



Food and Agriculture
Organization of the
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Training manual to enhance the capacity of trade counselors of IGAD member states working in Middle East and North African countries



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AcronyMS

ALOP	Appropriate Level of Protection
AGGDP	Agricultural Gross Domestic Product
AU-IBAR	African Union Inter-African Bureau for Animal Resources
B2B	Business to Business
CBPP	Contagious Bovine Pleuropneumonia
CCPP	Contagious Caprine Pleuropneumonia
CDC	Center for Disease Control
ELISA	Enzyme-Linked Immunosorbent Assay
EU	European Union
EU SHARE	European Union Supporting Horn of Africa Resilience
FAO	Food and Agriculture Organization of the United Nations
FMD	Foot and Mouth Disease
FMDV	Foot and Mouth Disease Virus
FTA	Free Trade Area
GATT	General Agreement on Tariffs and Trade
GCC	Gulf Cooperation Council
GDP	Gross Domestic Product
GF-TADS	Global Framework for the Control of Trans-boundary Animal Diseases
GLOBALGAP	Global Good Agriculture Practice
GSO	Gulf Cooperation Council Standardization Organization
HACCP	Hazard Analysis and Critical Control Point
HoA	Horn of Africa
HS	Hemorrhagic Septicemia
ICPALD	IGAD Center for Pastoral Areas and Livestock Development
IGAD	Inter-Governmental Authority on Development
IGM	Immunoglobulin M
IGO	International Governmental Organization
ISO	International Standard Organization
KSA	Kingdom of Saudi Arabia
LPI	Livestock Policy Initiative
LSD	Lumpy Skin Disease
LSP	Local Service Provider
MENA	Middle East and North Africa

MoA	Ministry of Agriculture
MS	Member States
NGO	Non-Governmental Organization
OECD	Organization for Economic Cooperation and Development
OIE	World Animal Health Organization
PPP	Public Private Partnership
PPR	Peste des Petits Ruminants
PVS	Performance of Veterinary Services
RVF	Rift Valley Fever
SAOS	Saudi Arabia Standard Organization
SGP	Sheep and Goat Pox
SPS	Sanitary and Phytosanitary
TADs	Trans-boundary Animal Diseases
TB	Tuberculosis
UAE	United Arab Emirates
USD	United States Dollar
WHO	World Health Organization
WTO	World Trade Organization

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Executive Summary

Global meat demand and prices are currently at unprecedented high levels. Buoyed by high GDP growth, globalization, higher incomes, and increased urbanization, diets are rapidly diversifying away from traditional staple commodities and towards high-value products including meat. With this increased demand for meat arises new opportunities for IGAD member states. The IGAD region is recognized for its vast wealth of livestock. However, available data indicates that exports of livestock and livestock products from the region are minimal compared with the potential demand. Despite the substantial demand for meat and live animals from potential importing countries, exports to those markets often face impediments as a result of stringent SPS requirements and poor market promotion and development.

Existing market opportunities can only be seized if IGAD MS address sanitary and non-sanitary constraints hampering export trade in livestock and meat. Producers and governments in the region will need to invest heavily in SPS compliance, disease management and surveillance, market promotion and development, capacity building, and infrastructure development to enhance trade in live animals and meat from the region.

The limited exports have partly been due to limited coordination among the trade counselors, exporters and competent authorities in IGAD member States. The gap has been in terms of real time market information and dissemination on import requirements as well as commodity prices, and limited promotional and linkage efforts. The complexities of international markets require the region to continue making concerted efforts on trade facilitation, including market promotion and development and ensuring that the region's interests are represented in major and emerging markets.

Addressing all these constraints will provide hope for the IGAD region to be able to take advantage of the present situation and assert itself as an important player in global live animal and meat markets.

The overall objective of this manual is to enhance the capacity of the trade counselors of IGAD MS working in the embassies of MENA countries in the areas of livestock and livestock products trade so that they can play a role in strengthening business linkages between the two regions. The manual gives facts and figures on the livestock resource base of the region, its contribution to national GDP, the volume and value of live animal and meat export from the region and its future opportunities. The role and responsibilities of the various international standard-setting organizations as they relate to live animals and meat trade are also presented. The SPS requirements of the Gulf Cooperative Council and individual countries in MENA are described in detail. Major challenges impeding the live animal and meat trade and the necessary measures that should be taken to address these challenges are discussed.

Most importantly, the manual lays out an action package that clearly identifies the role trade counselors from IGAD MS can play in market promotion and enhancing information exchange among stakeholders. The latter involves collection and dissemination of information related to price, quality specification, SPS and regulatory requirements of MENA countries. Moreover, it also identifies their active role in establishing diplomatic/business relations between the regulatory authorities of importing and exporting countries, in facilitating business-to-business relations between trading partners, and in the identification and establishment of local intermediaries who promote livestock and meat export trade from the IGAD region.

1. Introduction

1.1. IGAD Region

The Intergovernmental Authority on Development (IGAD) region is one of the trade blocks or economic communities in Africa. It was formed by a membership of eight countries in the Horn of Africa namely Djibouti, Eritrea, Ethiopia, Kenya, Somalia, South Sudan, Sudan and Uganda. The region has a total land area of 5.2 million square kilometers accounting for 17.2 % of Africa (Table 1). The total population of IGAD member countries in 2016 is estimated at 242.39 million (23.5 % that of Africa) (Table 2). The region has a great variety of climates and landscapes including mountains, glaciers, tropical forests and grasslands as well as arid and semi-arid areas among other features. The arid and semi-arid lands account for over 80% of the land mass in the region. The highlands of Ethiopia, Kenya, Uganda, and areas around Khartoum in Sudan are densely populated while the rest of the region is sparsely populated. The region is endowed with many renewable resources including livestock, which is contributing significantly to the livelihood of many.

Table 1: Total land area of IGAD by MS

Country	Total land area in million km ²
Djibouti	0.023
Ethiopia	1.100
Eritrea	0.118
Kenya	0.569
Somalia	0.637
South Sudan	0.644
Sudan	1.880
Uganda	0.236
Total	5.207(17.24% of Africa)

Source: World Bank, 2014

Table 2: Human population of IGAD

Country	Human population in Millions
Djibouti	0.896
Ethiopia	91.99
Eritrea	5.30
Kenya	46.60
Somalia	11.00
South Sudan	12.7
Sudan	34.00
Uganda	39.90
Total	242.39 (23.5% of Africa)

Source Worldometer 2016 estimate

1.2. Why this manual

IGAD and East Africa sub-regional office of Food and Agriculture Organization (FAO) of the United Nations have jointly formulated a regional project on “Improving Supply of Safe and Quality Livestock and Meat Exported from the Horn of Africa to Middle East and Gulf Countries” (GCP/RAF/490/ITA) with the financial support of the Italian Development Cooperation. The central objective of the project is to improve the supply of quality and safe livestock and meat exported from the Horn of Africa to Middle East and North African (MENA) countries.

Direct beneficiaries of the project are livestock producers including pastoralists and agro-pastoralists, traders, owners of export abattoirs and processing units, veterinary authorities, and national chamber of commerce in the IGAD member states. In addition, livestock traders and consumers in importing MENA countries are expected to benefit from the project in terms of improved food safety and quality.

IGAD is responsible for the project Outputs 3 and 4: Output 4 is: ‘Business relations between Horn of Africa countries and Middle East and Gulf countries effectively supported’. Building the capacity of trade counselors stationed in major MENA markets

in the areas of livestock export market, including the opportunities and requirements of importing countries, is one of the activities identified under this output. Trained trade counselors are expected to assist the private sector in the respective countries through promotion of products at the end markets by providing feedback on the products on demand, emerging requirements and import-related data. To translate this activity into action, preparing a training manual and training trade counselors using the manual was envisioned.

The manual covers the following areas:

- The livestock resource base of the IGAD region and the comparative advantage it offers for economic development in the region
- Volume and value of export of live animals and meat from the IGAD region
- International, regional, and country requirements impacting livestock and meat trade from the IGAD region
- Opportunities and challenges for expanding live animal and meat export from the IGAD region
- Interventions to address the challenges and meet the requirements of importing countries
- Role of business diplomacy in enhancing the live animal and meat export trade and development of an action package.

2. Objective

The overall objective of this manual is to help enhance the capacity of the trade counselors of IGAD MS working in the Embassies of MENA countries in the areas of livestock and products trade so that they can play a role in strengthening business linkages between the two regions. After going through this manual, trade counselors are expected to achieve the following specific objectives:

- Recognize the livestock resource base of the region and the comparative advantage it offers for the region's economic development;
- Understand the region's livestock and meat market volume, value, and future potential;
- Comprehend international standards and MENA countries' requirements impacting livestock and meat trade from the IGAD region;
- Create awareness on opportunities and challenges for expanding live animals and meat export from the region;
- Understand the interventions needed to address challenges and seize opportunities;
- Prepare to fully play the role of trade counselors in enhancing the live animal and meat export trade;
- Develop an action plan to enhance livestock and meat trade between the IGAD MS and MENA countries and get committed to translate it into action.

3. The livestock resource base of IGAD region and its contribution to the economy

3.1. The Resource Base

Livestock is one of the major renewable resource endowments of the IGAD region. IGAD is one of the regions with the highest ruminant livestock concentrations in Africa and in the world. As shown in Table 3 below, the region occupies 3.5% of the earth's land surface, keeps 8% of the cattle, 9.6% of the small ruminants, and 51% of the camel population in the world. About 38.6% of the cattle, 30.6% of the small ruminants, and 60.8% of the camel population in Africa is in the IGAD region, which accounts for 17.24% of the continent's land area.

Table 3: Livestock population in the IGAD region (millions) and its percentage share of population in Africa and in the World

Animal Species	World	Africa	IGAD		
			No	% world	% Africa
Cattle	1470	305.8	118	8	38.6
Sheep & goats	2100	663.6	203	9.6	30.6
Camel	27	23	14	51.8	60.8

Source: FAO Stat, 2012

The livestock resource base and type in individual member state varies with size of agro-ecological endowment. Countries with higher proportions of arid and semi-arid lands tend to keep more camels and small ruminants particularly goats while those with middle-to high-altitude grounds tend to keep more cattle than other livestock. The latter also tend to practise crop farming. Table 4 shows the livestock population by member state. Ethiopia has the highest cattle population in the region followed by Sudan and Kenya. Sudan leads in small ruminants followed by Ethiopia and Kenya. Somalia dominates the region in camel population.

Table 4: Livestock population by IGAD Member State (millions)

Animal Spps	Djibouti	Eritrea	Ethiopia	Kenya	Somalia	South			Total
						Sudan	Sudan	Uganda	
Cattle	0.04	2.3	56.7	17.5	5.1	11.7	29.2	13.02	
Sheep & goats	1	7.9	58.4	44.8	8.5	24.4	68.7	18.5	
Camel	0.05	0.3	1.2	2.97	8.5	-	4.5	-	

Source: Livestock contribution to the economy studies of MS (with these studies, it was made evident that livestock's contribution was underestimated)

3.2. Contribution to the Economy

The major economic driver of the IGAD Member States is agriculture, with livestock contributing an estimated 57% of the regional Agricultural Gross Domestic Product (AGDP). The contribution of livestock to the economy varies with country. The highest contribution is by Somalia (70% of AGDP and 40 % of GDP).

Table 5: Contribution of livestock to Agricultural and National GDP of IGAD Member States

Contribution to	Djibouti	Eritrea	Ethiopia	Kenya	Somalia	South Sudan	Sudan	Uganda
AGDP	87.4	39	45	46.3	70	14.5	47	18
NGDP	3.1	4.6	18.9	11.2	40	3.4	17	5

Livestock is expected to become the largest contributor to agriculture as economic development progresses because of growing demand for high-value food items (meat, dairy). In industrialized economies, livestock accounts for half of the agricultural GDP.

3.3. Why emphasis on livestock (livestock as engine for economic growth of the IGAD region -theory of change)

Most countries in the world are endowed with one or more resources which include: land, labor, and other renewable resources like water and livestock. When resources with highest comparative advantage for the country are identified and effectively utilized, quickest economic progressions are registered. When, by contrast, they are not effectively utilized, progress is either not achieved or not sustainable. In general, the future of every country depends on how best these resource endowments are utilized to generate wealth, and how the generated wealth is used to build a base for the next growth driver.

As indicated above, the IGAD region is endowed with huge livestock populations among other resources. It is one of the regions with the highest ruminant livestock concentrations in the world. It is also close to the major livestock markets, MENA countries. Compared to the potential, however, the contribution of the subsector to the economy is still low.

The demand for livestock and products in developing countries is growing fast, even faster than that for most other agricultural commodities. This is attributed mainly to growth in human population, income, and urbanization. This growth in demand is projected to continue for the coming 50 years. The growth creates a great opportunity for countries with high livestock resource endowments and those with potential for livestock development. IGAD member states, endowed with huge ruminant livestock populations and the demand for livestock and commodities steadily growing, need to enhance opportunities available around livestock resource endowments as they can be used as an engine for development of MS.

Furthermore, the secondary benefits of livestock production along the value chain and associated employment generation are also important. Various studies have estimated sub-Saharan Africa livestock sector multipliers. According to these studies, an incremental effect of \$1 additional spending on aggregate national household incomes results in an

average of US\$2.9 in primary livestock production and US\$5.9 in processing. In addition, whilst livestock is in most countries a stronger stimulus for economic growth than crops, fruits and vegetables, manufacturing and service sectors, the benefits of livestock sector growth are usually more equally distributed because of a web of indirect linkages across distribution, processing and marketing activities. In a retrospective analysis, studies also found a statistically significant causal relationship between livestock sector development and economic growth in 18 of the 20 African countries analyzed, strongly suggesting that increases in value-added per Tropical Livestock Unit (TLU) are a driver of GDP per capita growth. In general, increased agricultural productivity, including livestock, is anticipated to lower food prices, which directly benefits the poor and generates a surplus of products and factors that can be exported from agriculture to the rest of the economy, thereby facilitating economic growth and poverty reduction.

There are three critical interventions that governments can use to speed up economic development using this resource. The first is to maximize outputs from small holder animal agriculture, which employs vast numbers of people. It makes use of all available labor and technologies to push up outputs to the highest possible level on the basis of tiny gains per person employed. The overall initial is an overall surplus that primes demand for goods and services. The second intervention is to use the proceeds from animal agriculture to build livestock products-based agro-processing/manufacturing industries mainly targeting exports. The third intervention is to make the financial sector focus capital on intensive, small-scale animal agriculture and agro-processing/manufacturing development. Formulating effective livestock sector policies and institutional changes to harness the potential around the livestock sector is very critical and should be done now before it gets too late and be a missed opportunity.

4. The performance of live animal and meat export trade of IGAD MS

4.1. Live Animal Export

4.1.1. Global picture

Globally, over 90 countries participate in live cattle export business. In 2011, 95 nations exported a total of 10.4 million heads of cattle. Mexico was the largest exporter followed by France (Table 6). In the same year, around 15 million sheep were exported by 80 countries. Sudan was the largest exporter followed by Australia, Somalia and Romania (Table 7). Around 6 million goats were exported by 63 countries in 2011. The major exporters of goats were Somalia, Iran, Oman (most likely re-exports) and India (Table 8)

Table 6: World's largest exporters of live cattle (volume), 2011

Nation	Percentage of world trade	Main export destinations
Mexico	18	United States
France	15	Intra-European Union
Canada	7	United States
Germany	6	Intra-European Union
Australia	6	South-East Asia
Brazil	4	Venezuela, Lebanon
Netherlands	4	Intra-European Union
United States	2	Canada

Sources: ABS 2014c, FAO 2014, United Nations Statistics Division 2014

Table 7: World's largest exporters of live sheep (volume), 2011

Nation	Percentage of world trade	Main export destinations
Sudan	17	Middle East, Egypt
Australia	16	Middle East
Somalia	13	Middle East
Romania	12	Intra-European Union, Jordan, Libya
France	6	Spain, Italy
Bulgaria	5	Turkey, Intra-European Union

Sources: ABS 2014c, FAO 2014, United Nations Statistics Division 2014

Table 8: World's largest exporters of live goats (volume), 2011

Nation	Percentage of world trade	Main export destinations
Somalia	34	Middle East
Iran	26	Intra-regional (Middle East)
Oman	9	Intra-regional (Middle East)
India	5	Nepal

Sources: FAO 2014, United Nations Statistics Division 2014

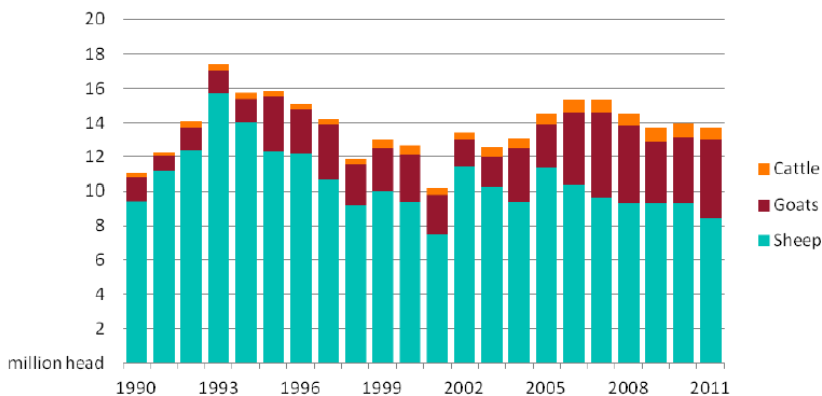
4.1.2. Major features of the Middle East and North African live animal import market

The MENA market is the largest live animal market in the world. It particularly imports significant volumes of sheep from different countries (Fig. 1). The annual import volume of sheep fluctuates and ranges from 6 to 16 million per year. In 2011, 8.5 million sheep were imported, primarily by Saudi Arabia (56%), Kuwait (11%), Bahrain (9%), and Qatar, Jordan, and Yemen (5%) (Fig 2). Intra-regional trade is also an important source of live sheep in the Middle East. Syria and Iran are net exporters of live sheep and primarily export to other countries in the region. In 2011, countries in the Middle East (mainly Iran and Syria) also exported significant numbers of sheep (1.6 million). The Kingdom of Saudi Arabia (KSA) and Jordan are net importers of live sheep but re-export significant numbers of live sheep to other countries in the region.

