

## Structure, Conduct and Performance of Potato Marketing in Sekela District West Gojjam Zone, Amhara Region, Ethiopia

Yaregal Tilahun Geremewe\*

Department of Agricultural Economics and Natural Resource, Mizan Tepi University, Mizan Tepi, Ethiopia.

**\*Corresponding Author:** Yaregal Tilahun Geremewe, Department of Agricultural Economics and Natural Resource, Mizan Tepi University, Mizan Tepi, Ethiopia.

**Abstract:** The study examined the structure, conduct and performance of potato marketing in West Gojjam Zone. The objectives of the study were to examine the structure and conduct of potato marketing system, assess its performance and estimate the cost and returns in potato marketing. Data collected were analyzed using descriptive statistics, gross margin analysis, marketing margins, marketing efficiency and the concentration ratio. Five potato marketing channels were identified in the study area with major share in volume of potato marketed going through producers to retailers and to consumers channel. Result from analysis of market concentration indicated that potato market characterized by weak oligopolistic market structure with the buyers' concentration ratio of 37.71%. Lack of capital, licensing problem and seasonal supply were identified as the major entry barrier to potato marketing. Market conduct shows that the price of potato is set by traders while producers are price taker. When it comes to market performance analysis the highest total gross marketing margin was 30.25% when producers sold potato to wholesalers and the lowest total gross marketing margin was 16.11% when producers sell potato to retailers (in channel III). The result showed that potato market in the district deviate from competitive market norm due to lack of perfect market information, price of potato being set by traders, weak oligopolized market structure and barrier to entry to potato market. Therefore, attention has to be given to reduce the problems through supporting local potato markets in order to reduce production and marketing cost and potato farmers should form a cooperative union in order to facilitate group sales which will increase their marketing margin.

**Keywords:** Potato, Market Structure, Conduct, Market Margin and Concentration Ratio

### 1. INTRODUCTION

Potato (*Solanum tuberosum* L.) popularly known as 'The king of vegetables', which is the fourth most important food crop after maize, wheat and rice worldwide (Naz *et al.*, 2011). It has been considered as a strategic crop by the Ethiopian government aiming at enhancing food security and economic benefits to the country. The percentage of potato consumed at home at country level is more than that of cereals and pulses and at least for once the consumers can eat potato. The reason for huge consumption level of the crop is due to increasing in the demand of the consumer, increase population growth, growth in fast food restaurants and a rise in the price of cereal products (Gildemacher *et al.*, 2009). It is a carbohydrate-rich, high source of vitamin C, vitamins B<sub>1</sub>, B<sub>2</sub> and B<sub>6</sub> and minerals such as potassium, phosphorous and magnesium and energy-providing food with little fat. Its average composition contains about 80% water, 2% protein and 18% starch (Haverkort *et al.*, 2012). In addition to production inconsistency, the marketing experience of potato in developing countries becomes low due to several constraints such as lack of cold storage, poor transportation, limited market opportunities, lack of infrastructures, lack of market outlets to connect farmer to another actors, high travel distance, lack of market information and lack of market linkage (Godfrey and Agnes, 2012). So, the structure, conduct and performance of a market is one of the most important approaches to analysis of market. Market structure includes the level of concentration of buyers and sellers; the level of product differentiation; the conditions of entry to the market. Market conduct refers to possible practices of collusion or exclusion, in addition to price fixing methods. Finally, performance is evaluated by means of price analyses (price correlation between markets) and costs and margins between players. An important variable in market structure analysis is concentration, which shows a situation in which a few large firms have the largest share of business. The effects of market structure, conduct and performance can go a long way in affecting the supply response of

agricultural products, especially in horticultural processing and marketing (Egbeadumah, 2008). Therefore, there is need to analyze structure, conduct and performance of potato farmers in West Gojjam Zone, Ethiopia.

The objectives of the study are to:

- Determine the degree of the market concentration among the market participants in order to classify the structure of potato market.
- Analyze the conduct of potato market state.
- Ascertain the performance of potato markets in the state.

