initiative etc.
Education	– Master's in Agriculture & Resource Economics from University of Agriculture Faisalabad. Certified Executive in Agribusiness Management from Lahore University of Management Sciences (LUMS).

Diwakar Gupta

ADB

Position	Vice-President for Private Sector and Public-Private Partnerships
Work Experience	Diwakar Gupta is the Asian Development Bank's (ADB) Vice-President for Private Sector and Public-Private Partnerships. He assumed office in August 2015. Mr. Gupta oversees ADB's assistance to private sector projects with a clear development impact but limited access to capital. Mr. Gupta was Managing Director and Chief Financial Officer of the State Bank of India, where he was responsible for setting strategies and direction alongside other members of the State Bank's Central Management Committee. He joined the State Bank of India in 1974 and held several positions at its various units and subsidiaries. Mr. Gupta also worked as Independent Director on the boards of various business councils, financial services companies and other private organizations in India.
Education	He holds a Master of Science degree in Physics from the University of Delhi, and a Bachelor of Science degree in Physics (with Honors) from St. Stephen's College in Delhi.

Akmal Siddiq

ADB

Position	Chief of Rural Development and Food Security (Agriculture) Thematic Group Sustainable Development and Climate Change Department
Work Experience	Dr. Akmal Siddiq is the Chief of Rural Development and Food Security, Thematic Group, Asian Development Bank, Manila, Philippines. He is a natural resource economist with extensive experience in sustainable development. In 20-year career at ADB, he has prepared several development projects and contributed to country strategies in several countries in the Asia Pacific region. He has promoted creative interventions in water resources management, horticulture and dairy value chains, animal disease control; forest plantations development projects. He has successfully led important policy dialogues with high-level government officials. He leads ADB-wide new initiatives in the sector, cultivates cooperation with other organizations, and helps generate knowledge and adopt high-level technologies
Education	– Doctor of Philosophy in Agricultural Economics: (1994) University of Illinois at Urbana-Champaign, IL, USA – Master of Science in Agricultural Economics: (1985) University of Arizona, Tucson, AZ, USA – Bachelor of Science in Agriculture: (1982) University of Agriculture, Faisalabad, PAKISTAN

Ahsan Tayyab

ADB

Position	Principal Natural Resources Economist Environment, Natural Resources & Agriculture Division Central and West Asia Department
Work Experience	Over 30 years of experience in development, including with international non-governmental organizations and development partners. Joined ADB in 2002 as international staff and since then have primarily worked in agriculture, natural resources and portfolio related subjects, Facilitated agribusiness projects across several countries including Pakistan, India, Bangladesh and Nepal. Carried out extensive dialogue on natural resource management and rural infrastructure connectivity in Southeast Asia and facilitated water quality and institutional restructuring initiatives in Pakistan. Currently designing an agriculture marketing program in Pakistan.
Education	Master's in Economics (University of Waterloo, Canada).

Md Abul Basher

ADB

Position	Natural Resources and Agriculture Specialist Rural Development & Food Security (Agriculture) Thematic Group Sustainable Development and Climate Change Department
Work Experience	Prior to joining ADB, he was a Researcher at Bangladesh Institute of Development Studies (BIDS) since 2012, where he carried out research on different issues including green growth, climate change, rural development, social and economic development. From 2008 to 2012, he was as an Economist at The World Bank, Bangladesh and was the country focal point for Economic Management and Technical Assistant Project (EMTAP), providing technical assistance to different line ministries of the government of Bangladesh. He also published (as the lead author) the country report "Consolidating and Accelerating Exports in Bangladesh" and mobilized the trust fund for Diagnostic Trade Integration Study (DTIS) on Bangladesh. He was responsible for monitoring the food security situation and trade dynamics of the country during his stint with the WB. In 2006-2008, he was an Assistant Professor in Willamette University, USA where he taught microeconomics, macroeconomics and international economics. He was a Research Fellow and Research Associate at the Bangladesh Institute of Development Studies from 1996 to 2001.
Education	He received his Doctoral degree in Macro and International Economics from the University of Washington, United States in 2007; Master's degree in Industrialization and Economic Policy from Strathclyde University, United Kingdom in 1997, and Bachelor's degree in Economics from Dhaka University, Bangladesh in 1993.

