



Green Economic Growth for Papua Provinces

Final Report | March 2018 - February 2023



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EKONOMI HIJAU
PROGRAM PERTUMBUHAN EKONOMI HIJAU PROVINSI PAPUA & PAPUA BARAT



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1. Introduction

The Green Economic Growth for Papuan Provinces (GEG) has aimed to increase the proportion that sustainable, low carbon business contributes to the Papuan economy.

In partnership with Ministry of Village, Development of Disadvantaged Regions and Transmigration (MoV), this last year of the Programme has been jointly funded by the United Kingdom's FCDO and USAID. This report summarises the achievements and lessons from the programme's implementation period from March 26th, 2018, until February 28th, 2023. It focuses on highlighting results and impact and is supplementary to the GEG Project Completion Report (PCR).



2. GEG Key Results in Numbers

GEG programme results by the end of 2022 (End of Five-Year Program).

Over the last five years, GEG has worked in twelve sites achieving the most sustained impact in Fakfak (nutmeg value chain), Jayapura and Ransiki (Cacao value chain). The key results have included:



39

Agribusiness commodities, products and/or related services supported



6,392

Households actively involved in producer group activities



5,019

Individuals have received training to increase productivity for agribusiness



226

Business entities have received business training or advanced business development support;



6,310

Employment opportunities have been created in four priority value chains



131

Intermediate service providers or lead firms actively buying from producer communities



IDR 32,191,470,000

£1.7 m

Worth of public and private funds were invested in the priority value chains

IDR 1,561,065,332,802

£90 m

Total added value from targeted commodity chains



44,513

Forest dependent peoples' livelihoods have improved



19,040

Beneficiaries being serviced by stakeholders in non-GEG sites replicating GEG approaches and interventions



221

Strategic communication products to key stakeholders and public audiences to share our lessons and impacts



3. GEG Value Creation for Papua and West Papua

GEG has had an impressive impact on wealth creation for local Papuans in both the short and long-term.

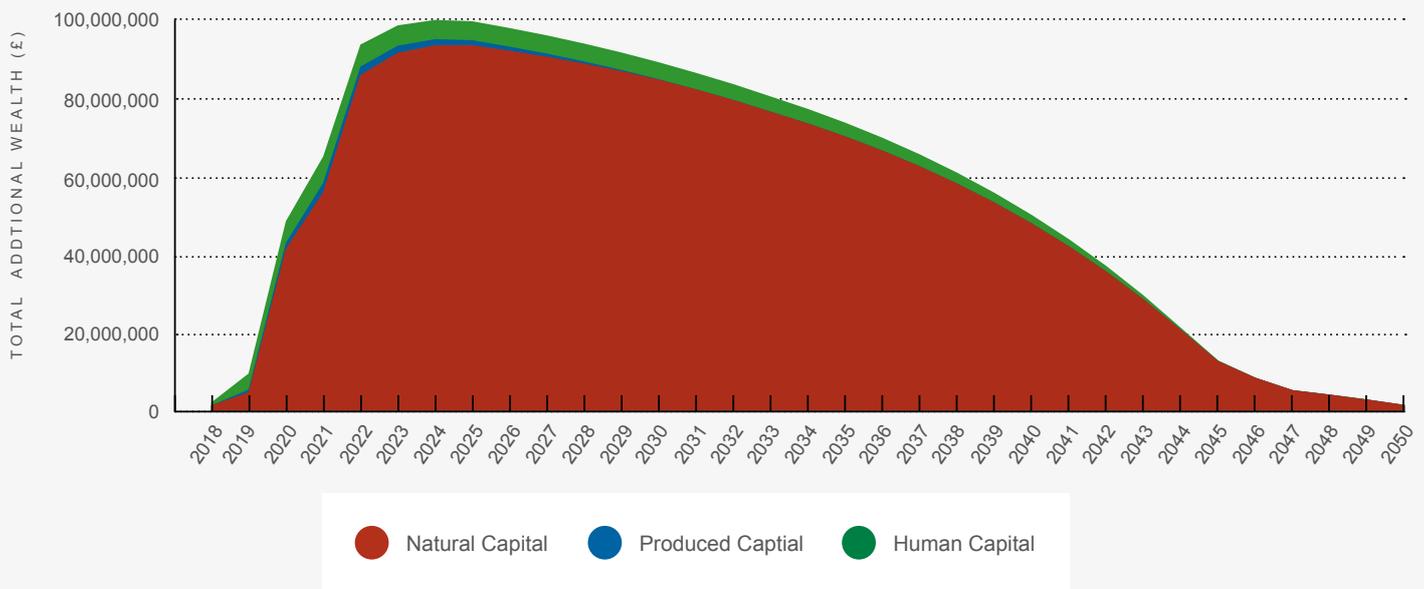
Economic analyses undertaken by the programme sought to understand not only the immediate value creation by the programme in terms of equipment or inputs supplied and subsequent yield or price increases, but also the sustained development of wealth created by enhancing skills and institutional infrastructure.

