

Pastoralist Livelihoods Initiative

# Livestock Marketing and Animal Resources in Sudan

## Report of a Study Tour by Ethiopian Policy Makers



July 2008

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## Executive Summary

As part of the capacity building support under the Pastoralist Livelihoods Initiative (PLI), Tufts University in collaboration with the Ministry of Agriculture and Rural Development (MoARD) organized a study tour for Ethiopian policy makers and technical authorities from the MoARD, Ministry of Federal Affairs and three regional states namely Afar, Somali and Oromiya regional states, to the Sudan from 4<sup>th</sup> to 9<sup>th</sup> June 2008. The main purpose of the study tour was to expose Ethiopian policy makers the ways in which Sudan supports animal resource development and livestock marketing systems, through mechanisms such as animal health services, credit facilities and other mechanisms. It was also known that Sudan has a central ministry dedicated to animal resources.

The study tour was formally welcomed by His Excellency Major General Ismail Khamis Jallab, the State Minister of the Federal Ministry of Animal Resources and Fisheries, the Republic of Sudan. During their stay in Sudan, the study tour members visited and held technical discussions with relevant policy makers, technical officers and implementers from the following organizations:

- General Directorate of Animal Health and Epizootic Diseases Control (visit to the headquarters at Soba)
- General Directorate of Foreign Trade in the Ministry of Foreign Trade
- General Directorate of Quarantine and Meat Hygiene (visit to quarantine, slaughterhouse and meat, hygiene and grading training centre)
- General Directorate of Animal Resources Services Company and visit to Mueilh (Omdurman) livestock market
- Animal Resources Bank
- Live Animal and Meat Exporters Associations, Chamber of Commerce

## Key Lessons Learned

Based on the discussions and explanations from the visited organizations, the delegates have identified the following lessons from the study tour:

1. The Sudan government has recognized and appreciated the importance of the livestock sector to the national economy and the livelihoods of its people. For that reason the government has created Ministry of Animal Resources and Fisheries to promote and improve animal production including fisheries, so as to give it a paramount role in the national economy and welfare of the population. In addition, appropriate policies were issued and adopted in consultation with all relevant stakeholders, and required institutions were put in place and legal provisions enacted and enforced to ensure smooth implementation of the policies.
2. The mission also understood that the Federal Ministry of Animal Resources and Fisheries has developed a well organized, coordinated and integrated animal health services delivery system at federal level and regional States. The ministry has also established an effective administrative structure for animal health services capable of ensuring the chain of command, defining the procedures to be followed and delegation of authority. The disease surveillance and early warning system is well organized and works efficiently as a result of good linkages and coordination. Several acts, rules and regulations are enacted with regards to animal health service delivery and disease control. The ministry has developed a strong inspection, quarantine, meat grading and processing systems with sufficient manpower and certification system.
3. The Federal Ministry of Animal Resources and Fisheries in Sudan has also demonstrated a well organized and managed marketing system e.g. the existence of primary, secondary and terminal markets with large and sufficient holding grounds. Market infrastructure is

administered by the private sector, and revenue is shared between private sector (40%) and government (60%). These market centres are functioning as a parastatal company.

4. An Animal Resources bank was established with partnership of public and private sector to assist the improvement of some livestock services to make them viable and economically self sustainable. The intention is gradually reduce the involvement of the government role and hand them over to the private sector through time when the situations permit.

### **Recommendations from the Study Tour team**

Although there are already some very positive changes in Ethiopia in terms of livestock production and export performance as well as the delivery of support services, the following recommendations are suggested after a thorough evaluation of the lesson learned from the study tour.

1. There is a need to establish a credible, responsible, viable and strictly accountable institution for livestock resources as a whole, at federal and regional levels.
2. There is need for broader consultation and direct involvement of the regional states in the development of a strategy to revitalize and strength the relationship and linkages between the regional states and the federal veterinary services.
3. The Ethiopian government has to avail sufficient land to establish a well-functioning quarantine station to support livestock export marketing. This quarantine station should aim to increase trade and deliver high quality and healthy livestock at very competitive prices to the consumer.
4. Establishment of relevant financial institutions governed by rules and regulations appropriate to Ethiopia is a priority. The participation of traders, pastoralists and their representatives, and government would be beneficial.