Imports of live goats and cattle are small compared with live sheep imports but generally increased over 1990 - 2011. In 2011, the Middle East imported 4.5 million live goats and the major import destinations were KSA, UAE and Oman. It also imported 781,000 cattle in the same year with Lebanon, Israel and Yemen being the main importers.

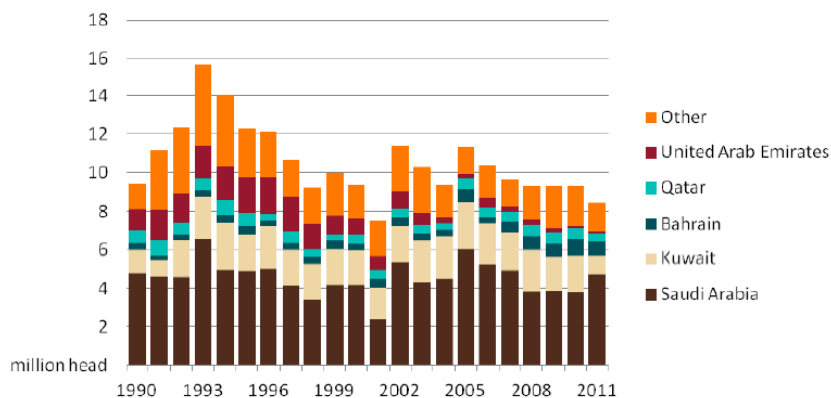
Religious and cultural preferences, primarily for *halal* slaughter, drive demand for live animal imports in the Middle East. Ninety one percent of the population in the Middle East is Muslim. Lack of refrigeration in poorer countries like Yemen also contributes to preference for importation of live animals.

Fig 1: Volume of live sheep, goats, and cattle imports into the Middle East by Year



Source: FAO 2014

Fig 2: Volume of live sheep imports into the Middle East by importing country



Historically, the livestock trade between the IGAD region and the Middle East was largely unregulated. Animals were transported across the Gulf of Aden into Yemen, from where they were trekked deeper into Saudi Arabia. A small proportion of the trade went directly to the ports of Jeddah and Muscat. However, in recent years, livestock importers have become more aware of potential health risks and therefore more concerned about the origin and health status of imported animals. The 2001/2002 outbreak of Rift Valley fever (RVF) in Saudi Arabia resulted in a ban on livestock imports from the Horn of Africa to the entire Arabian Peninsula. The ban was lifted in 2007 after extensive efforts by national, regional, and international institutions succeeded in building capacity for the flow of livestock, with the necessary measures for exclusion of known trans-boundary animal diseases. This included adoption of World Organization for Animal Health (OIE) guidelines for the export/import of animals, provision of adequate quarantine facilities, and availability of state veterinary services to monitor quarantine performance. Since then the export volume from the IGAD region has been growing steadily.

In 2011, imports of small ruminants from Sudan, Somalia and Djibouti accounted for 62% of total imports into the Middle East. This share has been increasing in recent years. In 2015 the market share had reached 80%. The Kingdom of Saudi Arabia is the primary destination for sheep from Africa.

Table 9 shows the major suppliers of sheep and goats to some selected countries in the ME. The major suppliers of live sheep and goats are countries in the IGAD region followed by Australia. Brazil and Somalia are primary suppliers of cattle in the Middle East. An estimated 50-80% of small ruminants exported from Djibouti and Somalia are originally from Ethiopia.

Table 9: Suppliers of live sheep and goats to selected countries in the ME

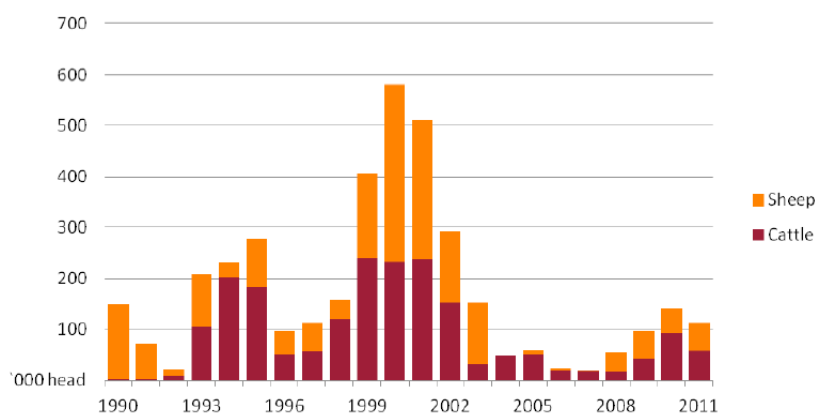
Import destination	Largest supplier	Second-largest supplier	Third-largest supplier
Saudi Arabia	Sudan	Somalia	Syria
Bahrain	Australia	Saudi Arabia	Somalia
Yemen	Somalia	Ethiopia	Djibouti
Oman	Somalia	Iran	Australia

Note: Kuwait and Qatar not included because of data limitations.

Source: Keogh & Tomlinson 2013

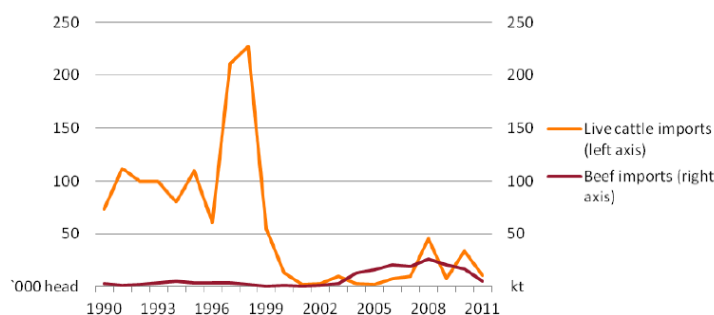
North Africa is another important destination for live animal exports. Egypt is the major live animal importer in the group followed by Libya (Figs. 3 and 4). While Egypt is a regular importer of live animals, Libya intermittently imports live sheep and cattle from different countries. Australia, Brazil, Ethiopia, Sudan, and Croatia are the major suppliers of cattle to the Egypt market. Romania is generally the dominant supplier of live cattle and live sheep to Libya. Libya also imports cattle from the Republic of Ireland. The volume of live animal import in a year is influenced by the volume of meat imported in that particular year (Fig. 5).

Fig 3: Live cattle and sheep imports into Egypt from various sources.



Note: ABS data for Australian exports to Egypt is used instead of FAO data for total imports by Egypt when ABS data exceeds FAO data.

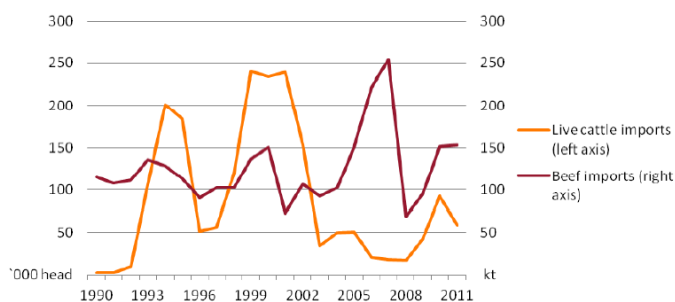
Fig 4: Live cattle and beef imports into Libya



Note: ABS data for Australian exports to Libya is used instead of FAO data for total imports by Egypt when ABS data exceeds FAO data.

Sources: ABS 2014c, FAO 2014

Fig 5: Live cattle and beef imports into Egypt



Note: ABS data for Australian exports to Egypt is used instead of FAO data for imports by Egypt when ABS data exceeds FAO data.
Sources: ABS 2014c, FAO 2014

4.1.3. Live animal export performance of the IGAD region

Live animals are the most important livestock commodity exported from the IGAD region to the Middle East and North African countries. Sudan and Somalia are the major exporters of live animals followed by Ethiopia, Djibouti and Eritrea. In 2014, exports from these countries covered over 80% of the small ruminant demand in the Gulf and North African countries. Kenya is a net importer of animals, exporting only very few. South Sudan and Uganda do not export live animals to the MENA countries.

The Kingdom of Saudi Arabia, UAE and Yemen from the Middle East and Egypt and Libya from North African countries are the most important destinations of live animals from the IGAD region. The live animal export trade in the region is seasonal and exports of live animals peaks during religious pilgrims.

The major competitors in MENA markets are Syria and Iran for sheep and goats, Australia for cattle and sheep and Brazil for cattle.

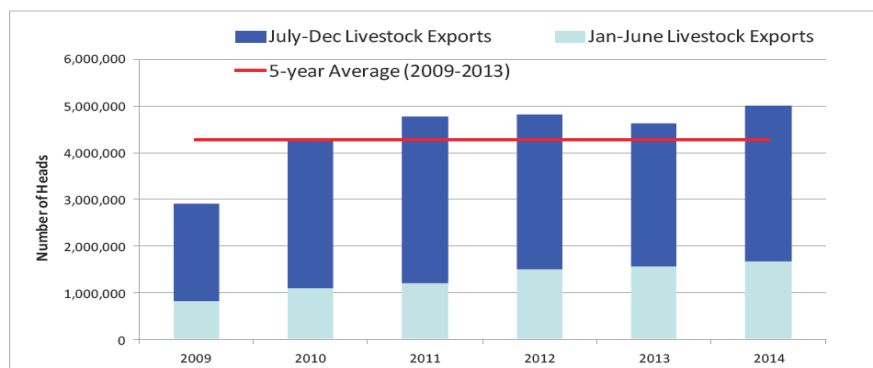
The performance of inter-regional live animal and meat export trade of member states of the IGAD region is presented below.

4.1.3.1. Somalia

Somalia is the largest exporter of goats in the world followed by Iran and Oman (most likely re-exports). In 2011, it accounted for 34% of the goats exported from 63 countries. In that same year, Somalia was also the third largest exporter of sheep, accounting for 13% of sheep exported.

The export data, collected by the FAO-managed Food Security and Nutrition Analysis Unit (FSNAU), indicated that Somalia exported 4.6 million goats and sheep, 340,000 cattle and 77,000 camels in 2014, worth an estimated US\$360 million. According to this source, Somalia's move in terms of increasing the volume export was very impressive (Fig. 6).

Fig. 6: Livestock export from Somalia during 2009-2014



- Livestock exports in the year 2014 is 4,999, 688 heads compare to recent years. For instance, 8% and 4% higher than 2013 and 2012 respectively

Much of the export from Somalia is mainly destined for KSA, UAE, Oman, Qatar and Yemen. About 69% of the exports occur from September to November for the Haji festivity.

4.1.3.2. Sudan

In 2011, Sudan was the largest exporter of sheep in the world accounting for 17% of the sheep exported from 80 countries, followed by Australia and Somalia. Sheep exports, mainly to Saudi Arabia and the Gulf, constitute about 80% of livestock exports followed by goats (10.5%), camels (exported mainly to Egypt) (9%) and some cattle. Livestock in Sudan contributes importantly to the national export. After 1997, livestock exports averaged 27% of the value of Sudan’s agricultural export.

Sudan’s livestock export has been increasing over the last decade. The country managed to increase its export volume from a little less than a million to 2.1 million during 2001-2010 (Table 10). The export surpassed 6 million in 2015 (Table 11). Major destinations of Sudan’s export are KSA, Egypt, Kuwait, Qatar, Jordan, UAE, Yemen, and Libya.

Table 10: Exports of live animals from Sudan during 2000-2010

Year	Sheep	Goats	Cattle	Camels
2000	731242	16599	315	145246
2001	15507	13883	-	18550
2002	1602638	53164	2655	155710
2003	1315399	57639	184	88423
2004	1703562	101989	750	132602
2005	1271787	1096654	501	131156
2006	1422109	102378	-	116184
2007	615843	30290	3658	85862
2008	610832	14337	1198	140757
2009	1510996	104630	19265	154477
2010	1813926	120693	5130	172196
Destinations	Saudi Arabia, UAE, Libya, Egypt, Kuwait, Jordan	Saudi Arabia, Egypt, UAE	Egypt, Kuwait, Saudi Arabia, Lebanon, Syria, Yemen	Saudi Arabia, Egypt, Qatar, UAE, Yemen, Libya

Source: MARF unpublished data

Table 11: Exports of live animals from Sudan by volume in 2015

Importing country	Sheep	Goats	Cattle	Camel	Total
KSA	5,459,024	443,260	-	12,715	591,4999
Egypt	125	2,582	45,825	192,223	240,755
UAE	-	-	-	-	-
Qatar	-	-	-	320	320
Kuwait	-	-	-	750	750
Libya	56	-	-	-	56
Total	5,459,205	445,842	45,825	206,008	6,156,880

4.1.3.3. Ethiopia

Ethiopia's major export is cattle. The country exports 200,000 - 300,000 cattle every year. The export of camel has been on the rise and reached 103,889 in 2012. Annual export of sheep ranges from 350,000 to 400,000 but that of goat export is very small (20,000-40,000) (Table 12). Animals for export are sourced mainly from pastoral areas. Unlike other countries which directly export animals from pasture, in Ethiopia, young cattle drawn from pastoral areas are conditioned for 75-90 days in mid-altitude areas, mainly around Adama where industrial by-products are abundant. When they reach the desired weight and qualify for exportation, they are exported mainly as live animals. Egypt and Sudan are the major destinations of cattle and camel. Sheep is mainly destined for KSA and is associated with festivities.

The export of live animals in Ethiopia is very much constrained by absence of international standard quarantine facilities. The government is therefore constructing two international standard quarantine facilities at Jigjiga, Somali region of Ethiopia to serve the Somali route; the other facility is at Mille, Afar region of Ethiopia to serve the Djibouti route. Though market is the governing factor, the plan on the part of the government of Ethiopia is to move slowly away from the live animal export market to value addition before exportation.

Table 12: Live animals exported by Ethiopia (2011-2015)

Species	2011	2012	2013	2014	2015
cattle	230,301	294,543	183,285	218,513	142,788
sheep	146,655	355,699	388,189	346,382	300,477
goats	15,233	24,807	34,096	41,784	27,582
camel	81,883	103,881	66,639	39,986	48,763
Total	474,072	778,930	672,209	646,665	519,610

Source: Ministry of Trade Official Report (2015)

4.1.3.4. Djibouti

Djibouti is the fourth largest exporter of live animals from the Horn of Africa. Most of the animals it exports are imported from neighboring countries. In 2014, Djibouti exported 54,000 cattle, 509,000 small ruminants, and 3800 camels to MENA. In 2013 alone the country earned 73 million USD from the export of live animals. The main destinations are KSA, UAE, and Egypt. Currently it is not exporting to UAE.

The most important comparative advantage that Djibouti has in terms of exporting live animals is the existence of the 'Regional Quarantine Center' established with the support of the US government. Animals from Ethiopia going through Djibouti quarantine to the Middle East change the certificate of origin and are exported as animals from Djibouti.

4.1.3.5. Eritrea

Live animals form the core of Eritrea's livestock-based exports. Hides, skins and leather and leather products are also important. According to Eritrea's MoA (2013), Eritrea exported 180,808 cattle, 199,708 sheep, 270,609 goats and 29,916 camels. However, there was no mention of destinations.

4.1.3.6. Others (Kenya, South Sudan and Uganda)

These countries are not currently exporting live animals to MENA.

4.1.4. Competition

The major competitors of live animal export in MENA countries are Brazil (cattle), Australia (cattle and sheep), and Iran and Syria (sheep and goats). The major competition from New Zealand and Australia is in price, reliability of supply and terms of trade whereas the competition from Syria is in the form of quality and preference. Small ruminants from Iran and Syria are the most preferred animals by the Middle East customers and fetch higher prices than animals from any other source.

4.1.5. Major constraints to the live animal export trade

Live animal export trade from the IGAD MS to MENA countries is confronted by a number of challenges. The most common are limited destinations, seasonality of the market (mainly during religious festivities), dominance of informal trade, limited market information exchange to all actors in the value chain (e.g. price and specifications), high transaction costs, losses due to mortality during transportation, unjustified rejection of shipments, volatile nature of the market (bans due to diseases), growing SPS requirements of importing countries and limited market promotion. Other constraints include testing animals for various diseases at a higher end of the chain leading to losses to exporters, lack of standards for live animals prepared as per specification of importing countries (to work through production line and to base negotiations on this standards), lack of trace back mechanisms, limited business knowledge of the operators (owners) - traditional business and less thrust on exporting countries' capacity (sending inspectors to exporting countries for every consignment) are also important challenges in this business). For more information on the challenges refer to section 8 of the manual.