Hyunyoung Song

ADB

Position	Natural Resources and Agriculture Specialist Environment, Natural Resources & Agriculture Division Southeast Asia Department
Work Experience	Hyunyoung Song is the Natural Resources and Agriculture Specialist in Southeast Asia Department, mainly focusing on agriculture value chain development in Cambodia, Philippines, Indonesia, and Viet Nam. Prior to joining the Bank, she has worked on value chain development and trade and investment promotion at various international and national development agencies including African Development Bank, United Nations Development Program, Korea Export-Import Bank, and Korea International Cooperation Agency.
Education	Master's degree in International Commerce from Korea University, Republic of Korea, with a completion of exchange program in public policy from New York University, in 2011.

Leonard Hau-Che Leung

ADB

Position	Natural Resources and Agriculture Economist Environment, Natural Resources & Agriculture Division Southeast Asia Department
Work Experience	– Natural Resources and Agriculture Economist – Asian Development Bank (Dec 2015 – present) – Investment Appraisal Consultant – African Development Bank (Feb 2013 – Nov 2015) – Financial and Economic Modeling Analyst and Lecturer – Cambridge Resources International (Aug 2008 – Feb 2013)
Education	– Queen's University Doctor of Philosophy (PhD), Economics (2008-2015) Master of Arts (MA), Economics (2005-2006) – The University of British Columbia Bachelor of Arts (BA), Economics (2003-2005) Bachelor of Arts (BA), Political Science; Asian Studies (1998-2003)

Silvia Llerena Muñoz

MERCASA

Position	Director of Business Development of Mercasa
Work Experience	Graduated in agricultural engineering, Silvia holds a Senior Business Management Program and a Diploma of Senior Management of Food Chain Companies. Silvia Llerena is the Director of Business Development of Mercasa since October 2018. She has been working in Mercasa for more than 20 years, occupying several major positions in the company as Head of Planning and Strategy, Head of Wholesale Markets and Wholesale Markets' Coordinator, among others. She is member of Board of Directors of Mercamadrid, Mercagranada, Mercavalencia, Mercazaragoza, Mercasevilla, Ms. Llerena has broad knowledge in strategic planning as well as in management and operations of wholesale markets.

José Ramón Espada Guarnido

MERCASA

Position	Deputy Director of Projects and Technical Department
Work Experience	Architect by the Universidad de Sevilla, he has been working in Mercasa since 2001 and has held different positions of responsibility in the company. He has been directly responsible for more than 30 projects and supervision of works of all types of commercial buildings in wholesale and retail markets in Spain and abroad. He has coordinated feasibility studies of more than 40 Retail Markets. Currently, he leads the team of architects, engineers, consultants and designers of Mercasa.

María González Pastor

MERCASA

Position	Head of Institutional Cooperation in Mercasa
Work Experience	María González Pastor, Head of Institutional Cooperation, MERCASA. Ms. González holds a Degree in Business Administration by the Université Catholique de Louvain, a Degree in Law by Universidad Nacional de Educación a Distancia and an Executive MBA by Instituto de Empresa. She started his professional career working in several strategic consulting firms. Since 2006 she has been working in the wholesale markets sector holding various senior management positions: first as Project Director and then as General Manager of the Association of Wholesalers and Distributors of Fruits and Vegetables of Mercamadrid, the largest Spanish wholesale market. She joined Mercasa in 2015 as senior consultant of the International Department. In February 2019, she was appointed Head of Institutional Cooperation of Mercasa. Ms. Gonzalez is member of the board of the World Union of Wholesale Markets (WUWM), Mercazaragoza, S.A. and Mercamalaga, S.A.

