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Sustainable Development of Livestock for Livelihoods in Africa

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MECHANISMS FOR STRENGTHENING PPPPs IN SADC RED MEAT AND LIVE ANIMALS VALUE CHAINS (RMLAVC)

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RECOMMENDED CITATION
AU-IBAR (2021): DEVELOPMENT OF LIVE ANIMAL AND CARCASS CLASSIFICATION AND GRADING SYSTEMS FOR BEEF CATTLE, GOATS AND SHEEP IN THE SOUTHERN AFRICAN DEVELOPMENT COMMUNITY (SADC).

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ACRONYMS

ACT	Agricultural Council of Tanzania
AFASA	African Farmers' Association of South Africa
AMIE	Association of Meat Importers and Exporters
AU-IBAR	African Union – Inter-African Bureau for Animal Resources
AYL-FAIN	African Youth in Livestock, Fisheries & Aquaculture Incubation Network
BAU	Botswana Agricultural Union
BBBEE	Broad Based Black Economic Empowerment
CAADP	The Comprehensive Africa Agriculture Development Programme
CAP-F	Country Agribusiness Partnership Framework
CBPP	Contagious Bovine Pleuropneumonia
CCARDESA	The Centre for Coordination of Agricultural Research and Development for Southern Africa
CFU	Commercial Farmers' Union of Zimbabwe
CPM	Coalition Paysanne de Madagascar
CRDB	Cooperative Rural Development Bank
DRC	The Democratic Republic of the Congo
EU	European Union
FANRPAN	Food Agriculture and Natural Resources Policy Network
FAO	Food and Agriculture Organization
FAOSTAT	The Food and Agriculture Organization Corporate Statistical Database
FEKRITAMA	Fivondronamben'ny Tantsaha Malagasy
FMD	Food and Mouth Disease
FUM	Farmers' Union of Malawi
GDP	Gross Domestic Product
GMTEU	Gauteng Meat Traders Employees Union
IFAD	International Fund for Agricultural Development
ILRI	International Livestock Research Institute
IREMA	Improving Rangeland and Ecosystem Management
LENAFU	Lesotho National Farmers' Union
LiDeSA	Livestock Development Strategy for Africa
LWCC	Livestock Welfare Co-Ordinating Committee Levy Admin
MIT	Meat Industry Trust
MSMS	Meat Statutory Measure Service
NASFAM	National Smallholder Farmers Association of Malawi
NERPO	National Emergent Red Meat Producers Organisation
NFMT	National Federation of Meat Traders
NMB	National Microfinance Bank
NNFU	Namibia National Farmers Union
PPPP	Public Private Producer Partnerships
RSA	Republic of South Africa

RMIF	Red Meat Industry Forum
RMLA	Red Meat Levy Admin
RMAA	Red Meat Abattoirs Association
RMRDT	Red Meat Research Development Trust
RMLAVC	Red Meat and Live Animals Value Chain
RPO	Red Meat Producers' Organisation
SADC	Southern Africa Development Community
SADP	Swaziland Agricultural Development Programme
SACAU	Southern African Confederation of Agricultural Unions
SAFA	South African Feedlot Association
SAFLA	South African Federation of Livestock Agents
SAMIC	South African Meat Industry Company
SAMPA	South African Meat Processing Association
SANCU	South African National Consumers Union
SAPPO	South African Pork Producers Organisation.
SDGs	Sustainable Development Goals
SEYFA	Seychelles Farmers Association
SHALC	Skins, Hides and Leather Council
SNAU	Swaziland National Agricultural Union
UAE	United Arab Emirates
UNAC	Unao Nacional de Camponeses
UNGPBHR	United Nations Guiding Principles on Business and Human Rights
WTO	World Trade Organization
ZALiP	Zimbabwe AgLivelihoods Innovation Project
ZFU	Zimbabwe Farmers' Union
ZNFU	Zambia National Farmers Union

EXECUTIVE SUMMARY

The African Union – Inter-African Bureau for Animal Resources (AU-IBAR) Strategic Plan (2018-2023) and the AU Agenda 2063 recognise that animal resources are key assets that support the livelihoods in Sub-Saharan Africa. The SADC region is richly endowed with both flora and fauna, specifically the ruminants and game that have for millennium grazed on vast tracts of grazing lands across diverse ecosystems. Despite the fact that red meat and livestock are a major component of agriculture in most SADC countries, investment and successes in these value chains have been at best minimal and certainly not optimal. The regional member states recognise the potential of the red meat and live animal value chain (RMLAVC) and prioritised this Agri-economic node for priority development through sustainable public-private-producer partnerships (PPPPs). Effective public-private-producer partnerships are inclusive and efficient in resource utilization.

The broad objective of the consultancy was therefore to develop mechanisms and strategies for effective PPPP that improve market access at local, regional, and international levels through capacity building, identification of opportunities.

Review of literature on the regional RMLAVC reveal that countries in the SADC region operate at varying levels of PP, PPP or PPPP development. These differences are more glaring in infrastructure and markets and marketing systems with more horizontal linkages rather than vertical integration. The public sector and private sector are not intersecting meaningfully and therefore not significantly impacting economic growth and changes in livelihood security are not meaningful. Commercial farmers dominate within the formal markets while smallholder producers who own over 75% of the national herds in the SADC region operate mostly within the informal sector. The study also revealed that most value chain linkages that could promote business among players were underdeveloped. The study also revealed the non-inclusiveness of the women, youth and the disabled in the value chain.