As of 2022, the wealth created by the GEG programme is estimated to be GBP93m across all value chains. This is expected to peak at GBP100m in the next three years, but there is expected to be lasting wealth creation, the direct effect tailing off as tree crops age and knowledge erodes.

Figure 1: Additional wealth created as a result of GEG interventions



Figure 2: Breakdown of the capital wealth accumulation by natural, produced and human capital assets



The majority of the GEG wealth creation is valued in terms of natural capital – enhancements in terms of crops and crop quality – but there is still significant growth in terms of produced and human capital.

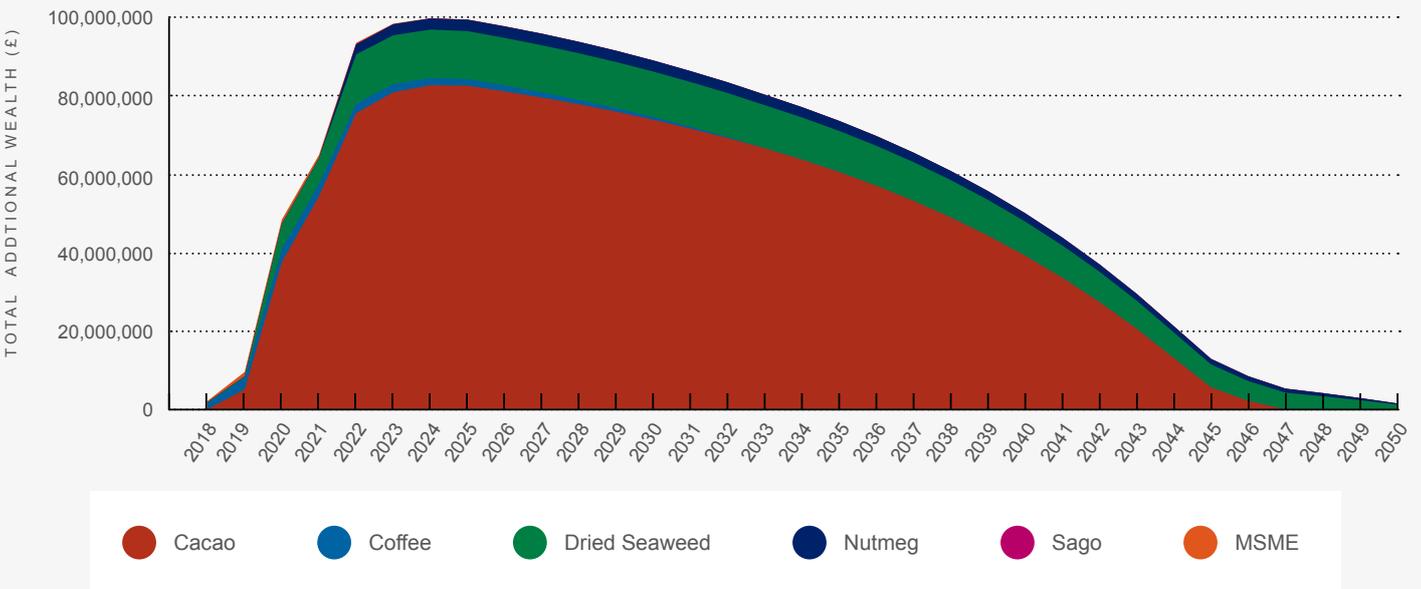
When considered across the programme, cacao reflects the value chain in which there has been the biggest natural capital accumulation, followed by

seaweed. It should be noted that these figures are based on 2022 data, focusing on wealth created rather than expected or anticipated wealth changes. Nutmeg, for example, is expected to grow as a value chain following GEG interventions and recent engagement by premium buyers.



