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I. Executive Summary

The livestock export value chain has two basic market systems. Meat and live animal export market system. Through informal (80%) and informal channel, the Live animal export market system has been contributing directly or indirectly to the livelihoods of many households in pastoral areas of Ethiopia. Especially the informal live animal export market which is the predominant channel has long history in pastoral areas of Ethiopia. This channel has been exporting animals of all species (sheep, camel and cattle), different age and quality to the gulf state through neighboring countries, Djibuti, Somalia and Kenya and it has been carried out through clan, sub-clan, and other kinship ties that are strongly maintained across international boundaries. The formal live animal and meat export market has flourished very recently and has grown steadily creating additional market opportunity for the livestock producing communities.

The pastoralist and agro-pastoralist areas such as Borena, Afar and Somali areas are considered the traditional source of livestock supplying more than 90% of livestock destined for export market. The Eastern cluster and Somali part of southern cluster tend to supply more to the informal live animal export market while most animals coming from Southern (Borena) and Afar cluster areas are supplied to meat and formal live animal export markets.

Despite the exponential rise in demand for livestock and livestock products on the domestic and international markets, the livestock value chain in pastoral area unable to exploit the growing opportunities. Hence a rapid market assessment and secondary data review was made to identify the major challenges contributing for inefficient market integration that hamper sustainable livelihood improvement and resilience in the three PRIME operating areas namely Eastern, Southern and Afar Clusters.

The assessment and desk review has indicated that seasonality and low supply of poor quality animals primarily because of poor market orientation of pastoralists, involvement of numerous market actors without significant value additions activities, traditional and unorganized livestock marketing system, limited business skill across value chain actors, inadequate export market promotion and expansion strategies, poor feed availability, lack of reliable and up-to-date livestock market information, lack of appropriate financial and insurance services that are well designed to benefit livestock sector, poor and substandard quarantine services, inefficient veterinary services and inadequate policy and regulations are the major constraints that hinder effective and efficient exploitation of the growing opportunities.

Based on the findings of the assessment, the following are the major recommendations forwarded that ensure maximum impact on the livestock export value chain while investing in improving pastoralists’ livelihood and their resilience to drought:

- Improving livestock production and marketing at producer level through designing support package that consists of promotion and support to small scale fattening, feed supply, herd level veterinary service improvement and supporting livestock trading
cooperatives. In this regard, improving the availability and dissemination of reliable and accurate livestock market information is imperative.

- Strengthen backward and forward linkage of value chain actors through Support embedded service provision, Facilitate establishment of Multi-Stakeholder Platform (MSP), and Organize market linkage trips and experience sharing opportunities.
- Providing business skill trainings to cooperatives, traders, exporters, and feedlot operators. And standardized transactions by scaling up live weight based transactions started in southern cluster.
- Enhance Sanitary and Phyto-Sanitary Measures and Operating Standards with continuous monitoring and credible certification system to the meat processing industries in order to fulfill the requirements and win trust of importing countries.
- Support Improvement of availability of animal feed through establishing and strengthening local feed producing enterprises and pastoralists, improving supply chain of forage seeds, and linking the pastoralists’ cooperatives/traders with concentrate feed producers.
- Promote animal health services, breed brand, export zone and establishment of holding grounds near major market places and routes.

In addition PRIME need to continue working with initiatives to establish export abattoirs in pastoral areas and start engaging potential and innovative live animal exporters and better organized livestock trade groups found in all the clusters to jump start the livestock value chain development interventions. Further researches and studies are required to identify opportunities for promoting and expanding end livestock export market and low land brand development.

II. Context

Livestock is a major livelihood for communities in the pastoral areas of Ethiopia. Furthermore, pastoral areas have been the traditional source of animals for meat and live export, due to surplus output and preferences of the Middle East and North African (MENA) countries for the lowland breeds of Ethiopia. However, the current levels of contributions of the livestock sector in the Ethiopian economy, at either the macro or micro level is below potential.

There have been tremendous efforts in pastoral areas during the past 2 or 3 decades by the Ethiopian government and international development partners in water development, animal health, infrastructure (market place) development, organizing livestock marketing cooperatives, and linking them to central markets and export abattoirs that are aimed to improve livestock production and productivities. Despite all these efforts, the productivity and competitiveness of the livestock sector remain below average as a consequence of human population growth combined with heavy grazing of rangelands, reduced mobility due to conflict and sedentarization. Encroachments into rangelands of agriculture and inedible plants, climate change, restrictions around livestock export and recurrent drought have further worsened the problem.
These intense challenges are, however, matched by opportunities for long-term development interventions that have the potential for significant positive impact on pastoralists and those transitioning out of pastoralism. Demand for livestock and livestock products on the domestic and international market continues to rise exponentially, the Government of Ethiopia (GOE) is gradually opening the economy to encourage private-sector growth, and improved infrastructure is spurring economic growth in urban hubs like Jijiga, Moyale and Dire Dawa. In recognition of these positive movements, development efforts are now converging around integrated market development approaches that combine life-saving assistance with efforts to enhance broad-based resilience.

In line with this view and based on its experience and achievements in implementing the RAIN and RAIN+ programs, Mercy Corps Ethiopia, has launched multiyear multimillion program called Pastoralist Resilience Improvement through Market Expansion (PRIME) which is a consortium program, to be implemented with 5 partners. One of main objectives of PRIME program is to stimulate increased productivity and competitiveness in the livestock and livestock products markets. It’s known that such program with new approach toward the pastoralist resilience cannot be started without validating achievements of past intervention and, more importantly, without knowing stakeholders and understanding their needs. It was with this context that this Livestock Market Assessment was designed to identify prominent gaps in livestock marketing sector, describe main actors and their needs in order to recommend area of interventions in the PRIME program activities.

III. Methodology
The Livestock Marketing Value Chain assessment was conducted from 7-30 of May 2013, using EMMA approach that provide a quick and effective means of understanding the key value chain actors, characteristics of the market system, constraints, and opportunities for designing intervention activities in order to improve the value chain. The livestock value chain assessment team had 8 members from five different institutions including AISDA, SOS-Sahil, PCA, HU and Mercy Corp. The team members were well diversified in terms of their academic background, i.e. Animal Health/Production, Marketing, Management and Economics with work experience of several years. Most of the team members have enough exposure to pastoral region, livestock marketing business and processing industry under private sector both locally and abroad that greatly helped them in identifying and easily communicating key value chain actors.

