



Identification of levers to impact the Base of the Pyramid with nutrition and sustainable sourcing projects— July 2013



Table of Contents

Overview

Challenges and opportunities faced by the food industry

Sustainable Sourcing

Case studies

- Nestle Dairy Business in Pakistan – Nestle
- Nile Breweries – SAB Miller
- EthioPEA – Pepsico

Nutrition

Case studies

- NutriGo – Danone
- NutriStar – P&G

Synergos' value proposition

Overview

- Synergos, a 25-year old international development NGO, supports companies engaged in developing inclusive businesses and social programs in emerging markets.
- We combine expertise from international development and management consulting and we leverage our large **on-the-ground networks** and **multi-stakeholder partnership experience** to help companies define and implement relevant approaches to on-the-ground realities and partner with key players.
- This report builds on Synergos expertise in the **food industry**, on **experts' interviews** and on **publicly available information**. This study highlights the opportunities, challenges, and the key levers for global food and beverage companies to generate a social impact for the Base of the Pyramid (BOP)¹.
 - The report presents a set of examples of strategic partnerships and innovative business models in emerging markets that highlights key levers for social impact.

¹ The 2.4 billion people living on less than \$2 a day (World Bank)

Executive Summary

Context

- The world's **demand for food is projected to grow** by 50% by 2030, as population is growing¹. This represents a great potential for global consumer markets.
- Food and beverage companies are positioning themselves to capture this growth by **developing innovative ways** to engage these markets.
- We believe these new ways of engagement have potential to generate not only business but also a large social impact. We will focus our study on two main areas that food and beverage companies can impact: **Sustainable sourcing models and nutrition**.

Key Findings

- Throughout our experience, experts' interviews and comparative analysis of several case studies, we have identified **nine key levers to generate these innovations** - in both **sustainable sourcing and nutrition** - on which new corporate expertise is required:

1. **Direct sourcing from farmers** : engaging direct collection and purchasing with the farmer
2. **Technological breakthrough**: innovating IT to facilitate communication around weather information and agricultural guidance
3. **Training and financing to farmers**: improving farmers' access to information, inputs and technical assistance
4. **Sustainable end-to-end supply chain**: supporting infrastructure development, engaging resources all along the supply-chain
5. **Nutritional products**: developing new reengineered products to respond to local needs **with** new pricing
6. **New distribution model**: innovating with distribution channels/partners to make quality products reach underserved clients
7. **Multi-stakeholder partnerships**: engaging in local and global partnerships with key stakeholders
8. **Education/training for behavioral change**: training local people, health educators, sales representatives to raise awareness on health benefits of micronutrients
9. **Advocacy**: raising awareness among key leaders to influence public policies and resource allocation decisions and to increase projects' scale

- These new operating models can be developed under **three corporate approaches: Business, CSR and/or Philanthropic**

¹ In the next 35 years, 2.5 billion people will be added to the current population of 6 billion, World Bank estimates

Table of Contents

Overview

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Synergos' value proposition

Food and Beverage companies have to face rising opportunities and challenges related to both social and business imperatives



Nutrition

- **Malnutrition** - one of the most critical issues of the 21st century:
 - In 2006 more than 2 billion people, 30% of the population of developing countries suffered from micronutrient deficiencies
 - In 2010, 925 million people were undernourished¹
 - 2.8 million adults die each year as a result of being overweight or obese²
- **Increasing demand for food: +50% by 2030¹**
- **Growing civil society pressure** on multinationals to be more socially responsible⁵



Sustainable sourcing

- **Increased customer expectations**
 - Customers requesting enhanced traceability and increased sourcing from fair trade³
- **Greater risk of sourcing scandals**, due to larger, more complex global supply chains, increased controls from regulatory bodies and civil society, more rapid media coverage
- **Pivotal challenges** for the industry
 - Over-complexity of supply-chain
 - Expensive intermediation of middle-men
 - Fragile partnership with suppliers
 - Pressure on food security

There is an economic potential driving business opportunities, that can have a large social impact:

- Reaching the base of the pyramid (BOP) market⁴
- Potential of market forces in large-scale poverty alleviation

¹ Food and Agriculture Organization Statistics

² World Health Organization

³ 2013 MamboTrack Annual Natural and Organic Product Survey

⁴ BOP= 2.7 billion people who live on less than \$2 a day

⁵ A recent example was Oxfam "Behind The Brands" scorecard, published in the New York Times

Many food companies are generating innovative approaches to deliver both business and social outcomes

