REPORT SNAPSHOT

Landscape of Technical Assistance to Agri-SMEs

Sub-Saharan Africa and Latin America and the Caribbean

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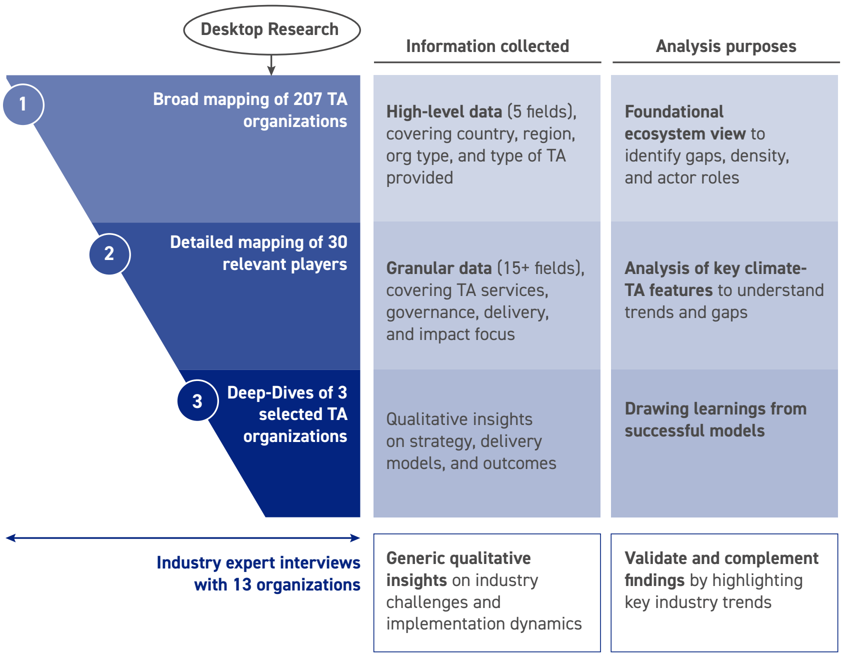
This report maps over 200 organizations providing technical assistance to agri-SMEs across sub-Saharan Africa and Latin America and the Caribbean.

Our scope focused on TA to mobilize finance for agri-SMEs, particularly missing-middle enterprises, whether donor funded or tied to investment vehicles. This mapping supports decision-making for three audiences:

- **Funders** can identify where their current portfolios may be duplicative or overlooking underserved markets.
- **TA providers** can identify complemntary organizations and coordination opportunities based on the services they provide.
- **Investors** can find partnerships with TA providers in their target geographies to strengthen their pipeline.

FIGURE 1. CLIC'S DATA COLLECTION APPROACH

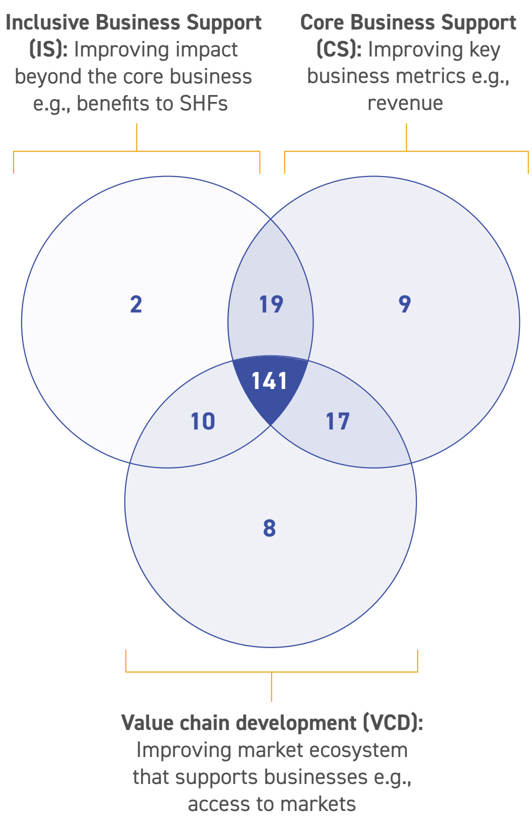


Service positioning trends toward comprehensive over specialized offerings

Over two-thirds (68%) of mapped TA organizations describe comprehensive packages combining business support, inclusive models, and value chain development. Less than 10 organizations provide only one type of service. Consultancies are the primary providers of core business support, while NGOs were leading providers of business support and value chain development services.