Finally, the participants of the study tour unanimously agreed that the tour has provided enormous lessons that are beneficial and can be implemented at home.

### **Outcomes**

One outcome of the study tour was feedback by participants from Oromiya region to the Oromiya Region President. In July 2008, the Oromiya Region Council endorsed the establishment of a new bureau for supporting livestock development – the Livestock Resources Development and Marketing Agency. This will help to overcome a common problem within agriculture ministries viz. that livestock is viewed as secondary to crop production. The initiative is also likely to greatly assist pastoralists in the region, who are highly dependent on livestock.

## 1. Introduction

The Pastoral Livelihoods Initiative (PLI) program aims to mitigate the impact of drought and other shocks by sustainably improving preparedness, livelihoods and incomes of pastoralists in three regions of Ethiopia viz. Afar, Oromiya and Somali. The program combines direct field level implementation of improved herd productivity and management to optimize use of available rangelands; early warning systems appropriate to pastoralist production systems that are linked to practical drought contingency planning from community level upwards, improved livestock marketing efficiency that benefits pastoralist livestock owners and finally strengthening the enabling policy environment through policy process to support and guide all these innovations and technical coordination.

Within PLI there is scope to provide capacity-building support to federal and regional governments. This support may take the form of 'hard' inputs such as equipment and 'soft' inputs such as trainings, workshops and study tours. Given the strong learning and policy component of PLI, there is an opportunity to use capacity-building support to both strengthen technical knowledge and skills, and complement the policy processes currently underway in PLI and other programs in Ethiopia. A priority area for Ethiopia to use this capacity building support is in the area of improving provision of veterinary services, and the need to develop coherent federal and regional animal health strategies.

Another important area for Ethiopia is the need to improve the understanding of issues related to livestock marketing and trade, and opportunities afforded by commodity-based approaches such as those currently under review by the Office international des epizooties.

In order to complement the existing initiatives and as part of the support to policy changes activities, the Feinstein International Center (Tufts University) in consultation with Ministry of Agriculture and Rural Development (MoARD) organized a study tour for senior-level policy makers and technical authorities from MoARD and three regional states namely Afar, Somali and Oromiya regional states, to look specifically at the issue of livestock marketing, trade and other related issues the provision of animal health services in the Sudan. Sudan was chosen due to its vast experience in the areas of livestock marketing and trade and the provision of animal health services.

This report summarizes the study tour in Sudan, conducted from 4<sup>th</sup> to 9<sup>th</sup> May 2008.

## 2. Objectives of the study tour

- To expose the Ethiopian policy makers to animal resources and livestock marketing system in the Sudan
- To gain an understanding of the ways in which the government of Sudan support livestock resources development and livestock marketing through animal health, credit facilities and other mechanisms.
- To draw lessons from the Sudan which might be applicable to animal resources and livestock marketing systems and policies in Ethiopia.

## 3. Itinerary

3-4/05/08	Arrival in Khartoum and meeting with Dr. Ahmed Hassan (the Coordinator for the Study Tour in Sudan)
5/05/08	Courtesy visit to HE the Minister of Federal Ministry of Animal Resources and Fisheries (FMOARF); visit to Animal Health and Epizootic Disease Control (AHEDC)

6/05/08	Meeting with Undersecretary MOFT; visit to Quarantine, Meat training centre and Kadaro slaughterhouse
7/05/08	Visit the Mueilh (Omdurman) livestock market
8/05/08	Visit to Animal Resources Bank; meeting with live animals and meat exporter; final meeting with the Undersecretary FMOARF and MOFT
9/05/08	Discussion and analysis of lessons learnt by the Ethiopian delegation and departure to Addis Ababa

#### 4. Members of the Ethiopian study tour to the Sudan

Mr. Habtamu Teka Keba	Commissioner, Oromiya Pastoral Areas Development Commission; Team Leader
Mr. Abdeta Yadeta Wayessa	Oromiya Pastoral Areas Development Commission
Dr. Asegid Shiferaw Beyene	Head, Animal and Plant Health Regulatory Director, MoARD
Mr. Awwal Arba Undie	Head, Afar Pastoral Agriculture and Rural Development Bureau
Dr. Gezahegn Eshete Beyene	Head, Animal Health Department, Afar Pastoral Agriculture and Rural Development Bureau
Mr. Abdureshid Sherif Mohammed	Bureau Head, Somali Livestock, Crop, Natural Resource Development Bureau
Dr. Abdu Hakim Mohammed	Head, Animal Health Department, Somali LCNRD Bureau
Mr. Gifawosen Tessema Bezabeh	Head, Department of Coordination for Somali Region, Ministry of Federal Affairs
Mr. Chane Gebeyehu Turi	Head, Department of Coordination for Afar Region, Ministry of Federal Affairs
Dr. Berhanu Admassu Abegaz	Senior Policy Advisor, Tufts University