The assessment was focused on key actors of livestock marketing value chain, mainly brokers, small and big traders, export abattoirs and live animal exporters. The assessment team visited 3 export abattoirs, 4 quarantine centers, and customs offices at cross-border stations. The team has visited major market places found in the three 3 clusters (Eastern, Afar and Southern). The assessment also has met government regulatory institutions such as meat inspection and quarantine services. Structured interview and discussion with identified key informants around the key analytical question, as well as visual observations was carried out to gather primary
data, while print-out reports, published/unpublished documents were used as a source of secondary information. Primary information and secondary data were used in analysis of the data and preparation of this report. The reluctance of some key actors, e.g. export abattoirs, to give information, absence of organized data at quarantine stations and the difficulty of discussing with traders on market days were some of the issues that have affected data collection.

IV. Market System Maps
Live animal and meat export value chain has complicated supply chains connecting different market participants including producers, brokers, small and large-scale traders, trading cooperatives, live animal exporters, abattoirs and foreign traders. Using the EMMA, the common live animal and meat export value chain is depicted in Figure—. The value chain does not include information regarding the volume of flows, transaction costs, price transmissions and efficiency of the different participants since it requires much more detail study than the EMMA approach.

Figure __ Live animal and meat export value chain map
V. Key findings – Results of the Market Analyses

1. General Overview

1.1. Live Animal Marketing System
Livestock export market has been contributing directly or indirectly to the livelihoods of many households in pastoral areas of Ethiopia. Live animal export has two channels namely informal and formal. The informal or as the government call it illegal livestock export trade has been exporting animals of all species (shoat, camel and cattle) different age and quality to the gulf state through neighboring countries, Djibuti, Somalia and Kenya. This cross-border livestock trade has a long history and carried out through clan, sub-clan, and other kinship ties that are strongly maintained across international boundaries. Accordingly, the economy and trade routes are also related to these age-old links of the clan system. In the last three to five decades, livestock trade in these areas has changed from a livestock subsistence society, characterized by milk, meat and grain staples, to a livestock export-oriented market economy developing comparatively sophisticated trade links both within the region and across the Gulf States. (FEWS NER Report October 2010). As some studies are indicating, live animal export through this channel accounts for more than 80% of the annual export of the country. (ACDI VOCA, May 2010). However, pastoral livestock marketing in these border areas often faces risks associated with unfavorable policies, conflict, drought and repeated ban due to animal diseases.

The formal livestock channel has also shown growing as a result of change in consumer preferences and greater demand for high quality products with adequate guarantees of food safety and as a result of increased government oversight of the sector. This channel requires legal registration and an export license. To meet the required currency regulations, the exporter must then obtain a letter of credit (LC) or cash against document (CAD), or deposit an advance payment in a recognized bank. In the advance payment system, which is operational in the legal cross-border trade, the exporter must deposit 500USD per head of cattle, 420USD per head of camel and 50USD per head of shoats—thereby ensuring that the government earns foreign currency—in order to obtain a bank permit. Then animals are exported through Djibouti or Somali Land to the Gulf States.

1.2. Meat Marketing System
Livestock and livestock products are the second major foreign exchange source, accounting for 12-17% of total foreign exchange earning of Ethiopia (Belachew H, 2005). Ethiopia’s comparative advantage in export of meat lies in the large livestock population, proximity to the MENA countries and potentially desirable natural quality meat. Development policy frame-work which is conducive for investment and institutional supports, and support of development partners created enabling environment. Presently the major livestock suppliers for meat export
and domestic consumption are small and big traders and sometimes livestock cooperatives mainly found in the pastoral region of the country. The major countries that import meat and meat by-product from Ethiopia include Kingdom of Saudi Arabia (KSA), United Arab Emirates (UAE), Egypt and Yemen (Annex 2).

Available figures indicate that country’s performance in live animal and meat export is increasing (Annex 3). However, the meat market remains small in volume and earning when compared to the country’s resource potential and above mentioned comparative advantages, believed to be constrained by inefficiencies in purchasing, poor animal handling and inadequate facilities at the abattoir and export level. These factors all give to low meat quality and unreliable supply—which are the major complaints of Gulf importers. Yet such the domestic prices for livestock meats have increased as more animals are needed to meet the rising export demand as well as the growing domestic market for meat. In addition to these internal challenges, Ethiopian livestock and meat exporters face stiff competition from other exporting countries, such as Somalia, Sudan, South America, Oceania, Eastern Europe and the European Union.

2. Features of Livestock Markets

2.1. Market Actors

Producers

Livestock is a livelihood asset for pastoralists and it is continuously produced. However, livestock marketing shows variations depending on the seasons and market demands. During the dry season, when there is scarcity of animal feed, number of animals sold is high with subsequent low price per head/kg of live weight while the number of animals that come to the market during rainy season is low but with high prices. It was observed that pastoralists/producers know when the demand for animals, either for meat or live export is high and accordingly prepared and sale their animals. In all the study areas, it was found that producers do not trust selling their animals directly to traders (smaller or bigger) or abattoir agents, without at least one intermediary broker. Credit transaction, where the only guarantee is the broker, is found to be a problem.

Brokers/Small Traders

Brokers and small traders (those who operate in only one market place) are found to be the main livestock market actors. They fill the gap of trust between the producers and big traders (who trade between markets) as well as abattoir agents/collectors. The brokers/small traders also play important role in shortening price negotiation. However, it was observed that brokers
in any livestock markets were neither registered nor licensed. On top of this, there is no any legal ground for the credit transactions that they mediate, and therefore, are not legally accountable in case of failure of parties to fulfill respective commitments. In the Eastern Cluster and in Somali districts of the Southern Cluster, livestock market brokering is clan or even sub-clan based, where brokers have power not only in influencing prices, but also in determining which animal is to be sold and even to whom it should be sold. In the Eastern Cluster, involvement of women in trading of small tock is very high. In Hartebeek market there are women brokers too.

**Big traders/collectors**

These are individual business men, small income generating groups and livestock marketing cooperatives, who buy 10 to hundreds of animals, based on type/spps of animals and their capacity, usually from more than one markets, to sale them to abattoirs and live animal exporters. The big traders have no contract agreement with abattoirs, except one case observed in Yabelo market, where a trader has a contract agreement with ELFORA abattoir to collect sheep and goats. This trader has well organized network consists of up to 40 registered collectors in villages and small towns. The trader said that each collector that is registered for him in turn has up to 4 collectors. The big trader pays money in cash or in commodity that producers most need in advance to the 40 collectors who then buy animals with this. No credit transactions since all balances are settled when animals are handed over or added up for the next purchase. The method of purchase is live weight based and the big trader distributed more than 80 weighing scales for all collectors.

The big traders complained lack of reliable long term agreement with both abattoirs and exporters and this discouraged has had a negative impact on the supply of animals to the market. The abattoirs also want animals at their gate on live weight bases with low prices, which is far below local market prices especially for those traders who have an option of cross-border trading. The assessment team has learned that the cross border livestock trading is highly competing for animals that are used for meat export by paying relatively better price per head without charging transport expenses and cost of loss due to feeding, weight loss, injury and death of animals.