Direct Business Objectives

- Create **new markets** / improve market access to increase sales
- Drive **innovation** and differentiate products from competition (especially vs. local offering)
- Create **sustainable** business and better manage risks
 - Develop workforce resilience
 - Build sustainable sourcing
 - Reinforce sourcing quality control
- Increase **productivity** and efficiency
- Improve **social capital** and brand image
- Secure « **license to operate** » locally



Direct Societal Outcomes

- Improve **access to food** (last-mile distribution, supply security, better quality, decreased prices)
- Address **nutritional** deficiencies
- Create **behavioral** change for better health
- Increase **farmers' income**
- Decrease impact on **environment**

EXAMPLES

- Nestlé's PPPs ¹ accounts for around **8% of Nestlé's annual sales** in 2009, and sales are growing at more than **12% per year**
- Unilever's Project Shakti² now accounts for **5% of Unilever's total revenues** in India



EXAMPLES

- Nestlé's PPPs sold **600,000 tons of iodine-enriched** Maggi products in 2009
- Unilever's Project Shakti² provides opportunities to about **45,000 women in 15 Indian states**

¹ Nestlé's "Popularly Positioned Products" (PPPs) focus on the specific needs of around 3 billion lower-income consumers worldwide in 70 countries

² Project Shakti aims at creating a new direct-to-home distribution system of Food products, run by underprivileged female entrepreneurs, in Indian village

Building multi-stakeholder partnerships is key for companies to achieve business and social objectives