#### 5. Details of meetings, events and visits

##### Monday 5<sup>th</sup> June 2008

##### Meeting with His Excellency Major General Ismail Khamis Jallab, the State Minister, Ministry of Animal Resources and Fisheries

Dr. Ahmed Mustafa. Hassan introduced the mission to the Minister and invited the team leader of the mission to introduce the objectives of the mission.

Commissioner Habtamu Teka, the MoARD delegate team leader introduces the Ethiopian study tour team members to the state minister and briefly introduces the objectives of the mission. The commissioner underlined the Ethiopian potential in livestock production and highlighted the gaps in knowledge and practices. Ato Habtamu expressed his believes that the Ethiopian delegates will greatly benefit from the Sudan's vast experience in the areas of Livestock Marketing and Trade and the provision of Animal Health Services.

The Minister, H.E. Major General Ismail Khamis Jallab, once again welcomed the visiting team to Sudan and expressed his thanks to the delegates for coming to Sudan. In his welcoming speech, His Excellency the state minister noted the good relationship and historical relationship of Ethiopia and Sudan people in their civilization and natural resources.

H.E highlighted Sudan's government commitment to improve such well-heeled relationship. The Minister anticipated that in the future this relationship could be enhanced into bringing the two brotherly countries to become into one country and one people. The Minister pointed out the story of Sudan's government decision to separate the animal resources management from the ministry of agriculture and created the ministry of animal resources and fisheries. The reason why the government desperately separates the two ministries was; though Sudan is endowed with a large number of livestock which is one of the important economic resources; the sector has been marginalized for far too long in terms of policy attention as well as investment. This resource is a real resource and is considered as a backbone of the country's economy and requires exceptional management and attention.

His Excellency, further pointed out that in Sudan Livestock are raised mostly under pastoral, agro-pastoral and village-based systems of production. In the pastoral and agro pastoral systems seasonal movement between wet and dry season grazing lands are common practices. The utilization of the rangeland for grazing by different tribal groups is based on traditional rights .The major goals in pastoral systems are to assure subsistence for the community and to reduce the negative impact of diseases and drought on livestock population by maximizing livestock numbers. Our rangeland is a cheap source of livestock feed but is vulnerable to draught and exhibit marked seasonal fluctuations in quantity and quality.

The state minister pointed out that the livestock sector is now given more attention and in the five year strategic plan a priority is given to this huge resource. There are attractive opportunities for investment in supporting services including construction and operation of modern slaughter facilities and development of cold chains in meat processing sector. Focus of future government funding for services in livestock farming will be on public goods that are needed for efficient growth of the sector such as rural infrastructure, research, extension, epidemic disease control.

In fact the livestock sector is in urgent need for modernization to remain competitive in the existing export markets and to enter new markets. To encourage modernization of the agricultural sector the government issued the investment encouragement act in which investment projects in the livestock sector are considered strategic projects and therefore enjoy many privileges.

HE said that he may not talk detail on technical issues. Rather he suggests that the mission will have sufficient time and chance to discuss in detail with his technical General Directorates and other ministries.

Finally HE the state minister wishes the delegates to channel what they would have seen and learnt, both weaknesses and successes, to enhance the improvement of livestock services provision in Ethiopia.

Following the welcoming speech, major technical discussion was held after detailed briefings from relevant general directorates and other offices that have direct and indirect involvement in livestock development activities in Sudan.



## **Meeting with Animal Health and Epizootic Disease Control General Directorate staff, in Soba, south Khartoum, 17 km from the FMAR&F**

The mission was welcomed by Dr. Mohammed Abdul Razik, the GD and he gave a brief talk on the organogram, current activities, proposed projects and strategic plan supported by a PowerPoint. According to Dr. Mohammed his general Directorate has three directorates;

- Directorate of animal health which encompasses the therapeutic centres and field diagnosis,
- Directorate of Epizootic Disease Control which encompasses the epidemiology and field operations
- Directorate of Veterinary drugs which encompasses the registration and control.

