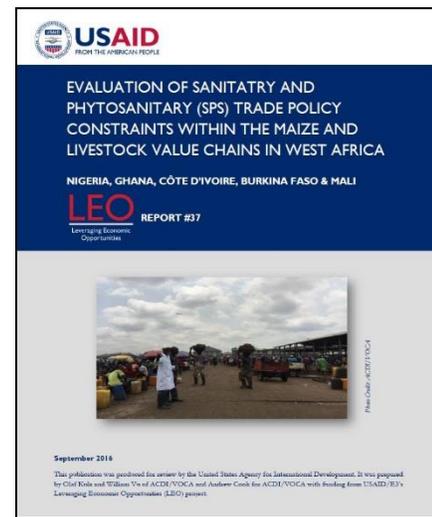


EVALUATION OF SANITARY AND PHYTOSANITARY (SPS) TRADE POLICY CONSTRAINTS WITHIN THE MAIZE AND LIVESTOCK VALUE CHAINS IN WEST AFRICA

BRIEF 2: LIVESTOCK VALUE CHAIN

USAID's Bureau for Food Security commissioned the study *Evaluation of Sanitary and Phytosanitary (SPS) Trade Policy Constraints within the Maize and Livestock Value Chains in West Africa* through the Leveraging Economic Opportunities (LEO) project¹. The study is one of three regional assessments carried out in East, Southern, and West Africa regions to identify key SPS-related constraints to trade within priority Feed the Future value chains, in order to gauge opportunities for potential SPS-related investments. The West Africa study covered Nigeria, Ghana, Côte d'Ivoire, Burkina Faso, and Mali. This brief identifies and details major SPS issues in the livestock industry - which includes cattle, small ruminants, and poultry - in West Africa.



SPS TRADE CONSTRAINTS

Cattle & Small Ruminants

Better vaccination schemes. Though ruminant health has improved markedly over the decades, by international standards, it is still poor. Governments organize national vaccination campaigns against the major infectious diseases but coverage sometimes does not reach the roughly 80 percent level that achieves herd immunity.

Difficulties of setting up private veterinary practices.

Though ECOWAS countries encourage veterinarians to set up in-private practice, the cost of doing so limits this. Therefore veterinary clinics are rarer in more remote areas, leading to limited veterinary care and more frequent recourse to the use of informal-sector veterinary medicines. On the livestock side, bovine, small ruminant, and avian diseases reduce productivity and increase mortality by as much as 30 percent.

SPS standards and practices are still too poor to generate exports internationally from West Africa in the short-term. Promotion of trade will need to be focused at the national- and regional-level.

Slow approval of veterinary medicines. In Burkina Faso, the government has been slow to approve imports of a range of veterinary medicines for different needs. The delays create less competition in the domestic market between substitutable products and thus keeps prices high. Herd owners react by using fewer approved products and by drifting towards using unapproved, illegally imported drugs that may be inert or harmful. Animal health consequently suffers.

¹ For more information on LEO, and to access the full studies for East, West, and Southern Africa, visit www.microlinks.org/leo.

Need for better border-post control for veterinary health. Most border posts lack quarantine facilities, which have largely fallen into disuse or disappeared since the eradication of rinderpest in the 1990s. So border animal-health checks prove meaningless and personnel are sometimes stretched between multiple posts rendering quality monitoring challenging.

Need for improved domestic vaccine production, management, and distribution. Domestic vaccine production in these countries is extremely limited, leading to oftentimes fractions of targeted figures (aforementioned roughly 80 percent) for effective control of diseases. Low production levels stem from factors such as meager public funding, poor maintenance of vaccine manufacturing machinery, and unreliable and costly resources (e.g. electricity and water) needed for its manufacture.

Poor SPS standards and practices inhibit exports from West Africa in the short-term. Buyers from the Middle East and other African nations have expressed interest and even developed strategies to partner with ECOWAS countries to purchase slaughtered sheep and goats, yet have been deterred after viewing the abattoir facilities and the conditions and practices for slaughter. Potential for large-scale exports exists, but will require significant upgrades. Abattoirs and slaughter slabs are sites of contamination of non-diseased carcasses by diseased ones. Disposal of diseased animals is poorly controlled. Until one member either builds and operates an abattoir meeting these countries SPS standards, or creates the conditions favorable for investment in one, this potential opportunity remains untapped.

Traceability systems do not exist, yet a growing and wealthier middle class care about the origins of their meat. The absence of a traceability system for livestock stems from several reasons, one being a multi-link value-chain from a herder in the Sahel to a consumer in a coastal country, making obtaining and tracking information challenging and unreliable. However with increases in income growth and urbanization in these countries, consumers will likely demand more information about the origins of their meat and ensure it is uncontaminated.

Poultry Value Chain

Most West African countries are far from being self-sufficient in poultry production and will need to rely on imports as consumption of poultry continues to grow. In parallel with red meat consumption, as consumers become wealthier in West Africa they will purchase more white meat. Domestic production of layers and broilers proves still starkly insufficient, and countries such as Ghana will need to depend on international imports unless they can produce significantly more maize.

Sixty to seventy percent of the cost of poultry production is maize feed. With sourcing of most maize feed from coastal countries where humid conditions are more conducive to aflatoxin, detecting and controlling the spread of this mycotoxin becomes a challenging problem. Poultry producers suffer due to the mortality and morbidity of their birds, and consumers suffer from the cost to their health.

Avian influenza and similar epidemics can lead to decimation of a country's poultry sector for extended periods of time. Without effective biosecurity measures, epidemics such as the avian influenza can emerge or re-emerge. Producers are forced to destroy their entire flocks and abandon their livelihoods, often with low compensation rates and delays in payments. These epidemics severely affect all actors along the value-chain, with consumers reducing their demand for white meat until the disease has been stamped out.

INVESTMENT OPPORTUNITIES

Given these findings, the table below identifies, consolidates, and proposes the priority and general investments to address the SPS issues pertinent to the livestock value chain. These investments to remove SPS barriers to trade cover the public and private sectors. A more detailed explanation of the investments can be referenced in the report.

Table 1 - Investment Opportunities in the Livestock Value Chain

	Investment	Target countries
Priority	Re-establish para-vet system under supervision of licensed veterinarians public &/or private. Para-vets or community animal health workers equipped with vaccines and trained in their use could greatly increase animal vaccination rates, but attention needs to be paid to ensuring such enterprises are financially viable.	Nigeria, Ghana, RCI, Burkina Faso
	Support value upgrading of Sahelian livestock chain near urban centers, including fatteners, breeders investing in cross-breeds, improved feed and fodder mixes, and traceability to provide regional supermarkets with a higher quality and disease-free product.	Initially Mali, Burkina Faso, Côte d'Ivoire, Ghana, Nigeria, and then rest of ECOWAS.
	Provide cost-share grants to support private abattoirs to upgrade and obtain quality standards for high-end domestic and export markets.	Nigeria, Ghana, RCI, Burkina Faso
	Train lenders and small-scale poultry producers in bio-hazard and other sanitary controls.	All West Africa countries

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