3. GEG Value Creation for Papua and West Papua continued

Figure 3: Capital accumulation by commodity type







4. GEG Impact Highlights

In order to understand the impact behind the results that are measured against logical framework indicators, GEG has undertaken a series of deep dive impact studies in the last year of the Programme. The key findings of these studies are presented below.

4.1 How has GEG impacted value chains?

Over the past five years, GEG has facilitated significant scaling of the selected value chains, but a range of short and long-term challenges remain which, if addressed, could enable greater value chain scaling.

For nutmeg, GEG has provided the equipment and post-harvest training necessary to improve product quality in terms of producing smoke-free and aflatoxin-free nutmeg. This high-quality product has a particular appeal to international traders who can mix the Fakfak nutmeg with higher myristicin varieties in powdered form to increase their margins and ensure product consistency. The programme has also explored other avenues for scaling such as organic certification, new green business models, and value-addition products such as soap and balms developed from nutmeg butter. At present, further scaling in the nutmeg value chain is restricted by a limited demand for premium product (currently one trader with limited upper purchase volumes) and low-quality outputs from value-addition activities, as well as the persistent challenge of low productivity, inherited nutmeg trees which occupy valuable growing land. These challenges could feasibly be addressed over the next three to five years with targeted capacity and skills development, as well as the provision of post-harvest transformation equipment.

In terms of cacao, the objective for GEG has been to stimulate the revitalisation of the Papuan cacao industry. It is important

to note that the fundamental structures and knowledge from the previously booming sector remain. The challenge has been to redevelop cacao farms from a very low level, back towards fulfilling the market opportunity – which remains strong. The first step has been by increasing production volumes to create the volume to attract markets. Specific areas for intervention identified were focused firstly at farmer level to provide sustainable access to disease resistant quality seeds and seedlings, as well as provision of training to support the agronomy for this new stock. Further interventions also then addressed opportunities in value addition, aiming to maximise the unique ‘Papua origin’ cacao flavours. The biggest impact achieved by GEG has been to pilot pest and disease resistant cacao varieties, working in Jayapura and Keerom regencies. The results of the wealth study above speak to the effectiveness of these efforts. However, challenges remain in the cacao value chain which restrict its potential for scale. The principal barrier is still agricultural inputs, particularly high-quality fertiliser (which the Indonesian Government has recently started subsidising) and pest and disease resilient seedlings. Regarding the latter, GEG has successfully laid the foundation for restoring the cacao production volumes by introducing new, more resilient seedling varieties, but significant investment is needed to produce and distribute the required number of seedlings. Agronomic skills, limited labour supply and a lack of current international buyers are further obstacles which will need to be overcome through future interventions for Papuan cacao to fully realise its potential, but these are unlikely to facilitate scaling until tree numbers have been restored.

For coffee, the programme has supported Papuan coffee farmers to significantly improve their yields. As a result of these interventions farmers saw their productivity double. GEG has also proven the concept in terms of developing the coffee culture in Jayapura, nurturing the growth of café culture and facilitating the development of new market linkages and key value chain players. Proprietors have received training from the programme in small business management, digital marketing and online selling. Innovations have also emerged - such as street coffee ventures with youths running coffee carts. This growth in the domestic coffee industry has enabled local farmers to sell significant volumes of coffee to Papuan coffee shops and roasteries, but the programme has found it harder to scale up the export of Papuan coffee as the volumes remain too low for most international buyers. There has been some success in export sales, however, based on smaller volumes of niche, premium product which attracts specialist buyers who can leverage the unique origins story of Papuan coffee. The opportunities for coffee production and sales are almost unlimited for Papua – the coffee is of good quality and demand is forecast to remain strong – but investment in certification and ongoing management is needed. Ongoing barriers rest mostly at the production end of the value chain, such as transport costs and lack of labour, and the constraints these have on overall volumes mean that those larger buyers struggle to see economies of scale.