166 veterinarians, 6 technologists, 5 Chemists and 20 technicians and other supporting staff are working under the GD.

After the presentation members of the mission held discussions, asked questions and received clarifications. Based on the discussions and clarifications the delegates have identified the following lessons learnt from the study tour

### *Strengths*

- Has developed 25 years strategic plan
- Well organized, coordinated and integrated animal health services delivery system at Federal, State and locality level and linkages from federal to the 26 regional states. Employees in the states are accountable to the states and technically accountable to the federal government
- The general information system, surveillance and early warning is well organized and work efficiently. The passive surveillance reporting rate is 100% for the last 3-4 years.
- The presence of sufficient number of veterinary professionals at federal and state level. The composition of professionals in terms of gender is well addressed. Female veterinary professional has higher participation.
- Veterinary drug and equipment administration and control is purely the responsibility of the Federal Animal and Fisheries Ministry
- Development of efficiently working mobile animal health units which are responsible for treatment and vaccination, simple and quick diagnostic service and animal health extension work.
- Several acts, rules and regulations enacted with regards to animal health service delivery and disease control.
- PACE is operational with strong governmental and EU financial support.
- Establishment of a well marked and functioning disease free zone to facilitate international trade.

### *Weaknesses*

- Cost recovery has not given attention.
- The issue of subsidizing of the veterinary services not clearly presented
- Centralized way of veterinary service delivery
- Animal health research not mentioned
- Private animal health services delivery is very weak only focused on pharmaceutical business and only few clinical works.

**Tuesday 6<sup>th</sup> June 2008**

## **Visit to the Ministry of Trade**

This meeting was scheduled that the delegates would meet with the Undersecretary for Foreign Trade but we were informed that the Undersecretary was unable to attend the meeting due to other commitments. The team were grateful that Mr Hashim Fetehala, the General Director for the Foreign Trade, managed to step in at the last minute to meet with the team.



Dr. Ahmed Mustofa Hassan, the facilitator of the mission, introduced the mission and passed it over to the team leader. Ato Habtamu thanked Mr. Hashim for hosting us at such short notice and spoke about the mission objectives and asked the director how does his Directorate play role in the integration and interfacing with other institutes with regards to the livestock trade and facilitating transportation. We keep the list of exporters and share the information with other ministries.

Mr. Hashim stated by thanking the team and presents and noted from the outset that his ministry is very much concerned about the livestock sector. The further development of livestock and livestock product is his ministry's priority at the moment and there is a well coordinated relationship with other ministries such as Ministry of Animal Resources and Fisheries. Since 1904 Sudan is exporting live animal and meat to our traditional markets and trying to access other foreign markets. Recently the ministry has sent marketing missions to Egypt and Saudi Arabia and others.

The government has got lots of relevant marketing and trade information but weak in terms of its use for the delivery of necessary services. The traditional animal husbandry practices in the country are a serious problem that needs to be addressed.

Our ministry is concerned about some of the constraints that the animal resources experience.

- The transportation system is the most challenging and is based on traditional way. Infrastructures are also least developed. The distance between the primary production sites to the export port is far too long. This by itself requires a specialized long size vehicle to carry animals from far distances especially at pick market during Haji period.
- Multiple taxation between the production sites to the port.
- Infrastructures are not well developed and we are depending on traditional way of exporting.
- Financial limitation

#### **Meeting with Quarantine and Meat Hygiene General Directorate staff (the visit was to the Quarantine, Kadaro slaughterhouse and Meat, Hygiene and grading training centre)**

The mission was welcomed by Dr. Abdel Monueium Bayomi, the GD and he opened the meeting with a brief introduction to the mission and passed it to Mr. Habtamu to introduce the team members and the objectives of the mission.

After the introduction various issues were raised and discussions and explanations were undertaken. After the delegates have visited the quarantine facilities, abattoir and meat grading training centre the following strengths, weaknesses and lessons were noted.