Over a third of organizations (40%) complement their core offerings with hands-on agronomic support. NGOs significantly outweigh consultancies in delivering agronomic services, highlighting the challenges of effectively working in the agriculture and food sectors. The inherent complexity of the sector neccessitates dedicated agriculture training on top of general business support, particularly in order for agribusinesses to meet international standards.

FIGURE 2. TYPE OF TA SERVICES PROVIDED



TA providers concentrate heavily on a small number of hub markets

This ecosystem density enables provider coordination and easier SME navigation, but also risks neglect of frontier markets. In SSA, five countries are served by over 80 TA organizations: Kenya, Ghana, Uganda, Niger, and Rwanda. Kenya dominates SSA's TA landscape with 104 organizations, 60% of the region's total, including 14 headquartered regional players. In LAC, the TA organizations we analyzed clustered their operations in large EMDEs; Colombia and Peru were both served by 61, and Mexico by 50.

Across both the SSA and LAC regions, least developed countries (LDCs) and small island developing states (SIDS) are the most underserved. In SSA, the LDCs, Guinea-Bissau and Eritrea, each have fewer than 20 organizations, while among SIDS, Cabo Verde has six. In LAC, countries with fewer than 10 organizations are predominantly SIDS such as the upper-middle-income nations Suriname, Saint Lucia, and Saint Vincent and the Grenadines. This pattern suggests potential market failures where vulnerability is highest.

Local TA providers are difficult to map systematically and appear underrepresented despite their important role. This is despite interviewees emphasizing the effectiveness of partnering directly with local providers who deliver TA on the ground and maintain existing relationships with beneficiaries and intermediaries. We found only 12 national TA organizations across SSA (in Ghana, Kenya, Malawi, South Africa, Uganda, Tanzania, and Zambia) and 3 across LAC (oin Colombia and Mexico), representing just 8% of our dataset.