4.2. Export of Red Meat

4.2.1. Global picture

Over 111 countries in the world participate in the beef export business. Beef is exported as fresh, chilled, and frozen. Every year, about 10 million metric tons of meat worth 47.76 billion USD is exported. In 2014, the total value of world chilled and fresh beef export was estimated at 22.76 billion USD. In the same year frozen beef export was estimated at 25 billion USD making the total annual export of beef 47.76 billion USD.

The major exporters of chilled and fresh beef are USA, Netherlands, Australia, and Ireland. These countries have a 40% market share of the world chilled/fresh beef market. The major exporters of frozen beef are Brazil, India, Australia and USA followed by New Zealand, Uruguay, and Paraguay. From Africa, Botswana, South Africa, and Namibia are distant followers of these groups. The first four countries (Brazil, India, Australia and USA) have a market share of 68% of the frozen beef market in the world.

The world demand for beef has been on the rise. For 2011 to 2015 global demand continued to grow but at a decreasing rate. Beef consumption in 2016 is expected to be 57 million metric tons, an expected 1% growth per year. Import and export of beef in the same period grew at 2 and 3.4% per year respectively.

Table 13: Major trends of world beef production, consumption, import and export in 1000 tons

	2011	2012	2013	2014	2015	2016 (forecast)	% growth
Production	58,160	58,527	59,467	59,746	58,443	59196	1.3
Consumption	56,517	57,047	57,785	57,708	56,466	57,006	1
Import	6,451	6,679	7,489	7,900	7,559	7,711	2
Export	8,072	8,138	9,126	9,990	9,601	9,926	3.4

The major importers of frozen beef are USA, China, Republic of Korea, Egypt, Malaysia, KSA and UAE. For fresh/chilled beef USA, Italy and Germany from western countries and UAE from the Middle East are major importers.

Fresh, chilled, and frozen sheep and goat meat is a 7.2 billion USD export business in the world. This export market is dominated by New Zealand and Australia followed by the United Kingdom, Ireland, Spain and the Netherlands. India and Ethiopia are distant followers of the group. About 70 % of the market share is occupied by the first two countries, New Zealand (38%) and Australia (32%).

USA, UK, and UAE are major importers of sheep and goat meat. In 2014, UAE imported sheep and goat meat worth 800 million USD. From countries in the Middle East Jordan and Qatar are distant followers of UAE.

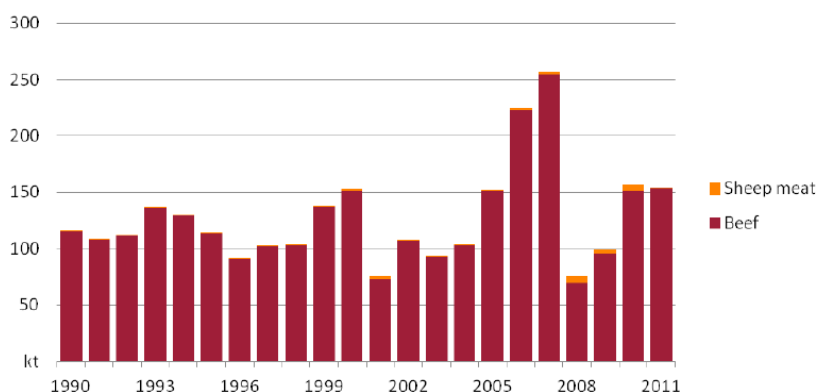
4.2.2. Major features of the Middle East and North African red meat import market

Total imports of meat and meat products in the Middle East region were estimated at US \$ 5.1 billion. This accounts for 6.5% of the total world demand which was valued at US \$

86.4 billion in 2009. The top importing countries in the region include Saudi Arabia, U.A.E, Iraq, Kuwait, Iran and Israel, all accounting for about 80% of total imports in the region. All the markets showed an increase in the value of imports during 2005 – 2009. The major exporters to the Middle East are Brazil, Australia, USA, New Zealand for beef and New Zealand, Australia, India, Ethiopia, and Pakistan for sheep and goat meat.

Egypt’s primary import is beef, as consumers in Egypt prefer it over other animal protein sources such as lamb and poultry. The major suppliers of meat to Egypt are Brazil, India, the United States, and Australia.

Fig 7: Meat imports into Egypt,



Note: ABS data for Australian exports to Egypt is used instead of FAO data for total imports by Egypt when ABS data exceeds FAO data.
Sources: ABS 2014c, FAO 2014

As indicated in Fig. 4 above, beef is also the main imported meat in Libya, but imports were limited to until 2000. The rise in imports in the rest of the period reflects lower domestic beef production. Sheep meat imports are much lower than beef imports, reflecting higher domestic production. Beef and sheep meat imports are mostly sourced from Australia, Uruguay, and Brazil.

4.2.3. Performance of red meat export in the IGAD region

Exportation of meat from the region to the Middle East and North African countries is limited in scale; overall it is not more than 30,000 tons a year (accounting for about 10% of the market in MENA). Meat export from the Horn of Africa is dominated by Ethiopia (20,000 tons) followed by Sudan (4690 tons) and Kenya (3000 tons). It is mainly chilled small ruminant carcasses, which is exported by air primarily to the United Arab Emirates and Saudi Arabia. The top export markets of meat in order of sales volume are the United Arab Emirates, Saudi Arabia, Angola, Egypt, Bahrain and Kuwait.

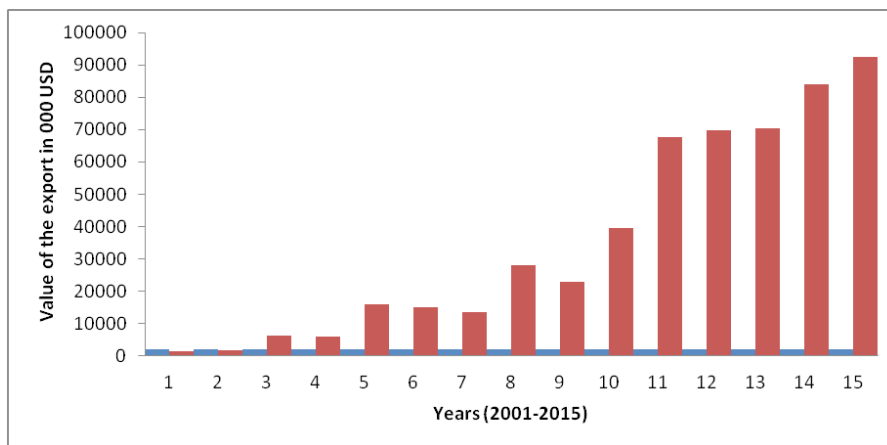
Inter-regional meat export trade performance of member states of the IGAD region is presented below.

4.2.3.1. Ethiopia

Currently Ethiopia is exporting about 20,000 tons of chilled small ruminant carcasses worth of 93 million USD a year, 10% of which is variety meat/offal. It is the leading small ruminant-meat -exporting country in Africa, but its world market share is very small (1.3%). The meat export volume has increased remarkably over the last 7 years (Fig. 9).

There are ten functional export abattoirs and eight more are under construction. The plan on the part of the government is to go for more meat export business than live animals. Major destinations are UAE and KSA.

Fig 8: Value of chilled goat and sheep meat exports to MENA by Ethiopia



4.2.3.2. Sudan

Sudan is the second largest exporter of meat in the region next to Ethiopia. During 2000 to 2004 the trend was upwards followed by a major depression between 2005 and 2007 and now it is increasing (Table 15). In 2015 Sudan exported about 4.69 thousand tons of meat (50% small ruminant meat and 46% beef) to Jordan, Qatar, Bahrain, United Arab Emirates and Egypt (Table 16). Most of the beef from Sudan (81%) is exported to Egypt.

Table 14: Meat export by Sudan, 2000-2010

	Sheep		Goats		Cattle		Camels	
	Head	Weight, tons	Head	Weight, tons	Head	Weight, tons	Head	Weight, tons
2000	534552	6157.82	43067	311.91	13133	2350.09	97	9.53
2001	437210	785.293	4843	35.711	799	1714.239	144	12.257
2002	652398	7148.788	49582	353.848	1886	347.073	64	6.647
2003	700216	7837.112	30997	221.293	839	178.214	174	16.273
2004	510673	5570.909	32637	217.1	5514	765.3	599	57.4
2005	428796	4710.5	3790	27.2	5115	656.4	282	27.9
2006	224087	2263.9	1182	8.4	-	-	100	10.2
2007	207796	2130.87	1623	12.37	-	-	62	12.22
2008	22709	207.356	257	1.567	12	2.935	6	0.712
2009	161121	1756.62	91	0.55	37	18.381	-	-
2010	409793	4126.53	762	4.731	3923	991.287	3	0.498
Destinations	Jordan, Qatar, UAE, Iraq, Kuwait		Oman, UAE, Jordan		Egypt, Qatar, Oman, UAE, Iraq, Kuwait, Jordan		Qatar, UAE	

Source: MARF unpublished data

Table 15: Red meat export by Sudan (2015)

Importing Countries	sheep	goats	Cattle	camel	total
Jordan	577	0	12	0	588.9
Qatar	479	63	389	0.13	931.5
UAE	360	78	6.3	6.42	450.2
Kuwait	280	0.43	5.3	2.49	288
Bahrain	484	0	0	0	484
Egypt	0	0	1754	0	1755
Oman	11	35	0.6	0	46
KSA	147	0	0	0	147
Total	2338	176	2168	8.9	4690.9

4.2.3.3. Kenya

Kenya is a distant third exporter of meat from the IGAD region to MENA. The exportation of meat has been progressively improving and reached the highest (3000 tons) in 2012. Major destinations are UAE, Qatar, and Oman

4.2.3.4. Somalia

Somalia's export as indicated above is very much dominated by live animals, with only little exports of meat. Somali Meat (SOMEAT) was exporting 20-30 tons of chilled goat carcasses every week in 2014/15, making the total export per year 1040 - 1500 tons.

4.2.3.5. Others (Djibouti, Eritrea, South Sudan, and Uganda)

Currently the above four countries do not export meat to MENA. Uganda is constructing an export abattoir (by an Egyptian Investor) to export beef to Egypt and the Middle East market. Djibouti is also thinking of modifying the existing local abattoir to do both export and local slaughter.

4.2.4. Competition

The main competition for the Middle East beef export markets comes from South America, Oceania, Eastern Europe and the European Union. The disease-free status of most of these countries and the more efficient production and marketing system attained are major competitive advantages of these countries over others. Market and product segmentation with advanced promotion is the approach used by these countries to be competitive in the market place. For meat from small ruminants, India and Pakistan for chilled meat and Australia and New Zealand for frozen meat, are the major competitors of IGAD member states.

Brazil is currently the second overall meat exporter worldwide after Australia. FAO has projected that Brazil will eventually become the leading exporter at global level. The

Middle East is a relatively important market for Brazil. Frozen sheep meat is New Zealand's and Australia's major export commodity to the Middle East. They have competitive prices when compared to frozen sheep meat from India or Pakistan. For chilled sheep and goat meat, however, Pakistan, India, and Ethiopia are more competitive because of proximity advantages.

Recently India has been moving aggressively with buffalo meat. It is targeting both the low and high ends of the export markets in Africa and the Middle East along with Brazil and Argentina.

4.2.5. Major constraints to meat export trade

Limited destinations, growing SPS requirements, cold chain breakdowns, poor packaging (quality of stock net for carcasses and quality of packing material for variety meat/offal), poor labeling (English and Arabic, sometimes defective labeling), less market promotion, less competitiveness of some products (beef in Ethiopia), lengthy processes for approval of export premises (e.g. KSA), absence of market segmentation practices, less value addition, and inadequate market information exchange are the major challenges of the meat export business from the IGAD region to MENA countries.

5. Opportunities for enhancing livestock and meat export trade from the IGAD Region

5.1. Supply Side Opportunities

5.1.1. Resource availability and competitiveness

Livestock is the major resource endowment of the IGAD region. IGAD is one of the regions with the highest ruminant livestock concentration in the world. It is also the only region in Africa that can satisfy its growing demand and may have some surplus for export. The production cost for small ruminants in most MSs is reasonably low compared to that of competitor countries, but the competitiveness of beef is getting questionable in most countries because of inefficiencies in the value chain, increased costs of feeds and transportation. As some sources indicate, Uganda seems to have an opportunity in beef as the cost of feed is still very low. Commercializing the beef industry to increase throughput, increasing off take, improving feed production, processing, marketing and linking to agro-industries such as sugar production facilities among other measures are crucial to the growth of a profitable livestock industry in the IGAD region.

5.1.2. Political commitment of countries to develop the sector

With respect to countries' commitment to develop the sector and seize the opportunities available, member states in the IGAD region can be grouped into three categories. The first comprises countries already on an aggressive move, the second comprises those countries that have started to see livestock as an important source of economic growth and are trying to set up institutions, and the third comprises countries that have not yet given due recognition to the potential role livestock can play in their economies. Most countries in the region fall under the first two categories and this is a big opportunity for enhancing livestock and meat trade in the region.

5.1.3. Geographic proximity to main export markets

IGAD countries have geographic proximity to the world's largest livestock and products market, MENA countries, which are only 2-3 hours' flight away. The major competitors are more than 12 hours' flight away from MENA, making the transport cost expensive for them. This is particularly true for fresh and chilled products which should be transported by air within short periods. With this comparative advantage, IGAD member countries can improve their competitiveness by supplying chilled/fresh meat which cannot be supplied easily by distant competitors such as Australia, Brazil, and New Zealand. Fresh/chilled meat is also preferred by consumers in MENA countries and fetches higher prices than frozen meat, which is the main form of shipment from distant suppliers.

5.2. Demand Side Opportunities

5.2.1. Increased demand for products of animal origin in major destination markets

World

Despite the worldwide economic downturn and the financial upheavals of the past few years, the outlook for the meat sector remains positive, with the global meat demand expected to grow up to almost 40% by 2025. The highest growth in meat demand is likely to occur in emerging markets in Asia, particularly China. This growth is being driven by changing diet patterns, rising standards of living, urbanization and population growth, with 80 million new mouths to feed every year. The Organization for Economic Cooperation and Development (OECD) projects world trade in meat to grow from its current volume of 22 million tons to close to 30 million tons by 2017.

Africa

Africa's economy is growing at 5.5% per year and the population is also increasing. The meat market in Africa is growing and is projected to increase by 145% in 2050. According to various studies the volume of meat consumed in Africa will be at par with that of the developed world by 2050. Meeting this demand from the IGAD region which is the only region in Africa that is self-sufficient in ruminant livestock meat production is a big opportunity that should not be missed as it can be used as an engine for growth.

The Middle East

The Middle East is the world's largest market for live animals and meat. The annual import volume is high and growing. Annual live sheep imports range from 6 to 16 million per year. In 2011, 8.5 million live sheep and 4.5 million live goats were imported, primarily by Saudi Arabia (56%), Kuwait (11%), Bahrain (9%), and Qatar, Jordan and Yemen (5%). The major import destinations were KSA, UAE and Oman. In the same year, 781,000 cattle were imported into the Middle East, with Lebanon, Israel and Yemen being the main importers. The market share of IGAD MSs for live sheep and goat is increasing, with Somalia and Sudan enjoying the highest share (> 80%) but the share of meat is still about 10%.

5.2.2. Position of competitors

Syria

Syria is one of the major suppliers to the Middle East market. Fat-tailed sheep from Syria is the most preferred sheep and fetches far higher prices than any other sheep in the ME market. With the current instability in Syria, livestock export from this country has decreased significantly and has created an opportunity for others including IGAD MSs.

Australia

Australia is one of the major exporters of live animals to the Middle East. However, it is now being challenged by in-country welfare activists and its export volume is steadily decreasing. This is an opportunity for countries exporting live animals. However, as it is establishing export abattoirs to accommodate surpluses, this is also a challenge for meat exporters.

India

In the last few years, the Indian goat meat export has been challenged by rising domestic prices, which have increased threefold. Goat meat export has declined as it was not competitive in the end market. This has created an opportunity for IGAD MS to increase their export volumes and to sell at better prices.

6. International standard-setting organizations

With the prohibition of quantitative controls on trade and gradual reduction of the bound tariffs, non-tariff trade barriers will increasingly become important for trade in the coming years. For agricultural products, the most notable non-tariff barriers are technical standards covered by the SPS/TBT Agreements. This is more so for developing countries where food standards are much poorer. Recent experiences amply show that even when the developing countries are competitive in price, exports have been inhibited by standards, particularly to developed country markets. Moreover, while lower income countries may get preferential treatment on tariffs, there is no such preference when it comes to food standards. Organizations involved in setting standards that have direct impact on live animal and meat export trade include the WTO SPS agreement, the World Animal Health Organization and the Codex Alimentarius. Moreover, there is the International Standard Organization and other emerging private standards.