The principal success factors for sustainable PPPPs are notably weak. It was noted that there is poor consultation and engagement of relevant PPP stakeholders, lack of transparency and accountability, evident unequal sharing of opportunities and benefits, poorly defined ownership and responsibilities, and a public sector that chronically faces financial and human resource challenges which affects enforcement of relevant PPP policies and capacity to monitor. The main goal is therefore to create a framework that allows for balanced relationships; contractually binding partnerships that are hinged on fairness, risk management and risk sharing, for more long-term profitability of the red meat and live animals' value chain. There is clearly a need to shift from the currently non-committal systems and adhoc arrangements by so called "partners" to strategy oriented and expert player/facilitator centred models that are non-partisan and takes the responsibility of coordinating and liaison, and monitoring and evaluating progress and managing risk.

Since most African countries have signed up to the CAADP Framework and have developed country-level results frameworks for their respective National Agriculture Investment Plans (NAIPs), it is essential that the PPPP framework enhances SADC members countries' ability to implement and measure progress in the RMLAVC as part of the broader CAADP results framework. A national development plan for RMLAVC that has full buy-in and commitment from all relevant stakeholders is implemented and tracked. It is envisaged that PPPPs would improve evidence-based planning and development for RMLAVC by setting goals with targets and milestones; outlining clear roles and responsibilities and commitments of resources and actions in order to achieve the goals. Progress in implementing the PPPP's framework of the RMLAVC should be an integral part of the biennial review of progress with the CAADP NAIPs and indicate how private sector investment and producer participation have been stimulated through the PPPPs.

CHAPTER ONE: INTRODUCTION AND BACKGROUND

1.1 Introduction

Livestock production is central to food security and economic development in developing countries. Improving public-private-producer partnership linkages in the livestock value chain would therefore stimulate growth, increase productivity and sustainability of agriculture based economies, reduce rural poverty, and eliminate hunger and malnutrition (FAO, 2019) as encapsuled in UN SDG1, SDG2, SDG8, SDG12 and SDG17 goals.

The Dar es Salam Declaration on Agriculture and Food Security (2004) committed SADC member States to improve the agriculture industry as means of alleviating poverty as 80% of the population is dependent on agriculture. The African Union – Inter-African Bureau for Animal Resources (AU-IBAR) Strategic Plan (2018-2023) and the AU Agenda 2063 also recognise that animal resources are key assets that support the livelihoods of rural communities in Africa. However, the potential of these resources is not fully exploited, and the continent remains a net importer of animal products. Hence this AU IBAR call responds to the regional agenda for significant transformation of the African livestock sector for enhanced contribution to environmentally sustainable, climate resilient, socio-economic development and equitable growth in the SADC region. The AU strategic plan for the animal resources sector is guided by the Malabo Declaration "going beyond attainment of poverty alleviation to boosting intra-Africa trade". This plan is supported by existing livestock policy frameworks, namely the Livestock Development Strategy for Africa (LiDeSA) whose goal is to transform the African livestock sector for enhanced contribution to socio-economic development and equitable growth.

1.2 Background

Livestock contributes more than 30% of the agricultural GDP of developing countries. The emergence of the modernized retail sector has led to higher standards for meat products worldwide and created a market opportunity for small-scale livestock producers. This is a great opportunity for the SADC region as it is endowed with large tracks of grazing land that hosts a wide diversity of grazing livestock breeds and game with estimated populations of over 70 million cattle, 36.8 million sheep and 53.7 million goats (FAOSTAT, 2020). Large herds of the cattle, sheep and goats are kept under communal, smallholder and small-scale commercial farming systems with equally large herds of landrace and mostly exotic breeds produced under feedlot systems. The SADC red meat industry is a billion-dollar industry; and dichotomous as noted above with a well-developed private sector and underdeveloped smallholder sector within and across countries. National statistics generally underestimate the contribution of smallholder farming communities to national economies as trading of animals through the informal sector is poorly captured due to lack of recording, traceability systems and poor application of animal identification systems. The enabling environment, at national and regional level, is an important consideration in the PPPP framework. First, it is important to note that small-scale livestock producers are often largely dependent on their physical environment, hence their relation to land is fundamental. Secondly, the distance from producer to consumer, as well as the existence (or absence) of logistics infrastructure (roads, markets, transport etc.), and intermediate players (abattoirs, processors, and distributors) have a major impact on the functionality of the red meat and live animal value chains (RMLAVC). Finally, the enabling environment such as national legislation, policies and programmes, regional policies, as well as organizational or sociocultural considerations are essential for development of functional PPPPs.

Until recently, there were no policies in the SADC region that anchored on conservation of indigenous genetic resources. The establishment of the regional Animal Gene bank in Botswana and the adoption of the Animal Health Strategy for Africa (AHSA) formulated by the AU-IBAR) for the management of transboundary and zoonotic diseases are notable milestones for the region. There is, however, less focus on enhancing utilisation of the livestock for economic growth. The SADC declaration therefore aims at instituting support mechanisms for strengthening private sector engagement in agriculture and rural development in accordance with provisions of the World Trade Organization (WTO) on domestic support for agriculture. Mainstreaming of women, youth and people living with disability through repealing of discriminatory laws and addressing discriminatory cultural and religious practices that inhibit access to finance, land and livestock ownership by these marginalised groups is also a key development component.