4.2 How have GEG interventions influenced deforestation?

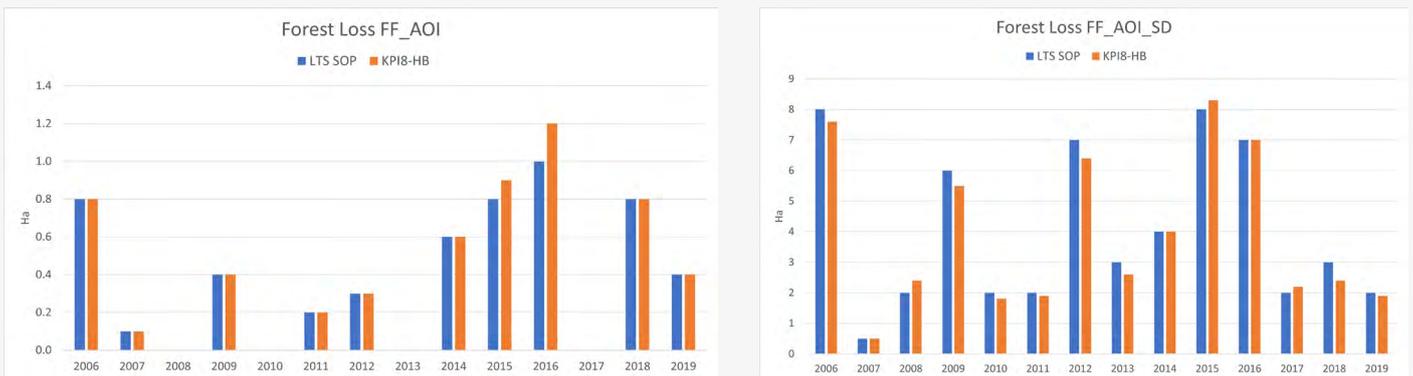
Although GEG never had the explicit impact goal of reducing deforestation, conserving forest and biodiversity is implicit to the concept and principles of green economic growth for Papua. Therefore, implicit to the theory of change for GEG was the assumption that GEG interventions would not lead to further deforestation. In 2020, a historical deforestation baseline analysis (2006-2016) was conducted in three specific geographical areas focusing on the GEG intervention commodities which have a higher risk of driving deforestation such as coffee, cacao, and nutmeg (Jayawijaya, Jayapura and FakFak). One of the challenges of this desk-based study was the small scale of the GEG intervention areas in relation to detecting significant forest loss or deforestation. The programme compared several methodologies for this purpose including that developed for the ICF indicator¹. Although this provided useful historical data about each district and intervention sites it was apparent that it would be very challenging to examine dynamics of deforestation at the scale of intervention that GEG was making using desk based remote sensing analysis. However, at the very least this baseline analysis provided an overview of the bigger context in terms of land cover, forest distribution and deforestation risks in relation to GEG sites.

¹ Comparing Approaches for Measuring Deforestation Impacts in Papua. Learning Brief GEG. No 1 September 2020.