## **2. METHODOLOGY**

### **2.1. Description of the Study Area**

Sekela is one of the fifteen Woredas in West Gojjam Zone of Amhara National Regional State. It is located at 459 Kms in North West of Addis Ababa, the capital of Ethiopia, it is 160 Kms in South East of Bahir Dar, the capital of Amhara National Regional State, and 74 Kms in North East of Finote Selam, the capital town of West Gojjam Zone. It is bordered on Southwest by Bure Woreda, on the West by Agew Awi Zone, on the North by Mecha Woreda, on the East by Quarit Woreda and on the South East by Jabi Tehnan. The administrative center of Sekela Woreda is Gish Abay town. The district has a total of 27 *kebeles* of which 26 are rural based *kebeles* and only 1 are urban *kebeles* (SWAO, 2017).

### **2.2. Sources and Methods of Data Collection**

Both primary and secondary data were used for the study. The primary data were collected from sample potato producers and traders by using structured and semi-structured questionnaires using formal survey and informal survey. Separate questionnaires were designed for sampled farmers and traders. The questionnaires were pretested before the actual data collection practices. In addition to the questionnaire, an informal survey in the form of market appraisal and focused group discussions were employed to acquire additional supporting information. Discussions were made with key informant farmers, potato traders, and potato consumers. In addition to primary data, secondary data were collected from Sekela Woreda Agriculture and Rural Development agricultural office, Sekela Woreda Trade and Industry office and published and unpublished documents.

### **2.3. Sample Size and Methods of Sampling**

Two stage sampling procedure was used for the selection of sample household heads. At the first stage, from a total of 26 *kebeles* of the district, 4 potato producing *kebeles* were selected randomly. In the second stage, from the selected *kebeles*, about 130 sample households were selected randomly using probability proportionate size. According to the information obtained from the trade and industry office, there were only 4 licensed wholesalers and 5 processors. So, census survey was conducted for wholesalers and processors. But due to lack of clear data in the district about how many retailers involved in potato trade, an informal survey was conducted to come up with clear pictures of retailers engaged in potato trading activity in the study area. Then, 9 retailers from district market and 4 retailers from village market were selected purposively during the market day constituting a total of 22 traders were interviewed. Finally, 20 sample consumers were selected randomly from the market. This means consumers who came to buy potato were randomly selected and they were asked to respond to the questions.

### **2.4. Data Analysis**

Two types of analysis techniques, namely descriptive statistics tools (like mean, standard deviation and percentage) and Market structure, conduct and performance analysis were used.

#### *2.4.1. Market Structure, Conduct And Performance Analysis (S-C-P)*

Efficiency factors can be evaluated by examining marketing enterprises for structure, conduct and performance (Abbott & Makeham, 1981).

**Structure of Market:** is characterized by market concentration, barrier to entry (licensing procedure and capital requirement), market transparency and price setting behavior.

**Market Concentration:** is defined as a number and size distribution of sellers and buyers in the market. Other factors, such as the firm's objectives, barriers to entry, economics of scale, and assumptions about rival firm's behavior, were relevant in determining the degree of concentration, the relationship between concentration and behavior and performance (Scherer, 1980).

**Concentration Ratio (CR):** concentration ratio is a way of measuring the proportion of the industry's output accounted by the r largest firms: it shows whether the industry is dominated by a few large firms or many small or ones.

$$C = \sum_{i=1}^r S_i \quad i = 1, 2, 3, 4, \dots, r \quad \text{confederate mail}$$

Where: C- is concentration ratio,  $S_i$ - is market share of the  $i^{th}$  firm and

r- is the number of largest firms for which the ratio is going to be calculated

$$S_i = \frac{V_i}{\sum V_i} \quad \text{Where, } S_i = \text{market share of trader } i; V_i = \text{amount of product handled by firm } i; \text{ and } \sum V_i$$

=Total amount of the product supplied to the market.

Kohls and Uhl (1985) bring into play as a rule of thumb, four largest enterprises' concentration ratio of 50% or more (an indication of a strongly oligopolistic industry), 33-50 % (a weak oligopoly) and less than 33% (competitive or non-concentrated industry). The greater the degree of concentration is the greater the possibility of non-competitive behavior existing in the market. Even if CR, HHI and Gini coefficient are methods which are used to measure market structure, CR was used for this study to analyze the relative degree of potato market structure of sampled potato traders.