Developing a framework for Public-Private-Producer Partnerships (PPPPs) that create enabling and supportive environment for financial and market access whilst promoting equitable and inclusive participation of youth, women and people living with disabilities is a notable forerunner for the success of the RMLAVC. Public–Private–Producer Partnerships (PPPPs) are crucial for leveraging private investment, strengthening policy dialogues, securing technology and expertise, and scaling up positive results sustainably (IFAD, 2016). As noted in the AU-IBAR, Seychelles meeting communique, and publications, participation levels of all players in RMLAVC varies significantly across the SADC region. This variability is reflected in the volumes and value of trade recorded for the countries in the region. Three countries stand out in the region notably Namibia, Botswana and South Africa that participate in continental and global trade of both red meat and live animals. South Africa currently dominates the continental market for red meat while Botswana and Namibia are leaders in European and Asian markets, partly because of the strength of their PPPP frameworks. The drivers to these achievements are meaningful partnership linkages between the core value chain businesses of the commercial sector and supportive partner functions. The smallholder sector do not have the same opportunities hence this is a window to create a framework that is conducive for the public and private sectors to empower some of the underrepresented stakeholders across the red meat and live animal value chain in the SADC region. The commissioning of this consultancy by AU-IBAR and strategic partners in SADC region to develop a framework for strengthening the PPP partnerships is therefore timely. This is in light of the dawn of the African Continental Free Trade Agreement (AfCFTA), growing opportunities to access local and regional markets and growing markets in the Middle East, United States of America, Asian and Europe which South Africa, Botswana and Namibia have penetrated to some extent. Domestic markets will continue to be satisfied from non-export components and live animals. The Covid-19 pandemic has awakened the industry to develop and strengthen mechanisms for increased resilience.

1.3 Objective of the consultancy

The objective of this consultancy was to assess existing Public Private Producer Partnerships (PPPPs) in SADC red meat and live animal value chains, identify gaps and propose mechanisms that would strengthen the PPPP and in addition, assess the level of participation of the vulnerable groups such as women, youth and the disabled.

Specific objectives of the consultancy:

1. To interrogate and review the existing PPPPs in the red meat and live animal value chain for cattle, sheep, and goats in selected countries to understand the situation
2. To develop an instrument for assessing the level of PPPPs in the red meat and live animal value chain in the region
3. To propose a strategy/framework with models for PPPPs relevant to the red meat and live animal value chain to foster collaboration cross border trade across the SADC region.
4. To compile best practices for the red meat and live animal value chain PPPPs that can be adopted and domesticated by Member States in the region
5. To compile recommendations on interventions including national and regional structures to address observed challenges or gaps with particular emphasis on the participation of youth, women and people living with disabilities.

CHAPTER TWO: METHODOLOGY

Literature review: The study commenced with review of literature of the red meat and live animal value chain in the SADC countries to have an overview of the development and current status. From the overview, a total of nine countries were selected for more detailed study of the production systems, production statistics, livestock policies and programmes and value chain actors and players.

Sources of Information: The target institutions for the detailed study include, Government Ministries, State owned entities, Industry bodies, Agricultural research systems, producer organizations and producers (Annexure 1). There were also interviews with key regional and national informants to better understand the dynamics of the value chain and fill in the gaps in the information gathered.

Data collection: The following methods for data collection were used: face to face discussions (where possible), electronic meetings through Microsoft Teams/Zoom/Google Meet were deployed. Two Electronic questionnaires (Annexure 2.1 -2.5) were designed and sent out to identified key informants, depending on the availability of the target informants as well as how readily they can access and use the various platforms of communication.

For Public Sector and Experts: a total of 90 Questionnaires were sent out to informants in the 10 selected countries. We received 31 responses across the 10 countries

For Producers/Processors: 69 Questionnaires were sent to informants in the 10 selected Countries. We received 17 responses from only 5 countries.

Criteria for selection of countries: four factors namely livestock population, value chain integration, institutional arrangements and opportunities for growth were combined to derive an index. Countries regional average index less than 10 were selected for in-depth review of their RMLAVC. The criteria is described in section 3.4.

Development of best practices: From the pool of documents and information obtained from the desktop review, questionnaires and key national informants, there was wealth of knowledge to compile best practices as well as perform strengths-weaknesses-opportunities-and-threats (SWOT) analyses of PPPPs in order to identify areas that should be enhanced as well as those that need to be resolved or capitalize on in order to develop and strengthen these PPPPs.

Validation Workshop: A virtual consultative workshop attended by 45 experts across all the SADC countries and comprising participants, players and other actors in the RMLAVC was held on 21st May 2021. The workshop deliberated on the report and made propositions and recommendations on best practices for the RMLAVC PPPPs that can be adopted and domesticated by Member States.

CHAPTER THREE: OVERVIEW OF THE RED MEAT AND LIVE ANIMAL VALUE CHAIN

3.1 Current status

The SADC region is rich in animal genetics and countries such as South Africa and Tanzania have large herds of both cattle and small stock (Table 3.1). Beef cattle are the prime commodity followed by the small stock (goats and sheep). The livestock sector contributes about 51% of value-added exports from the region with frozen beef dominating livestock value added exports (Trademap, 2020). South Africa is a notable key driver of regional value chains, both as a supplier of inputs and as a destination market for exports (World Bank, 2016). Namibia, Botswana and Eswatini also export carcasses to EU via the South African port in Cape Town (World Bank, 2016). In the past decade, South Africa has grown from a net importer to a net exporter of largely high value cuts to the Middle East (BFAP, 2020). These exports are predicted to increase from the current 10% of production to up to 24% of production by 2029, if the proposed Agricultural and Agro-Processing Masterplan (AAMP) is implemented, and the partners therein play their part in driving the development of the smallholder sector (BFAP, 2020). Growth in the sector has however, not been significant in most of the member states due to a myriad of challenges especially for the smallholder sector. The challenges faced include limited access to resources- mostly land tenure issues, production (feed unavailability), finance and markets; compounded by weaknesses in policies and implementation of thereof. The enablers and role players have been interacting and the successes are variable, most relations have not been sustained, others had low returns on investment and success stories are few. Existing relationships among stakeholders have various strengths and weaknesses that need to be addressed urgently to improve efficiencies in the partnerships.