4. GEG Impact Highlights continued

Figure 4. Example Baseline Analysis of Historical Deforestation Fakfak

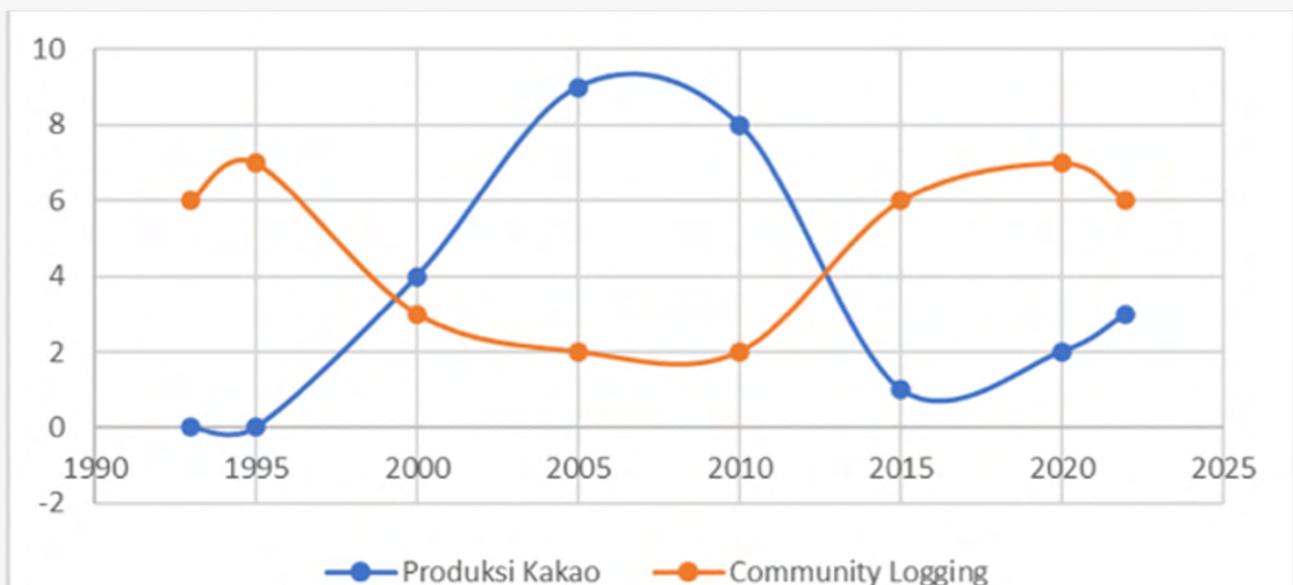


In 2022 a field-based study was carried out to understand better community perceptions of deforestation in the same three sites through in-depth interviews with a range of stake-holders. The three different sites with their different histories identified a range of drivers of deforestation including status and function of forests, weak government regulations, development and the socio-cultural conditions of the local people who of course have interacted with forest ecosystem through shifting cultivation².

For example, in Jayapura district, along with the presence of oil palm plantations, community logging was identified as a driver of deforestation. The field team identified over 40 community logging points on the road along the left and right of the road from Yapsi District to Kaureh District (Soskotek Village) which is approximately 80Km distance. Interviews

with farmers revealed a relationship between productivity of Cacao and levels of community logging in Yapsi district. A scale of 1-10 was used to discuss with farmers the scale of community logging over time and this was then plotted against the productivity of Cacao in the area over time. By giving a scale of 0-10 and looking at cocoa production/ harvest results from 1990 – 2020, it became clear that cocoa production increased significantly from 1995 to 2005 by approaching a scale of 10 and followed by a decrease in the number of community logging activities (scale 2), but it is clear that the community logging rate increased again when the production of cocoa commodity began to decline (below the scale number 2) between 2005 to 2015.

Figure 5: Relation between cacao production and community logging in Yapsi District



The qualitative case study in Yapsi District found a direct relationship between Cacao productivity and community logging (Figure 5). This case study - although at a small scale - indicates that focusing on increasing the productivity of Cacao has probably not led to further deforestation. In fact it is likely that it provides a solid foundation for protection of forests in the future providing those farmers have a productive crop of Cacao for alternative sources of income.

In the context of Jayawijaya, a GEG intervention area for coffee, the field study team identified that there is a high demand for fencing, firewood and building materials. Forest areas in this area are primarily allocated for protection (108,127 Ha) with a limited area designated as production forest (31,831 Ha). It was noted that there are opportunities to consolidate efforts to support coffee farmers in establishing shade for their coffee crop as well as meeting their subsistence needs for wood.

The team observed differences between the quality of the coffee plantation supported with better shade through cooperation with the Sengon Seedling Procurement Program supported by UPT KPHL Jayawijaya. This illustrates how supporting the commodity of coffee and the establishment of shade trees supports the overall principles of coffee as a green commodity providing no significant evidence that it could lead directly to further deforestation. It illustrates how improving the production of the coffee could also provide opportunity to address timber livelihood needs of local communities. However, it also illustrates how a programme such as GEG needs to integrate and collaborate with different actors such as UPT KPHL.

The main threats identified in Fakfak by the field study team were by those areas allocated to timber concessions (total area approx. 450 Ha). The team concluded that due to customary practices and the value of the nutmeg forest locally there are low risks of deforestation in the area. During the lifetime of the GEG programme it was identified



4. GEG Impact Highlights continued

that a certain amount of wood is being used for the traditional smoking of nutmeg the study itself did not identify this as a threat. Observations made by the GEG field team indicate that timber for drying is mainly coming from farmer's own gardens although the smoking process itself is of course a source of emissions. To ensure that developing this value chain further does not lead to further deforestation or carbon emissions the GEG team and partners have identified a low carbon cold solar dryer technology that will address this issue at the same time as improving the quality of the dried nutmeg.

Overall, it can be concluded that the main drivers of deforestation in these three study areas are not related to expansion or scaling of the green commodity value chains related to GEG interventions focusing on community-based approaches. However, there are opportunities within the value chain development in the production and processing to continue to safeguard the conservation of existing forests.

Key recommendations from the study included the ongoing collaboration between stakeholders particularly local government ensuring for example that farmers have

access to field extension advice on Cacao production and management especially as an agroforestry system, access to timber species that are appropriate for coffee shade and access to appropriate drying technologies for nutmeg. In addition, considering how such value chain development can be scaled up and linked with existing customary forest management rules particularly where forest areas are licensed as Hutan Adat so that green business development strategies are explicitly linked to improved conservation of community forest areas³ where it is feasible.