FIGURE 3. MAP OF TA ORGANIZATIONS ACTIVE IN SSA

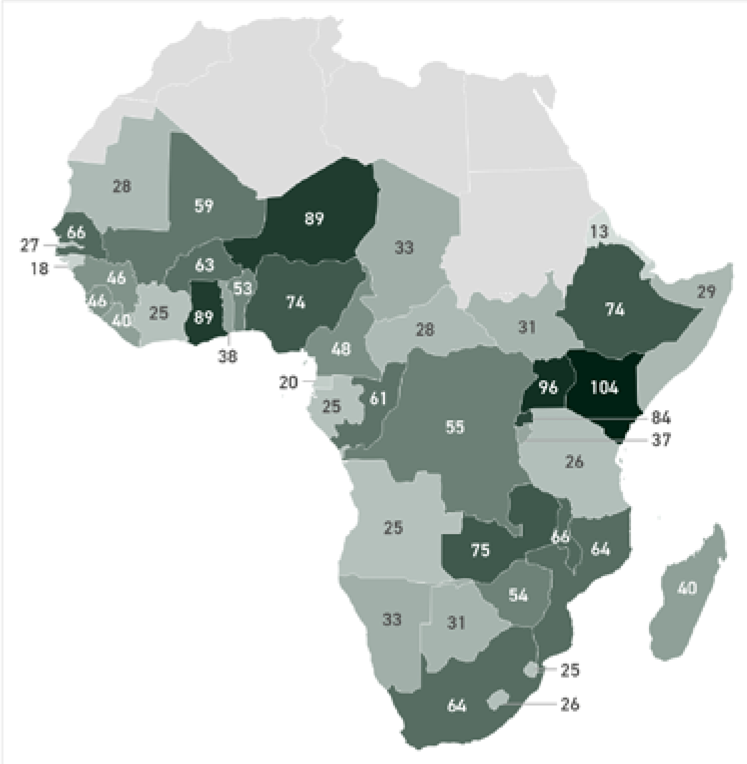


FIGURE 4. MAP OF TA ORGANIZATIONS ACTIVE IN LAC

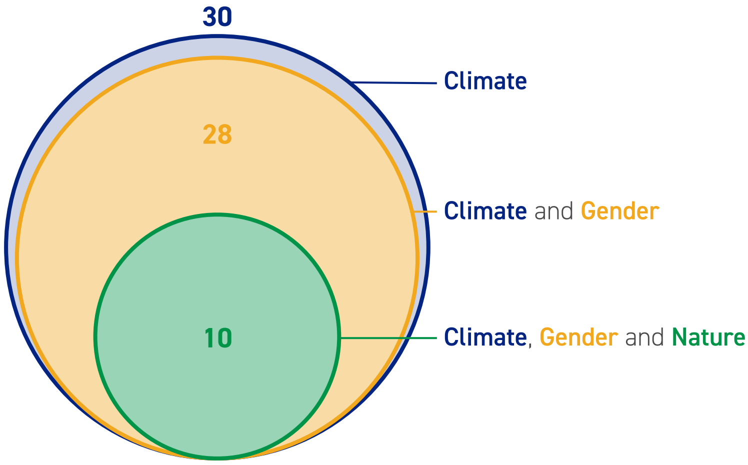
The analysis also provides an in-depth examination of 30 TA providers and facilitators specializing in climate.

Nature lags behind climate and gender integration

Gender integration is standard among climate-focused TA leaders. Nearly all organizations (28) describe themselves as integrating gender equality and women's empowerment as strategic priorities or components of specific programs, through HR support, strategy, and sourcing models.

Nature integration appears less systematized. Only 10 organizations integrate nature considerations to varying degrees, and fewer explicitly mention supporting nature-positive practices, such as agroecology, biodiversity protection and regenerative agriculture. This presents an important area for building agri-SME expertise, as investor expectations around nature-positive outcomes grow.

FIGURE 5. IMPACT AREAS OF SELECTED TA ORGANIZATIONS

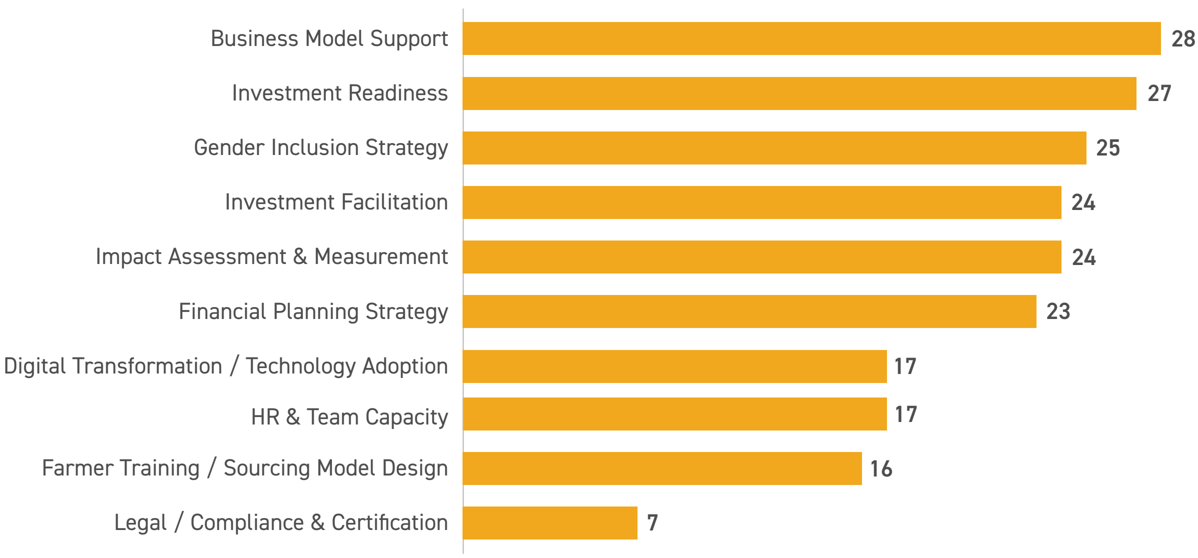


Few providers focus solely on pre-investment support

While over half (16) provide support throughout the investment cycle, fewer focus (9) on the pre-investment stage that helps SMEs reach investors and secure a first round of commercial capital. This distribution reflects the financial sustainability challenge discussed in the report: organizations focusing solely on pre-investment struggle to fund operations without committed investor capital, while those serving both stages can balance donor-funded early support with fee-generating later support.