The IGAD countries are signatories of the major international regulatory institutions including the World Trade Organization (WTO) that governs international trade, Codex Alimentarius that sets international standards for food safety, and OIE which deals with trade aspects of international animal health. While all IGAD countries belong to the OIE, Djibouti and Somalia are not signatories to Codex and only Djibouti, Kenya and Uganda are Members of WTO. Ethiopia and Sudan are on accession for WTO membership. IGAD has also observer status at five standard setting organizations: OIE; CODEX; SPS; TBT and IPPC.

Table 16 - IGAD MS Membership in the WTO, Codex and OIE

Country	WTO	Codex	OIE
Djibouti	X	X	X
Eritrea		X	X
Ethiopia		X	X
Kenya	X	X	X
Somalia		X	X
South Sudan			X
Sudan		X	X
Uganda	X	X	X

6.1. World Trade Organization (WTO)

The World Trade Organization (WTO) came into force in 1995 following the signing of the Final Act of the Uruguay Round of Multilateral Trade Negotiations in Marrakech on 15 April 1994. Contained in the Final Act along with the General Agreement on Tariffs and Trade (GATT 1994) and other agreements was the Agreement on Sanitary and Phytosanitary Measures (SPS Agreement) established for the application of food safety and animal and plant health regulations which may directly or indirectly affect international trade.

The SPS Agreement is essentially about health and international trade. The Agreement recognizes the need for WTO members to protect themselves from the risks posed by the entry of pests and diseases, but also seeks to minimize any negative effects of SPS measures on trade. The international trade aspect of the SPS Agreement basically means that, in seeking to protect health, WTO members must not use SPS measures that are: unnecessary, not science-based, arbitrary, or which constitute a disguised restriction on international trade.

The SPS Agreement has 14 Articles, containing the rights and obligations that WTO members have agreed to. The Agreement also has three annexes giving definitions of various terms and elaborating on certain obligations in the body of the SPS Agreement. The SPS Agreement is administered by the Committee on Sanitary and Phytosanitary Measures (the 'SPS Committee'), in which all WTO members can participate. The SPS Committee is a forum for consultations where WTO members regularly come together to discuss SPS measures and their effects on trade, to oversee implementation of the SPS Agreement, and to seek to avoid potential disputes.

The central principles of harmonization, equivalence, appropriate level of protection (ALOP), risk assessment, regional conditions and transparency are covered by specific Articles of the SPS Agreement.

Harmonization: WTO members are entitled to determine their own SPS measures provided they are in accordance with the terms of the SPS Agreement. However, under

the principle of harmonization WTO members are encouraged to base their SPS measures on international standards, guidelines and recommendations, where they exist.

Equivalence: The SPS Agreement requires importing WTO members to accept the SPS measures of exporting WTO members as equivalent if the exporting country objectively demonstrates to the importing country that its measures achieve the importing country's ALOP. Typically, recognition of equivalence is achieved through bilateral consultations and the sharing of technical information.

Appropriate level of protection: According to the SPS Agreement the appropriate level of protection (ALOP) is the level of protection deemed appropriate by the WTO member to protect human, animal or plant life or health within its territory. Each WTO member has the right to determine its own ALOP. However, in determining their ALOP, WTO members should take into account the objective of minimizing negative trade effects. In addition, WTO members are required to apply the concept of ALOP consistently; i.e. they must 'avoid arbitrary or unjustifiable distinctions' that 'result in discrimination or a disguised restriction on international trade'.

Risk assessment: The SPS Agreement requires WTO members to base their SPS measures on a risk assessment, as appropriate to the circumstances. In conducting such risk assessments, WTO members are required to take into account risk assessment techniques developed by relevant international organizations.

Regional conditions: the SPS Agreement requires WTO members to adapt their SPS measures to the regional conditions from which the product originated and to which the product is destined. In particular, WTO members are required to recognize the concepts of pest-/disease-free areas and areas of low pest/disease prevalence.

Transparency: The principle of transparency in the SPS Agreement requires WTO members to provide information on their SPS measures and to notify changes in their SPS measures. WTO members are also required to publish their SPS regulations. The notification requirements are met through a national notification authority. Each WTO member must also nominate a national enquiry point to deal with SPS- related queries from other WTO members. A single agency may perform both notification and enquiry functions.

Technical assistance and special treatment: The WTO recognizes that the technical capacity to implement the SPS Agreement will vary among WTO members. Developing country members, in particular, may find implementation challenging due to resource constraints, including limited expertise.

To help overcome this problem, a number of mechanisms are built into the SPS Agreement. WTO members agree to facilitate the provision of technical assistance to other members, especially developing countries, either bilaterally or through international organizations such as the Three Sisters. The form of this technical assistance and how it can be provided is broadly defined. The SPS Agreement also provides for special and differential treatment. For example, in applying SPS measures WTO members are required to take account of the special needs of developing country members, particularly the least-developed country members.

6.2. World Animal Health Organization (OIE)

The need to fight animal diseases at global level led to the creation of the Office International des Epizooties through the international Agreement signed on 25 January 1924 with 28 member countries. In May 2003 the Office became the World Organization for Animal Health but kept its historical acronym OIE. The OIE is the intergovernmental organization responsible for improving animal health worldwide.

It is recognized as a reference organization by WTO and in 2014 had a total of 180 Member Countries. The OIE maintains permanent relations with 45 other international and regional organizations and has Regional and sub-Regional Offices on every continent. The organization is placed under the authority and control of a World Assembly of Delegates consisting of Delegates designated by the Governments of all member countries.

The day-to-day operation of the OIE is managed at the Headquarters situated in Paris and placed under the responsibility of a Director General elected by the World Assembly of Delegates. The Headquarters implements the resolutions passed by the International Committee and developed with the support of Commissions elected by the Delegates. The OIE has set up five Regional Commissions to express specific problems facing its members in the different regions of the world. These Commissions can be seen as fully fledged regional institutional bodies. They cover the following regions: Africa, Americas, Asia, Far East and Oceania, Europe, Middle East.

The OIE is the international standard-setting organization for animal health and zoonosis. Its objectives include ensuring transparency in the global animal disease and in the zoonosis situation, publishing health standards for trade in animals and animal products, promoting veterinary skills, improving the safety of food of animal origin and promoting animal welfare through a science-based approach. OIE's standards, guidelines, and recommendations are contained in the Terrestrial Animal Health Code, the Manual of Diagnostic Tests and Vaccines for Terrestrial Animals, the Aquatic Animal Health Code, and the Manual of Diagnostic Tests for Aquatic Animals.

It addresses the control and prevention of important and emerging diseases primarily by collecting and disseminating relevant animal health information worldwide, and by adopting and publishing sanitary standards and recommendations for animals and animal products. The OIE's Information System is aimed at promoting transparent knowledge of the global animal disease situation, crucial in making decisions for safe trade. It operates an early warning system based on official reports from member countries, and complemented by an active search and verification of unofficial information. The system requires notifications, and provides reports in several degrees of urgency, determined by the nature of the disease agent and the epidemiological characteristics of the outbreak. For the purpose of harmonization of international trade measures, and in order to prevent discriminatory actions by importing countries, the WTO-SPS requires countries to base their import decisions on science-based international standards.

The OIE terrestrial animal health code provides recommendations for the safe trade of animals and animal products, making reference to the various possible health status of the exporting country or zone. The Code also provides recommendations on horizontal subjects such as risk analysis, regionalization, traceability, animal welfare, surveillance, and monitoring and evaluation of veterinary services. In addition to the Code, the OIE

provides recommendations on methods for the diagnosis and prevention of diseases, defines standards for biological products, vaccines, and diagnostic preparations.

Implementation of the Code as it relates to international trade is based on three important principles from which the other requirements flow naturally:

- A scientific basis for all recommendations as it relates not only to the animal diseases listed in the Code but also for methods of surveillance, diagnostics, risk analysis, risk mitigation procedures and methods of disease control
- A reliable and well-functioning and independent veterinary service
- Transparency, integrity, and maintenance of ethical standards in disease reporting

The critical issues for the quality delivery of veterinary services include:

Professional judgment – having trust in the scientific expertise and competency of the service for professional decision-making.

Independence – implies an unhindered service delivery and decision making free from political, commercial, and financial interference or hindrance.

Impartiality – implies that scientific decision-making should not be hindered by political preferences and agendas.

Integrity – creating trust for the acceptance of decisions by individual officials and the veterinary service as a whole.

Objectivity – is integral to sound scientific judgment which should not be clouded by discriminatory threats and hindrances.

Legal base for decision-making – the impartiality and integrity of delivery of services, decision-making and certification should be mandated by sound and supportive national and where applicable, sub-national legislation that reflects both the sentiments of the Code and the SPS Agreement.

To assist members who may wish to know their current level of performance in applying international standards for veterinary service delivery, the OIE assesses the performance of the veterinary services of countries to identify their needs in eventually moving towards compliance with OIE standards. This process, known as the PVS evaluation process, applies a specific methodology where trained OIE experts visit countries wishing to be evaluated. The focus of the evaluation is on assessing performance of the country within the context of specific critical components for veterinary service delivery: human, physical, and financial resources; technical authority and capability; interaction with stakeholders; and access to markets. The level of advancement of a country is assessed in detail in respect of the critical competencies within each of these four components.

6.3. Codex Alimentarius Commission

The Codex Alimentarius Commission (the ‘food code’) is a body of the Joint Food Standards Program of the Food and Agriculture Organization (FAO) and the World Health Organization (WHO). Codex develops and encourages implementation of standards, codes of practice, guidelines and recommendations covering all aspects of food safety,

including handling and distribution. In setting international standards for food, Codex has a dual mandate to protect the health of consumers and to ensure fair practices in the food trade. Codex has developed a wide range of specific texts covering various aspects of food safety and quality, which can be found on the Codex website.

The Codex Alimentarius or “Food Code” was established by FAO and the World Health Organization in 1963 to develop harmonized international food safety standards, which protect consumer health and promote fair practices in food trade. The reference made to Codex food safety standards in the World Trade Organization’s Agreement on Sanitary and Phytosanitary measures (SPS Agreement) means that Codex has far reaching implications for resolving trade disputes. WTO members that wish to apply stricter food safety measures than those set by Codex may be required to justify these measures scientifically.

By June 2013, the Codex Alimentarius Commission had: 186 Codex members including 185 member countries and 1 member organization (EU); and 220 Codex observers including 50 International Governmental Organizations (IGOs), 154 Non-governmental Organizations (NGOs) and 16 United Nations Organizations. The legal basis for the operation of the Codex Alimentarius Commission is determined by the Commission’s statute. According to Article 1 from the Statute of the Codex Alimentarius Commission, its obligations are:

- protecting the health of consumers and ensuring fair practices in food trade;
- promoting coordination of all food standards work undertaken by international governmental and non-governmental organizations;
- determining priorities and initiating and guiding the preparation of draft standards through and with the aid of appropriate organizations;
- finalizing standards elaborated after their acceptance by governments;
- publishing the standards in a Codex Alimentarius either as regional or international standards; and
- amending published standards, after appropriate survey in the light of developments.

The Codex Alimentarius includes standards for all the principal foods, whether processed, semi-processed or raw, for distribution to the consumers including general provisions in respect of: i. contaminants; ii. food additives; iii. food hygiene; iv. inspection and certification; v. labeling and presentation; vi. methods of analysis and sampling; vii. pesticide residues; and viii. veterinary drug residues. It also includes provisions of an advisory nature in the form of: codes of practice, guidelines, and other recommended measures.

Over the years, the Codex has developed over 200 standards covering processed, semi-processed or unprocessed foods intended for sale for the consumer or for intermediate processing; established over 40 hygienic and technological codes of practice; evaluated over 1000 food additives and 54 veterinary drugs; set more than 3000 maximum levels for pesticide residues; and specified over 30 guidelines for contaminants.

6.4. International Standard Organization (ISO)

The ISO plays an increasingly important role in both the setting of standards and capacity building in the development of standards. It is an independent, non-governmental international organization with a membership of 162 national standards bodies. Through its members, it brings together experts to share knowledge and develop voluntary, consensus-based, market-relevant International Standards that support innovation and provide solutions to global challenges. ISO International Standards ensure that products and services are safe, reliable, and of good quality. For business, they are strategic tools that reduce costs by minimizing waste and errors, and increasing productivity. They help companies to access new markets, level the playing field for developing countries and facilitate free and fair global trade.

The International Standards Organization published its food safety management standard in 2005. ISO 22000 took the good agricultural practice quality management of the ISO 9000 standards and added the principles of HACCP. It can be applied throughout the supply chain. ISO/IEC 17025:2005 specifies the general requirements for the competence to carry out tests and/or calibrations, including sampling.

6.5. The Emergence of Private Standards

The emergence of private standards in the global agri-food markets has been documented by several authors. The dynamic process has been dominated by several different groupings of private sector players. GLOBALGAP has become the most widely respected and accepted family of standards for primary production of agricultural products. Today there are more than 80,000 GLOBALGAP certified producers in 80 countries. GLOBALGAP certification has become virtually a mandatory market access requirement for producers wishing to sell to GLOBALGAP's 38 food retailer members who include virtually all of the major players in the EU and Japan.

7. SPS Requirements of Gulf Cooperation Council (GCC) and MENA countries

7.1. SPS requirements of Gulf Cooperation Council

GCC Standardization Organization (GSO) is responsible for developing food and non-food standards in the GCC which comprises six GCC countries namely Bahrain, Kuwait, Oman, Qatar, Saudi Arabia and United Arab Emirates. Yemen is not a GCC member, but became a member of the GSO effective January 2010. Chaired by Qatar, the GSO food standards committee has been working to harmonize existing GCC standards within the guidelines of the Codex Alimentarius, ISO and other international organizations. Nearly 1,000 food and food-related technical regulations and standards have been developed or updated by the GSO. Once a new standard is approved by the GSO food standards committee, each member country officially adopts the standard, thus making it a national standard as well as a GSO standard.

Live animals: SPS requirements set by the GCC for live animals include:

- Animals are kept in accredited quarantine station for 30 days.
- Animals are tested for FMDV infection with negative test results
- Animals are vaccinated against RVF at least 21 days prior to shipment

Meat and meat products: Likewise, the GCC has established uniform SPS regulations on export meat and meat products for member states. The regulations are:

- All livestock must be free from trans-boundary animal diseases (TADs).
- All consignments must be accompanied by an original health certificate issued by the competent authority in the country of origin or an officially recognized body. The health certificate should attest compliance with the food safety regulations and technical requirements of the GCC countries and, where relevant, animal health requirements.
- In addition to a health certificate, a certificate of origin is also required
- Meat shipments must also state the date of slaughter and shelf life.

7.2. Country-Specific SPS Requirements

7.2.1. Saudi Arabia

Saudi Arabia is the most influential member of the GCC. As a group, the GCC is striving to create a common set of food standards, with the Saudi Arabian Standards Organization (SASO) as the lead agency. The Saudi market is often unpredictable because of stringent health requirements, frequent import bans or rejections at the port of delivery.

Live animals: The following are some of the official live animal imports requirements for Saudi Arabia:

- Vaccination is required for RVF and pox.
- Animals are required to be quarantined for 30 days before being shipped to KSA.
- Livestock exporters must obtain an import permit from the Saudi MOA's Animal and Plant Quarantine Department before shipments leave the exporting country. Livestock shipments must be accompanied by country of origin and health certificates from a recognized authority in the country of origin duly authenticated by the Saudi embassy in that country.
- An authorized veterinarian should issue official health certificates declaring that the exported livestock is free from diseases.
- Port of departure of shipped animals must be one of the ports inside the country of origin, directly to the Kingdom of Saudi Arabia with no anchorage or call to any other port, place or country which the Kingdom of Saudi Arabia has declared infected by epidemic diseases and therefore banned from animal imports to the kingdom.
- A report, with contents that must be known to the shipper, must be submitted to indicate the status of animal health throughout the journey.
- Veterinary inspection shall be conducted upon arrival at any Saudi port. The whole shipment shall be rejected if it is infected with any of the diseases listed.
- Shipment may be quarantined upon detection of any other diseases if the percentage of infection does not exceed 10 percent of the random sample inspected. If, however, the percentage exceeds 10 percent, the shipment will be refused entry.

- Saudi MoA may ban importation from any country or area as per the health status of that country or area according to decisions taken by the competent international organizations.
- Brucellosis is a major concern to Saudi Arabia, which requires 100 percent testing for the disease. Saudi Arabia has very stringent SPS requirements. The country requires 30-day quarantine and 100 percent testing for Brucellosis.