In most member states, the public sector has partnered with philanthropic driven or international facilitators such as the European Union (EU), Food and Agriculture Organisation (FAO), International Fund for Agriculture Development (IFAD), World Bank, African Development Bank (AfDB), the global beef round tables, in country private sector and community development organizations to push commercialization in the smallholder sector and promote international trading. Farmer organizations, the community and industry-based associations also facilitate and/or provide expert and mentorship support to PPPPs.

However, the smallholder sector remains underdeveloped while the commercial sector is growing and accessing international markets. The growth of the commercialized livestock sector can only be sustained by tapping into the vast animal, land, and human capital resources that are in the smallholder production system. These dynamics indicate that the public sector and private sector are not intersecting meaningfully and therefore not impacting livelihood security. Principal success factors for sustainable PPPPs are notably weak in the Southern African Development Community (SADC). In this study, we note that there is poor consultation and engagement of relevant stakeholders, lack of transparency and accountability evident in unequal sharing of opportunities and benefits, ownership and responsibilities are not clearly defined, and the public sector faces financial and human resource challenges which affects enforcement of relevant policies. The main goal is therefore to have balanced relationships that are contractually binding and hinged on fairness, risk management and long-term profitability of the red meat and live animals value chain. There is clearly need for a role player/facilitator that is non-partisan in the PPPP that takes the responsibility for coordinating and liaison, and monitoring and evaluating progress and managing risk.

Approaches and strategies for strengthening PPPP proposed in this report were validated by country experts. The proposed interventions should be country contextualized to promote development of more effective PPPPs among then SADC countries.

3.2 Description of the livestock sector

3.2.1 Beef, goat and sheep herds and offtakes

The SADC region boasts of about 74 million heads of cattle with United Republic of Tanzania being host to one third of the cattle population (Table 3.1). Seychelles and Mauritius have the least cattle populations. The regional average in cattle offtake in 2018 was low, about 15% hence the need to strengthen partnerships and capitalize on existing capacities in resources, infrastructure, carcass classification and meat grading systems in countries such as Botswana, Eswatini, Namibia, South Africa, and Zimbabwe. Statistics on goats are also summarised in Table 3.1. The regional goat herd size was estimated at 60 million with average offtake of 32% (double that for cattle). Malawi had the highest offtake of 78%; however, the carcasses are very small (7.9 kg) relative to the regional average of 12.3 kg. South Africa had the largest sheep flock, with an outstanding carcass weight of 27.1 kg and almost double the average for other SADC countries (Table 3.1). Both South Africa and Tanzania account for over 75% of the sheep slaughtered in the region. Eswatini had a high offtake for sheep at 86% while Zimbabwe has the lowest of 9% (FAOSTAT, 2018). The high offtake noted for Mauritius could be an indicator of high imports for slaughter.

Table 3. 1: *Cattle and small stock herds, average carcass size and % offtakes in the SADC in 2018*

Countries	Cattle			Sheep			Goats		
	Stock	Carcass (kg)	% offtake	Stock	Carcass (kg)	% offtake	Stock	Carcass (kg)	% offtake
Angola	5,044,205	162	12%	1,169,552	15.0	25%	4,625,156	15.0	29%
Botswana	1,100,000	200	15%	221,357	14.0	44%	1,338,029	12.0	30%
Comoros	50,705	110	22%	24,861	15.0	25%	121,114	10.0	31%
Democratic Republic of Congo	1,144,766	187	9%	911,243	10.0	31%	4,105,026	11.6	39%
Eswatini	621,525	226	12%	39,423	18.0	86%	248,229	18.0	36%
Lesotho	479,079	157	11%	1,888,736	10.0	34%	878,816	8.1	32%
Madagascar	10,322,869	128	13%	848,032	12.0	32%	1,540,664	15.0	46%
Malawi	1,655,517	111	27%	317,899	11.1	43%	8,374,006	7.9	78%
Mauritius	3,985	243	187%	3,806	18.9	42%	26,026	13.7	9%
Mozambique	2,020,189	152	5%	87,000	12.0	41%	3,840,658	12.0	4%
Namibia	2,895,379	267	4%	1,857,789	15.4	34%	1,909,368	12.0	16%
Seychelles	273	189	14%	-	-	-	5,630	11.2	35%
South Africa	12,789,515	301	26%	22,500,072	27.1	25%	5,404,600	14.4	15%
Tanzania	27,282,702	147	12%	7,945,775	12.0	27%	18,497,912	12.0	19%
Zambia	3,714,667	161	37%	261,712	14.0	27%	2,822,168	12.0	30%
Zimbabwe	5,404,875	227	9%	284,015	14.0	9%	4,896,838	12.0	43%
Regional	74,530,251	185	15%	38,361,272	14.6	27%	58,634,240	12.3	32%

Source: *FAOSTAT (2020)*

3.2.3 Meat trading by SADC countries

Few countries were involved in the export of beef, with South Africa accounting for almost 90% of the trade (Table 3.3) (Tralac, 2020). However, all the countries except Zambia imported beef, with Angola, Eswatini and Mozambique being the leaders. South Africa, Namibia and Botswana were the only three countries with positive balance of trade. Tanzania was responsible for all export of chevon. The proportion traded was very low indicating that this commodity is mostly traded in domestic markets. Namibia, South Africa, and Tanzania were main traders of sheep. Seychelles was a leading destination for lamb and mutton after South Africa.

It is clear that the priority red meat and live animals value chain within the SADC countries are beef, goat, and sheep in that order except for South Africa and Tanzania where the sheep value chain is of higher economic importance than the goat value chain. The intra-SADC and international livestock trade is shown in Figure 3.1. Institutions and other organizations in the region are not valuing the existing assets and therefore the commodity corridor remains weak.