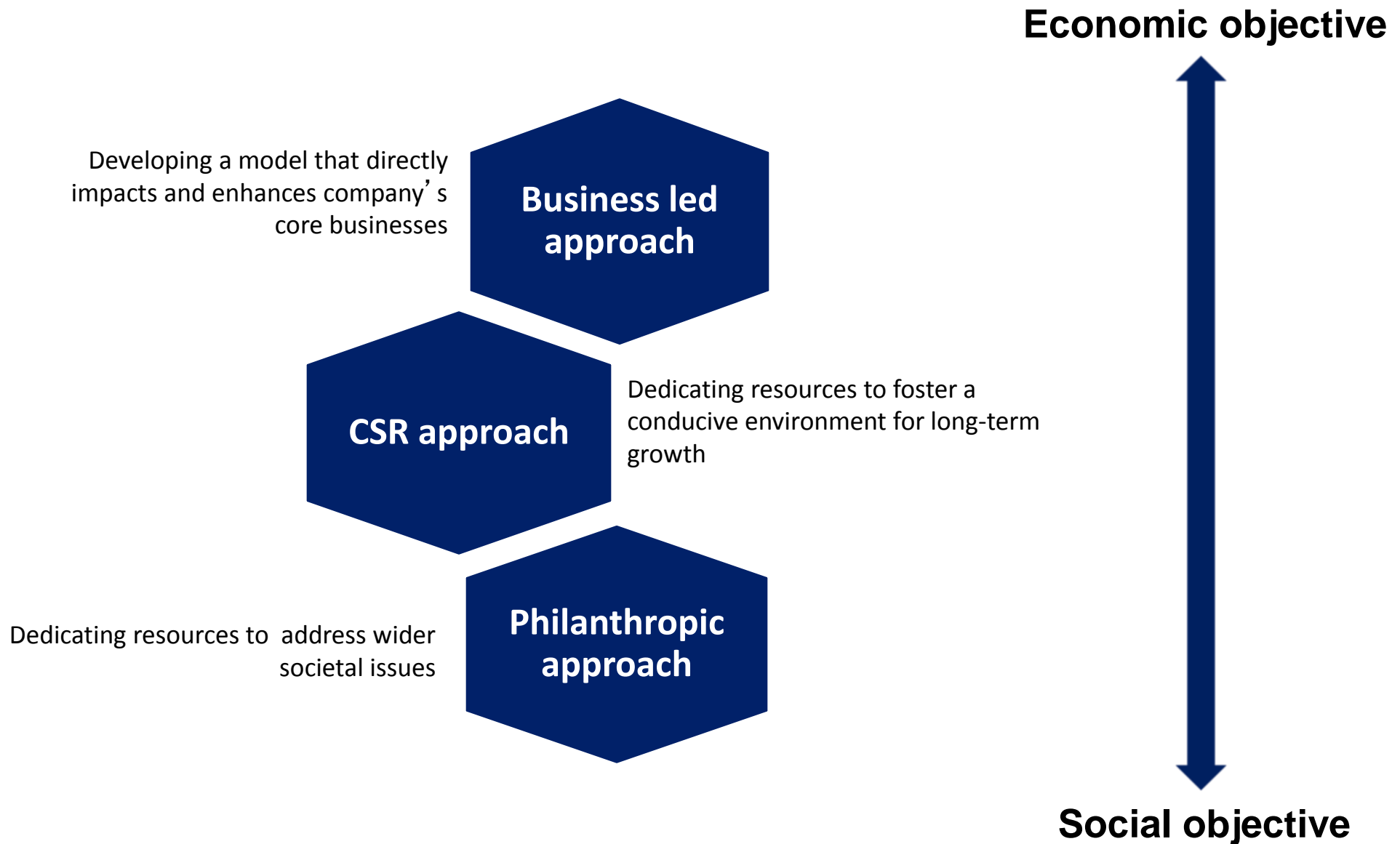
Partnerships' benefits

- **Extending reach and scale** of projects around nutrition and sustainable sourcing, especially through public-private partnerships (PPPs)
- Sharing or **reducing risk**
- Improving **effectiveness** and efficiency by capitalizing on existing knowledge base or on other stakeholders' complementary assets
- Strengthening **local knowledge** and market understanding
- Increasing **employees' satisfaction** and improving company image

Partnerships' key success factors

- Implementing a **needs-based approach** tailored to local context
- Engaging in **broad-based global partnerships** and with **local stakeholders**, to leverage knowledge and resources and to work at different levels in parallel (ex. local, regional, national)
- Identifying bridging organizations, able to translate meanings across sectors and to build trust
- Using existing **country systems** and promoting **local ownership**
- Envisioning scale but starting small by **piloting**
- Envisioning **sustainability** beyond the company's own resources, by shifting the **institutional** arrangements
- Generating **baselines** and monitoring results – tangible and intangible
- Engaging **other company business departments** (not just CSR)

Multinationals can use a combination of approaches to obtain business and social objectives



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Synergos' value proposition

Implementing innovative approaches requires overcoming key challenges

Challenges

- **Overcoming barriers** to reach low-income suppliers
 - **Geographical:** numerous and dispersed farms
 - **Organizational:** inefficient supply chains
- Avoiding **side-selling** (e.g., black market)
- Bypassing **traditional intermediaries** opposed to supply chain innovation
- Avoiding large **intermediation costs**¹
- Finding a buyer or pool of buyers atop the supply chain to **guarantee the purchasing** of the output

Best Practices

- Building **hubs** and intermediate collection facilities
- Absorbing **intermediaries**
- Implementing an **end-to-end supply chain** with a direct management of suppliers (some companies manage networks of up to 4 millions rural farmers and create direct collection and payment system to replace traditional middlemen)

Synergos' specific expertise

- *Several sourcing projects with multinationals in Africa*
- *A network of civil society, entrepreneurs and government leaders and of companies in the agricultural sector*
- *25 years of experience managing multi-stakeholders partnership and developing community engagement programs*

¹ "Intermediaries such as transporters, traders, commission agents, and wholesalers typically extract between 30 and 45 percent of the final market value, while spoilage and wastage may account for up to another 30 percent lost" - Monitor report – Emerging Markets, Emerging Models, Mars 2009

Food & Beverage companies can employ six key levers to reach out successfully to the BOP

EXAMPLES

Key Levers	Examples of Actions
① Direct sourcing from farmers	<ul style="list-style-type: none">• Engage direct purchasing relationships with the farmer• Engage direct collection from the farm gate
② Technological breakthrough	<ul style="list-style-type: none">• Develop cluster of information• Use mobile technology to provide weather information and guidance on agriculture to farmers
③ Training and financing to farmers	<ul style="list-style-type: none">• Improve farmers' access to information• Provide technical assistance• Provide subsidized inputs
④ Sustainable end-to-end supply chain	<ul style="list-style-type: none">• Commit to purchase the entire crop• Build storage facilities• Develop infrastructure : e.g. improved quality of local roads
⑤ Multi-stakeholder partnerships	<ul style="list-style-type: none">• Partner with competitors to collaborate R&D efforts and share information networks• Partner with supporting organizations, e.g. NGOs offering microloans or doing awareness campaigns
⑥ Advocacy	<ul style="list-style-type: none">• Partner with larger organizations , institutions or governments to raise awareness, increase collaboration and identify opportunities for scale• Raise awareness among key leaders to influence public policies and resource allocation decisions

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Synergos' value proposition

Case: Sustainable sourcing - Nestle dairy business in Pakistan

BASED ON
PUBLICLY AVAILABLE DATA



Nestlé

Good Food, Good Life

Nestlé Pakistan plays a central role in the **modernization of the dairy sector in Pakistan** by increasing productivity, improving market access and promoting diversified livelihoods for smallholder farmers.