**Feedlot operators**

Most of the feedlot operators are found at Adama, Mojo and Metehara areas with their main role of fattening cattle and shooit for different markets. They use cattle of different age groups and breed types according to the demands and the type of their customers. Older animals (more than four years old) and some times of highland origin are fattened for domestic market (slaughterhouses) while young bulls (three to four years old) and usually of lowland origin are kept for export market. They use Borena markets as the main source of market because of
accessible transportation, relative higher supply and their preference for cattle sourced from these areas due to fast growing, large body size, efficiency in feed conversion and adaptation to harsh environments. Shoats are also highly supplied to these feedlot operators from Afar areas and used either for local consumption or export purpose. Cattle coming from Afar are always fattened and used for local consumption. They buy week animals from producers or from small traders and collector at primary or secondary markets. Feedlot operators have different capacity from small that can fatten 10 to 20 animals to bigger that can fatten 100 to 300 animals. Few of them also export live animal but majorities sell to live animal exporters and occasionally to export abattoirs. Animal feed is major problem for feedlot operators.

**Export Abattoirs**

There are 8 functional export abattoirs, out of which 3 in Modjo 2 in Bishoftu, 1 in Matahara, 1 in Mekele and 1 in Bahirdar and non is located in pastoral areas or at nearby main source of animals that are slaughtered for meat export. However, the assessment team has observed one export abattoir, which is under construction (about 60% completed) at Fafan, near Jijiga and another export abattoir at Yabelo which is at “Project Concept” level. Out of 8 functional abattoirs, only 2 are exporting beef. Assessment results and almost all available documents indicated that all functional export abattoirs operate under their potential capacity (Annex 4). The abattoirs claim shortage of animals supply and poor quality for their under capacity operation, while the study team has observed and identified that there is no real shortage of animals.

The draft proclamation on reforming livestock marketing system (April, 2013), indicated that the destination market for the Ethiopian meat is limited mainly to two markets, KSA and UAE (Annex 2), which are also exposed to repeated sanctions. It was also understood that there is no effort even to maintain the existing limited market, leave alone the effort of market expansion. The current destination markets of the Ethiopian meat prefer meat of lowland animals, but no established and protected brand for meat export. The assessment team has been told that some export abattoirs buy 10% of high quality lowland animals and 90% low quality highland animals and export meat by the name of the lowland animals. In the above mentioned document, it is indicated that the price that is paid for the Ethiopian meat is very low when compared to the international meat prices because of its low quality, thus, limiting the capacity of abattoirs to pay more attractive prices for live animals when compared to the cross border trading that compete for the same type of animals.

**Live animal Exporters**

These are exporters of live animal through the formal and informal channels. Exporters are few in number compared to traders in the market. They collect export animals from secondary markets (from big and small traders, livestock trading cooperatives, collectors occasionally from
producers). The number of these actors in the formal live animal export sector is increasing from time to time. Some importers from Yemen, Djibouti and Somalia are now trying to directly involve in purchasing animals from the domestic market and exporting the same to their country. For this purpose, they use the export license of Ethiopian exporters who will be paid commission on the number of animals to be exported. They also rent barns at Adama and pass their animal through the quarantine process. Usually, these foreign exporters-importers collect animals directly from the source markets through brokers and sometimes they purchase animals from feedlots. Some of them are also engaged in informal export market. Their direct involvement has raised objection from formal exporters as their involvement distort the livestock marketing system.

2.2. Market Operation
Supply and Demand

In Ethiopia, the pastoralist and agro-pastoralist areas such as Borena, Afar and Somali are considered the traditional source of livestock supplying 95 percent of livestock destined for export market (Belachew and Jemberu, 2003). Among these major supply areas, Borena zone and Somali region are the most important livestock supply areas. Supply in the market does not have uniform pattern, where supply highly fluctuates from time to time. Overall, during the peak period, sales of animals were at least twice as high as in the off-peak period. In the pastoral lowland areas, a number of factors contribute to this phenomenon such as:

- Seasonality of consumption demand (fasting and other ceremonial period) in domestic and export markets. Domestically Ethiopian New Year, Christmas, Easter and Eid al-Adha celebration at the end of the Hajj and Eid al-Fitr stimulate high supply of Shoats and cattle as price for livestock rises during these religious ceremonies. The external demand for low land sheep reaches its peak during Eid al-Adha and Eid al Fitir period (Oct to Dec). For other species like cattle and camel there was irregularity of demand from importing countries. However, based on the discussion made with potential exporter -----now a day there is a growing trend of continuous demand for all species from importing countries as far as trust and reputation is established. Even if there is still inadequate preparation in terms of producing the required quality of animals, producers and traders are well aware of the high peak demand periods and respond accordingly.
- Drought, disease outbreak, lack of information, availability of food aid, clan conflicts and others are considered as complex issues affecting the decision to hold on or to sell livestock by the producers.

Market Interaction

The livestock market is structured so that the marketable livestock from the major producing areas reaches to the final consumer or end-user passing through complex channels along the
supply chains involving various actors including producers, middlemen (Brokers), livestock trading cooperatives, traders, feedlot operators and live animal exporters passing through bush, primary and secondary markets levels (See Map).

**Unit of transaction/Pricing**

In all livestock markets there is no objective standard for selling and buying animals. Eye ball estimate or visual observation of the animals is widely used, the use live weight as unit of transaction is also not uncommon throughout the Eastern and the Southern Clusters, however.

Eastern Cluster and Somali part of Southern cluster markets are highly characterized by clan based marketing system where transaction between Somali pastoralists and traders facilitated by brokers from their own clan. Brokers in these markets have stronger power than any other markets in Afar and Borena areas. All transactions occur through brokers, with both buying and selling parties using their own. In these areas each clan has their own set of livestock brokers and members of the clans will only conduct transactions through them. The use of brokers by both parties involved in the transactions has the following benefits:

- Build trust between pastoralists and traders and act as guarantor
- Facilitate information flows between actors in the value chain.
- They also often act as translators between different regional languages.
- They also offer holding grounds for animals that are not sold.

However, there are instances where broker can also irresponsibly distort the market information in the area and disturb the transaction and make benefit out of it. Cash based payments are the most preferred method of transaction. However, credit sales do occur on occasion, with the payments being made anywhere from a day or two to weeks later. The potential for not receiving payment was also likely and common as the credit was not made through formal agreement. After having an order from importing countries, live animal exporters purchase livestock from different secondary markets, either through their own purchasing agents or from client traders, or occasionally from small traders and cooperatives. The animals then exported through different channels.