**Market Conduct:** refers to the behavior of firms or the strategies used by the firms in their pricing, buying and selling activities. Meijer (1994) said that, "conduct is pattern of behavior which enterprises follow in adopting or adjusting to the market in which they sell or buy", in other words the strategies of the actors operating in the market.

**Market Performance:** marketing efficiency is essentially for the degree of market performance.

The two approaches to measure marketing performance are: marketing margin and marketing costs.

The total marketing margin is the difference between what the consumer pays and what the producer/farmer receives for his product. Computing the total gross marketing margin (TGMM) is always related to the final price or the price paid by the end consumer and is expressed in percentage (Mendoza 1995).

$$TGMM = \frac{P_c - P_p}{P_c} \times 100$$

Where, TGMM = Total gross marketing margin

$P_c$  = Consumer price (end buyer price); and

$P_p$  = Producer price (first seller price)

It is use full to introduce here the idea of "producer participation", "producer portion" or "producers gross margin" (GMMp) which is the proportion of the price paid by consumer that belongs to the producer and the producer's margin is calculated as:

$$GMP = \frac{P_c - TGMM}{P_c} \times 100$$

$$GMP = 1 - TGMM$$

Where, GMP = the producer's share in consumer price

The above equation tells us that a higher marketing margin diminishes producers' share and vice versa. It also provides an indication of welfare distribution among production and marketing agents.

### 3. RESULT AND DISCUSSION

#### 3.1. Major Actors in the Potato Market Chain

The actors participated in potato market chain in the study area were input suppliers, smallholder farmers, retailers, wholesalers, processors/hotels and consumers.

- **Inputs suppliers:** the main source of input suppliers to farmer in the district were woreda agricultural office, traders and informally from farmer to farmer exchange. They provide seeds, fertilizers, pesticides and farm implements. Majority of sampled producers used seed from own produce and market (wholesalers). Traders (wholesalers) buy seeds from other traders from other district and sell to district producers. There is no specialized seed supplier in the study area. Regarding fertilizers, potato growers obtained either from market or development agent.
- **Producers:** are the major actors who perform most of the market chain functions right from land preparation, application of inputs, disease controlling, produce and store and deliver the product to the market. Since the product is highly perishable in nature, some producers sold the crop immediately after harvest. They produce potato product for both consumption and market by means of rain fed system only. They sell their product to wholesalers, retailers, processors and final consumers in woreda market but they sell only to retailers and consumers in village market.
- **Wholesalers:** are those participants in the marketing system who buy seeds from other traders those who live in other district and sell to the district producers. Wholesalers are one of the major actors who supply seeds to farmers even though the distance of the market center from producer is relatively far.
- **Retailers:** they buy potato most of the time from producers and sometimes from wholesalers to sell the product to processors and consumers. Village retailers only buy from producers and only sell directly to consumers but woreda retailers buy from both wholesalers and producers and sell to consumers and processors.
- **Processors:** they buy potato mostly from farmers and retailers in their surrounding and sell processed potato to consumers. They perform several value addition activities such as buying, processing and selling to end consumers through converting the fresh product to cooked one.
- **Consumers:** they are the last agent for potato market chain. Consumers for this particular study mean those households who directly buy, process and consume potato at their home and also those who consume from processors.

#### 3.2. Potato Market Channels

The analysis of marketing channels is intended to provide information on a flow of the goods and services from their producer to the final consumer. The total quantity of potato produced by sample producers was about 5145 quintal from this 2655 quintal was supplied to the market. The main potato marketing channels identified from production to end consumption were:

Channel I: Producers  $\rightarrow$  Consumers = 718qt (27.04%)

Channel II: Producers  $\rightarrow$  Processors  $\rightarrow$  Consumers = 234qt (8.82%)

Channel III: Producers  $\rightarrow$  Retailers  $\rightarrow$  Consumers = 939.75qt (35.40%)

Channel IV: Producers  $\rightarrow$  Retailers  $\rightarrow$  Processors  $\rightarrow$  Consumers = 313.25qt (11.79%)

Channel V: Producers  $\rightarrow$  Wholesalers  $\rightarrow$  Retailers  $\rightarrow$  Consumers = 450qt (16.95%)

The producer sold their product to retailers, consumers, wholesalers and processors with percentage share of 47.19%, 27.04%, 16.95% and 8.82% respectively. Therefore, channel comparison was made based on volume that passed through each channel. Accordingly, from a total amount of potato supplied to the market the largest and the lowest volume of potato passed through channel III and II respectively. In the district the flow of potato was more concentrated mostly on retailers and consumers. In the district the flow of potato was more concentrated mostly on retailers and consumers and less on wholesalers and processors.