Business objectives & outcomes

Objective: Increase productivity

Outcome: Sourcing 500 million liters of milk a year generating a **5% net profit** on revenues in 2008

Objective: Improve market access

Social objectives & outcomes

Objective: Offer higher quality milk
Fight iron-deficiencies

Objective: Provide training to dairy farmers

Outcome: 30,000 dairy farmers to be trained in 2013-18 through training centers

Objective: Average salary of the factory worker is doubled the average in this industry

Outcome: Enhanced productivity : farms earning about **59% more per cow**

Key levers employed

- ① **Sourcing directly from farmers**
 - Buying milk directly from **over 150,000 farmers** over a wide geographic range
- ④ **Organizing sustainable end-to-end supply chain**
 - Setting up Village Chilling Centers in large villages, spaced out for up to 20 min. travel
- ③ **Providing training**
 - 3% wages spent on training of the Village Milk Collection Agent who runs the chilling centers
 - Training on milk collection and operational techniques

Case: Sustainable sourcing - SAB Miller business in Uganda

BASED ON
PUBLICLY AVAILABLE DATA



SAB Miller pioneered the use of local raw materials (LRM) in commercial brewing of clear beer in Uganda

Business objectives & outcomes

Objective: Increase sales

Outcome: Increase of **+7m beer cases** in 8 years

Objective: Increase productivity

Outcome: Sorghum usage multiplied from 1,600 tons in 2003 to 8,500 tons per annum in 2012

Objective: Position brands in new markets

Outcome: Eagle brand represents 35% of the total beer market in Uganda

Social objectives & outcomes

Objective: Increase farmers' income

Outcome: Income of US\$ 3 million earned by 9,000 farmers and 100,000 beneficiaries, in over 20 districts across Uganda

Objective: Offer hygienic clear beer, alternative to home brews and informal alcohol

Key levers employed

① Sourcing directly from farmers

- **8,000 farmers** in Uganda
- **34,000 jobs** impact in agriculture including direct and indirect job

② Using a technological breakthrough

- Epuripur sorghum developed by the Serere Animal & Agricultural Research Institute

③ Providing financing to farmers

- Guaranteed market and price for sorghum offered by Nile Breweries Ltd

Case: Sustainable sourcing - PepsiCo Enterprise EthioPEA

BASED ON
PUBLICLY AVAILABLE DATA



PepsiCo partners with World Food Programme and USAID to increase chickpea production and promote long-term nutritional and economic security in Ethiopia

Business objectives & outcomes

Objective:

- Increase PepsiCo's access to chickpeas
- Create new domestic and export markets for Ethiopian chickpeas

Objective:

- Create sustainable business opportunities for PepsiCo
- Build a \$30 billion global nutrition business by 2020 with an important part of chickpea-based products

Social objectives & outcomes

Objective:

- Help 10,000 Ethiopian farmers double their production of chickpeas
- Improve the overall quality of the soil farmed

Objective: Address the critical issue of famine in the Horn of Africa

Outcome: Develop a locally sourced, nutrient-rich, ready-to-use supplementary food (RUSF) to address malnutrition

Key levers employed

- 1 Sourcing directly from farmers**
 - Enable nearly 10,000 Ethiopian farmers to realize a two-fold increase in chickpea yield by applying more modern agricultural practices and irrigation techniques.
- 3 Providing education to farmers**
 - Introduce more vigorous seed strains along with technical and financial assistance to deploy low-cost flood irrigation

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Nutrition

Case studies

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- NutriStar – P&G

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Implementing innovative approaches requires overcoming key challenges

Challenges

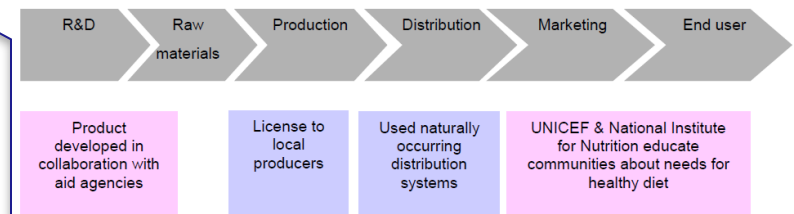
- Overcoming **in-country** infrastructure to reach and deliver the product to the poorest communities
- Possessing **local knowledge** and reach : understanding what customers want vs. what they need
- Getting **credibility on product's health benefits**, often undermined by the absence of enforced intellectual property rights

Best Practices

- Adopting a **network approach** and building **partnerships** with partners already well established on the ground
- Focusing partnerships around an **educational need or an informational resource** that would be trusted and recognized by customers