Almost all organizations (24) examined provide impact assessment and measurement services. However, their approaches vary significantly, resulting in a wide variation of metrics that are difficult to standardize, aggregate, and compare. The tension between the efficiency of common metrics and appropriateness of context-specific assessment highlights key trade-offs in the sector.

FIGURE 6. TYPE OF TA SERVICES PROVIDED BY SELECTED TA ORGANIZATIONS



Four structural gaps weaken the TA ecosystem

Our analysis and interviews identifies four interconnected gaps that limit the effectiveness of TA: in information transparency, pre-investment funding, standardization, and collaboration incentives. We also provide a case study for each gap, illustrating what addressing these issues can look like in practice.

CHALLENGE	Constrained visibility into the full ecosystem	An pre-investment funding gap for early-stage SMEs	Limited standardization across delivery models	Lack of incentives to collaborate
IMPLICATIONS	• Funders risk duplication in hub markets and concentration in mainstream TA areas. • Agri-SMEs and TA providers rely on their immediate networks and word of mouth referrals.	The absence of viable funding models at the pre-investment stage contributes to a bottleneck in the pipeline.	Agri-SMEs undertake multiple incompatible climate assessments for different funders, wasting limited resources.	• Limited coordination among TA providers results in duplicated demands on agri-SMEs. • Limited knowledge dissemination creates slower learning across the ecosystem.
CASE STUDY	Prospero Zambia demonstrates how national providers play a critical role in reaching SMEs and building local pipelines.	IDH's reVive Hub illustrates how a dedicated facility with a longer runway and lower conversion expectations can help close the gap.	IDH's FarmFit Fund partnered with the Cerise+SPTF to develop a de-risking tool that could serve as a public good to benefit other TA providers and investors in the sector.	Smallholder SustaiNability Upscaling Programme (SSNUP) shows how a trusted intermediary can enable coordination within the investor community.

Recommendations to improve ecosystem efficiency

We identify four areas where coordinated action could materially improve ecosystem function, building on the case studies examined. For each opportunity, we outline specific actions in that donors, investors, and TA providers can take, based on examples from exising practice.

ACTION AREA	Establish independent brokering and coordination infrastructure	Build shared digital infrastructure while preserving local flexibility	Address the pre-investment funding gap through dedicated facilities	Prioritize national provider visibility and invest in frontier market development
CHALLENGE ADDRESSED	Fragmented ecosystem with limited coordination mechanisms between competing providers	Duplication of effort across providers; SMEs cycling through similar programs; no shared visibility of who is served where	Post-investment bias across delivery models; promising SMEs filtered out before reaching scale	Underrepresentation of national providers; geographic concentration in hub markets; absence of investment vehicles in frontier markets

DONOR OPPORTUNITY	• Fund and designate a trusted neutral body to verify overlap, facilitate referrals and manage coordination without requiring providers to share competitive intelligence directly, based on the model of the Smallholder SustaiNability Upscaling Programme (SSNUP).	• Fund shared databases tracking which SMEs receive what support; invest in technology platforms with sustainable funding beyond initial grants; coordinate reporting timelines • Demand that TA providers adopt • compatible climate and nature impact frameworks to reduce SME reporting burden across programs.	• Fund standalone pre-investment facilities (e.g., the IDH reVive • Hub model) with longer timelines and explicit mandates to build a pipeline without guaranteed investment outcomes.	• Fund country-level TA ecosystem mapping (e.g., through chambers of commerce, industry associations, or equivalent local institutions). • Provide 3–5-year funding commitments with budget flexibility to deploy local partners as primary delivery vehicles.
INVESTOR OPPORTUNITY	• Request visibility into TA coverage for target SMEs before committing capital.	• Accept compatible frameworks in due diligence rather than requiring bespoke submissions.	• Advocate for “preparation capital” carved from main funds.	• Pair frontier-market scouting with assessment of investment ecosystem maturity; adjust ticket size expectations accordingly.
TA PROVIDER OPPORTUNITY	• Participate in coordinated structures; share project-level information with trusted intermediaries; adopt compatible frameworks that allow for program-specific requirements.		• Build matchmaking infrastructure connecting TA-supported SMEs to appropriate investors. • Experiment with milestone-based TA-plus-grant combinations (e.g. USAID-WFP model) that tie funding to SME progress.	• Partner directly with national providers.