



Institutions and policies to implement the Ethiopia livestock master plan

Over the last two decades, Ethiopia has transformed its agricultural sector – as set out in the 2010–2015 Growth and Transformation Plan (GTP I) and its successor, the 2015–2020 GTP II. The absence of clear roadmaps to develop the livestock sector has hindered successful implementation of these investment plans. Despite significant progress in increasing livestock production, analysis of livestock production and consumption show a huge shortfall in the supply of livestock products. In the absence of investment, these gaps will grow, causing food insecurity and other important economic and social repercussions. Detailed inter-disciplinary research provides clear empirical evidence of the potential benefits of a comprehensive livestock master plan (LMP) for Ethiopia.

With rapid population and income growth, and increasing urbanization, the demand for livestock products is growing, presenting huge opportunities for the sector and the overall economy. The proposed investments of 7762 million Ethiopian birr (USD 388.1 million), set out in the LMP have the potential to improve productivity and total production in key poultry, red meat, milk, and crossbred dairy cow value chains.

Using the most recently available data, from 2013, the Livestock State Ministry (LSM) and the International Livestock Research Institute (ILRI) used a Livestock Sector Investment and Policy Toolkit (LSIPT) to develop herd and sector models and a baseline assessment of the current

state of agricultural development in Ethiopia. This was used to assess the potential long-term, 15–20 years, impact of proposed combined technology and policy interventions, referred to as the livestock sector analysis (LSA).

The LMP was formulated from empirical evidence generated by detailed LSA and value-chain studies of poultry, crossbred dairy cattle and red meat and milk (from indigenous cattle, sheep, goats, and camels). The LSA and the LMP identified promising areas for investment in the livestock sector. The ex-ante assessments based on biophysical and socio-economic simulation analyses, undertaken as part of the LSA, demonstrated the technical and financial viability of the proposed investments, following the completion of a cost-benefit analysis.

A critical dimension to realize these results is an enabling (institutional and policy) environment, facilitating the realization of the proposed investments.

Livestock policy and institutional constraints

The strategies presented here were developed from a review of key policy documents, government directives, regulations, laws, targeted interviews, and a review of the LSA and research papers. The findings show that relevant national policies exist but they are held back by a lack of enforcement capacity and the need to update older policies.

The LMP identifies the following institutional and policy issues for attention:

Land policies

- The main land issues in Ethiopia are its availability and accessibility. In the highlands, where the road infrastructure is relatively developed, land availability is very limited. Conversely, land is available in remoter lowland areas, but accessibility is limited. This shortage of land for animal feed production is a critical constraint in livestock production. Given that land in Ethiopia is the property of the government and farmers and others only have the right to use it, increasing land availability for animal feed production depends on security of land use rights. Land contracts for investment purposes should be clearly regulated, creating clear rights and responsibilities for those who hold the right to use land and sub-contractors.

Agricultural research

- The different organizations undertaking livestock research in Ethiopia have mainly focused on the improvement of primary livestock production. Research on secondary production, like processing and food manufacturing is essential to improving the productivity and competitiveness of the sector.

Capacity building

- The LMP and LSA were conducted with the support and collaboration of ILRI. The LSM needs to build in-house capacity to conduct similar analyses after the current one has expired. It needs institutional capabilities to generate and compile statistics which facilitate the monitoring and evaluation of the impact of new investments, and policy and institutional changes. The establishment of a suitably resourced livestock policy support unit is essential.

Animal health

- Ensure an efficient deployment of resources by clarifying the roles of public and private animal health service providers, and delegating the provision of certain activities, as well as offering loans, to the private sector.
- Introduce on a pilot basis an animal identification and traceability system, testing effectiveness and acceptability by trading partners before upscaling and establishing a national livestock registry and traceability databank.
- With other agencies and levels of government, develop feasible, adequately and sustainably resourced, and cost-effective control and prevention strategies for priority diseases based on their importance to trade, livelihoods and the risk of zoonotic exposure, ensuring clear decision-making authority and accountability during an animal health emergency.

- Harmonize upwards the quality of veterinary education in Ethiopia, offer incentives to private sector employers hiring young graduates and restrict entry of students to match labour market demand.
- Establish an appropriate system to regulate livestock movement in the country, reducing disease transmission.

Dairy

- Implement the existing draft breeding policy, ensuring adequate attention is paid to genetic improvement of dairy cattle of remote and poor smallholders.
- With all relevant stakeholders, implement the draft dairy board establishment document and develop the national dairy development strategy.
- Revise quality standards, and develop a regulatory framework on a pilot basis for the Addis Ababa milk shed, offering incentives to producers to raise quality standards and increasing consumer demand for safe milk.
- Introduce a voluntary milk-recording scheme to develop reliable production records that facilitate on-farm selection and activities undertaken at genetic improvement centres (such as artificial insemination and bull stations).