Example of model to overcome challenges

P&G: Nutritional product



Source: Procter & Gamble Combating “hidden hunger”, World Business Council for Sustainable Development

Synergos' specific expertise

- Several projects supporting food & beverage companies develop nutritional products for BoP consumers
- A network of civil society, entrepreneurs and government leaders and of companies in the food sector
- 25 years of experience managing multi-stakeholders partnership and developing community engagement programs

Food & Beverage companies can employ five key levers to reach out successfully to the BOP

EXAMPLES

Key Levers	Examples of Actions
① Nutritional products	<ul style="list-style-type: none">• Tailor packaging of products to local needs: smaller units• Develop new pricing model: pay per use and tiered pricing• Enhance products' nutritive elements
② New distribution models	<ul style="list-style-type: none">• Leverage assets by capitalizing on local partnerships that decrease supply chain inefficiencies• Use Micro-Distribution Centers to reach remote areas• Prefer shared channels: partner with micro-Finance networks• Develop new direct-to-home distribution systems
③ Multi-stakeholder partnerships	<ul style="list-style-type: none">• Partner with competitors to collaborate R&D efforts and share distribution networks• Partner with supporting organizations, e.g. NGOs offering microloans or doing awareness campaigns
④ Education/training for behavioral change	<ul style="list-style-type: none">• Raise awareness on the public health benefits of micronutrients• Raise awareness through community organizations• Educate population by training health educators and sales supervisors
⑤ Advocacy	<ul style="list-style-type: none">• Partner with larger organizations, institutions or governments to raise awareness about nutrition and increase collaboration and identify opportunities for scale• Raise awareness among key leaders to influence public policies and resource allocation decisions

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Synergos' value proposition

Case: Nutrition - Danone NutriGo in China

BASED ON
PUBLICLY AVAILABLE DATA



Danone launched a social business in China that will generate both a large business and social impact. Danone is leveraging 3 of 5 key identified levers¹ to target BOP consumers.

Business objectives & outcomes

Objective: Increase penetration rate

Outcome: Achieved 35% penetration rate, representing 200,000 users per province

Objective: Build a credible and trustworthy image

Social objectives & outcomes

Objective: Fight child malnutrition in rural China – by reaching 800,000 babies
Outcome: Distribution of a fortified complementary product

Objective: Reach populations without access to nutritional information and products
Outcome: Training rural women in nutrition and sales

Key levers employed

- 1 Launching a new product**
 - YingYangBao, a nutrient-dense food supplement for babies
- 3 Building local partnerships**
 - Partnered with two Chinese NGOs, a Chinese public institute and a foundation
- 4 Education and training**
 - Trained 1,300 people and 130 doctors and Health practitioners

¹ See page 19



After a first unsuccessful “go in and do everything yourself”¹ mentality, P&G shifted away and looked to **engage with new partners** already well established on the ground. P&G leveraged this network of partnerships to redefine its strategy².

Business objectives & outcomes

Objective: Position brands in new markets
Outcome: Develop a new commercial product designed for a large customer base

Objective: Iterate strategy for succeeding in BOP markets in other countries

Social objectives & outcomes

Objective: Combat “hidden hunger”
Outcome: Powdered drink mix with all the vital micronutrients sold in BOP markets

Objective: Strengthen knowledge and awareness of hidden hunger
Outcome: Product advertising coupled with NGO-led awareness campaigns

Key levers employed

- ① **Developing nutritional products**
 - Content innovation: Low cost powdered drink mix
 - Packaging innovation: small sachets
- ③ **Catalyzing multi-stakeholder partnerships to create new models**
 - Partnered with Local enterprises, UNICEF, USAID, WHO, academic think-tank
- ④ **Investing in extensive educational campaigns**
 - Donating \$ 1 million of the profits to fund public service programs on proper nutrition

¹ World Business Council for Sustainable Development, Procter & Gamble Combating “hidden hunger” Case Study, 2004