#### *Strengths*

- Well established quarantine facilities in an area of 40 hectares of land
- Inspection from purchase area to terminal quarantine service
- Sufficient manpower assigned to the quarantine services (more that 600)
- Certification system of livestock movement from producers to terminal markets with strict by-laws
- Strong meat inspection supported by efficient laboratory diagnosis and quality control
- Meat grading and processing system established
- Well defined livestock routes and check points at state level
- Well organized transport facilities for livestock marketing
- Regional training centre for meat inspection, hygiene and grading was established 1984
- Presence of model abattoir



Meeting with Federal Pastoral Association under the President's Office



Meeting with Undersecretary, Federal Ministry of Animal Resources and Fisheries



Farewell session and meeting with Adviser to the State Minister and colleagues, Federal Ministry of Animal Resources and Fisheries

### *Weaknesses*

- Internal quarantine facilities are not entirely fulfilled and need rehabilitation
- The infrastructure established is underutilized
- Absence of proper shade in the quarantine / holding pens

**Wednesday 7<sup>th</sup> June, 2008**

### **Visit to the Mueilh Market Training Centre and Omdurman Livestock Market**

#### *Strengths*

- The existence of market training centre
- The undertaking to grade meat based on quality and cut
- Capacity building for technical work both the private and public sector
- Meat quality control based on bacterial count and measurement of PH practiced
- Well organized market centre for auction
- Market infrastructure administer by the private sector in which case revenue is shared between private sector (40%) and government (60%)
- The existence of primary, secondary and terminal markets with large and sufficient holding ground
- The presence of checking, admission and keeping / holding of the livestock
- Market centre functioning as a parastatal company

#### *Weaknesses*

- Livestock sales not based on weight, age and sex
- No veterinary service delivery observed
- More government service delivery that is of profit making to encourage the private sector
- Existence of multiple taxation
- Incapability of control of illicit trade
- Marketing has not better benefiting the livestock producing communities at large

#### Omduraman Livestock Market





**Thursday 8<sup>th</sup> June 2008**

### **Visit to Sudan Animal Resources Bank**

#### *Strengths*

- The presence of this unique bank by itself is an achievement. it was established in 1993
- The bank basically finances the livestock sector related to livestock development such as support importation of veterinary inputs and feeds etc.
- Shareholders are composed of individual pastoralists and high level companies
- The linkage and relation of the Bank with other financial institutions and civil societies is strong
- The absence of material collateral which is replaced by personal collateral such as reputable people and community leaders
- Low interest rate (8-10%)
- Operates combining conventional and Islamic financial credit system
- The commitment of the Bank to joint venture livestock export with traders, micro financing of producers and collaboration with scientific research funding
- The financial system has a short (one year), mid up to 2 years, and long term more than 2 years

#### *Weakness*

- A lot will be expected from the Bank to specialize in livestock marketing exporters, producers and researchers
- The Bank is more of commercial oriented than development
- Sometimes finances non livestock activities

### **Visit to the Live Animals and Meat Exporter Association**

Dr. Ahmed M. Hassan, the facilitator of the mission, opened the meeting with a brief introduction to the mission and passed it to the team leader of the mission to introduce his delegates to the meeting and the objectives of the mission.

The forum was then given to the secretary general of the association, a man with an imposing presence who spoke through an interpreter. The Secretary General introduced the association that deal with a variety of issues that affect live animal and meat export. The Secretary General emphasises that the major problems encountered in Sudan are:

- Shortage of feed and fodder, in which he believe that is available and cheaper in Ethiopia.

- Price rise in Sudan is now affecting the business. for example in earlier times he mentioned that three barrel of oil was equivalent to one sheep, but now it turn out to be that one barrel of oil is equivalent to one sheep
- Multiple taxation is also affecting the business seriously.

Member of the associations agreed that such type of mission will help the two countries to collaborate on marketing and trade issues. They mentioned that by and large prices are cheaper in Ethiopia compared to Sudan. Sudan has better facilities and Ethiopia lacks port and experience. Therefore it will be reciprocally beneficial if we start joint venture and improve the cross border trading. The custom problems on cross border trading require attention on both sides. Information sharing and exchange visit mission like this one can improve our collaboration. Very recently member of the Sudan trade associations have visited Ethiopia. They visited places like Nazareth, Jimma and Diredawa. In general livestock prices are cheaper in Ethiopia and the mission concluded Ethiopia could be a potential source of livestock for trade.