### 3.3. Structure- Conduct - Performance (S-C-P) of Potato Market

In this section the structure, conduct and performance of potato market was analyzed and discussed.

#### 3.3.1. Structure of Potato Market

In this study, potato market structure was judged using market concentration, degree of transparency (timeliness and reliability of market information) and entry condition (licensing procedure, capital limitations and seasonal supply).

#### 3.4. Degree of Market Concentration

The concentration ratio is expressed in terms of CR<sub>4</sub> which stands for the percentage of the market sector controlled by the biggest 4 firms. Since the number of traders in the district market level was few, therefore, the analysis of the degree of market concentration ratio was carried out for all traders to analyze the type of markets prevailed in the district.

**Table1.** Potato trader's concentration ratio in Sekela district

Frequency (A)	% of traders (B = A/22)	Quantity purchased in quintal within a year (C)	Total quantity purchased (D=C*A)	% share of purchase (S <sub>i</sub> =D/5144)	% cumulative purchase (C = ∑ <sub>i=1</sub> <sup>n</sup> S <sub>i</sub> )
1	4.54	600	600	11.67	11.67
1	4.54	550	550	10.69	22.36
1	4.54	420	420	8.16	30.52
1	4.54	370	370	7.19	37.71
2	9.1	250	500	9.72	47.43
1	4.54	240	240	4.67	52.1
3	13.62	200	600	11.67	63.77
4	18.2	180	720	13.99	77.76
4	18.2	156	624	12.13	89.89
1	4.54	150	150	2.92	92.81
1	4.54	130	130	2.53	95.34
2	9.1	120	240	4.66	100
Total	100		5144	100	

**Source:** Own survey results, 2017

The result of sample market potato traders' concentration ratio CR<sub>4</sub> was found to be 37.71%. According to Kohls and Uhl (2002) this value of potato market concentration ratio in the study area indicates a weak oligopoly market structure. This suggests that there is market imperfection since a few traders seem to have oligopolized the potato market.

Market transparency: It refers to the adequacy, timeless and reliability of market information that the traders have for their marketing decision. The result in the given table indicated that there is no well-established system of dissemination of market information in the district. Therefore, market was not transparent in district market since producers lack it.

**Table2.** Access and sources of market information for respondents

Variables	Response	Frequency	Percent
Access to information	Yes	79	60.8
	No	51	39.2
Types of information	Price information	47	74.6
	Market channel option	6	9.5
	Time of year to sell	10	15.9
Where you get information	Through personal observation	51	39.2
	From other farmers	48	60.8
	From potato traders	13	16.5
	From both farmers and traders	18	22.7

**Source:** Own survey result, 2017

#### 3.4.1. Barriers to Entry into the Potato Market

Barriers to entry into market reflects a constraint which restrict competitive relationships between existing traders and potential entrants. If the barriers to entry are low, new traders can easily enter into potato markets and compete with established traders.

**Table3.** *Barrier to entry in potato market*

Source of barriers to entry	Frequency	Percent
License	7	31.8
Lack of capital	15	68.2
Lack of continuous supply	10	45.4

**Source:** Own survey results, 2017

Generally, due to lack of market transparency, entry barrier and weak oligopoly market structure, potato market in Sekela district had deviated from competitive market structure.

### 3.4.2. Potato Market Conduct

As stated in Bain (1968), market conduct is analyzed in terms of price setting, purchasing and selling strategies of producers and traders.

Price setting and selling strategy of potato producers: The survey result showed that about 85.4% of farmers don't negotiate on price to sell their produce; indicating this large amount of producers are price taker. But 86.9% of the respondents stated the term of payment is conducted through cash in hand system.

Selling and buying strategy potato traders: About 45.5% of traders reported that potato price was set by themselves. From this about 90.9% of sampled traders reported that buying price was set individually. About 63.6% of traders attract their supplier by fair weighting. Giving better quality and credit was the main aim of traders to attract buyers.