Table 3. 3: *Balance of trade in red meat in 2018*

Countries	Cattle (Beef)		Goat (chevon)		Sheep (lamb & mutton)	
	Balance of Trade					
	head	US$'000	head	US$'000	head	US$'000
Angola	-4,040	-11,677	-7	-69	-221	-1,087
Botswana	474	1,170	-	-	-105	-320
Comoros	-8	-37	-	-	-35	-63
Democratic Republic of Congo	-644	-1,914	-52	-249	-110	-649
Eswatini	-2,224	-7,686	-	-	-152	-698
Lesotho	-700	-1,719	-	-	-136	-387
Malawi	-2	-9	-	-	-2	-20
Madagascar	-	-	-	-	-	-
Mozambique	-1,853	-7,674	-15	-60	-83	-328
Namibia	433	2,375			1,966	11,844
Seychelles	-234	-1,637	-78	-265	-365	-2,740
South Africa	8,940	38,359	-	2	-6,639	-16,541
Tanzania	-351	-1,330	1,009	3,246	194	677
Zambia	70	32	-	-	-1	-3
Zimbabwe	-1	-16	-	-	-3	-29
Region	**-140**	**8,237**	**857**	**2,605**	**-5,692**	**-10,344**

Source: *FAOSTAT (2020)*

****NB:*** Madagascar is currently not trading with live cattle due to an embargo that was recently imposed by the country to manage the high risks of stock theft.

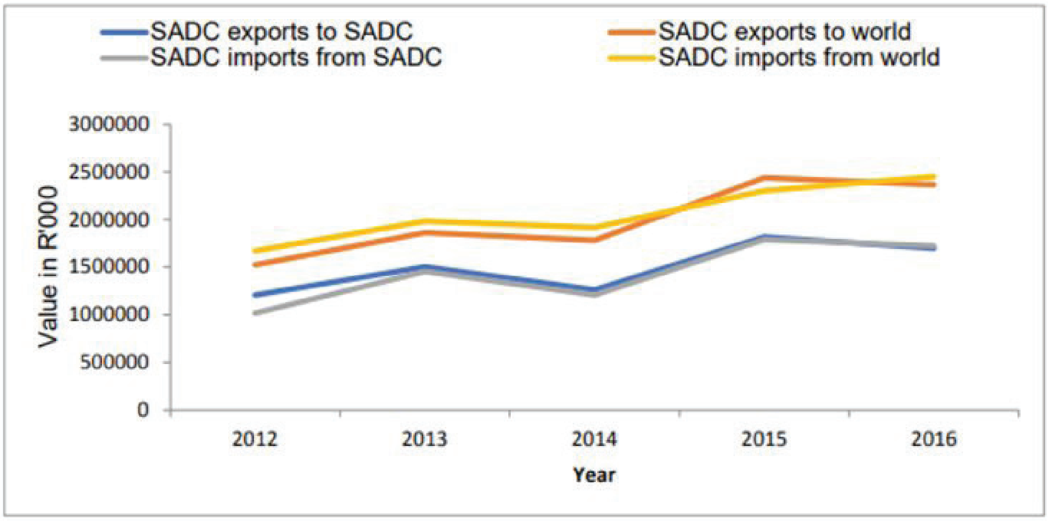


Figure 3. 1: *Intra-SADC livestock trade.*
(Source: Trademap, 2017)

3.2.4 Indexing performance of member states based on value chain characteristics.

Statistics in Tables 3.1, 3.2 and 3.3, and literature on vertical integration of the value chain, institutional arrangements and opportunities for growth were used to rank member states and an index value was generated to identify countries for in depth review of the RMLAVC (Table 3.4).

The indicators for opportunities for growth include:

i. Specialized red meat and live animals value chain with classification and grading systems,
ii. Infrastructure, road, and rail network,
iii. Commercial system that produce large volumes of slaughter stock
iv. Uniqueness of key value chains: State of development of the value chains
v. Market access
   - level of development of the local market
   - centrality for regional trade
   - access to international markets
   - barriers for disease control (Ocean) -Island countries

Table 3. 4*: Indexing of countries identified for in depth study of PPPPs*

Country	Ranking of countries based on features (1- High; 2- Medium; 3- Low)				
	Livestock Population	Value chain integration	Institutional arrangements	Opportunities for growth	Index
Angola	2	3	3	2	10
Botswana	3	3	2	1	9
Comoros	3	3	3	3	12
Democratic Republic of Congo	3	3	3	2	11
Eswatini	3	3	2	1	9
Lesotho	3	3	3	2	11
Madagascar	2	3	3	1	9
Malawi	3	3	3	3	12
Mauritius	3	3	3	3	12
Mozambique	3	3	3	3	12
Namibia	3	1	2	1	7

Country	Ranking of countries based on features (1- High; 2- Medium; 3- Low)				
	Livestock Population	Value chain integration	Institutional arrangements	Opportunities for growth	Index
Seychelles	3	3	3	3	12
South Africa	1	1	2	1	5
Tanzania	1	3	2	1	7
Zambia	3	3	3	2	11
Zimbabwe	2	3	2	1	8
Regional	**2.56**	**2.75**	**2.62**	**1.81**	**9.75**

Note: It should be emphasized that the ranking and Indices was for the sole purpose of selection of countries for more detailed study in the consultancy. Countries with Index below the regional average (10) were selected for more detailed study. However, Malawi and Zambia were included to gain better understanding of the livestock value chain from the viewpoint of a low-end production system and the ZAMBEEF conglomerate and NyamaBEEF partnerships in the two countries. Table 3.5 below, gives a clustering of member states based on value chain characteristics and list of countries that were selected from each group for the in-depth review of their RMLAVC.