Vanessa Moreno Vincent

MERCASA

Position	Head of Coordination of the Mercas Network
Work Experience	Ms. Vanessa Moreno is the Head of Coordination of the Mercas' Network of Mercasa since 2018. She is member of the board of Mercalicante, Mercalgeciras, Mercabadajoz, Mercabarna, Mercacordoba, Mercagranada, Mercajerez, Mercamadrid, Mercapalma, Mercasantander and Mercasevilla. She has been working in Mercasa since 2005, first as general manager of Shopping Center Getafe-3 and then as coordinator of several Mercas and shopping centers. Ms. Moreno holds a double degree in Business Administration by the Universidad Autónoma de Madrid and the Université Paris-Dauphine and a Master in Management of Retail/Distribution Businness by the CECO (Centro de Estudios Comerciales).

Antonio Sartorius Saenz

MERCASA

Position	Senior Consultant of Technical and Projects Area
Work Experience	Twenty four years of international experience on innovation and project management consulting for international clients, of both the private and public sectors; especially the EU external aid, the World Bank Group, IDB, and other international development banks. Has worked extensively on innovation and entrepreneurship support structures and hubs (science and tech parks, centers, areas, incubators and clusters), economic competitiveness, and small business development projects; in more than 40 countries around the world. Has also acquired extensive worldwide expertise in strategic planning of wholesale market, development of agribusiness and fresh produce value chains, export promotion and in evaluating project efficiency, effectiveness, impact and sustainability of private sector development interventions. He is founder and managing director of T4K Spain, working with government agencies and their contractors in improving their innovation, programme and project management practices and toolkits, and evaluating their performance, impact, replication and scalability potential. Economist Un. Malaga, MSc Industrial Enterprises.

Gloria Sierra Royo

MERCASA

Position	Technician at the Institutional Cooperation Area in Mercasa
Work Experience	Ms. Sierra holds a Master Degree in Marketing and Sales by the Universidad Rey Juan Carlos and the School of Business Administration (EAE). She has more than 20 years of experience in public administration and strategic consulting for international governments in the field of development and management of wholesale and retail markets. She has been working in Mercasa since 1995, holding various positions, as chief of staff of the President of Mercasa and as consultant in the Department of Studies, among others. She is specialized in the coordination and organization of major events both nationally and internationally.

Annex V: Photo Album Study Tour (June edition)

Monday, June 24th

Ministry of Industry, Commerce and Tourism and registration. Meeting with Secretary of Commerce, Mrs. Xiana Méndez (also attending DG of International Trade and Investment, and Deputy DG of Asia, Europe (non EU) and Oceania).

Mercamadrid. Meeting with the General Director of Mercamadrid. Working day given by the Mercasa team.

Tuesday, June 25th

Visit Mercamadrid.

VISITAS

ATOLON

seguridad

Wednesday, June 26th

Visit Villa del Prado: Production areas, post-harvest facilities and meeting with council representatives and farmers.

Thursday, June 27th

Visit ACTEL facilities and meeting with high management of ACTEL, in Lleida.

Visit ACTEL facilities and meeting with high management of FRUITS DE PONENT Cooperative, in Lleida.

Friday, June 28th

Visit Mercabarna.

Cultivar

Annex VI: Photo Album Study Tour (September edition)

Monday, September 23th

Working day given by the Mercasa team.

Tuesday, September 24th

Visit Mercamadrid.

CMR INFINITA
VISITA
mercamadrid

frutas
www.frutasolivar.cc

CARSANA

Wednesday, September 25th

Visit Villa del Prado: Production areas, post-harvest facilities and meeting with council representatives and farmers.

Thursday, September 26th

Visit to Anecoop's field of experiences “Masía del Doctor” Innovation Center. Valencia.

Visit to Cooperative “San José” (Alcasser, Valencia).

Visit to Central Market of Valencia.

Friday, September 27th

Visit to Mercavalencia.

BAJAMOS PRECIOS
MERCAVALENCIA
recomendado
VISITA

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