Meat and meat products: The following are some of the official fresh meat imports requirements for Saudi Arabia:

The Competent Authority shall testify that the meat is derived from animals slaughtered in an approved and recognized slaughterhouse under the supervision of (name of the official body) and He/she shall also testify that:

- The meat is derived from animals with an average age of (to be precisely specified by the Competent Authority) and had been tested within the range of 12 hours before and after slaughtering by the official bodies concerned to ensure their safety and fitness for human consumption.
- The meat is derived from animals born and reared in (name of country of origin) and from herds that are officially registered in (name of the body responsible for registering herds).
- The meat is from animals which have never been suspected or proved to be infected with an infectious disease.
- The meat is prepared, handled, stored, and transported according to the approved standards.
- The meat is supervised through all stages of production, storage, and transportation by the official technician from (name of the official body).
- The meat is not subjected to or stored with products suspected or proved to be infected with an infectious disease.
- The meat is transported from the slaughterhouse to the cutting house and then to the port of export, according to regulations, that does not allow it to pass by or stop at areas where pigs are kept, and the means of transportation should not be at any time used to carry pigs or its meat or products.
- Within the last three months, there was no outbreak of an epidemic in (name of the region or county) and we also declare that:
 - All cows, veal, goats and sheep and their meat are subjected to inspection and veterinary examination.
 - According to the regulations in (name of the country), all infectious diseases are officially notified.
 - All animals infected with infectious diseases are completely destroyed.
- A ban is placed on importing of all kinds of chilled, frozen and canned beef, veal and mutton along with all by-products thereof from any country infested with epidemic diseases included in the Veterinary Quarantine Regulation applicable in the Kingdom of Saudi Arabia.
- All consignments of all kinds of chilled, frozen and canned beef, veal and mutton along with all by-products thereof shall be in compliance with the standard specifications applicable in Saudi Arabia.
- The abattoir shall not be used for slaughtering pigs.
- A certificate shall be attached with each consignment authenticated by the official

authorities, stating that the animals are not fed with animal protein, animal-fats- or animal-manure-manufactured forages and that the animals are not treated with any materials containing hormone activity such as growth stimulants.

- Each consignment shall be without offal, dangerous organs, spinal cord, head, limbs and kidneys fat. A part of the tail may be left so as to identify the animal's species.
- The meat shall maintain their qualities and shall be free of signs of decay and all harmful materials.
- In case of frozen meat consignments, the period between butchering and date of arrival into Saudi Arabia shall not exceed four months. Until delivery to the customers, the meat shall be kept under temperatures not exceeding $\pm 18^{\circ}\text{C}$.
- The packing materials shall not leave any poisonous substances or anything that makes the meat harmful or make it to be contaminated by any undesirable materials. The carcasses and parts shall be packed with a soft, porous and clean cloth in addition to Kraft paper or polyethylene (in case of frozen meats).
- Slices of meat shall be packed in waxed cartons or polyethylene; and all the data shall be stated
- The animals have not been fed with feed manufactured with animal protein or fat or animal remains and the feed must comply with the approved standards.
- The animals were not subjected to growth hormones that do not comply with the levels mentioned in the approved standards.
- The meat is processed with drugs and veterinary medicine within the levels mentioned in the approved standards.
- According to the approved standards, the meat does not contain any flavoring or coloring substances.
- All health requirements are available in all abattoirs where livestock are being slaughtered and prepared for export.
- Hazard Analysis and Critical Control Point system (HACCP) should be applied at all production phases at the abattoirs and factories where all kinds of meat and foodstuff are prepared.

7.2.2. United Arab Emirates SPS requirements

Live animals: The main SPS requirements in the UAE for live animals include:

- Testing is required for FMD, Brucellosis (10% of the animals).
- A health certificate is required for animals and animal products. All live animals are subject to quarantine for 21-30 days before shipping to the UAE.
- When livestock reach the respective destination ports in the UAE, the Food Trade Control Section conducts necessary certification checks, clinical observations, and random laboratory analysis to ensure that regulatory health requirements are strictly complied with and fully satisfied. The quarantine regulation requires 15 days of quarantine for live animals before they are released into UAE. Live sheep and goats are tested for Rift Valley Fever and Brucellosis by conducting randomized sampling. If disease is detected, an additional 15 days of quarantine is required to look for clinical signs of suspected diseases. At the quarantine in the port of Hamriya, cattle are vaccinated against FMD type A, O, C and SAT 1, while shoats are directly taken to the market.
- Stock/herds must be certified by a qualified veterinarian for passing through a recognized laboratory and quarantine facility.

- Following standard clinical procedures, animals should be issued with official health certification clearances as free from infectious, contagious and zoonosis diseases particularly PPR, FMD, RVF, Blue tongue, Orfs, Pox, and Brucellosis.
- Animals should come from an internationally known port in the exporting country.
- The Ministry of Environment & Water in UAE is the government body responsible for regulating the importation of live animals. UAE officials typically respond to disease notifications in exporting countries. Consequently, import requirements for live animals can and do change. Exporters should ensure that their importers have been in touch with the Ministry of Environment & Water prior to shipping.

Meat and meat products:

- Animals should be slaughtered in an approved abattoir which has HACCP or other quality assurance systems. Export abattoirs need to be approved by the Dubai Municipality. Approval depends on a number of hygienic and health factors as well as whether the abattoir uses the halal slaughtering procedure and is certified by the regional Islamic council.
- The presentation of a veterinary certificate is also crucial to prove that the animals came from a zone free from Rift Valley fever and were kept in an official quarantine station for 21-30 days prior to slaughtering, and were tested for Rift valley fever in an official laboratory with negative results. However, animals should not be vaccinated against Rift valley fever.
- Meat shipped fresh or frozen requires specified inspection and health certification issued by the government of the country of export.
- Meat must be free of filth, and must be deemed fit (by health officials) for consumption in the destination country before release for distribution.
- Anti-mortem inspection should have been carried out before slaughtering and revealed no clinical signs.
- The meat must not be mixed with any other animal products.
- The meat should be free from any pathogenic microorganisms or parasitic agents.
- The carcasses should be completely eviscerated and submitted to maturation at temperatures above +2°C for a minimum period of 24 hours following slaughter.
- The pH of the meat should be below 6.
- Meat should be transported in a temperature-controlled cargo (either chilled or frozen) with its specified temperature range maintained.
- Chemical contamination is a growing concern of UAE authorities and efforts are underway to update local guidelines and improve testing procedures for establishing limits of pesticide residues in agricultural and food products. The UAE and GSO have also issued several standards addressing acceptable limits of aflatoxin and other toxics, radiation and irradiation in food products.
- UAE has implemented measures to protect their human and animal food supply from terrorist sabotage. These measures may require pre-importation registration of the supplier, packer, additional supplier documentation and notice of each shipment within a specified time period prior to shipment and/or importation.

7.2.3. Kuwait SPS requirements

Kuwait, a member of the GCC, enforces the same SPS and regulation mechanisms that have been established and agreed upon by all GCC member states.

Live animals: the following are some of the requirements for importing livestock to Kuwait.

- All livestock imported to Kuwait must be free from trans-boundary animal diseases.
- Vaccination is required for RVF and sheep and goat pox.
- Animals are required to be quarantined for 21 days.

Meat and meat products: As a member of the GSO, Kuwait has the following standards for meat:

- The imported meat consignment shall be accompanied with certificates attesting that slaughtering has been carried out in an authorized abattoir and according to Islamic rules, and that the animal has been inspected within 12 hours before slaughtering and immediately after slaughtering by an official veterinarian and it has been found sound, free from infectious diseases and fit for human consumption.
- Meat of livestock that had been fed protein or fat of animal origin cannot be exported to Kuwait.
- Each meat consignment shall be accompanied with an attested certificate issued by any of the relevant consulates of GCC states or by their authorized representative or by an Islamic center or organization to prove that slaughtering has been carried out according to the Islamic rules. The stamp of the Islamic center or organization shall be tamper-proof and the branding ink shall be stable and harmless to health.
- Each carcasses (chilled or frozen) or final containers of special meat cuts shall be branded with the Islamic center or organization official stamp, and by the authorized person.

7.2.4. Oman SPS requirements

Live animal import requirements for Oman:

- Livestock to be imported to Oman should be kept in an approved quarantine for one month under the supervision of vet authorities.
- No incident of anthrax or Peste des petits Ruminants (PPR) or lumpy skin disease should have been reported during the 20 days before the shipment, during the period from birth or during the six months before the shipment.
- Animals should be kept in isolation under the supervision of the public vet authority and no incident of rabies should have been recorded during the 12 months before the shipment.
- The imported animal should be IGM tested for Rift Valley disease and brucellosis with a random sample representing 50% of the number of animals at each consignment.

Meat and meat products import requirements for Oman:

- In general, all imported meats (i.e., beef and poultry products) to Oman require a health certificate issued by the country of export and a “Halal” slaughter certificate issued by an approved Islamic center in that country.

- Health certificate issued by the country of export
- certificates must be attested by the Embassy of the Sultanate of Oman or that of any G.C.C. country
- The importer should apply for a permit before arrival or departure of the consignment.
- The Omani Ministry of Agriculture and Fisheries has the right to impose any additional condition, determine port of entry for consignment or refuse or cancel the issued permit

7.2.5. Qatar SPS requirements

Live animals: As a member country of the GCC pact, Qatar enforces the same SPS and regulation mechanisms that have been established and agreed upon by all GCC member states. Accordingly,

- All livestock imported to Qatar must be free from trans-boundary animal diseases.
- In addition, livestock must be kept in a veterinary quarantine for three weeks before shipping to Qatar.
- Vaccination is required for RVF, FMD and pox.

Meat and meat products:

- Abattoir should be approved by the GCC
- Original health certificate issued by the competent authority
- The certificate should attest compliance to GCC requirements
- Meat and meat products are routinely tested for *Salmonella*. If *Salmonella* is detected in more than 20% of the tested samples, the shipment will be rejected.

7.2.6. Bahrain SPS requirements

Live animals: Bahrain requirements for live animals include:

- Animals are required to be vaccinated for RVF, FMD, Pox and LSD.
- Animals are required to be screened for TB and brucellosis.
- Animals are required to be quarantined in an approved facility for 21 days,
- Animals are free from Foot-and-Mouth Disease, Contagious Bovine Pleuropneumonia, Rabies, Hemorrhagic septicemia, Bovine brucellosis, Bovine tuberculosis, Bovine spongiform encephalopathy; AND Screw-Worm fly.
- The animals showed no clinical signs of anthrax on the day of export and the animals either: originated from a property or properties free from anthrax for the twenty (20) days prior to export; or were vaccinated against anthrax not less than twenty (20) days and not more than six (6) months prior to export.
- The property of origin either: is located in a zone free from cattle tick and tick borne diseases and the cattle are free from evidence of cattle ticks; or
- The cattle have been treated for ticks and are free from evidence of ticks.
- The animals were examined during the 48 hours prior to loading for export and were found free from evidence of diseases and fit to travel.
- The decks and compartments used for transporting the ruminants and storing feed have been thoroughly cleaned.

Meat and meat products: The following are the health requirements for slaughter sheep and goat:

- Animals are free of Foot and Mouth Disease, Rinderpest, Peste des Petits Ruminants, Sheep Scab, Goat Pox, Sheep Pox, Warble Fly, Rabies, Brucellosis and Contagious Caprine Pleuropneumonia.
- The animals show no clinical signs of anthrax on the day of shipment and were from an establishment prior to shipment where no case of anthrax was officially declared during the 20 days prior to export or were vaccinated, not less than 20 days and not more than 6 months prior to shipment. The animals have been held in isolation for at least three days, and were examined by a government-accredited veterinary officer within 48 hours prior to shipment and showed no clinical signs of the disease.
- The decks and compartments used for transporting the ruminants and storing feed have been thoroughly cleaned.

7.2.7. Yemen SPS requirements

As a non-GCC member, Yemen has less stringent SPS requirements and does not participate in GCC bans.

7.2.8. Jordan SPS requirements

Live animals: The following are the import regulations stipulated by the Jordanian Ministry of Agriculture:

- The shipment should be accompanied by a veterinary health certificate that certifies cattle as free from infectious diseases and a certificate of origin stating that the animals originate from a disease-free zone. The animals should not have suffered from FMD during the previous three months.
- The cattle should be kept in an official veterinary quarantine facility for 30 days prior to shipment and during which time serological testing for brucellosis and laboratory examination for FMD strains (using 3ABC-ELISA) should be carried out.
- The cattle should not be vaccinated against FMD, lumpy skin disease or CBPP but should be vaccinated against hemorrhagic septicemia (HS)
- The animals should also be dipped or sprayed to ensure that they are free from external parasites.
- The animals should be quarantined upon arrival in Jordan for at least 14 days.
- Transportation, loading and unloading of animals should be carried out according to Jordanian standards.

Meat and meat products: The following are the general requirements for importing meat and meat products to Jordan.

- All of meat and processed meat products imported into Jordan must be accompanied with a Sanitary and Phytosanitary certificate (SPS) from proper authority indicating that the product is free from infectious and contagious diseases as a preliminary food safety requirement.
- The certificate shall also state that the animal has not been fed feed that contains bovine bone and meat meals.
- Meat should be free of glands and bones.

- Meat should be from animals that are hormone free; a hormone free certificate is required.
- Meat should be from animals that received ante-mortem inspection in the country of origin.
- Bovine meat should be from animals that have not been subjected to gas injection into fore cavity (nasal or mouth cavity) or upper vertebral column puncture (might cause nervous tissues rupture) before slaughter.
- Consignment should be free of eyes, brains, spinal cords or meat mechanically extracted from skull or vertebral column.
- Meat should be from cattle not exceeding 30 months of age.

7.2.9. Egypt SPS requirements

Live animals: The Egyptian market stipulates the following regulations and requirements for imports of live animals (cattle and sheep).

Requirements for import of live sheep

- Only male sheep shall be imported.
- Animals shall be quarantined at the shipping port for not less than 30 days.
- Serological testing for foot-and-mouth disease (FMD) should be carried out during the quarantine period.

Requirements for import of live cattle

- Only male animals younger than three years and over 300 kg live weight shall be imported.
- Animals shall be free from contagious diseases, particularly FMD, rinderpest and contagious bovine pleuropneumonia (CBPP).
- FMD is currently a major concern to Egyptian authorities. Therefore, Egypt requires a 30-day quarantine period for live animals prior to entry into the country. All livestock imported into Egypt must also be free from other trans-boundary animal diseases. Egyptian veterinary inspectors often embark on ships carrying camels from the Horn of Africa and carry out health checks before the animals can be offloaded into the port. The animals are quarantined again after entry into Egypt and slaughtered at the port of unloading so as to avoid any possible transmission of a disease(s).
- Serological testing for FMD and CBPP shall be carried out during the quarantine period.
- Animals are required to be vaccinated for RVF and LSD.
- Animals shall be drenched, injected and sprayed against internal and external parasites respectively.

Meat and meat products: Requirements for import of chilled bone-in-beef to Egypt include:

- Animals intended for slaughter should be quarantined for 30 days and tested for contagious diseases from the 16th day.
- Animals testing negative should be slaughtered in approved facilities.
- Only the fore and hind quarters shall be exported; the quarters shall be packaged in labeled cartons and stored at 0 – 2°C.
- Chilled bone-in-beef shall be deboned immediately upon arrival at the Cairo airport

in one of the government deboning halls under supervision of veterinarians from the Public Corporation for Veterinary Services.

- A certificate of origin and copy of pro-forma invoice shall accompany the shipment.
- Meat of livestock that had been fed protein or fat of animal origin cannot be exported to Egypt.

7.2.10 Common non sanitary requirements

- Halal slaughter certificate and labeling: All imported consignments of meats shall be accompanied with an official Islamic slaughtering certificate issued from the Competent Authority in the country of origin.
- approved Islamic Center is required
- Date of slaughtering and Expiry date should be mentioned on each meat product batch.
- Commercial Invoice
- Bill of loading
- Country of Origin Certificate
- The abattoir shall not be used for slaughtering pigs
- The sale of pork products is banned or strictly regulated

Requirements related to testing, vaccination and quarantine period for export of live animals from the Horn of Africa to MENA countries are summarized in Table 17. It is noteworthy that the requirements of the various countries in MENA are not the same and wide variation is observed. Despite the standardization and harmonization of SPS requirements by GCC, member states fail to fully embrace and adopt the regional standards sanctioned by GCC.

Table 17 - Requirements for export of live animals from the Horn of Africa

Country	RVF	FMD	CBPP	BRUCELLOSIS	POX	LSD	Quarantine period (days)
Egypt	Vaccination	Test	Test	--	--	Vaccination	30
Emirates	Vaccination	Test	--	Test 10%	--	--	21
Kuwait	Vaccination	--	--	--	Vaccination	--	10
Oman	Test 5%	--	--	Test 50%	--	--	21
Saudi Arabia	Vaccination	--	--	Test 100%	Vaccination	--	30
Yemen	Vaccination	--	--	--	--	--	10
Qatar	Vaccination	Vaccination	--	--	Vaccination	--	10
Jordan	Test 10%	Test 10%	Test 10%	Test 100%	Vaccination	--	30
Lebanon	Test 100%	Test 5% + Vaccination	Test	Test	RP Test 3%	--	30
Bahrain	Vaccination	Vaccination	--	--	Vaccination	Vaccination	7-21

7.3. Trends in SPS Requirements

It should be noted that in the wake of globalization many countries including the traditional trading partners for the IGAD region are moving to rapidly integrate SPS and world trade organization principles. As a result, countries are reviewing their policies and practices and major changes are under way that will have an important impact on livestock trade. These escalating standards for livestock and livestock products, with all their auditing and certification requirements, present a growing challenge for IGAD countries seeking access to external markets.