Based on the study results and local observations of the team the programme cannot demonstrate that it has contributed to reducing deforestation but the positive links between the different value chains and sustainable land management have been made and the programme has not contributed to further deforestation or created new risks of deforestation. The study team recommended that based on their analysis and observations to see a positive impact on deforestation the programme would need longer term engagement and more commitment than five years⁴.

³ https://www.ekonomihijaupapua.org/_files/ugd/e20b72_f8aab92542a445b89ba5b2081cad506a.pdf

⁴ Summary Brief GEG Deforestation Study Rory Marwani and Paulus Mandibondibo. November 2022 (Bahasa Indonesia).

IMPACT STORY FROM THE FIELD

Yan Lani: The Future of Jagara Coffee Plantation

Yan Lani is a 30 year old young man who comes from Jagara village in Jayawijaya Regency. He is one of the children of Mr. Maksimus Lani who is working closely with the GEG programme in Jayawijaya. Yan is the one helping his father running their coffee businesses. Not only helping his father expanding their coffee plantation, he is also a barista and a roaster who is in charge of processing their coffee beans into ready to sell products.



Yan Lani's family owns 20 hectares of land which they want to develop into a tourism spot called Jagara coffee plantation. This year they have expanded their coffee plantation to 5 hectares. In years coming he plans to gradually plant the other 15 hectares with coffee. They have also started to plant pine trees as shade for this purpose.

Their family-owned coffee businesses has been running very well in the last few years. They are not only selling coffee beans from their plantations but they also act as a hub that buys coffee from surrounding districts, namely Lanny Jaya, Tolikara and Yahukimo districts. The coffee they buy from farmers in these areas is parchment coffee which then they process and dry until it has the ideal moisture content. The demand for coffee beans from them is quite high. Every 6 months they usually supply approximately 5 tons of coffee to Amungme Gold in Timika whilst their other buyers in Jayapura also demand large quantities. At the end of November 2022 they sent 2.4 tons of coffee to Pitts Corner, a large coffee shop and company in Jayapura

Apart from selling coffee beans, he also helps his father provide coffee seedlings by engaging the church to help them. They run a certified seedling center. In 2022, their nursery managed to sell as many as 52,000 coffee seedlings with a price of 15,000 per polybag. Nduga and Lanny Jaya Regencies each bought 20,000 seedlings, Tolikara District purchased 10,000 seedlings and Maybrat District in West Papua Province purchased 2,000 coffee seedlings.

"I will keep helping my father in the plantation and coffee production because coffee has improved our life so much," said Yan Lani enthusiastically. Hopefully, Yan's commitment will be a motivation also for other young people in his village and surrounding villages to also go back to their village, work on their land and improve their livelihoods."



4. GEG Impact Highlights continued

4.3 How has GEG impacted livelihoods and gender?

Rikolto Indonesia was contracted to conduct a livelihoods and gender impact study focusing on the value chains of Seaweed, Coconut and Cacao focusing on GEG intervention sites as case studies. The aim was to identify under which conditions livelihoods have been improved and document any relevant lessons.

Seaweed. The field study team identified that programme intervention delivered by GEG in seaweed, from cultivation, processing, and linking to markets have also led to the improvement of household managerial skills, networking, and confidence. Despite its lower contribution to household income portfolio in the

intervention areas, the earnings from seaweed could cover small household expenditure on food purchasing to reduce their vulnerability during the difficult situations particularly when the fishing season or “sasi” is closed. The team reported a perception that seaweed farming activities reduced the potential of overfishing and community logging to fill gaps in household income needs. The main bottleneck for increasing livelihood impacts from seaweed development identified in this study is the need for seedlings and to intervene at scale with minimum size of a seaweed farm needing up to 2500 kilograms of seedlings. Weather variability with higher rain intensity was also identified as a barrier that not only reduced fishing time but also reduces seaweed production.



IMPACT STORY FROM THE FIELD

Marcella Wayangkau: Planting Coconuts for the Future

Marcella Wayangkau and her husband planted 50 coconut trees their yard in Kansai village, Numfor Island for the future. Since then, she is regularly producing VCO and directly experiencing the benefits of VCO particularly that the trees are planted so close to her house.