**Djibouti Channel**

This channel is the largest formal live animal export channel. Animals bought from secondary markets in southern clusters like Moyale, Dubluk, Teltele, Harobeke, Negele are transported by truck mainly by Isuzu and collected in Adama, Mojo and Metehara areas on own or rented holding ground. Animals may be fattened and sold for domestic consumption or exported by feedlot operators who have export license or sold to live animal exporter and exported. Feed is
the major constraint at this stage as animals that are not export standard need to be feed for quite some times. Animal feed price both hay and supplementary feed is dramatically increasing from time to time. Then the animals get quarantine services at Adama and transported to Djibouti through Awash by heavy trucks. Animals are again requirantined in Djibouti and exported to Gulf States Animals bought from Babile markets are exported to Djibouti after passing Dire Dawa quarantine.

Somali Land Channel

This channel entertains both the formal and the informal live animal export. The informal live animal trade from eastern cluster to Somaliland represents the largest share of cross-border trade in terms of volume and value. The majority of animals exported through this channel are Somali Blackhead or fat-tailed sheep, followed by goats, cattle and young camels—all male. Shoats account for the vast majority of exports to Somaliland: These animals are trekked through Hartishek and Lefeissa to the Somaliland border town of Togwajale, then on to Borama, and finally trucked from Borama to Berbera Port. This market is so complex and it is clan and sub clan based.

The other growing form of market is the formal live animal export market through this channel. Animals bought from southern clusters, Babile, Degahabur, Jijiga markets and fattening feedlots of Adama and Metehara areas are formally exported through Togwajale to Somali land. According to the report obtained from Jijiga custom office number of registered formal live animal exporters and the number of animals exported through Togwajale are increasing from time to time. Health certification is provided by Jijiga quarantine. Currently animals are quarantined on individual holding grounds or yards as the new quarantine station is under construction near Jijiga on the way to Togwajale.

Kenya/Somali Channel

A significant number of cattle are exported from southern Ethiopia, both from Borena Zone in Oromiya Region and from Afder and Liben zones of Somali Region in informally to Kenya Mobasa through Dolo Ado or Moyale. The other informal export route for all species is Bosaso port. Animals coming from Chereti, Filtu are trekked to Dolo Ado and then to Somalia Bosaso port. These trade routes are complex and difficult to categorize, as they operate unofficially at the junction of Ethiopia, Somalia and Kenya.

End market

As most studies are indicating, low land breeds of Shoat are most preferred by gulf state. Of the various breeds of cattle found in the Horn, the Boran breed (found in Borena Zone in the
Oromiya Region of Ethiopia) is one of the most prized in the Middle East markets. Djibouti, Somalia, Yemen, Saudi Arabiya, UAE, Egypt are the most live animal importing countries.

3. Market Supporter System

Animal Health

The main objectives of the veterinary services are to make sure animal health and welfare; to protect human health and make sure the provision of healthy hygienic animal products. In Ethiopia, there are some diseases which still affect subsistence farming and the country’s international and domestic trade of livestock and livestock products. According to stakeholders interviewed and team observation, there is poor communication between the Federal and Regional Veterinary Services as well as between the Federal Animal Disease Investigation and Regional Veterinary Laboratories that resulted in the absence of nationally coordinated disease surveillance system that is in line with SPS requirements and satisfies the interest of importing countries.

Transportation

There are no specialized trucks for transporting animals to different levels of market. Traders mostly trek animals from primary to secondary market. From secondary market they use old ordinary trucks, mainly FSR-ISUZU, to transport animals which usually cause injury, weight loss and death of the animals. Some of big traders/collectors stated that there is difficulty of importing duty free special animal transportation trucks as part of their investment. Concerning meat transport, shortage of refrigerated trucks forced exporter abattoirs to transport meat by overloading the available trucks (owned/rented); also there is no refrigerated store at airport, which further spoils the quality of meat to be exported.

Market Information/Infrastructure development/Financial Support

The assessment team has observed the result of past interventions by support of development partners to improve livestock marketing system. In almost all the districts that has been visited, there are well built livestock markets with all necessary infrastructures, though most of them are not functional, “absence” of clear ownership or accountability, with a result of lacking proper management, is the easily observed gap on market places, however.

It was known and market actors also mentioned very well, that the RAIN and RAIN+ Program of Mercy Corps, that was implemented with EMDTI, developed Livestock Market Information System that was providing accurate and timely information to the livestock market actors along the value chain and it was important and helpful, but no more functional and used as it was. Some livestock marketing cooperatives indicated that they were receiving financial support as a
loan without interest that they effectively utilized and re-paid on time, but not sustained beyond the emergency destocking operations. The team also learned that the effort of SPS-LMM in expanding market destinations and creating linkages are not maintained to the level of producing observable impacts by attracting more importers and/or by shortening the distance between pastoralists and exporting abattoirs.

**Market Promotion**

According to earlier understanding of different programs like SPS-LMM and the assessment team’s observations, the meat from lowland breeds are highly preferred by the MENA countries, particularly Boran bulls and Somali Black Head sheep—are prized by consumers. Some study reports also indicated that meat from some high land Ethiopian breeds has good demand on the same markets. Interviewed abattoir owners and some big livestock traders indicated that there is no effort from the government side to establish brands for the animals and accordingly promoting, may be due to limited knowledge of market preferences for type and quality of meat products. In spite of tremendous effort from the government and development partners, there is no strategic design and monitoring for market expansion and maintaining the existing markets, and the assessment team was fortunate, to hear one government inspection and regulatory officer saying that the meat export market of the country is monopolized by few export abattoirs who are resistant to any feedback comment and for any innovative change.

**4. Market Regulations**

**Animals**

Even though there is a guideline that indicates which animal should be slaughtered for meat export, there is no or weak control that abattoirs are operating as per the guideline.

**Export Abattoirs**

The Animal and Plant Health Control and Inspection Service (APHCIS) of the Federal MOA has standards for establishment and operation of export abattoirs, most of the export abattoirs, including the visited ones do not fulfill the requirements. The operating procedures of the abattoirs do not meet the required standards, and it is indicated that the abattoirs are reluctant to implement corrective measures. There is a gap in assessing the abattoirs and their operating procedure before issuing annually renewed working license to the abattoirs. APHCIS has staff in all export abattoirs to undertake ante-mortem and post-mortem inspection, however, the assessment team was learned that they do not inspect the origin of the animals (lowland/highland). Similarly, the inspectors do not control how carcasses are packed in the cold chain facilities at the abattoirs or in the transporting facilities.
SPS-Requirements

Identification of animals and movement control are not practiced, thus tracing origin of animals is difficult. It was observed that the relation between field animal health services, including disease surveillance, which are carried out under regional states, APHCIS and the EMDTI that promotes meat markets and receivers feedbacks from destination markets, is very weak.