In addition to diseases which affect animals and microorganism contamination of animal products which causes outbreaks of food-borne diseases in humans, current and upcoming food safety concerns relate to the following types of contamination:

- Residues of agricultural chemicals (e.g. pesticides, rodenticides, herbicides, fungicides) and veterinary drugs, e.g. sulphur drugs, antibiotics, growth and other hormones
- Mycotoxins, e.g. aflatoxin
- Environmental contaminants (heavy metals) e.g. cadmium, lead, mercury, zinc
- Food additives, especially those to which significant numbers of consumers are hypersensitive such as sulphur dioxide and tartrazine
- Filth, e.g. dirt, insect and insect parts, urine and animal droppings, hair
- Excessive radioactivity, e.g. radionuclides

Many MENA countries are moving to rapidly integrate SPS and World Trade Organization (WTO) principles and their regulatory environment would change dramatically over the short- to medium-term. They are concerned about the disease status of exporting countries but also consider the quality of information available, the quality of veterinary services in exporting countries, the reliability of health certifications process and membership to the WTO. Several of the importing countries indicated that trust in the reliability of animal health certificates was an important criterion in decision-making. Moreover, animal welfare and livestock identification and traceability are also increasingly becoming requirements.

Key importing countries are increasing internal food safety standards in terms of the application of Hazard Analysis Critical Control Point (HACCP) procedures in slaughter houses and manufacturing plants and anticipate that they will require standards on imports to conform to evolving domestic standards.

Multi-national supermarkets, food suppliers and restaurant chains are a principal growth sector in the MENA region. Major international supermarket chains with private standards that surpass government standards have already invested in the region. As countries embrace the WTO, this trend will probably accelerate rapidly. These organizations procure many products on a regional basis and often operate to private standards that surpass national standards and international guidelines. Over the medium to long term, products regulated by private commercial standards will probably dominate the main market.

8. Challenges for enhancing live animal and meat export trade from the IGAD region

8.1. Presence of Trans-boundary Animal Diseases

The livestock sector has enormous potential to contribute to food security and general economic integration within the IGAD region. However, the sector is seriously constrained by animal diseases. The bans that the Inter-Governmental Authority on Development (IGAD) region experienced from the major importing countries on livestock imports due to concerns over trans-boundary animal diseases (TADs) have had significant impacts on the livelihoods of livestock-dependent communities and business enterprises. Trade-sensitive livestock diseases are major non-tariff barriers to trade in livestock and livestock products between the IGAD region and the rest of the world. It is therefore imperative that the region strengthens the disease control and prevention efforts and find ways of sustaining and enhancing the valuable livestock trade and its benefits. Some of the major diseases hampering trade include:

Foot and Mouth Disease (FMD)

Foot and mouth disease (FMD) is one of the most contagious diseases of mammals and is endemic in the IGAD region. It affects cloven-hoofed animals, and because of its highly contagious nature it spreads quickly through a region. It is very difficult to eliminate as both raw and processed meat can carry the disease. Travelers, tourists, wind and transport vehicles can carry the disease from one region or country to another. Only some 59 countries are currently officially free of the disease, as registered by the World Organization for Animal Health (OIE). The disease causes high economic losses for producers, and substantially limits trade opportunities in disease-free lucrative markets.

There are several cases of trade bans and rejection of consignment by some MENA countries on live animals from the IGAD region due to FMD. Vaccination is complicated by multiplicity of antigenic types and subtypes. Eradication of the disease is a long term objective for the IGAD region. OIE/FAO have developed a 'Global strategy for the control of FMD' under their GF-TADs Framework, the objective being eradication of the disease from livestock. A seven-stage process is foreseen for the progressive control and eradication of FMD. IGAD MS individually and collectively should actively participate in this process to manage the disease.

Rift Valley Fever (RVF)

Rift Valley Fever (RVF) is a vector-borne disease that is transmissible from animals to humans and is endemic to the IGAD region. The disease has been responsible for three separate trade bans from Saudi Arabia and other Gulf states over the past two decades. From February 1998 to April 1999, Saudi Arabia banned imports of live animals from the Horn as a result of a regional outbreak of Rift Valley Fever. In 2000, an outbreak occurred for the first time outside Africa, in Saudi Arabia and Yemen, causing these two states as well as four others (Bahrain, Oman, Qatar and the UAE) to ban imports from the Horn. The 2000 ban was kept in place for five years, long after the risk had subsided. In 2007, an RVF outbreak in Kenya, Tanzania and Somalia caused yet another trade ban.

These bans have disrupted trade patterns and dealt severe economic blows to the region. For instance, the Saudi trade ban lasted 10 years until September 2009 affecting local economies and causing several changes in livestock marketing. The ban caused financial losses to exporters and serious economic hardships on pastoralists whose major incomes are from livestock and livestock products. A loss of \$132 million in value added and 36% fall of GDP was estimated in Somali region of Ethiopia due to a trade ban imposed as a result of the outbreak of RVF in Northern Somalia and Kenya in 2000.

Peste des Petits Ruminants (PPR)

Peste des petits ruminants (PPR), or small ruminant plague, a viral disease primarily affecting goats and sheep, is the major constraint to productivity. The disease is widespread globally and is endemic in most IGAD Member States. The socio-economic losses associated with PPR mainly result from the high case fatality rates. The co-existence with other small ruminant diseases such as sheep and goat pox, contagious caprine pleura-pneumonia, brucellosis, endo- and ecto-parasites compounds the problem and the socioeconomic losses. The existing technical tools are sufficient to enable the progressive control of PPR to commence. There are ongoing efforts to progressively control the disease under the EU SHARE program. Outbreaks occur by movement of goats and sheep from within the areas of persisting infection in country and across borders. The good news is that experience in the region shows that it is possible by intensive, focused vaccination to eliminate the disease from large areas relatively quickly and for extended periods. It should be noted that global eradication of PPR will only be possible through a massive coordinated campaign, as achieved with the successful Global Rinderpest Eradication Program.

Contagious Bovine Pleuropneumonia (CBPP)

CBPP is an infectious disease of the lungs in cattle caused by a bacterium. The disease is endemic in the IGAD region, affecting trade. CBPP is spread almost exclusively by direct contact between animals although indirect spread is also possible. When the disease spreads for the first time within a sensitive cattle population, it generally causes high mortality.

CBPP can be controlled by immunization using existing vaccines. However, these vaccines are not 100% efficacious and confer immunity only for a relatively short period. Successful control and eradication of CBPP was achieved in Europe in the 19th century using the “stamping-out” policy. In Africa, there is only one authenticated case of CBPP having been eradicated in Botswana in 1995/96 where 320,000 head of cattle were destroyed and buried at a cost exceeding US\$350 million.

Lumpy skin disease (LSD)

Lumpy skin disease primarily affects cattle and African Cape buffalo and it is caused by a pox virus. It is present in Africa. The disease is believed to be spread between animals by biting flies and mosquitoes, although spread of the disease is often related to cattle movements. Many animals in a herd will be affected but a few animals die from the disease. Death rates are greater among calves. The disease causes damage to hides, loss of milk and beef production, abortions in females and sterility in bulls. Economic losses in herds with the disease are very severe.

Contagious caprine pleuropneumonia (CCPP)

CCPP is an acute highly contagious disease of goats caused by a mycoplasma and characterized by fever, coughing, severe respiratory distress, and high mortality. Contagious caprine pleuropneumonia is a disease of goats, and where the classical disease has been described, only goats were involved in spite of the presence of sheep and cattle. Contagious caprine pleuropneumonia has been described in many countries of Africa, the Middle East, Eastern Europe, the former Soviet Union, and the Far East. It is a major scourge in many of the most important goat-producing countries in the world and is considered by many to be the world's most devastating goat disease.

Sheep and goat pox

Sheep and goat pox (SGP) is an acute to chronic disease of sheep and goats characterized by generalized pox lesions throughout the skin and mucous membranes, a persistent fever, lymphadenitis, and often a focal viral pneumonia with lesions distributed uniformly throughout the lungs. Subclinical cases may occur. Sheep and goat pox virus causes clinical disease in sheep and goats. The virus replicates in cattle but does not cause clinical disease. The disease is endemic in Africa, the Middle East, the Indian subcontinent, and much of Asia.

Contagious ecthyma (Orf)

It is caused by a Pox virus and is a highly infectious viral disease of sheep and goats characterized by the development of pustular and scabby lesions on the muzzle and lips. Deaths are due to the extension of lesions in the respiratory tract.

Brucellosis

Brucellosis, especially caused by *Brucella melitensis*, remains one of the most common zoonotic diseases worldwide with more than 500,000 human cases reported annually. The bacterial pathogen is classified by the CDC as a category (B) pathogen that has potential for development as a bio-weapon. The geographical distribution of brucellosis is constantly changing with new foci emerging or re-emerging. The disease occurs worldwide in both animals and humans, except in those countries where bovine brucellosis has been eradicated. The worldwide economic losses due to brucellosis are extensive not only in animal production but also in human health. The disease is primarily an occupational risk in exposed professions, veterinarians, farmers, laboratory technicians, abattoir workers, and others who work with animals and their products. Although a number of successful vaccines are being used for immunization of animals, no satisfactory vaccine against human brucellosis is available. When the incidence of brucellosis is controlled in the animal reservoirs, there is a corresponding and significant decline in the incidence in humans.

Zoonotic Diseases

Zoonotic diseases are those that arise in animals but can be transmitted to humans. Potentially pandemic viruses, such as influenza, are the most newsworthy, but many others exist, including rabies, brucellosis, bovine tuberculosis, Rift Valley fever and anthrax. Zoonotic diseases may cause significant productivity losses in livestock (or in

other domestic or wild animal species), but their major impact is usually in causing human disease and suffering. Some can be characterized as endemic, such as many of the meat-borne helminth zoonoses, brucellosis and tuberculosis, and some are epidemic in nature, such as rabies and Rift Valley fever (RVF). Around 60% of all human diseases and around 75% of emerging infectious diseases are zoonotic.

Food-borne diseases

Food-borne pathogens are a major threat to food safety. Most food-borne illness is caused by infection by microbial pathogens that have entered the food chain at some point from farm to fork. Food-borne illness can also be caused by toxins (microbial or chemical) that have contaminated food. The majority of cases of food-borne illness are mild and self-limiting, although unpleasant. However, occasionally, more serious illness or even death may result. Around one-third of people in developed countries are affected by food-borne pathogens each year, according to the WHO. This figure is significantly higher in developing countries.

The cost and burden of food-borne illness is high and is a global concern. International trade means that contaminated food has the potential to spread widely. The most common food-borne pathogens include *Campylobacter*, *Salmonella*, *E. coli* O157, and *Listeria monocytogenes*. In addition to disease caused by direct infection by food-borne pathogens, food-borne illness can be caused by microbial toxins that contaminated food. Mycotoxins are produced by certain molds that grow on various foods including livestock products. Mycotoxins cause a range of negative health effects in humans; some, such as aflatoxins, are carcinogenic in animals, and probably humans.

8.2. Weak SPS Compliance by IGAD MS

SPS regulations and laws are outdated: National SPS regulations and laws are outdated and fail to comply with scientific advances in the field, international standards and requirements of importing countries, hampering market access for live animal and meat export.

Growing SPS requirements: The international market for live animals and meat is becoming increasingly stringent. All those involved in the production, processing and marketing of live animals and meat must comply with improved SPS practices to maintain and increase market share.

Absence of traceability system: Traceability systems are important, effective tools that can be used for many things, including the protection of animal health, public health and food safety. They can help reduce response time, thereby limiting economic, environmental and social impacts of emergency situations such as disease outbreaks. It is increasingly becoming a requirement for market access. However, despite some pilot initiatives, effective implementation of livestock identification and traceability is not yet realized in most of IGAD MS.

Poor animal welfare: The welfare of farm animals has been the subject of significant regulatory and policy attention in many countries and is an issue of growing importance all over the world. Changing public opinion about the importance of good animal welfare and applying legislative actions will be important in animal production systems in the IGAD

region where poor animal welfare is immense and livestock handling and management is below required standards.

Testing animals for various diseases at higher end of the chain leading to losses to exporters: Most of the importing countries in MENA have testing requirements for livestock coming from the IGAD region. However, some of them perform additional tests once the animals reach their destination market. At times different test results at origin and destination are source of conflict and contention.

Less trust on exporting countries' capacity: Importing countries usually have less trust on the capacity and certification system of the region. As a result they usually send inspectors to spot check every consignment or export facility and give official approval.

Unjustified rejection of shipments: At times consignments are totally rejected by competent authorities of importing countries after the commodities reach their final destination market. Usually such rejections are not scientifically justified and are arbitrary, resulting in heavy financial losses to the exporter.

Lengthy approval process of export premises: Some of the MENA countries perform official approval processes for export facilities such as live animal quarantine stations and export abattoirs before they allow imports. This is done by sending their official inspectors to the facilities. However, this approval process is very lengthy and bureaucratic, affecting business operations negatively.

8.3. Marketing Problems

Limited destinations: Current markets for meat and live animals from the IGAD region are very limited. As a result exporters from the region have poor bargaining power and are price takers. Major efforts should be made by member states to diversify their client basis and penetrate new potential markets.

Seasonality of the market: The demand for live animals in the MENA is heavily influenced by the season of the year and the occurrence of religious festivals. It is particularly strong around some holidays and festivals such as Eid Al-Adha. For some markets, the lead up to the holiday can cause increases in exports while in other markets trade remains steady.

Limited market information exchange to all actors in the value chain: Often, collection of livestock market information is initiated as part of a project or as a project on its own and is not continued after the end of the particular project. Trained manpower (data collectors, processors, and analysts) go elsewhere once the project is phased out, eliminating possibilities for improving on the quality of data collection, interpretation and dissemination with time. Sustainability is the key problem in livestock market data collection due to lack of funds.

Domination by informal trade: Informal cross-border trade is the movement of goods which are unrecorded or unrecognized by the government, carried out without adherence to procedural requirements of all formal institutions. The cross border livestock trade operation in the Horn of Africa is one of the largest live animal export movements in the world. There is a critical need to transform informal into formal trade and to secure these operations for the benefit of the region and its population.

Limited market promotion: Despite the comparative advantage of the region in supplying free range and organic products, little is done to capitalize on these desired attributes. Ideally, IGAD MS should join hands to devise a regional promotional strategy rather than proceed on unilateral basis to position/reposition their products with certain attributes that appeal to the attitude of present day consumers (for example, capitalizing on free ranging animals).

Absence of market segmentation practice: Market segmentation is the process of defining and subdividing a large homogenous market into clearly identifiable segments having similar needs, wants, or demand characteristics. Its objective is to design a marketing mix that precisely matches the expectations of customers in the targeted segment. IGAD member states should start marketing segmentation which should start first by knowing exactly which segments represent the most potential sales for their business.

8.4. Less Value Addition

Bulk of products exported are fresh primary products: The bulk of the livestock products exported from the region are fresh primary products. A few processed products e.g. sausages are beginning to penetrate markets. A few traditional products are at various stages of entering the formal market chains. Generally, meat and live animal exported from the region are sold without value addition. Live animal exports continue to be volatile and subject to arbitrary bans and rejections. Therefore, the IGAD MSs should give emphasis to value addition.

There is little vertical integration: Complete vertical integration is to align and control all of the segments of a production and marketing system under single ownership. The factors aligned and controlled are price, quantity, quality, and transactional terms of exchange. A totally integrated system can provide consistent quality from the field to the shelf, eliminating middlemen and even saving money for consumers.

Limited capacity for meat processing and fabrication: Accessing higher-end markets will require not only quality improvements for existing meat exports, but also technological upgrading for new products. Capacity to produce processed products, deboning of whole carcasses into primal pieces and extending shelf life of meat products is lacking in the region and investment in such upgrading must be encouraged in order for higher-end meat products from the IGAD region to target higher-end markets in the MENA. In order for this to occur, a greater in-depth understanding of the various segments of the Middle Eastern market is necessary.

8.5. The Existence of Strong Competitors

Attainment of efficient production and marketing system: Competitors within the Middle Eastern markets compete not only on price and quality, but also on other factors such as flexibility of payment terms, aggressive marketing and promotion, and export incentives. Public-private initiatives and strong governmental support for meat exports are critical to enhance competitiveness. These are measures that IGAD MSs may seek to emulate in order to increase the competitiveness of its meat exports and ultimately target higher-end markets. It should be noted that only low cost and efficient producers will be able to survive and compete in the market.

Compliance with the health and quality standards: Most of the competitors including Brazil, Argentina, Australia, New Zealand and European countries have complied with the health and quality standards of importing countries in the region. They have eradicated diseases such as FMD and put in place credible surveillance, risk assessment and certification systems acceptable to the trading partners.

Quality issues for meat exported from the IGAD region are due in large part to inadequate infrastructure and inappropriate handling practices at the slaughter and export stages. Investments in appropriate infrastructure and cooling equipment particularly cold stores for meat are critical to address the problem. Enforcement of proper animal and meat handling practices will also be an important factor in improving meat quality and enabling IGAD MS meat exporters to target higher-end markets within the MENA. The lack of refrigerated transport must be addressed in order for IGAD MSs to enter the market for frozen meat. This will require investment in refrigerated (“reefer”) trucks for shipping boneless meat and carcasses overland to ports.