² Albion Laboratories acquired P&G NutriStar business on February 28, 2012

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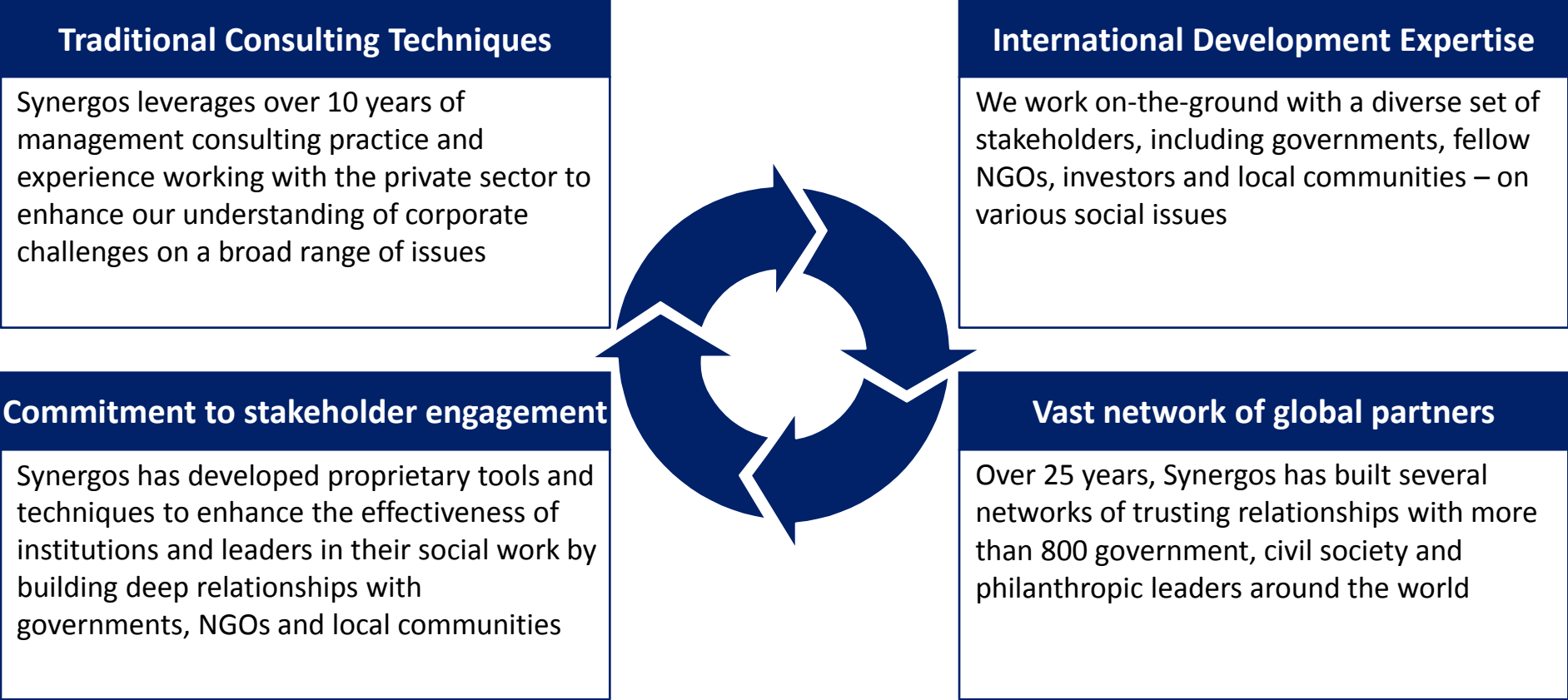
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Synergos' value proposition

Synergos Consulting Services could help you design, implement or scale up similar initiatives

We offer companies a strong value-proposition, offering companies a mix of:



“ Synergos enabled Unilever to form a powerful coalition on child nutrition in India. Synergos was instrumental in identifying individuals and organizations and bringing them into a multi-stakeholder partnership to help combat the huge problem of hunger and malnutrition in children in India.

– Paulus Vershuren, Former President, Unilever Asia

”

Our work at Synergos

Synergos Consulting Services, the consulting arm of Synergos, helps global companies engage in initiatives that advance both corporate and social interests and build sustainable business practices into core business models.

We leverage 25 years of international development work undertaken by Synergos, engaging with local communities across a number of topics including local empowerment, nutrition, healthcare, education and agricultural issues.

We help private sector clients seeking to build sustainable businesses in emerging markets. We help them define their social impact strategy, and design and implement BoP solutions and CSR programs, by supporting them in:

- Generating innovation targeting systemic changes
- Developing strategies that generate both a business and a social impact
- Tailoring existing business models to new markets
- Analyzing and assessing business models with social impact
- Monitoring and evaluating social outcomes
- Gathering on-the-ground knowledge and linking bottom-up with top-down strategies
- Mapping stakeholders, engaging non-traditional partners and brokering partnerships in emerging markets
- Institutionalizing change by building local capabilities and leadership

Other examples of our work



Food and Personal Care / India

Integrating Corporate Social Engagement efforts in the global endeavors of multiple local development actors

Supported Hindustan Unilever and several other private and public partners in India to fight child malnutrition



Food and Beverage Sector / Sub-Saharan Africa

Developing new product for Base of the Pyramid consumers to help fight under-nutrition

Supported a food & beverage company develop a Base of the Pyramid model for nutritional products in both India and East Africa



Food and Beverage Sector / Ethiopia

Building a sustainable sourcing model and building capacity for systems-shifting collaborations

Supported a US food & beverage company build a sustainable sourcing model with small-holder farmers in Ethiopia. Our work leveraged Synergos' experience in the creation of the ATA (Agricultural Transformation Agency) supporting the Ministry of Agriculture



Science and Agriculture / Africa

Aligning an agricultural sustainability strategy with business objectives

Helped a leading supplier of advanced plant seeds align its business objectives with its sustainability strategy and think strategically about the social impact of their agricultural initiatives in Africa.