### 3.4.3. Performance of Potato Market

The performance of potato market was evaluated based on level of market margins and marketing costs for key market participants.

#### a) Production Cost of Potato Producers

Potato producing farmers of the study area incur costs mostly during the production phase. They incur an average production cost of 163.89 birr per quintal. The estimated cost include labor cost, seed cost, fertilizer cost, pesticide cost, oxen rent, and land rent.

#### b) Marketing Cost and Gross Profitability of Potato Producers and Traders

Marketing costs are estimated to calculate the share of profit captured by key actors in the market chain. The highest marketing cost was incurred by wholesalers (58.26birr/qt) followed by processors (51.25birr/qt).

**Table4.** *Potato average marketing costs and profitability for different marketing agents (birr/qt)*

Marketing costs	Producers	Wholesalers	Retailers	Processors
Production cost	163.89	-	-	-
Average purchasing price	-	316.85	326.26	335.25
Packaging material	5.00	4.5	4.5	4.5
Labor cost for packaging		2.00	1.5	2.00
Loading/unloading	5.45	6.65	5.3	5.00
Transportation	10.5	15.8	2.7	3.5
Storage	-	5.67	1.89	-
Sorting	-	4.68	1.5	2
Processing	-	-	-	17.45
Wastage (loss)	20.5	14.46	7.82	11.5
Telephone/information cost	-	2.5	2	2
Tax	-	2	2	3.3
Total cost/qt	205.16	58.26	29.21	51.25
Selling price/qt	334.9	-	-	-
Average purchase price/qt		316.85	366.9	358.9
Total cost/qt		375.1	396.1	410.2
Average selling Price/qt	-	407.5	407.3	454
Gross profit/qt	129.74	32.4	11.2	43.8

**Source:** Own survey results, 2017

*c) Marketing margin*

Marketing margins is a measure of the percentage of price paid by the consumer that is maintained by each agent in the marketing chain.

**Table5.** *Potato marketing margin for different channels (Birr/qt)*

<b>Potato Marketing Channel</b>						
<b>Actors</b>		<b>I</b>	<b>II</b>	<b>III</b>	<b>IV</b>	<b>V</b>
Producers	Production cost	163.89	163.89	163.89	163.89	163.89
	Marketing cost	41.27	43.34	39.8	39.8	43.34
	Selling price	358.61	335.25	326.26	326.26	316.85
	Gross profit	153.45	128.02	122.6	122.6	109.62
	GMMp (%)	100	73.85	83.89	71.87	69.75
Wholesalers	Purchase price					316.85
	Marketing cost					58.26
	Selling price					407.5
	Gross profit					32.39
	GMMRw (%)					19.95
Retailers	Purchase price			326.26	326.26	407.5
	Marketing cost			29.21	29.21	29.21
	Selling price			388.93	378.65	454.32
	Gross profit			33.46	23.18	17.61
	GMMRr (%)			16.11	11.54	10.30
Processors	Purchase price		335.25		378.65	
	Marketing cost		51.25		51.25	
	Selling price		454		454	
	Gross profit		67.50		24.10	
	GMMpr (%)		26.15		16.59	
	TGMM (%)	0	26.15	16.11	28.13	30.25

Where TGMM, GMMp, GMMRw, GMMRr and GMMpr represents Total Gross Marketing Margin, Growth Marketing Margin of producers, Growth Marketing Margin of wholesalers, Growth Marketing Margin of retailers and Growth Marketing Margin of processors respectively.

**Source:** Own survey results, 2017

The result showed that potato producers' gross profit was highest when they directly sell to consumers in channel I which is 153.45birr/qt and to processors in channel II which is 128.02birr/qt. Producers take a lower gross profit when they sell to wholesalers which is 109.62birr/qt in channel V. So, producers are more profitable if they sale to consumers and processors. Processors from traders shared the highest profit 67.5birr/qt when they direct purchase from producers in channel II and they sold directly to consumers. Retailers gained the second highest profit 33.46birr/qt in channel III when they purchase directly from producers and sold to consumers.