Poultry

- Establish a clear policy defining the role of private and government interventions, ensuring a level playing field between private and public sector actors, and facilitating the growth of existing commercial producers and the entry of new producers throughout the value chain.
- Enhance the quality of inputs (e.g. vaccinations, feeds, credit etc.) and their respective delivery systems by promoting public-private partnerships, reduce VAT rates on raw materials/ ingredients etc., and facilitate land allocation to poultry farms.
- Strengthen the poultry disease control system by reinforcing disease diagnostic capacities and epidemiological services, establishing compensation and contingency plans in the case of contagion, and enforcing stricter controls on the importation of commercial stocks.

Hides and skins

- Implement clear and applicable regulations including an objective leather quality grading system and encouraging supply chain actors to improve the quality of their outputs by way of incentives, protocols, etc.
- Encourage the promotion of flawless hides by ensuring abattoir staff are trained in handling procedures and producers gain access to appropriate chemicals to control ecto-parasites and disease-driven skin quality deterioration.

- Establish public and private sector stakeholder consultation platforms to discuss key policy issues, including the development of market information flows on prices of hides and skins for producers and traders, and the implementation of regulations encouraging reductions in waste and tannery effluent.
- Implement hides and skins trade proclamation No. 457/97 by raising awareness of its benefits to producers and traders, institutionalizing the regulation in the relevant sector bureaus nationally, and issuing regulations on the uniform and timely implementation of the proclamation in all regions and city administrations.
- Enhance attention to policies, strategies and programs on pastoral development, addressing the risks related to drought and flood and resource conflicts, and safeguarding access, administration and use of pastoral land.
- Introduce and enforce regulations to support the effective functioning of livestock trade corridors designed to mitigate the effects of drought, including resources to build necessary infrastructure (e.g. water points, feed storage facilities, etc.) and mobilize the active involvement of communities in the governance of protected corridors.
- Improve understanding of the resilience and adaptive capacity of drylands by publishing information on production practices, marketing decisions, and linkages of the pastoral sector to the larger economy.

Live animals and meat

- Train and certify graders and empower them with statutory powers to enforce the use of demand-driven quality grading for meat and live animal pricing.
- Enforce the use of designated live animals transport measures and refrigerated trucks in meat transport.
- Develop or enforce standards on and incentives for feedlot management, building the capacity of feedlot operators, including the design, management and operation of feedlots, best-cost ration formulation and feeding management, and livestock trade and related requirements.
- Develop guidelines and directives, within the framework of the regional initiatives like the AU framework on pastoralism, to formalize cross-border trade, ensuring policy decisions on livestock trade are based on a cost-benefit analysis.

Pastoral and agro-pastoral areas

- Strengthen sustainable pastoral and agro-pastoral production through the introduction of policies facilitating the availability of timely and reliable market information, and modalities supporting cross-border livestock marketing, as well as assisting pastoralists in understand market trends and substantially extending the role of customary institutions in influencing policy, legal and institutional frameworks.

Breed improvement

- Improve the genetic potential and productivity of the national herd by using artificial insemination (AI) and oestrous synchronization of crossbreds and local cattle, establishing a quality system of progeny testing and selection of AI bulls, strengthening an operating system that guarantees the supply of quality semen and other inputs, and promoting local breed improvement via selection within breeds.
- Encourage through the provision of grants and loans the gradual development of private provision of AI services, increasing national coverage of quality, efficient and cost-effective services to small farmers, while guaranteeing public delivery, including through the provision of technical and financial incentives to rural AI workers in remote areas where private provision is unviable.
- Facilitate linkages between producers and buyers to create awareness of the needs of both, and establish a modality to facilitate the use of oestrous synchronization and AI with local breeds for big herds in pastoral areas in order to increase calf birth rates.



Background to the LMP

Since 2014, the Livestock Resources Development Sector (or Livestock State Ministry) of the Ethiopian MoA and ILRI have been collaborating to develop a livestock master plan (LMP) to provide guidance to the government of Ethiopia on future priorities for livestock research and development activities.

The LMP project development process was funded by the Bill & Melinda Gates Foundation (BMGF). Beyond the plan itself, the project aims to build the capacity of the government to carry out data-driven, fact-based analytics and planning.

The LMP was developed by a joint team from ILRI and the MoA. Development was overseen by a high-level technical advisory committee (TAC) comprising directors of key MoA Livestock State Ministry departments and institutes, as well as representatives from the Food and Agriculture Organization of the United Nations (FAO), the Intergovernmental Authority on Development (IGAD), the Ethiopian Agricultural Transformation Agency (ATA) and the presidents of the relevant professional associations of livestock experts (the Ethiopian Society of Animal Production and the Ethiopian Veterinary Association).

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