Case study- Synergos project - the Bhavishya Alliance



Synergos helped Hindustan Unilever and three other major corporations to establish in 2006 a unique multi-stakeholder partnership in India with UNICEF and other local stakeholders to develop a cohesive response to **child undernutrition in the State of Maharashtra in India**.

This alliance pioneered a partnership model that involved companies, state government, community organizations and global agencies.

Synergos helped those partners **implement** a series of **innovative pilot** projects in target areas:

The Food Diversification project

Improvement of quality and variety of supplementary nutrition foods provided at childcare centers

➤ **149,000 children reached**

The Girls Gaining Ground initiative

Recognition of adolescent girls as key stakeholders able to influence child malnutrition

➤ **10,000 girls reached**

Taj Chefs' work on the menu

Creation of 40 different recipes providing nutrition at minimum cost to tribal children

➤ **13% increase in state schools attendance**

Computer-Aided Literacy, Health and Nutrition Awareness Programme

Training to local women

➤ **1,260 participants in 30 centres trained**

Rates of stunting fell from 39% in 2005 to 23% in 2013 in the State of Maharashtra

Key achievements

1. Creating a unique, **multi-stakeholder partnership** to tackle the complexity of child malnutrition: The Bhavishya Alliance was recognized as one of the most impactful partnership in nutrition in India by many development leaders
2. **Scaling up innovations** beyond pilot stage
3. Introducing a **groundbreaking model for problem solving** blending a new social technology with an entrepreneurial approach
4. Shifted **stakeholder engagement practices** within partner organizations

Key lessons

1. Seek an **enabling environment** (e.g., strong political will and achieve players)
2. Prototype the viability of interventions
3. Foster **government commitment** at various levels
4. Partner strategically with locally-based NGOs and communities
5. Foster cooperation across corporate sector players and leverage specific resources (e.g., Hindustan Unilever and ICICI Bank)
6. Rather than taking on the role of government, **model the potential** for their role

Our core leadership team



Robert Dunn, CEO of Synergos

- Provided advisory consultation to global and national groups assessing social impact
- Served previously as Chairman, President and CEO of BSR (a non-profit organization working with global companies to promote sustainable business practices). Also served as Vice President for Corporate Affairs at Levi Strauss & Co.
- Serves on several boards of mission-driven organizations



John Heller, Synergos Services

- 20 years of experience in international development and business
- Launched a series of large-scale initiatives integrating market, state and NGO actors to achieve results on such challenges as child nutrition in India, health systems effectiveness and agricultural transformation in Africa
- Served as a lead advisor to global companies seeking to create path-breaking approaches to achieve social impact through business in Asia, Africa, and Latin America
- Specializes in enabling clients to innovate through processes that integrate wisdom across disciplines and cultures



Rajash Sarin, Director of Synergos Services

- Develops and implements offerings to global companies seeking social impact
- Served as an investment banker and management consultant (Booz & Company, KPMG) for about ten years across Europe, Middle East and Africa
- Served recently as a fellow in India for LGT Venture Philanthropy, an impact investing fund



Audrey Philippot, Senior Manager of Synergos Services

- Develops and implements offerings to global companies seeking social impact
- Served as a strategy and management consultant for ten years, both at McKinsey and LVMH (a Luxury Goods company), where she advised several global companies on strategies, organizations and turn around projects.
- Served as a consultant and advisor within several NGOs to advise small entrepreneurs in developing countries on growth strategies

Our core team is supported by internal experts and staff located in Africa, India and Latin America, and by a network of affiliated consultants bringing in specific expertise.