Table 3. 5: *Clustering of member states based on value chain characteristics.*

Description	Member state categories	Countries selected for in depth review per category
High level	South Africa Botswana Namibia	South Africa Botswana Namibia
Moderate level	Zimbabwe Eswatini	Zimbabwe Eswatini
Low level	Democratic Republic of Congo, Mozambique, Madagascar, Malawi, Eswatini, Seychelles, Comoros Mauritius, Lesotho, Angola, Zambia, Tanzania	Madagascar Malawi Tanzania Zambia

3.3 Value chain characteristics

The red meat and live animals value chain has the structure of a pyramid, with 100% dependency on the primary producers of beef cattle, sheep, and goat. These are the value chain influencers with regard to the entry level product- the live animal. Red meat is a product of processing. The value chains are very distinct within country and across the region. The beef cattle value chain is the key driver of livestock and meat trade while the goat value chain is mostly a shorter value chain, mainly of live animal sales and supports livelihoods of mostly marginalised communities. There are, however, successful commercial goat value chains. The sheep value chain is mostly commercialized in South Africa and small in other countries in the region.

3.3.1 The beef value chain

This is a highly diverse network of linkages of farmer/producer, feedlot, abattoir, wholesaler, processor, distributor and retailer and exporters as shown in Figure 3.3. The beef supply chain is a cold chain and is vertically integrated. Integration is mainly driven by feedlots that own auctions, abattoirs and are involved downstream in wholesale and retail and export and imports.

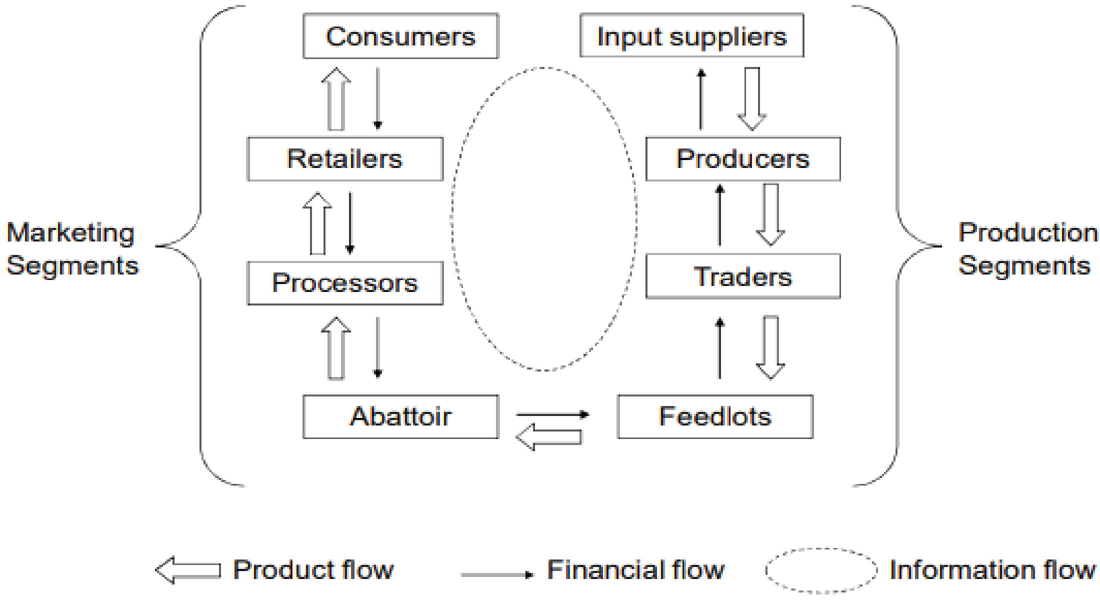


Figure 3. 3: *Generic Beef Value Chain*
*(**Source:** RMIF 2020)*

Figure 3.3 illustrates a more detailed and longer red meat and live animals value chain. South Africa has a well-developed local value chain and growing export market value chain. Namibia and Botswana, value chains are geared for export but also supply local markets. Eswatini, is set up for export but not meeting obligations and so is a net importer. Madagascar has a localized rudimentary value chain, but with huge potential to grow and be similar to that of South Africa.

Figure 3.4 depicts a long value chain with many PPPP branches reaching the local and external markets. This would be considered as the ultimate structure for a viable and sustainable livestock industry. The skew for each country is determined by the volume of production from the ordinary livestock keeper vs advanced livestock keepers and supporting vertical system. Advanced producers key into the longer value chains, which tend to disadvantage role players due to the increased number of transactions that result in reduced margins for each role player. These are however, becoming the norm and could account for the reduction in the number of primary producers. Most PPP brokered through public sector support exhibit this structure and sustainability is low.