## **6. Lessons learned from the study tour**

The delegates have conducted a meeting on Friday 9<sup>th</sup> June 2008 in order to be able to assess whether this five days study tour to the Sudan was beneficial, to draw positive lessons learned from the study tour and come up with the way forward to strengthen the livestock marketing and animal health services delivery initiatives in Ethiopia.

### **General lessons from the study tour**

- The Government of Sudan has recognised and appreciated the importance of the livestock sector to the national economy and the livelihood of the rural people. As a result of this thinking the Ministry of Animal resources and Fisheries was created.
- The Government of Sudan demonstrated wholehearted commitment and internalized the sector as a source of income/economic backbone and thereby a means of livelihoods of pastoralists as well as the nation (as domestic revenue and foreign currency)
- Proven coordination of line ministries and down line ministries at regional level with regards to the national key resource base.
- Appropriate policies were issued and adopted in consultation with all relevant stakeholders.
- Required institutions were put in place and legal provisions enacted and enforced to ensure smooth implementation of the policies.
- The Animal Resources Bank was established with partnership of public and private sector to assist the improvement of some livestock services to make them viable and economically self sustainable. The intention is gradually reduce the involvement of the government role and hand them over to the private sector through time when the situations permit.

### **Lessons related to animal health**

- The necessity of mobile animal health service delivery particularly to the pastoral communities.
- Veterinary drugs and inputs administration and control are under Animal and Fisheries Resources Ministry for better management and efficiency



- The prerequisite of good administrative and technical linkages between regional states and federal ministry
- Advanced way of disease surveillance /reporting system as a result of good linkages and coordination.
- The Federal Ministry of Animal and Fisheries has established an effective administrative structure for animal health services capable of ensuring the chain of command, defining the procedures to be followed and delegation of authority. The capability and authority of the AHEDC to establish and maintain disease free zone, in accordance to the criteria established by the OIE.
- The capability and authority of the AHEDC based on national legislation and proposes legislation and set regulations.

#### **Lessons related to quarantine and meat hygiene**

- The requirement of sufficient land area for the establishment of a quarantine station.
- The animal transport facilities and establishment of livestock market routes demarcation.
- The meat grading requirement and availability of the proper facilities.

#### **Lessons from livestock marketing and bank visit**

- The service rendering and cost sharing system.
- It is a good practice to interlink livestock marketing centres with quarantine stations.
- Identification of livestock trade routes and establishment of proper market centres.
- Strengthening use administration system of livestock market centres.
- The presence of livestock resources related Bank is highly appreciated.
- Non material collateral and low interest rate.

## **7. Recommendations and way forward**

Though there are already some positive changes in Ethiopia country in terms of production and export performance as well as the delivery of support services the following recommendation points are suggested by the mission:

1. Establishment of credible, responsible, viable and strictly accountable institution both in Animal Health and Livestock Resources as whole.
2. Mobile animal health services delivery has to be introduced in the pastoral areas in the shortest possible period to complement the existing community-based animal health services delivery.
3. The need for broader consultation and direct involvement of the regional states in the development of strategy to revitalize and strength the relationship and linkages between the regional states and the federal veterinary services.

4. Capacity building of the existing manpower and increasing the number of veterinary professionals
5. The Ethiopian government has to avail a large mass of land to establish a well functioning quarantine stations particularly in an area where the export market is located as in Adama. This quarantine station should aim to increase trade and deliver high quality and healthy livestock at very competitive prices to the consumer.
6. Establishment of model abattoir at regional level
7. Establishment of similar financial institution governed by rules and regulations appropriate to our country is highly essential
8. Participation of traders, pastoralists at large and government to establish an appropriate financial institutions
9. Consideration of community leaders and reputable persons as collateral for animal resource bank and other Banks in the country

Finally, the participants of the study tour unanimously agreed that the tour was exceedingly beneficial.

## **8. Outcomes**

One outcome of the study tour was feedback by participants from Oromiya region to the Oromiya Region President. In July 2008, the Oromiya Region Council endorsed the establishment of a new bureau for supporting livestock development – the Livestock Resources Development and Marketing Agency. This will help to overcome a common problem within agriculture ministries viz. that livestock is viewed as secondary to crop production. The initiative is also likely to greatly assist pastoralists in the region, who are highly dependent on livestock.