Have branding strategy and sale branded products: Most of our competitors have a strong brand identity and their products are perceived by the market as safe and of high quality. They have built, maintained, and protected a positive image, high awareness, and product preference in the buyer’s mind.

Ensure reliable and consistent supply: Another advantage of our competitors is that they ensure consistent and reliable supply of meat and live animals. Exporters from IGAD MSs at times fail to supply consistently and breach contractual obligations which results in lack of trust. These are largely a product of the supply/purchasing systems and abattoir/export operations, which must be addressed in order for exports to increase.

8.6. Lack of Investment on Infrastructure

Livestock production is traditional and not market oriented: There is a need to change traditional subsistence livestock rearing to commercialized or market-oriented livestock production. This requires smallholders to move from producing for household consumption with the option of selling surplus, into market-oriented production for the profitable product. The change in priority from household consumption to production for the market is a difficult transformation against the traditions of the rural population. However, it is already happening in some IGAD MSs and this process of change can be enhanced by focused interventions which demonstrate to the smallholders that livestock farming for the market is good business that will provide them with more income and security than the traditional production system. They will then be willing to invest capital and labor in more productive livestock systems with higher quality products and more efficient incorporation into the value chain.

Market and quarantine facilities not well developed: Market centers and their associated infrastructure are important factors that have to be considered in the move to increase the supply of livestock for both domestic and export markets. Due to the wider geographical location of pastoralists, some important sources of livestock are very far from market centers. Pastoralists from the border areas need to travel long distances to reach these market areas.

Moreover, there is a need for further establishment of standard quarantine stations which are well-equipped and approved by importing countries. These are facilities where animals are held in isolation for a specified period for purposes of veterinary observation, sampling, testing, vaccinations and/or treatment as per requirements of the importing country.

Not well developed slaughtering and cold storage: One infrastructure-related constraint to increasing meat exports from the IGAD region to MENA as well as additional destinations is the lack of appropriate slaughtering, cold chain storage and transportation facilities, including limited docking stations at ports that can be used until the shipment is loaded onto vessels.

Not well developed live animal transportation facilities: Traders often cannot move their trucks to producer areas, while livestock owners complain that traders and their trucks never reach their areas—which forces them to trek long distances. Another trade-related, transport infrastructure issue involves the use of general-purpose tracks to transport livestock. While these tracks are sturdy and carry both imports such as grains and other goods into lowland areas and livestock animal exports out, they are not ideal for moving livestock. Animals lose condition, are often injured and in some cases die.

Limited PPP arrangements: Most of the IGAD MSs have no clear policy and guidelines to support public private partnerships in the management and running of livestock services. These partnerships are essential for bringing in technology, investment, knowledge and skill into the livestock sector.

8.7. Poor Information Flow along the Chain

Lack of capacity to collect regular market information: One apparent area of weakness is the lack of capacity to collect regular market information from livestock importing countries. As a result vital market information is not collected on regular and systematic basis.

The apparent indifference to collect this information comes from a misunderstanding about the dynamics of the export market and the wrong perception that the markets will always function in a similar manner.

Lack of timely information on tariffs, rules, regulations and trade restrictions imposed by importing countries: Tariffs, rules and restrictions are imposed from time to time or are changing for various reasons. Such information is not collected in a timely fashion to support decisions in business. As a result considerable time and resource will be lost or the whole consignment might be rejected.

Poor business skill and communication: There is feedback from trading partners from MENA that exporters of live animals and meat from the IGAD region poorly respond to queries and complaints. To establish a strong business relationship, effective communication practices must be established.

8.8. Lack of capacity

Lack of capacity to implement SPS standards: The SPS compliance with increasingly demanding quality and safety standards is a growing challenge for the IGAD region seeking increased access to global livestock and livestock products market. As noted in various studies the stringent SPS standards set by importing countries, coupled with the lack of technical and economic resources of MSs limits access to potential markets. This results in considerable loss of export revenue, employment, and income.

Cold chain breakdowns: Breakdown in the cold chain is one of the common problems which at times result into total rejection of the meat consignment. Cold chain is a continuum from the time the carcass is skinned and eviscerated and enters the chilling processes, is stored, dispatched and transported. This helps to achieve a level at which microorganisms do not grow. If cold chain control is violated at any point, meat safety, quality and hygiene will be compromised.

Poor packaging: Quality of stock net used for carcasses and packing materials for variety meat/offal are areas of complaint by importers. Adequate packaging of meat with suitable protective material is an area which requires further improvement.

Poor labeling: Poor labeling of meat and meat products is one major area that needs to be addressed. Labels are an essential part of keeping consumers informed regarding their purchases. A label should be written based on requirements of importing countries. Some might require the language of labeling to be Arabic while others might require both Arabic and English and this should be complied with. All required information on the label must be presented in a legible manner. It cannot be concealed in any manner such that it is unlikely for the consumer to read. Labels must be made of materials that do not contaminate the food.

8.9. Absence of Grades and Standards

No grades and standards for live animals and meat: There is a lack of communicated and enforced grades and standards for livestock and meat. The problem of grades and standards has also negatively affected the image and credibility of meat and meat products in export markets as these are considered to be inconsistent. The absence of grades and standards restricts development of effective and efficient marketing systems. Therefore, it is important to have a grading system which accurately describes products in a uniform and meaningful manner.

Price setting not based on grades and standards: Current marketing systems are increasingly relying on repeatable, fully intelligible descriptions to allow remote trading. Hence there is a trend towards objective grading of meat and live animals. In the IGAD region, livestock and carcasses are appraised and their price is determined subjectively.

Absence of qualified graders: Training services to deliver skills and competencies for appropriate grading of live animals and meat are lacking. Creation of and supporting grading assistants at grass roots level across the products is a major gap that has to be filled.

9. Interventions to address the challenges and meet the requirements of importing countries

9.1. Measures to Enhance Inter-regional Trade

9.1.1. Control of major TADs and compliance with SPS requirements

Legal reform: IGAD MSs should review and overhaul their legal framework so that they comply with current scientific advances, international standards and requirements of importing countries.

Negotiation of alternative approaches to the creation of disease-free zones: Establishment of disease free zones is very costly, difficult to achieve and even not feasible for the IGAD region in the foreseeable future. Therefore, the region and MSs should negotiate alternative approaches with current and potential importing countries. Some of these alternative approaches include:

Commodity-based trade: For countries in the IGAD region, a commodity-based approach would be a pragmatic way of ensuring levels of acceptable risk for particular commodities without necessarily being required to prove freedom from trade-influencing infections. This would provide opportunities for trade and improved income generation without threatening importing countries with outbreaks of TADs. The idea is that once meat has been sufficiently chilled and matured, it no longer poses a threat for diseases such as FMD and, as such, the origin of the animal (assuming it is healthy) is immaterial for the purposes of trade. This means a focus on the quality of each product and how it was produced, rather than where it originated. This would not undermine disease control and eradication measures, as countries would actually have greater incentives to strengthen veterinary services and improve disease control.

Commodity processing: Processing of commodities frequently provides an effective method for risk mitigation. It offers additional opportunities for access to export markets by countries where trade-influencing diseases or infections occur. Once again, although this concept is recognized by the Code there is arguably too much emphasis on disease freedom and insufficient guidance on commodity processing for risk management.

Compartmentalization: means one or more establishments under a common biosecurity management system containing an animal subpopulation with a distinct health status with respect to a specific disease or specific diseases for which required surveillance, control and biosecurity measures have been applied for the purpose of international trade. The compartment concept is progressively evolving, but with emphasis placed on biosecurity, the internationally acceptable interpretations of a compartment are still largely limited to commercial production and processing enterprises, but also potentially to certain vertically integrated systems.

Developing countries' participation in the SPS agreement: Active participation of IGAD MSs in any SPS matters, international standard setting organizations and SPS committees is important to maintain and present their interests. Various studies suggest that developing countries could realize the potential benefits of the SPS agreement if they are actively involved in the SPS agreement and its institutions. There is, however, very low participation of developing countries on SPS-related issues since the agreement was

put into operation. The other indicator of developing countries' low participation in SPS agreement is the attendance rate in the meetings of SPS committees.

Animal welfare: Animal welfare is an issue of growing importance in the international trade for livestock and livestock products. For this reason, exporting countries are required to comply with sanitary and welfare requirements of importing countries. Changing public opinion about the importance of good animal welfare and applying legislative actions will be important in animal production systems especially in the IGAD region where poor animal welfare is rampant and the handling and management of livestock is below the required standards.

Livestock identification and traceability system: Animal identification and traceability requirements are important for current and future bilateral trade negotiations. Countries that have well-developed mandatory animal identification and traceability programs should not only be better prepared to prevent and control animal diseases, but also enjoy comparative advantages in terms of exports in relation to countries without such systems. Lack of a proper system of animal identification and traceability may result in loss of competitiveness and access to certain markets.

Residue monitoring: MSs should build their capacity to carry out analytical tests to detect residues such as antibiotics, pesticides, heavy metals and hormones in food of animal origin. This also involves the development of a national residue monitoring plan.

Early detection and rapid response: Investment in surveillance activities as information for action is warranted. The lack of confidence expressed by trading partners in animal health certificates in part stems from a lack of confidence in national surveillance systems. National authorities need to reach beyond passive surveillance approaches to more active systems that engage production stakeholders as partners. The final result of a surveillance system should be timely, accurate, low-cost information that is collected through an auditable system. The system should be documented and regularly assessed for quality of performance.

Improve laboratory diagnostic capacity: MSs should strengthen their laboratory systems so that test results coming from these laboratories are credible and accepted by the trading partners. This involves establishment of a quality assurance system and accreditation of the laboratories for ISO 17025.

9.1.2. Improvement of marketing system

Diversify and expand market destinations: Understandably, the MENA is a major market for live animals and meat exports. However, total reliance on these markets alone is not advisable. Identifying and supplying other markets is therefore essential as a risk minimization strategy in addition to providing an opportunity for increasing the volume of exports. Countries with less stringent animal health and SPS requirements could be targeted to diversify the market base.

Curb informal livestock trade: IGAD MS lose considerable income through informal livestock trade. The nature of the cross-border trade poses challenges to national and local-level authorities, both in terms of development and revenue collection and for border security management. The key challenge is to find ways to attain safe and secure

borders that will also contribute to sustaining and enhancing this valuable trade and its benefits.

Aggressively pursue market promotion: Ideally, IGAD MSs should join hands to devise a regional promotional strategy rather than proceed on a unilateral basis to position/reposition their products with certain attributes that appeal to the attitude of present day consumers (for example, capitalizing on free ranging animals). Such a regional promotional approach will also help the individual countries to cut costs on advertising, enable them to use the natural diversification of the region for promotional purposes while providing them a better chance of standing against their giant competitors (such as Australia and New Zealand) than on unilateral basis. Promotional costs could be high but they pay in the end.

Develop and implement market segmentation strategy: It is a marketing strategy which involves dividing a broad target market into subsets of consumers, businesses, or countries that have, or are perceived to have, common needs, interests, and priorities, and then designing and implementing strategies to target them. Market segmentation is playing an important role in defining business approaches. The “one size fits all mentality” is being replaced by wholesalers and retailers trying to match products with consumer demand. This is true in MENA countries.

Develop and implement branding strategy: This involves the development and utilization of appropriately branded products in selected markets to enhance consumer confidence and increase profitability. IGAD MSs must focus on the development and promotion of branded products across different markets and consumer segments. A brand should create increased sales, greater margins, and improved returns on investment.

9.1.3. Enhance competitiveness

Carry out study along the value chain to determine factors affecting competitiveness: It is not just the SPS compliance which is the limiting factor in expanding trade. Enhancing competitiveness is an area which needs to be addressed. Some of the factors affecting competitiveness are known while others have to be studied all along the value chain and tackled accordingly.

Reduce transaction costs and be competitive in quality and price: IGAD MSs need to revise their strategies. If they decide to compete head on with major competitors, then they have to bring down their export prices to a level that allows them to compete. This strategy, however, requires an unprecedented level of reform in the internal markets. Domestic taxes have to be reduced, efficiency and cost cutting have to be greatly improved. The second alternative is niche marketing in the MENA. This again requires employing various promotional tools on almost continuous basis specifically directed at that segment of the population that is ready to pay more for livestock or meat originating from the region. This strategy has to be backed by efficient and consistent supplies of livestock or meat from the region.

Ensure consistent and reliable supply: Unreliability of supply is a consequence of the lack of integration within the livestock value chain. This is due to traditional livestock production and marketing systems as well as the abattoirs’ specific purchasing systems. Increased vertical integration through buyer-seller contracts will enable better planning to meet the needs for the export market.

Design incentive mechanism to enhance export: As competition is becoming more intense, suppliers are employing a variety of marketing strategies to reach the different market segments (stratified by income, ethnic group, age, and religious beliefs among others) in the MENA. Many countries are active in offering different forms of promotional assistance to local importers to increase sales. These include subsidies, price and payment terms such as credit facilities and price discounts on bulk buys and promotional activities such as TV and magazine advertising. IGAD MSs should design appropriate incentive mechanisms to support and encourage meat and live animal exporters.

Encourage public private partnership (PPP): A public–private partnership (PPP) is a government service or private business venture which is funded and operated through a partnership of government and one or more private companies. PPPs are claimed to enable the public sector to harness the expertise and efficiencies that the private sector can bring to the delivery of certain facilities and services traditionally procured and delivered by the public sector. IGAD MSs need to develop a national PPP policy and guidelines, drawing on experiences from other African countries to inform decision-making when entering into negotiations and contractual agreements on PPPs.

Encourage and support commercialization of the sector: Current livestock production systems in the region are basically subsistence and are not commercially oriented. Pastoralists and farmers alike sell their animals when they have desperate need for cash. Therefore, a gradual shift to commercial livestock production is needed to ensure consistent and quality supply of animals for both domestic and export markets.

9.1.4. Promote value addition

Gradually move into value added products: There is a growing need for value addition in livestock production as a strategy for value chain actors to exploit market opportunities in high-value and niche markets. Value added products fetch higher prices on the market due to shifting consumer demands, changes in market trends, technological developments and niche opportunities that have differentiated products from commodities.

Deboning whole carcasses into primal pieces: Because of lower labor costs than in Australia and New Zealand, IGAD MSs would have an advantage on processing boneless beef and sheep meat cuts. There is certainly an opportunity to consider deboning whole carcasses into primal pieces for further processing in an importing country.

Processed products e.g. sausages: Special processing of variety meats could also be performed to client specifications.

Promote technological development for meat fabrication and extend shelf life: Different technologies will be required for value addition for the local market, regional and international markets, making it critical for IGAD MSs to mainstream promoting technology development and adoption to enhance value addition along the livestock value chain. Boneless beef, whether fresh or frozen, is the major traded product. Meat processors from the region will need to invest in the technology and training to increase supplies of boneless beef versus carcasses and bone-in cuts.

9.1.5. Improvement of investment and infrastructure

Develop market and quarantine facilities: There is need to develop needed infrastructure such as markets, quarantine stations, and holding grounds through public, private or PPP arrangements. Similarly, government-owned infrastructure such as live animal markets, holding grounds, water pans, boreholes and quarantine stations that are in various states of disrepair can be contracted out to the private sector. This would ensure the repair and maintenance of the infrastructure and above all their utilization, at service fees, as intended. Regular monitoring of these livestock facilities by the regulatory bodies would ensure that the state of the infrastructure and the services provided by the private sector are up to the required standard.

Develop slaughtering and cold storage facilities: many of the export abattoirs in the region are small and mainly process sheep and goat carcasses. In all cases, the regional beef processing abattoirs in the Horn are not operating in a vertically integrated system. Such a system requires a deboning facility, sufficient freezing capacity, refrigerated container trucks, and appropriate docking facilities at ports to export substantial quantities of frozen beef instead of live cattle. At present these are sorely lacking in the region.

Develop live animal and meat transportation facilities: Achieving IGAD MS's goal of increasing export earnings will depend on addressing the challenges in live animal transport throughout the supply channel. Changing public opinion about the importance of good animal welfare during transportation and applying legislative actions will be important.

With regard to meat transport, an integrated cold chain that encompasses the management of the movement of perishable meat from the abattoir through the entire postharvest chain to the final consumer needs to be developed. A cold chain for perishable foods such as meat is the uninterrupted handling of the product within a low temperature environment during the postharvest steps of the value chain including harvest, collection, packing, processing, storage, transport, and marketing until it reaches the final consumer. IGAD MSs and private operators must work together to promote the use of cold chain technology, improve logistics, maintenance, services, infrastructure, education and management skills, and create sustainable markets for the design, use and funding of cold chains for reducing perishable food losses.

9.1.6. Improve information flow along the market chain

Improve the market information exchange to all actors in the value chain (price, specifications, etc.) on a regular and systematic basis: It is essential to regularly assess the live animal and meat market in MENA countries and provide regular feedback to users on price, preference, market segment and competitors. MSs need to pay special attention to the changes in such factors as demography, attitude, disposable income, ethnic composition, and distribution channels of the importing countries as such changes are likely to affect their export potential in a number of ways. Moreover, meat and live animal-importing countries in MENA have specific requirements in terms of quality and SPS specifications. These requirements are not static and would change over time depending on various factors. Regularly collecting information related to SPS, weight, age, fat layer, packaging, and labeling among other information and giving feedback to users is of paramount importance.