In the study area, both processors and retailers received the highest gross profit when both of them purchase directly from producers and they sold directly to consumers. Since both retailers and processors purchase the product from producers' relatively lower price and processors add value to the product, the profit they gained for both became relatively higher. Also both processors and retailers received the lowest profit when processors purchase from retailers and retailers purchase from wholesalers since the price paid to them was relatively higher.

The result indicated that total gross marketing margin (TGMM) is highest in channel V which was 30.25% and lowest in channel III which was 16.11%. Without considering channel I (producers selling directly to consumers) producer's share (GMMp) was highest in channel III which was 83.89birr/qt and lowest in channel V which accounts 69.75birr/qt. This difference might support the theory that as the number of marketing agents increases the producers share decreases. The results also shows that the maximum gross marketing margin from traders was taken by that of processors, which accounts 26.15% of the consumer's price in channel II followed by wholesalers which was 19.95% in channel V. Generally, producers obtained higher percentage share of profit when they sold their product directly to final consumers. However, when there are intermediaries between producers and final consumers, the percentage share of producers from the total marketing margin was highest in channels where only one intermediaries are involved which includes retailers in channel III.

#### **4. CONCLUSION AND RECOMMENDATION**

The result of this study revealed that different market actors were involved in the potato market chain. The major actors involved in marketing of potato include input suppliers, producers, wholesalers, retailers, processors and consumers. From a 5145qt of potato produced by sample producers about 2655qt (51.6%) was supplied to the market through five channels. Mostly producers sell more of their produce to retailers and consumers compared to wholesalers and processors. Moreover from five channels, major share of potato was goes in channel III (producers-retailers-consumers).

The structure of potato market was analyzed by using concentration ratio, market transparency and entry barrier into potato market. The analysis of market structure through four firms' concentration ratio indicated that about 37.71% of the total volume of potato purchased in 2016/17 was concentrated in the hand of few traders who controlled the larger share of the market. The market transparency indicated that there is no clear market information for all potato market actors and being licensed in potato trade business and capital requirement were required to participate in potato market. These barriers reduce the number of participants entering in to potato trade business and thereby reduce the level of competition in the market. Starting from production up to marketing, every farmer produce and sold on individual basis due to absence of cooperative member in their surroundings. The market conduct analysis also showed that the price of potato was set by traders that are traders being a price setter and producers are a price taker. This indicated that potato market in the area was deviates from competitive market structure.

The result of market margin analysis showed that potato producers' gross profit was highest when they directly sell to consumers in channel I which was 153.45 birr/qt and lowest when they sell to wholesalers in channel V which was 109.62 birr/qt. Processor from traders shared the highest profit when they purchase from producers and sell to consumers in channel II which was 67.5 birr/qt and retailers shared the lowest profit when they purchase from wholesalers which was 17.61 birr/qt in channel V. The total gross marketing margin (TGMM) was highest in channel V which was 30.25 birr/qt and lowest in channel III which was 16.11 birr/qt. The survey results also showed that the maximum producers share (GMMp) is highest in channel III which was 83.89 birr/qt and lowest in channel V which was 69.75birr/qt. It is observed that as the number of intermediaries' in market increases, the producers share in consumers price decreases. So, without considering channel I (producer-consumer) to make the market efficient, the producer should sell their produce to retailers since the price difference between producer and consumer price is lower than other channels.

Based on the study results, it is possible to conclude that; the market chain system of potato in the study area is inefficient since there is no coordination among producers and traders to sell their product. Due to lack of market linkage and market information, oligopoly market structure, entry barrier and high price paid by consumers and low price paid to producers for potato produce. There are also factors affecting market supply of potato and outlet choice of potato produces, which require interventions.

Based on the results and discussions, the study made the following recommendation are drown: potato market in the study area is characterized by weak oligopoly (concentrated in the hands of few trades), low bargaining power, lack of clear market information to all actors, entry barrier (need license and capital requirement to run the business) and high price variation between producers and consumers which makes potato market imperfect. Therefore, responsible governmental bodies and responsible stakeholders intervention is required to improve the challenges through dissemination of up-to-date potato market information, provide credit service, establish market access and improve market linkage, link producers with potential markets and establishment of producers' cooperatives to get input, information and to deliver their product to the market at reasonable price.

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