Representative Supporters, Partners and Clients

Some of our supporters, partners and clients include:

Corporations & Foundations

- BNP Paribas
- Deutsche Bank
- McKinsey & Co.
- Mvelaphanda Group
- PepsiCo
- Pfizer, Inc.
- Shell
- Unilever
- Ford Foundation
- Bill & Melinda Gates Foundation
- The W.K. Kellogg Foundation
- Nike Foundation
- The Rockefeller Foundation

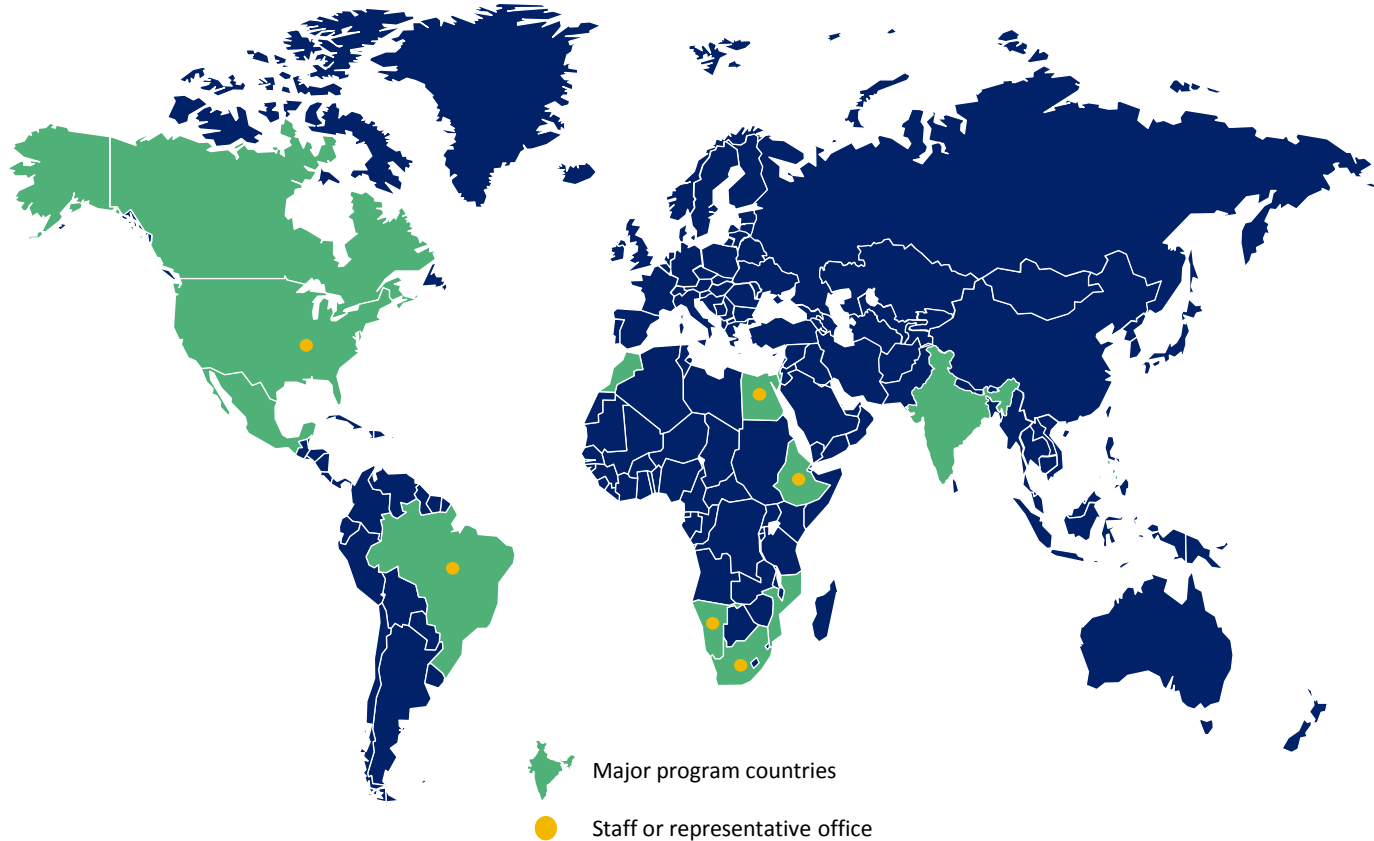
Government & (Inter-) governmental organizations

- Ethiopia - Ministry of Agriculture
- Ethiopia - Agricultural Transformation Agency
- Namibia - Ministry of Health and Social Services
- South Africa - Departments of Health, Social Development and Women (among others)
- Brazil - Government of Pará
- India - Government of Maharastra - Women and Child Development Department
- Canada - Ministry of Aboriginal Relations and Reconciliation of British Columbia
- India - UNICEF
- U.S. - Agency for International Development (USAID)



Where we work

In 25 years, Synergos has worked in more than 30 countries and regions. Our current key projects are in Middle East/North Africa, Southern Africa, Ethiopia, India, Canada and Latin America.





Synergos

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