Collect timely information on tariffs, rules, regulations and trade restrictions imposed by importing countries: Tariffs, rules and restrictions are imposed from time to time either to protect domestic producers or to thwart perceived fear of importing diseases. The importance of obtaining such information and trying to redress it, if possible, can't be overemphasized. Moreover, tariff levels are an important part of the export equation, which should be followed and monitored closely by exporters from the region to adjust production costs and margins accordingly.

Enhance business and communication skills of market operators: Good relations among members of a business are critical for success. Good communication skills are an important element for the development of good relationships. Poor communication starves a relationship while good communication nourishes it. So, improving communication skills is important for success.

9.1.7. Capacity building

Build the capacity of MS to fully implement SPS standards. Not all IGAD MS are at the same level of development and there are also clear differences in their needs and priorities. It is important, therefore, to identify, evaluate and quantify the specific needs of each country, in terms of resources required, relevance in resolving problems and cost of such capacity development.

Improve cold chain management: In cold chains of fresh meat and meat products, refrigeration can be considered as the primary process used for controlling and minimizing pathogenic growth and the growth of spoilage microorganisms. It is required at each stage of the cold chain so as to guarantee safe meat and meat products. For meat businesses, this implies placing great emphasis on ensuring the monitoring of temperature conditions over the entire meat supply chain, including distribution, storage and handover points.

Improve meat packaging (stock net quality for carcasses and quality of packing material for variety meat/offal): The basic purpose of packaging is to protect meat and meat products from undesirable effects on quality including microbiological and physiochemical alterations. Packaging protects the meat from contamination by dirt, microorganisms, insects, and toxic substances or those influences affecting smell and taste or causing loss of moisture. Packaging should help to prevent spoilage and weight losses and enhance customer acceptability. Therefore, quality packing materials acceptable by the trading partners and the regulatory authorities should be used all the time.

Improve labeling of packages: The label on meat is important to the exporters and consumers alike. The meat exporter's most direct (and sometimes only) way to communicate with the consumer is via the label on the meat. For consumers, the label contains a wealth of information, which allows informed purchase decisions. Therefore, it should be done properly based on the regulatory requirements of the importing country.

9.1.8. Develop grades and standards

Grades and standards for meat and live animals are important in determining quality for a given product, to avoid adulteration and to promote marketing of a consistent product of defined quality and build the confidence of consumers. It involves defining differences based on expected carcasses yield and desirability and facilitating price setting according

to quality. Grading requires a hands-on approach and special skill. Therefore, regular training should be offered to produce qualified graders. The grade and standards should also be popularized and implemented. With regard to existing grades and standards, gaps in the standards and grades should be identified and resources mobilized to fill these gaps. Harmonized grades and standards between IGAD MS can reduce transaction costs by reducing duplicative conformity assessment functions, including testing and certification.

9.2. Measures to enhance intra-regional trade among IGAD MS

- Implement Standards Methods and Procedures (SMP) for laboratory systems, disease control and surveillance.
- Formalize cross-border trade in livestock. By providing different levels of support, IGAD should lift the informal trade out of its grey zone. The organization should be able to start a policy dialogue to improve cross border trading systems while promoting investment in livestock and pastoral areas.
- Enhance information exchange on animal health
- Gradually reduce and eliminate import and export restrictions to trade amongst the member states, subject only to compliance with regionally agreed sanitary measures and quality control requirements.
- Harmonize customs procedures and formalities to ensure speedy movement of products, services and people across borders. This, for instance, would include mutual recognition of sanitary certificates.
- Agree on sanitary measures which are effective but which are also proportional and do not unduly restrict trade. While establishing an FTA depends on the removal of obstacles to trade across borders, governments also have the responsibility to ensure that nothing enters their territory that may endanger the health of their consumers or their livestock.
- Establish a system for mutual recognition, then gradual harmonization, of national standards. As examples, these might include agreement on definitions of livestock products or the quality control of veterinary medicines.

10. Role of business diplomacy in enhancing the live animal & meat export

10.1. Market Promotion

10.1.1. Developing promotional materials for live animals and meat from MS

Development of promotional materials requires involvement of several stakeholders from the public and private sector. However, trade councilors have an indispensable role in regular assessment of the end market to determine promotional needs based on the local context of the importing countries, participate in the crafting of the message to be communicated, participate in the determination of the language and medium of communication, comment on the promotional materials prepared (e.g. video clips,

posters, fliers) and finally actively participate in the implementation of market promotion. This can start by, but should not be limited to, displaying promotional materials at the compounds of the embassies of MS.

10.1.2. Branding

Trade counselors can play a crucial role in promoting brand strategies. The marketing of live animals and meat products from IGAD MS should seek to enhance 'brand' recognition and the positive association that consumers have with the origins of these animals. Most important is the need to show that the animals are grass-fed and 'naturally-produced.' This may be accomplished through production of professional quality promotional videos and sponsoring site visits to production and processing sites. If the branding strategy includes improved health standards, then this added value will remain associated with the product as it moves down the market chain. Certain breeds of sheep, goats and cattle from the region are known for their quality and can easily be branded and promoted in MENA countries. These include black head Ogaden sheep and Boran cattle.

10.1.3. Participating in food trade fairs

IGAD MS trade councilors can also be involved in identifying appropriate food fairs for promoting live animal and meat products from the region. This activity will lead to the initiation of trial shipments of experimental products for the market segments with the assistance of counselors. Emphasis would be on value-added products that fit a particular niche. There is increasing participation of MS in food fairs such as the International Food Show in Dubai. However, in most of the cases, such participation is not followed up to determine whether the intended objectives were achieved or not. Therefore, trade councilors can participate in the documentation of lessons learnt from each trade fair and development of action packages to translate lessons learnt into action.

10.2. Enhancing Information Exchange

10.2.1. Regularly collect market information

Research live animal and meat market in MENA countries and provide regular feedback to users on price, preference, market segment, competitors and competitiveness. IGAD MS trade councilors in MENA countries have a role to play in the collection and dissemination of this crucial information that would enhance the exporters' understanding of future trends in demand and which demographic groups to target.

10.2.2. Regularly collect information on quality specifications

MENA countries that import meat and live animals have specific requirements in terms of quality and SPS specifications. These requirements are not static and would change over time depending on various factors. Regularly collecting information related to SPS, weight, age, fat layer, packaging, and labeling among other parameters and giving feedback to users is of paramount importance.

10.2.3. Information sharing on changes in regulatory landscape and SPS

Importing countries determine animal health certification requirements for importation of livestock. The exporter is responsible for obtaining requirements of the importing

country for each consignment and preparing livestock in accordance with those requirements. Failing to comply would result in severe penalties including rejection of the whole consignment resulting in heavy financial losses. Therefore, provision of timely and regular information to exporters related to SPS and changing the regulatory environment is an area to which IGAD MS trade councilors can contribute significantly.

10.3. Establishing Good Diplomatic/Business Relationships

10.3.1. Strengthen the relationship of the regulatory authorities of importing and exporting countries

IGAD MS trade councilors can facilitate regular regional and bilateral meetings and exchange visits to strengthen the relationship of the regulatory authorities of importing and exporting countries. Such interventions help to develop greater transparency and enhanced communication with potential importing nations. Countries that send livestock trade delegations and make invited exchange visits are generally better perceived in terms of reliability and trustworthiness of information.

Moreover, trade councilors could also facilitate approval of export facilities by competent authorities of the importing countries. In the past, considerable delays were observed in obtaining timely visits to and approvals of export facilities such as export abattoirs and quarantine stations with severe financial consequences.

10.3.2. Facilitate business to business relationships (B2B)

Trade councilors could help in identifying existing live animal and meat buyers in MENA and meet regularly to discuss challenges encountered and possible solutions. Moreover, they can also help in identifying potential buyers and establish B2B relations through sector associations. These business-to-business (B2B) actions are inherently win-win in nature, and will build trust in the buyer-seller relationships.

10.3.3. Establishing local intermediaries in cities/sub-cities of countries where embassies exist, and in countries where embassies do not exist

A market intermediary who is also a local service provider (LSP) in each country and city in MENA, and who has the capacity to enhance market linkages and represent MS live animal and meat companies is very useful in penetrating the market segments identified. The LSP could be responsible for promoting both generic and branded programs. Trade councilors can be involved in identifying cities, sub-cities and countries where local intermediaries will be needed and also identify appropriate intermediaries in collaboration with sector associations

11. Action Package

As indicated in the objective above, trade counselors, after going through this manual, are expected to develop an action package to guide their move towards enhancing the export trade of livestock and products from member states of IGAD region to MENA countries. To facilitate development of country-specific action packages, the template below has been prepared. The major emphasis will be on achieving the outputs related to market promotion, information exchange and establishing good diplomatic/business

relationship with government and other stakeholders. Under each output a number of activities and sub activities are identified and people and institutions responsible are also indicated. Trainees are therefore expected to adapt this plan based on their local contexts.

Intergovernmental organizations, competent authorities of member states, sector associations and other stakeholders are also expected to plan their own activities based on the responsibilities attached to them. Monitoring and evaluation of the planned activities will be done regularly by IGAD/ICPALD and MSs.

Action Package

	Objective/Output	Activity	Sub-activities	Institution/person responsible
	<p>Objective: Enhancing the volume and value of livestock and products exported from the IGAD to MENA countries and ensuring that all the stakeholders in the value chain are benefiting in a manner proportional to their contribution</p>			
1	<p>Output1: Improved livestock and products market promotion in the end market</p>	<p>Developing promotional materials for live animals and meat from MS</p>	<p>Assessment of the end market to determine promotional needs Fine-tune and craft the message to be communicated Determine the medium of communication Develop promotional materials (e.g. video clips, posters, fliers) Implementation Impact assessment Adjusting promotion materials developed based on the inputs from the outcome of the assessment Identify quality parameters to be branded for the commodity and MSs Setting standards for the identified quality parameters Developing means of verification for the set standards Implementation including promotion of brands Assessing the impact and adjusting the</p>	<p>IGAD/ICPALD with counselors from member states IGAD/ICPALD with counselors from member states & business communities CVO's, Business communities and counselors IGAD/ICPALD with counselors from member states and to be approved by CVO's of MS and the business community Trade counselors and MS & business community Third party- to be financed by IGAD/ICPALD IGAD/ICPALD with counselors from member states together with the competent authorities of the MS MS, after receiving regional training on the subject Competent authorities of MS - Informed by the assessment made on promotional needs. Competent authorities of MS Counselors IGAD/ICPALD</p>

Action Package

Objective/Output	Activity	Sub-activities	Institution/person responsible
	Participating in food trade fairs	<p>branding strategy accordingly</p> <p>Identify appropriate food fairs for promoting our products</p> <p>Raise funds from business communities and regularly attend trade fairs (leasing the space, setting pavilions, ...)</p> <p>Document lessons learnt from each trade fair and develop action packages to translate lessons learnt into action.</p> <p>Regularly assess the implementation of the plan before the next event</p> <p>Establish regional market information hub at IGAD/ICPALD</p>	<p>IGAD/ICPALD- facilitated by business counselors</p> <p>Sector Associations & MS</p> <p>Sector associations with the support of competent authorities and business counselors</p> <p>MS competent authorities, sector associations and business counselors</p> <p>IGAD/ICPALD</p>
2	Output 2: Enhanced exchange of information on market, quality, regulatory and SPS requirements between the two regions and various stakeholders involved in the chain.	<p>Develop standard formats for collecting regular information on price, preference, market segment, competitors, competitiveness, etc. on live animal and meat export trade</p> <p>Regularly collect and channel the information to the hub</p> <p>Collate, analyze and interpret the information and provide feedback at regular intervals to MSs and the business community</p> <p>Follow up on how the feedback provided is translated into action</p> <p>Develop standard formats for regularly collecting SPS (testing, vaccination, quarantine, certification,... and quality (weight, age, fat layer, packaging, labeling,...) requirements of importing countries</p>	<p>IGAD/ICPALD with MS</p> <p>Business counselors</p> <p>IGAD/ICPALD</p> <p>IGAD/ICPALD with MS</p> <p>IGAD/ICPALD with MS</p>
	Regularly collect market information and providing feedback to users		
	Regularly collect information on quality and SPS specifications		

Objective/Output	Activity	Sub-activities	Institution/person responsible
		<p>Regularly collect and channel the information to the hub</p> <p>Collate, analyze and interpret the information and provide feedback at regular intervals to MS and the business community.</p> <p>Promoting compliance of quality and SPS requirements of importing countries</p> <p>Follow up on how the feedback provided is translated into action</p> <p>Follow up and notify MS whenever there are changes on the regulatory landscape of the importing countries</p> <p>If accepted adapt the new changes in the system</p>	<p>Business counselors</p> <p>IGAD/ICPALD</p> <p>Animal production and health divisions of the MS to translate requirements into doable action plans and ICPALD for backstopping.</p> <p>IGAD/ICPALD and MS</p> <p>Business counselors</p> <p>Competent authorities of MS</p>
<p>3 Output 3: Good diplomatic/business relationships with governments and other stakeholders of the two regions established.</p>	<p>Information sharing: changes on regulatory landscape</p> <p>Strengthen the relationship of the regulatory authorities of importing and exporting countries</p> <p>Facilitate business to</p>	<p>Develop common positions for a regionally harmonized disease management and certification system</p> <p>Negotiate with importing countries on the common positions</p> <p>Conduct regular regional and bilateral meetings and exchange visits when needed, to be concluded with protocol agreements</p> <p>Facilitate approval of export facilities by competent authorities of the importing countries</p> <p>Regularly undertake inventory of buyers</p> <p>Identify existing buyers and undertake</p>	<p>IGAD/ICPALD and MS</p> <p>IGAD/ICPALD together with MS</p> <p>IGAD/ICPALD and MS of importing and exporting countries</p> <p>Business counselors and Competent authorities of MS</p> <p>Business counselors</p> <p>Business counselors</p>

Action Package

Objective/Output	Activity	Sub-activities	Institution/person responsible
	business relationships (B2B)	regular meetings to discuss challenges encountered and possible solutions	
	Establishing local intermediaries in cities/sub-cities of countries where embassies exist, and in countries where embassies do not exist	Identify potential buyers and establish B2B relations through sector associations	Business counselors and sector associations
		Identify cities, sub-cities and countries where local intermediaries will be needed	Business counselors and sector associations
		Identify intermediaries and conclude with formal agreements	Business counselors and sector associations

12. Conclusions/recommendations

The trade counselors noted that the IGAD region is recognized for its vast wealth of livestock. However, available data indicates that exportation of livestock and livestock products from the region is minimal when compared with the potential. Despite the substantial demand for meat and live animals from potential importing countries, exports to those markets often face impediments as a result of stringent SPS and poor market promotion and development.

The limited export has partly been due to limited coordination between the trade counselors, exporters and competent authorities in IGAD member States. The gap has been in terms of real time market information and dissemination on import requirements as well as commodity prices and limited promotional and linkage efforts. The complexities of international markets require that we continue to focus significant efforts on trade facilitation, including market promotion and development and ensuring the region's interests are represented in major and emerging markets. The following are recommendations made by trade counselors to enhance the export of live animals and meat from the IGAD region to MENA countries.

For Trade Counselors

1. Vigorously participate in the collection of essential, timely information related to marketing, SPS, quality and regulatory requirements regarding live animal and meat trade in the MENA region.
2. Utilize efficiently and effectively the promotional materials and branding strategies to be developed, and organize trade fairs to enhance livestock and meat trade.
3. Facilitate linkages and negotiations between competent authorities of importing and exporting countries which could culminate into firm trade protocols.
4. Facilitate linkages and business negotiations between business communities in the IGAD region and trading partners in the MENA region.

For IGAD Member States

5. Support the production of promotional materials that would enhance the live animal and meat trade from MS that meet specific market requirements. The timeliness, content, language, and quality of the promotion material is crucial to achieve the desired objective. Development of the materials should involve all relevant stakeholders including private business operators, chambers, investment commissions, line ministries, and sectoral associations.
6. Encourage private sector investment in the livestock sector, both domestic and Foreign Direct Investment, to bring in the necessary investments, technology, efficiency, technical know-how and management skills that would transform the sector.
7. Develop branding and positioning strategy to maintain and enhance the competitiveness of live animal and meat export to MENA region.
8. Develop and implement programs to formalize cross border livestock trade.

9. Take all necessary measures to comply with current and upcoming SPS requirements and develop quality grade and standards for live animals and meat
10. The Ministry of Foreign Affairs shall avail the necessary budget for trade councilors to undertake activities related to market promotion and information exchange to enhance live animal and meat export trade. The ministry may also request the involvement of the private sectors.

For IGAD/ICPALD

11. Assist competent authorities and business community in development of sustainable national and regional information hub to collect, collate, analyze and disseminate information related to market, SPS and quality requirements and regulatory requirements.
12. Build the capacity of MS to comply with growing SPS and quality requirements of their trading partners in MENA region and in development of a branding strategy.
13. Harmonize regional disease management, surveillance, laboratory and certification procedures among IGAD MS and negotiate this common position with MENA countries.
14. Create a focal point to be supported by IGAD ICPALD and attached to one of the member state embassies that will serve as a coordination hub for promotion and information sharing.



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