Trade Agreement Requirement

There is unfair completion among the few export abattoirs, both in accessing live animals and foreign markets. Big traders that supply or collect animals for the abattoirs said that the abattoirs do not keep their agreements not only with them, but also with the meat importing partners.

Transaction

According to export regulation, the price of exported meat is paid through the National Bank of Ethiopia in advance, but big traders/collectors indicated that there is transactions on credit bases and claim that they have unpaid money, which they described as a bottle neck for the business and for their relationship with the producers.

5. Major Constraints and Gaps

Based on the assessment made and as the secondary data are also showing the following issue are found most critical for the improvement of livestock export market.

Seasonality and Low Supply of Poor Quality Animals

This is mainly attributed to a number of factors:

- Even if the pastoralists aware the external demand, the production system has not been yet transformed in to market oriented production system. The pastoralists still supply animals as need for cash arises.
- Recurrent drought and reduced carrying capacity of the range coupled with inadequate utilization of supplementary feed and forage as well as scarcity of water hinder the supply of the required quality of animals.
- Presence of high prevalence of diseases and inadequate and inefficient animal health services in pastoral areas pose a challenge to produce quality animals.
- Livestock supplies are fragmented, which means herds must be bulked up before trekking or transporting across long distances. Producer groups and cooperatives are not well developed in pastoral areas that could supply animals in bulk.
- Lack of clear and reliable livestock market information. Pastoralists do not have specific information on price time, type and quality of animals required by the end market as a result livestock producers’ supply to the market fail to meet
market requirement. Buyers must choose from whatever is available in the market, making it very difficult to meet quality requirements in end markets.

Long, Disorganized and Traditional Marketing Chain
Live animals are marketed through the traditional marketing routes passing from primary markets to secondary and terminal markets to reach export markets. The market chain is characterized by numerous intermediaries/actors that make the supply chain unnecessarily long without significant value addition activities. Except few cooperatives in Southern cluster, there are no strong groups or cooperatives that are organized to supply considerable volume of required animals. Collection of animal require extra time and cost. High marketing cost then lead to reduced profit margin and market inefficiencies that will be reflected at all level and impair the export market.

Lack of Standardized Unit of Transaction
Except using weighing scale for buying and selling shoat for export abattoirs in southern cluster, all animals are sold and bought on eye ball estimate or observation. Transaction is mainly facilitated by brokers in both eastern and southern cluster. In such situation, the purchase price of an animal will reflect not only the bargaining skills of both buyers and sellers but also the buyer’s preference for the characteristics of the animal and the seller’s willingness to sell, sometimes leading to transaction failure. Operating in such uncertain system, buyers always try to keep their risk to the minimum level by operating at smaller scale which eventually discourages producers to supply more animals to the export market.

Week Vertical Linkage and Integration between Value Chain Actors
There is lack of coordination and collaboration between market actors. This is evidenced by limited information flow up and down the chain, Buyers and sellers tend to seek each other out based solely on the best price offered, mistrust among producers and other market actors in the chain and there are very few embedded services provided with the limited linkages that do exist. No examples of input supplies, veterinary supplies or similar services were reported as being provided to lower chain actors by other value chain actors.

Lack of Waiting /Holding Ground
Open pastoral land was typically reported as being the areas where animals were held before being transported to central markets, fattening grounds in the central region or abattoir facilities. Traders of all sorts also stated that when collecting animals that they would keep them on open pastoral or graze land near the purchase market. In market areas, there are often small thorn enclosures used as short term holding grounds by traders and pastoralists, often for a fee, which suggests a demand for short term pre- and post-market holding grounds. Seasonal supply shortages and other circumstances (such as clan conflict) that drive shortages may
coincide with very high demand period from the importing countries. Thus, holding reserve stock in low and mid altitude areas will buffer such conditions. Having holding grounds in different locations can also serve to resolve problems created as a result of communication gap between abattoirs and traders from remote markets. Shoats purchased in excess of exporter’s demand can be kept as reserve stock while traders keep on buying from source markets. This helps to avoid the extra effort needed to re-inform producers to bring animals to the market after they are told to stop for a certain time. This means, holding grounds can help to properly match demands with supply. (ref Live animal and meat export value chains for selected areas in Ethiopia: Constraints and opportunities for enhancing meat exports. 2008)

Inadequate Live Animal Export Promotion and Expansion:
Market search is done individually no institutions that promote and search for better export market and penetrate in to a new market. Most of the export markets tend to focus only to a few end markets. Even if there is high preference to Ethiopian low land meat by importing countries, the opportunity to develop low land animal brand and get premium payment was not tapped.

Unofficial Direct Involvement of Foreigners in the Export of Live Animals:
Foreign exporter-importers are increasingly purchasing animals from within Ethiopia, using Ethiopian traders as collecting agents in primary and secondary markets and export through unofficial channel or use Ethiopian who only issued export license. This has a tendency to distort the market and disturb the system. Credit repayment default is frequent and common in this type of transaction.

Shortage of Feed and Water Supplies:
According to discussions with exporters, feedlot operators and traders; the main reason for lack of inconsistent livestock quality supply is shortage of feed and water especially during dry seasons. Most traders and feedlot operators around Adam often complained of dramatical increase of feed price and the cost of transport between production and delivery points as the most limiting factors regarding Feed supplies. Interview conducted with traders in Somali regions reveled that feed supply is very poor like other clusters but government feed supply licensing regulation is also aggravating the problem. Traders uniformly stated they make every effort to reduce the amount of time the animals are in their possession before reselling them to minimize the feed and water requirements. There is a need to increase the availability of supplementary feed to Afar, Somali and Borena areas, or to find cheaper locally available sources of feed to improve quality of traded animals.

Poor Veterinary Service:
Credible and efficient veterinary service is one of the critical support services needed to improve the health and productivity of livestock as well as the health and safety of consumers.
Although public vet service is the main veterinary services provider in pastoral areas, Community Animal Health Workers (CAHWs), Private Veterinary Service providers, NGOs and black market vet drug supplies from neighboring countries are also sources of veterinary services and inputs. However, pastoralists and traders in Afar, Somali and Borena regions are repeatedly mentioned shortages in availability of quality veterinary service provision. Due to budget, logistic and man power limitation and lack of appropriate strategy, coverage and efficiency of public veterinary service delivery system is far below expected. To fill this gap several NGOs and donor organization had started supporting veterinary services through establishment of community based animal health delivery system and private veterinary services. However, the effort is still unable to satisfy the conspicuous need of the service in pastoral areas.