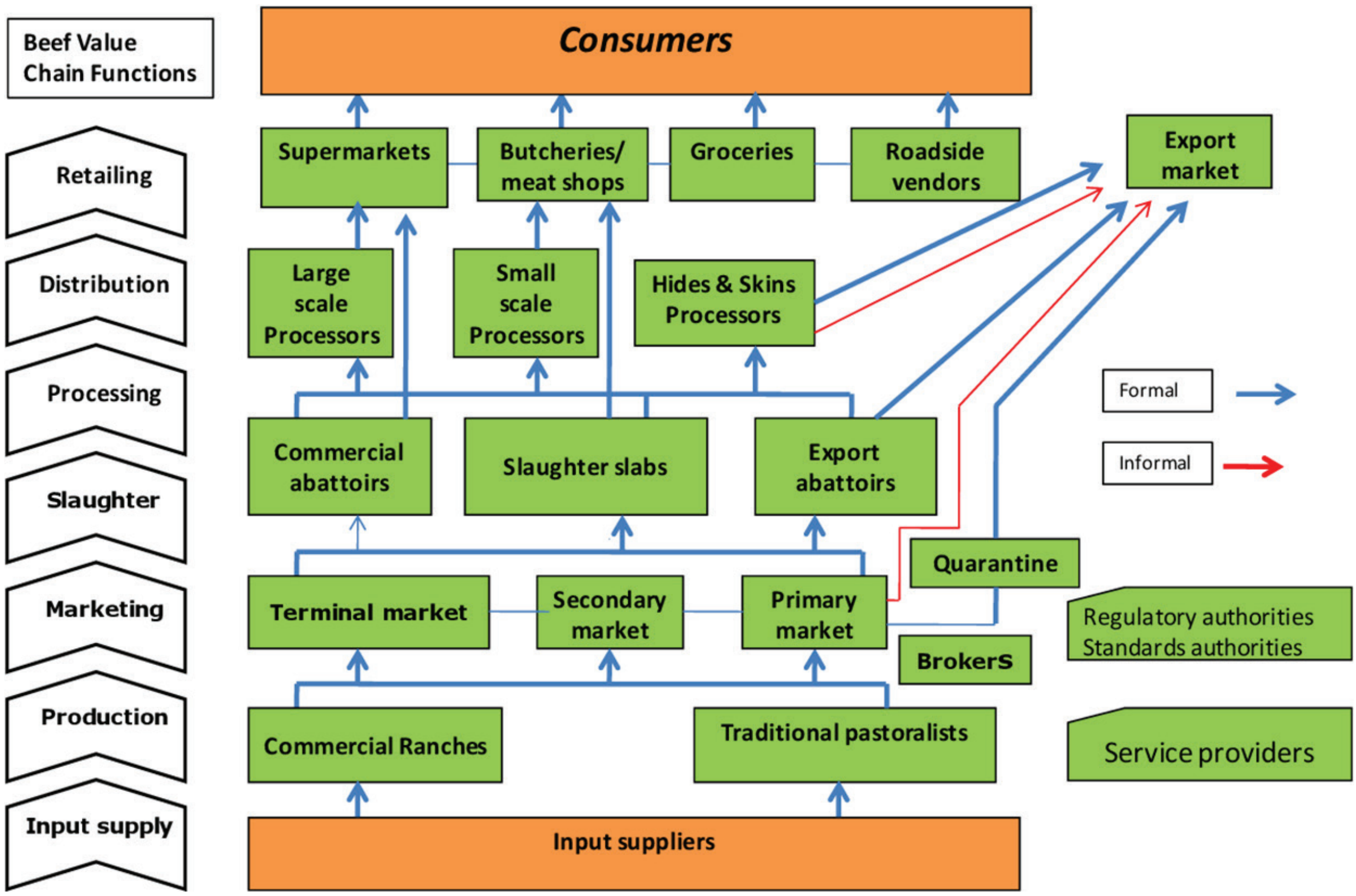


Figure 3. 4: *Overview of the red meat and live animal value chain*
Source: *Staricko, 2015)*

3.3.2 The goat value chain

There are limited authentic documents on the goat value chain in the SADC region. Marketing of live goat and goat meat in most countries is mostly traditional and handled by private traders. A number of middlemen are involved in the processing of the goat and goat meat marketing. Most reports indicate that goat markets are not efficient given the challenges such as market information, low offtake, handling equipment, processing equipment and cold storage.

Goat meat accounted for less than 10% of the red meat produced in SADC countries. Nonetheless, the goat meat value chain is reported as being an intrinsic part of the livestock value chain in the discussion, description, and mapping of the livestock value chain. It is safe to mention that the goat meat value chain invariably follows the same pattern as for the beef cattle value chain except on the scale, volume traded and intensity. The goat meat value chain actors are also more or less the same as there are no different or specialized markets for the small stocks.

Small ruminant trade mostly occurs directly between farmers and customers, but a considerable amount also occurs through traders selling at informal urban markets. There tends to be a large live animal value chain for goats than cattle, and hence the peri-urban goat markets such as Mbudzi (Harare) and others scattered around Bulawayo townships in Zimbabwe, Nchalo and Nsanje markets in Malawi, Xipaminine market in Mozambique, Roque Santeiro and Asa Branca in Angola, and large markets in Dar es Salaam, Tanzania that are mostly dominated by men and sometimes foreigners. These traders are opportunistic middlemen who purchase animals from farmers and sell to final customers. At times, the middlemen act as bulking agents for transporting to markets in urban centers. Animals that are traded in markets are often transported over long distances and across several contact points, where sheep and goats from different areas can be mixed. Significant proportion of the animals sold at local and urban markets are slaughtered for direct sales to consumers. These are mostly carried out in the absence of veterinary inspections and unhygienic slaughter procedures which poses severe public health risks as meat is often sold in heaps of varying sizes or by pieces. Commercial farmers on other hand channel their goats for slaughter at their owned facilities for processing and are sometimes involved in running the distribution channels such meat outlets and supermarkets. Figure 3.5 below is a generic goat value chain map. The goat value chain is growing in importance given the rise in the level of standard of living and opportunities being created for small holder farmers to engage in goat production as an important route for poverty alleviation and economic growth as envisaged by the Malabo Declaration.