Marcella has been producing VCO since 2020, she both sells from her home and sent to her daughter who was studying in Jayapura. Her daughter used to sell the VCO to pay for her school fees at IDR 60,000/100ml. Her daughter successfully completed her education in 2021 and has become a teacher at a school also in Jayapura. "VCO has helped me pay for my daughter tuition. During her education, instead of sending her money, I am sending her VCO."

Marcella also buys coconuts from Warido village, approximately 30 minutes walking distance from her village, at a price of Rp. 100 for each coconut. Usually by using around 30 coconuts she can produce 18-26 bottles of VCO which she sells at an average price of IDR 50,000/100 ml bottle in Numfor. The amount of VCO produced of course depends on the size of the coconuts used.

Through having this income generating experience she and her husband were encouraged to start growing their own coconuts so they could choose coconut trees with the best quality fruit so that later they will not have to walk far to get a supply of coconuts and can also reduce their production costs. This is the long-term vision of Marcella and her husband who have now created a small coconut plantation around their house.





4. GEG Impact Highlights continued

Coconut. The team also focused on Numfor Island where GEG had focused on building capacity in the coconut value chain mainly through training women up until 2020. Women mainly focus on VCO production at night after their domestic work has been completed. Men help to find firewood to boil water and collect coconuts. Evidence suggested that although coconut processing is not a main livelihood activity the sale of VCO contributed significantly 30-40% of household income and is used primarily to pay school fees and costs during religious holidays.

Cacao. Programme beneficiaries reported that, before the Cacao production declined in 2010, cocoa farming was their main livelihood strategy including enabling some farmers to send their children to university. Since that decline, livelihood strategies diversified to include motorcycle taxi, construction work, handicraft sales (women). Transmigrants also diversified to selling fruit (dragon fruit and oranges). The GEG deforestation study also identified that in some sites communities practiced community logging as part of their livelihood strategy due to decline of Cacao production⁴.

The field study team concluded that there have been both positive and neutral changes observed in the livelihood strategy and outcome of GEG beneficiaries in Jayapura district. Positive change was observed in households who planted the Cacao seedlings provided by GEG in 2019 (early adopters) and those who are part of an experienced farmer group. The livelihood impact is differentiated depending on how long the group has been formed, the group's ability to independently conduct collective marketing, and the group's ability to conduct post-harvest processing. Early adopter and experienced beneficiaries have experienced more livelihood impacts as they have been able

to generate more value over a longer period. Improved yield and continual production due to GEG intervention, combined with facilitation and post-harvest capacity building from trader CV Agri Lestari, enabled the farm groups to engage with artisan chocolate brands such as Mason and Jungle Gold. An additional livelihood strategy was adopted by farmers who are in experienced groups through the nursery and seedling business unit also introduced by GEG. Overall, the more experienced farmers have benefited the most from the GEG interventions to date. The field team did observe that some individual farmers who are in proximity with an experienced group have started to invest more time in their cocoa farms even though the trees were not yet producing. For example, investing time to cut down old unproductive cocoa trees, investing in machineries, and investing in fertilizer and pesticides. The late adopters who have planted towards the end of the programme are expected to benefit in 3-4 years.

In relation to gender, Cacao farming was considered by both men and women in the household to be the responsibility of both genders. Women specifically were identified as responsible for income both on farm and off farm. Women measure the farm success by how much income cocoa farming can cover basic household expenditures (money). Men measure success by the presence of facilities and cocoa productivity (cocoa yield). Women felt that the condition of newly planted cocoa (from GEG intervention) are the responsibility of the men, as women do not have enough knowledge to take care of these new plants.

Lessons and conclusions. Not all the value chains supported by GEG have created significant value. However, they have all influenced livelihood strategies in different ways including impacting social, economic and natural assets and to some extents have reduced vulnerability in periods of the year where income is low.

- GEG has created livelihood value in the coconut and seaweed value chains by building capacity for developing derivative products and linking to intermediate service providers. The additional income from these products has decreased vulnerability at times of the year where costs are high or other livelihood activities are not possible.
- GEG interventions have led to increased confidence of communities in managing household income and networking enhancing their social assets
- Focusing on shortening the value chain between the producers and the buyers by building capacity for bean fermentation and collective marketing enables farmer to receive significantly higher prices particularly in the case of Cacao leading to increased income at the household level .
- Livelihood impacts have been greater where groups or farmers are more experienced and can leverage the capacity or equipment provided. Where farmers and communities are inexperienced engagement needs to be more frequent and intensified.
- Professionalising and creating healthy competition between farmers can catalyse inexperienced farmers to engage and behave differently. Professionalising farmer groups requires an integrated multi-stakeholder approach.
- Introducing new livelihood value chains such as seaweed needs a sustained approach and significant investment including ensuring critical supplies of seedlings and extension advice to ensure communities have the support they need. Communities will not continue if the income is not significant to make a difference in their lives and efforts are not rewarded ongoing incentives and training is required.