**Lack of Appropriate Financial Services and Insurance**

In all the clusters all levels of traders expressed the lack of capital as one of their main constraints. In addition, there are limited amounts of transactions that occur on a credit basis. Most traders do not prefer to sell animals to larger traders or abattoir purchasing agents on a credit basis as payments can be delayed, or in some cases never arrive. The issue of default payment is still one of the causes of market instability and uncertainty. Hence the role of financial institutions is so immense to meet the in dire financial need of the livestock sector. However none of the exiting private and public banks are serving the livestock value chain actors and supporters. Now days a number of banks has flourished in pastoral areas. Except giving money transfer and exchange services most of them do not provide loan to the sector. Few banks like Oromiya and Commercial bank of Ethiopia lend money following the conventional way of lending money which is very difficult to access for pastoralists and other traders. Islamic trading communities could not even access and benefit from very few conventional loan opportunities because of lack of Islamic compliance banking system. From experience obtained from Kenyan side Oromiya Insurance in collaboration with ILRI has started index based livestock insurance against severe droughts in the southern cluster? This needs further investigation to see how the value chain actors would benefit from this initiative.

**Lack of Appropriate Transportation Means:**

The trekking services available to the livestock industry are informal in nature. Most pastoralists trek their own animals to markets as need arise. Traders of all sizes hire individuals to trek cattle, sheep, goats and camels from bush and primary markets to secondary markets. The trekkers hired may be smaller traders, brokers or family members of the livestock owner. The largest proportion of livestock animals are transported also via privately owned Isuzu trucks. These Isuzu trucks transport grains and other commodity goods too. Camels are transported by big trucks totally restrained, in most cases camel get paralysis due to improper transport and lack of resting. The transporters or truck drivers are matched with traders through brokers who
arrange the transportation fees and collect a commission. As the truck are not meant for livestock transport, there are instances where transporting of large number of animals to outlet market became very difficult and hinder efficient supply. In both cases animals are transported long distance without resting, getting feed and water and this cause, poor meat quality, high weight loss and high mortality.

**Problem with Taxations and Letter of Credit:**
The letter of credit scheme effectively prohibits all but the largest livestock traders from participating in official export trade due to the minimum capital requirement of 265,000 ETB to gain a letter of credit. The report also found that the requirements were the key reason why unofficial trade routes dominated the livestock export along the Djibouti and Somaliland borders. There is also multiple taxations problem that appears in several ways. Pastoralists are taxed by multiple levels of the government (woreda and municipality administration) and at the market during livestock transactions. Export traders experienced multiple points of taxation along the export routes through Somaliland. The multiple taxations are more pressing to the Borena and eastern cluster areas.

**Inadequate Quarantine Service:**
There are no so far standard quarantine stations that are recognized and accepted by all importing countries in Ethiopia. Currently two big standard quarantine station are under construction in Jijiga and --------. Quarantine services are currently provided using mainly private holding grounds at Adama, Dire Dawa and Jijiga. There are serious shortage materials, equipment and vet input in all the three quarantine service stations. Ear tag, vet drugs and vaccines are in short and individual traders some time requested to full fill the required materials and vet inputs. Some countries have not recognized the Ethiopian quarantine services and hence animals are required to be re-quarantined at the Djibouti port and re-certified as Djibouti origin.

**Insecurity:**
Clan based conflicts and political disputes are frequently creating security problems in accessing some livestock potential areas. These conflicts also limit animals movement along the chain.

**Opportunities**
- The involvement of private sector in the livestock export sector is increasing from time to time. Reports obtained from Jijiga Custom offices and Adama Quarantine service, formal live animal exporters and number of animals exported through official channel is increasing which really improve foreign currency earnings and the economy at all level. See Annex 5 that show live animal export trend. Number of feedlot operators and exporter with very huge capacities are also increasing. The team could visit very big holding ground of its first kind at Metehara area owned by prominent exporter called
ato Moges Assefa. During the visit there were more than 10,000 sheep bought from different direction of the country and there were more than 1500 camel bought from mainly Moyale, Negele and Borena areas all destined for export.

- There are well constructed market places in almost all visited secondary markets. However, because of ownership issue, there are serious management and administrative problems.
- Government of Ethiopia is about to develop livestock market system proclamation that will really help and facilitate better organized and efficient marketing system

VI. Recommendation
- Livestock production and productivity and livestock marketing can be improved at producer level by designing a support package that consists of promotion and support to small scale fattening, feed supply and forage development, herd level veterinary service improvement and group/coops based marketing system in a selected livestock potential kebeles in close collaboration with respective district agriculture and cooperative offices and private partners.
- Support establishment or capitalize on already started initiatives of trading livestock in an organized and formalized way like association cooperatives and groups (from small trader up to export level). Marketing in organized way enables traders to enjoy economies of scale, improved access to market information and financial services and thereby lead to a stronger bargaining position. At the same time, when dealing with traders associations/cooperatives/groups, instead of small and dispersed individual sellers, traders face lower transaction costs. Ensure networking and allow traders communicate simultaneously with several traders and buy larger volumes of quality livestock at a specific time and place, which reduces their operational costs and the risks incurred.
- Scale up and expand live weight based transaction started in selling and buying shoat for export abattoirs in Southern cluster to Afar and Eastern clusters. The ability to know the live weight of animals will allow value chain actors to sell or buy only those sheep and goats that will be accepted by big traders or abattoirs and thereby avoid risks and reduce wasted time and effort. Support awareness on the importance of utilizing weight based transactions and increase supply of scale through linking cooperatives and livestock trading groups with main suppliers.
- Strengthen backward and forward linkage of value chain actors through the following means:
  - Support embedded service provision. After identifying critically needed inputs at all level, encourage higher market actors to provide these inputs to lower value chain actors. For example instead of only coming to buy animals, when exporters
or big traders are coming to buy or collect animals, they can bring and sale critically needed inputs (livestock feed, other basic necessities etc) to smaller traders and producers. In doing so their linkage improve and trust developed and other key services like market information credit and training can also be easily exchanged.

- Facilitate establishment of Multi-Stakeholder Platform (MSP) participated by representatives from all categories of actors within the value chain; pastoralists, cooperative leaders, traders, fattening unit and holding ground operators, live animal exporters and export abattoirs and their purchasing agents and major supporting service providers. Bringing together forward-thinking representatives from the entire livestock value chain actors will allow all participants in the industry to discuss and identify critical challenges, opportunity, seek solution develop common vision and fully understand how their livelihoods are all interconnected and that the key to increased competitiveness is cooperation and collaboration.

- Organize market linkage trips and experience sharing opportunities between livestock value chain actors across the cluster so that best practices and lessons can be adopted and scaled up.

- Support provision of business skill trainings to cooperatives, traders, exporters, and feedlot operators. The training can help them in improving business management skills, creating market linkage and formalizing businesses in the chain.

- Encourage and support establishment of holding grounds near major market places and routes. The in dire need of holding ground at all level indicates an opportunity for engagement of private sectors. As part of investment promotion and improvement of livestock export market, work with concerned body to attract private sectors who are in the business or out of the business to engage in to establishment of holding ground so that livestock are rested for an appropriate amount of time before being loaded onto transport vehicles or trekked to the next level and facilitate value addition.

- The existing export abattoirs, are operating under their potential capacity, complaining shortage of animal supply for this, while producers, marketing cooperatives and traders arguing lack of market for animals. The team has learned that this difference is attributed to the low price that the abattoirs offer because the meat they are exporting is of a lower price due to its quality. Therefore, the team recommends enhancing Sanitary and Phyto-Sanitary Measures and Operating Standards with continuous monitoring and credible certification system to the meat processing industries in order to fulfill the requirements and win trust of importing countries.

- Having export abattoirs in the pastoral areas, like the one already started at Fafan near Jijiga and the other expected to start at Yabelo, will greatly reduce cost of animal supply,
serve as a sustainable market outlet for animals, improve quality carcasses and help in establishing brand meat export
- Support abattoirs in strengthening and upgrading their cold chain capacity, with establishment of cold room stores at ports
- Support Improvement of availability of animal feed.
  - Establishing and strengthening local feed producing enterprises and pastoralists is imperative. Conducting research in finding cheaper locally available sources of feed and commercializing the output is a very critical in improving animal feed supplies in pastoral setting.
  - Supporting private companies and pastoralists cooperatives to engage in silage making and fodder bank establishment is also necessary.
  - Improving supply chain of forage seeds and technologies to potential agro-pastoral areas of Afar, Somali, and Borena can help to promote and introduce forage production and supply near the pastoral areas.
  - Supporting model pastoralists and coops to establish feed conservation and preservation schemes at good times for using them during dry season is also necessary.
  - There is also a need to link the pastoralists cooperatives/traders with concentrate feed producers in Awassa, Adama and Bishoftu and in the long term work with and encourage potential private sectors to establish a feed processing plant at pastoral areas.
- Work with the financial sectors (formal and informal) to encourage the creation of appropriate loan products and lending schemes for the livestock value chain actors. PRIME needs to capitalize on RAIN achievements, like promotion and establishment of SACCO/RUSSACOs and introduction of Islamic banking systems. There is a need also to support more research to determine the specific types of appropriate loans and lending schemes for pastoralist and traders further down the value chain. Encouragement and supporting formal banking sector, microfinances to work with pastoralist cooperatives and livestock traders in extending loan, credit and saving services which is responsive to the context and need. Work with the insurance sectors to encourage the establishment of livestock insurance plans that could be made available to pastoralists, cooperatives and truck owners. Explore more on already started index based livestock insurance and support the initiative.
- Support establishment and improvement of livestock market Information to improve availability and dissemination of reliable and accurate market information regarding both quantities and qualities of animals required and available and the respective market prices for abattoirs and export markets. Build the capacity of district marketing departments with regards to gathering, analysis and dissemination of market information Revitalizing SMS based market information gathering and sharing mechanism is one potential system to improve livestock market information. The establishment of either a public or private sector run weekly radio program is an effective way to reach the vast majority of the rural populations
- Support private engagement in to more appropriate livestock transportation trucks and cooling facilities.
- Animal Health Services, Breed Brand, Export Zone and Promotion. Enhance disease surveillance by strengthening regional veterinary laboratories at least in the target areas, and integrating them with federal disease investigation and surveillance networking to scientifically describe/update animal disease status of the country
  - Establish/recognize livestock types of the country by describing characteristics/locality and then giving specific “Brand” with subsequent protection/control and promotion
  - Based on disease distribution map and breed localities, establish export zones with subsequent promotion
  - Enhance end market research to describe needs, requirements and standards
VII. Annexes

Annex 1 Livestock Export Routes

Key:
- Informal trade routes: Red lines
- Formal trade routes: Black lines
- Export channel: Circle with solid line

Export channels:
- Jijiga
- Jilje

Major cities:
- Adama
- Awash
- Babile
- Dire Dawa
- Djibouti
- Berbera
- Hargele
- Harta Sheikh
- Bossasso
- Mombassa
## Annex 2. Seasonal Calendar for Live Animal and Meat Export
(Pastoral Context)

<table>
<thead>
<tr>
<th>Long Rainy Season</th>
<th>Short Dry Season</th>
<th>Short Rainy S.</th>
<th>Long Dry Season</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ma</td>
<td>Ap</td>
<td>May</td>
<td>Ju</td>
</tr>
<tr>
<td>Livestock Supply (Volume)</td>
<td>Low</td>
<td>Medium</td>
<td>High</td>
</tr>
<tr>
<td>Domestic Demand</td>
<td></td>
<td>High</td>
<td></td>
</tr>
<tr>
<td>Export Demand</td>
<td></td>
<td></td>
<td>High</td>
</tr>
<tr>
<td>Price</td>
<td>Medium</td>
<td>High</td>
<td>Medium</td>
</tr>
<tr>
<td>Body Condition</td>
<td>Poor</td>
<td>Medium</td>
<td>Good</td>
</tr>
<tr>
<td>Pasture and Water Availability</td>
<td>Medi</td>
<td>High</td>
<td>Medium</td>
</tr>
<tr>
<td>Animal Disease Prevalence</td>
<td>Low</td>
<td>Medium</td>
<td>Low</td>
</tr>
</tbody>
</table>

Note: Price is dependent on demand and supply: high supply volume combined with low export demand results in low price during the months of Dec, Jan and Feb.
Annex 3. Countries that Import Ethiopian Meat and Performance

![Graph showing destinations of exported meat](image)

**Figure:**- Chart Title
Destinations of Exported Meat by end markets (%)
(SPLM report)

<table>
<thead>
<tr>
<th>Country</th>
<th>UAE</th>
<th>KSA</th>
<th>Turkey</th>
<th>Comoros</th>
<th>Viet Nam</th>
<th>Bahrain</th>
<th>Egypt</th>
</tr>
</thead>
<tbody>
<tr>
<td>Volume %</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Value %</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Table 1: Abattoirs Performance in Meat Export

![Graph showing export operators' shares](image)

**Figure:** Export Operators' Shares of Exported Meat by Volume and Value, 2010/11
Rank Export Operators Export Shares (%) Vol (16,877 mt) Val (63.25 mil USD)
(SPLM - Annual report - 2011)