Some specific recommendations were made by the Rikolto team including:

- Value chain development approaches such as those used by GEG need to also focus more on mapping availability of input supply and engaging farmers groups, traders and brokers as input suppliers and distributors to ensure availability of fertilisers and pesticides which are scarce in most of the GEG intervention areas. This should be accompanied by appropriate training to ensure the inputs are used correctly.
- Conducting a specific gender assessment at the start of the programme could have improved the overall gender strategy of GEG including ensuring for example, the timing of trainings is accessible to women and designing household level trainings focusing on inclusivity and sustainability of household decision making. To some extent this was addressed in GEG but not through a conscious strategy.



5. Towards Sustainability

Through GEG’s adaptive management learning approach, different interventions have been explored over the last five years. Some of these have been successful, others less so, but provided the opportunity to adjust other components of the programme.

The decision to support SMEs provided the opportunity to assist coffee roasters and coffee shops in Jayapura and Manokawi to promote Papuan coffee to the local population and develop buyer networks in other parts of Indonesia. This intervention has resulted in several SMEs that will sustain their business in the long term.

IMPACT STORY FROM THE FIELD

Highland Roastery – A Coffee Learning and Development Centre for Papua

Highland Roastery is the only coffee learning centre owned by an indigenous Papuan in Jayapura, Papua Province. Until now, Yafeth Wetipo’s coffee lab has succeeded in producing 55 baristas who have worked in other cafes in Jayapura, even outside Papua. In December 2022 he conducted a Barista training for Vocational students in collaboration with the Sagu Foundation, a local organization in Jayapura. Before receiving GEG support Yafeth was able to process less than 100 kg of coffee but now he is processing up to 400 kg per day assisted by the tools and equipment he received through GEG support. Highland Roastery’s total coffee production in the form of roasted coffee, ground coffee to drip coffee products has sustained 7 tonnes from 2020 until now.

Currently Yafeth and Highland Roastery have a very important role both upstream and downstream of the local coffee value chain. Not only is he marketing coffee and providing a coffee learning platform for other young people, he is also responsible for coffee quality control and assisting the process of expanding coffee plantations in Yahukimo district in cooperation with the local government.

During his time running this coffee business and actively working with the farmers, Yafeth has discovered there are issues at the farmer level affecting the quality of the coffee beans produced. The farmers tend to over ferment their beans as they do not realise that it will affect the final taste and also there is limited proper storage space for coffee beans in the village and this affects the ability to maintain the quality of the beans harvested.

Although Yafeth recognises that the potential of Papuan coffee is enormous he knows that only collaboration of all parties to think and act together can ensure that good quality coffee can be continually produced from the Papua region in a sustainable way.



GEG's activities to support the Cacao and Nutmeg industry have significant opportunity to scale up and have a long-term impact. In Jayapura, the platform has been established to bring cacao production back to levels achieved in 2007. Farmers have established nurseries capable of producing certified pest and disease resistant cacao seedlings. Companies like Cargill and Olam are now showing interest in developing long term partnerships. In Ransiki, the cooperative has developed a business case for future investment. The Rabobank Foundation is continuing support to the Cooperative post GEG to enable the cooperative to finance future operations.

In the nutmeg industry in Fak Fak, through GEG's support, traders can produce aflatoxin free nutmeg suitable for the European market. Nedspice has demonstrated commitment to purchase 200 tons

of nutmeg on a regular basis. Other organisations like the Rabobank Foundation are providing a continuation of the activities developed by GEG to expand the export of high-quality nutmeg for the industry in Fak Fak.

In the last few months of the programme, GEG in collaboration with the UK-funded Papua Spatial Planning (PSP) programme produced two green business guide documents linking land suitability and spatial planning with green business value chain development opportunities for the districts of Fakfak and Jayapura for Nutmeg and Cacao respectively. It is anticipated these guides will be a foundation for the district governments to prioritise further development interventions and attract further investment . A learning brief was also produced to highlight lessons on linking spatial planning with green business opportunities.⁶





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