<table>
<thead>
<tr>
<th>Rank</th>
<th>Export Operators</th>
<th>Export Shares (%)</th>
<th>Vol (16,877 mt)</th>
<th>Val (63.25 mil USD)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>LUNA</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>MODJO</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>ORGANIC</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>ELFORA</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>HELMEX</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>ABERGELLE</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Other</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Total</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Annex 4. Export Abattoir and feedlots

### Table 2 List of Export Abattoirs and their Capacity

<table>
<thead>
<tr>
<th>No</th>
<th>Name</th>
<th>Capacity in tons/day</th>
<th>Current</th>
<th>Potential</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>ELFORA/Bishoftu</td>
<td>540</td>
<td>810</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>HELMEX/Bishoftu</td>
<td>396</td>
<td>1320</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Modjo Modern/Modjo</td>
<td>495</td>
<td>600</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Luna/Modjo</td>
<td>495</td>
<td>600</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Organic/Modjo</td>
<td>200</td>
<td>350</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Almawashi/Matahara</td>
<td>528</td>
<td>1056</td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>Abergale/Mekele</td>
<td>n.a</td>
<td>n.a</td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>Ashraf/BahirDar</td>
<td>n.a</td>
<td>n.a</td>
<td></td>
</tr>
</tbody>
</table>

### Table 3 Number of Feedlot and their Location

<table>
<thead>
<tr>
<th>S.No</th>
<th>Location</th>
<th>No</th>
<th>Distance km from main quarantine station</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Adama town</td>
<td>26</td>
<td>0-8 km</td>
</tr>
<tr>
<td>2</td>
<td>Mojo</td>
<td>4</td>
<td>20 km</td>
</tr>
<tr>
<td>3</td>
<td>Meki</td>
<td>2</td>
<td>100 km</td>
</tr>
<tr>
<td>4</td>
<td>Dera</td>
<td>11</td>
<td>30 km</td>
</tr>
<tr>
<td>5</td>
<td>Awash Melkasa</td>
<td>3</td>
<td>25 km</td>
</tr>
<tr>
<td>6</td>
<td>Metehara</td>
<td>5</td>
<td>100</td>
</tr>
<tr>
<td>7</td>
<td>Awash</td>
<td>4</td>
<td>130</td>
</tr>
<tr>
<td>8</td>
<td>Adami Tulu</td>
<td>2</td>
<td>130</td>
</tr>
</tbody>
</table>

Source: Ministry of agriculture Nazareth animal and plant quarantine
Annex 5 Live animal Export Performances

Figure 1 Performance of Adama Quarantine

Source: Ministry of agriculture Nazareth animal and plant quarantine

Figure: Live animals exported through Jijiga Custom
Annex 6. Location of Some of the Market Places Visited by the Team

Sample (market, abattoirs and feedlot visited by team)
## Annex 7 List of Market Actors Contacted

<table>
<thead>
<tr>
<th>S.N</th>
<th>Name</th>
<th>Function</th>
<th>Area</th>
<th>Tel No</th>
<th>Remark</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Tesfa Lidet</td>
<td>Meat Exporter</td>
<td>Mojo</td>
<td>0911211271</td>
<td>Luna Export Abattoir General Manager</td>
</tr>
<tr>
<td>2</td>
<td>Tigist</td>
<td>Meat Exporter</td>
<td>Mojo</td>
<td>0921332425</td>
<td>Organic Export Abattoir Admin and Finance head</td>
</tr>
<tr>
<td>3</td>
<td>Tadessa Ketema</td>
<td>Ethiopia live animal trade association</td>
<td>Adama</td>
<td>0911422831</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Aniwar Zekeriya</td>
<td>Camel Exporter</td>
<td>Dire Dawa</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Omar Giire Alaale</td>
<td>Livestock traders</td>
<td>Afdem</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Gebremedihin Birhane</td>
<td>Small Trader</td>
<td>Dire Dawa</td>
<td>0913918306</td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>Abdikerim Ali</td>
<td>Livestock traders</td>
<td>Dire Dawa</td>
<td>0915738970</td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>Mulugeta Tesfaye</td>
<td>Quarantine</td>
<td>Dire Dawa</td>
<td>0915753302</td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>Ahmed Mehad Ali</td>
<td>GOV</td>
<td>Jijiga</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>Endriyas Dana</td>
<td>Jijiga Custom</td>
<td>Jijiga</td>
<td>0912066316</td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>Keder Mehamed Hadi</td>
<td>Shoat Exporter</td>
<td>Jijiga</td>
<td>0911994391</td>
<td>Mohamud Hadi Hubene Export plc</td>
</tr>
<tr>
<td>12</td>
<td>Mohammed Gad</td>
<td>Live animal Exporter</td>
<td>Jijiga</td>
<td></td>
<td></td>
</tr>
<tr>
<td>13</td>
<td>MusaSheck</td>
<td>Live animal Exporter</td>
<td>Jijiga</td>
<td></td>
<td></td>
</tr>
<tr>
<td>14</td>
<td>Mohammed Nur</td>
<td>Live animal Exporter</td>
<td>Jijiga</td>
<td></td>
<td></td>
</tr>
<tr>
<td>15</td>
<td>Abdi Meyigag Waberi</td>
<td>Broker/collector</td>
<td>Jijiga</td>
<td>+251915012280</td>
<td></td>
</tr>
<tr>
<td>16</td>
<td>Tesfaye Girma</td>
<td>Agri. Marketing Improvement Project Coordinator</td>
<td>Afar/Semera</td>
<td>0923440153</td>
<td></td>
</tr>
<tr>
<td>17</td>
<td>Mewhame Hussen</td>
<td>Marketing Expert</td>
<td>Afar/Gewane</td>
<td></td>
<td></td>
</tr>
<tr>
<td>18</td>
<td>Moges Assefa/Sintayehu Birhanu</td>
<td>Exporter</td>
<td>Adama</td>
<td>0911491711/09 11491710</td>
<td>Has biggest holding ground around Metehara area</td>
</tr>
<tr>
<td>19</td>
<td>Desalegne Abayenahe</td>
<td>Marketing office</td>
<td>Dubuluke</td>
<td>0911123456</td>
<td></td>
</tr>
<tr>
<td>20</td>
<td>Ashebre kasa</td>
<td>Small trader (camel ,cattle )</td>
<td>Haro bake</td>
<td>0912092205</td>
<td></td>
</tr>
<tr>
<td>21</td>
<td>Habtamu Bekele</td>
<td>Big traders</td>
<td>Yabelo</td>
<td>0911735025</td>
<td></td>
</tr>
<tr>
<td>22</td>
<td>Hayimanote Asefa</td>
<td>Marketing office</td>
<td>Yabelo</td>
<td>0912801225</td>
<td></td>
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VIII. References