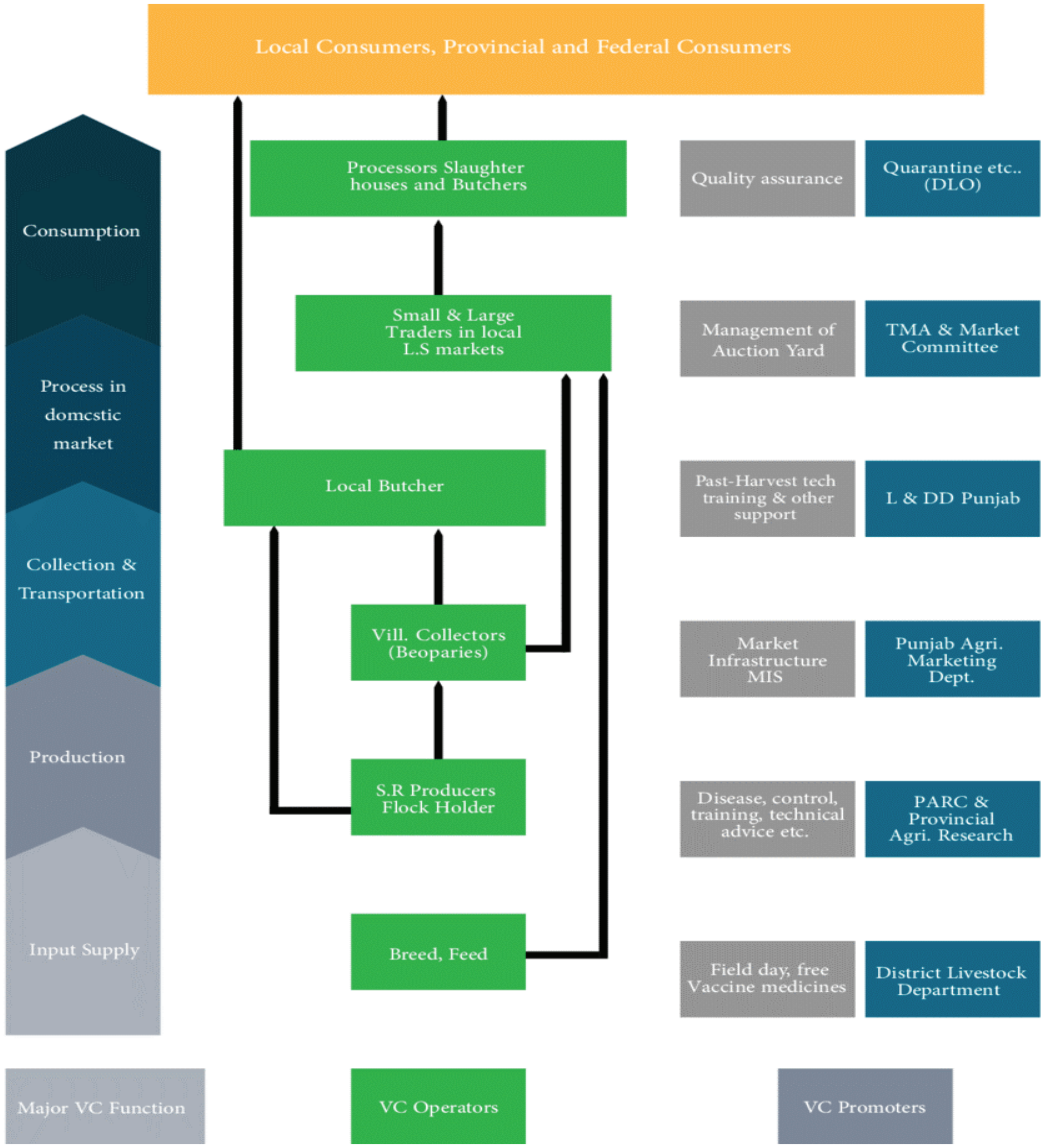


Figure 3. 5: *Governance of the Small Ruminant Value Chain in Chakwal*
Source: *ICARDA, 2015*

3.3.3 The sheep value chain

The sheepvalue chain is poorly developed in the region except for a few countries such as South Africa and Namibia. This is given the small number of smallholder farmers raising sheep, low number of sheep population and the very small market in majority of the countries in the region. There was paucity of reports on the sheep value chain as it was not widespread. The actors are relatively few, mostly the commercial farmers and the chain much shorter than the goat value chain although similar in outlook. The sheep value chain is however known to be more sophisticated than the goat value chain in South Africa and Namibia given the high lamb prices, high profile clientele and limited space for sale in supermarkets. There is a favourable market for mutton (by-product of lamb and wool production) due to aggressive marketing by the private sector and retailers via social and other media platforms for example recipes on how to prepare lamb and mutton dishes (The Lazy Makoti's Guide to the Kitchen-South Africa) and competitions to motivate uptake of consumption of sheep meat. One notable feature of the sheep value chain is also the importance attached during the Muslim festive periods when demands are high locally and internationally. This is also true for the goats.

3.3.4 The Leather and skins value chain

The leather and skins value chain studies are in its infancy and yet to gain traction and prominence in the SADC region. The opportunities for processing leather and skins into high value products such as leather seats, jackets, shoes, belts, wallets, though attractive is relatively untapped (Figure 3.6). Presently, at the centre of the value chain are the commercial producers and feedlotters that apply standards on animal welfare, good management system and herd health measures in place to protect and enhance the hide and skin quality of the animals. Such measures include guarding against injuries to the animal hide and skin, prevent tick infestation through rotational grazing and treatment of infested animals among others through regular dipping or hand application of tick control remedies.

The smallholder farmers, however, miss out on the opportunities presented. The smallholder farmers get paid for the animals put up for sale which usually is based on the live weight or conformation/condition, never for the quality of the hide and skin unless the animals are wounded. In some instances, however, there now exist an opportunity for farmers to be paid for the quality of the hide/skin in addition. In most cases, the 5th quarter (which includes offals and the hide/skins) is retained by the Abattoirs as payment in lieu of cash. However, in other instances, farmers collect the skins but poor processing, damages or destroy the products. Farmer cooperatives can be more efficient and effective in taking up the processing role given the investment required.

There is the need to sensitize the smallholder farmers on animal management practices that ensures, animal welfare and avoid injuries to animals that could lead to poor quality hides and skins. Farmers should also be aware of the huge potential of an additional income stream from the sale of the hides and skins through simple processing of the raw hides. Abattoirs and slaughter slabs should also be part of the drive to develop skills in tannery.

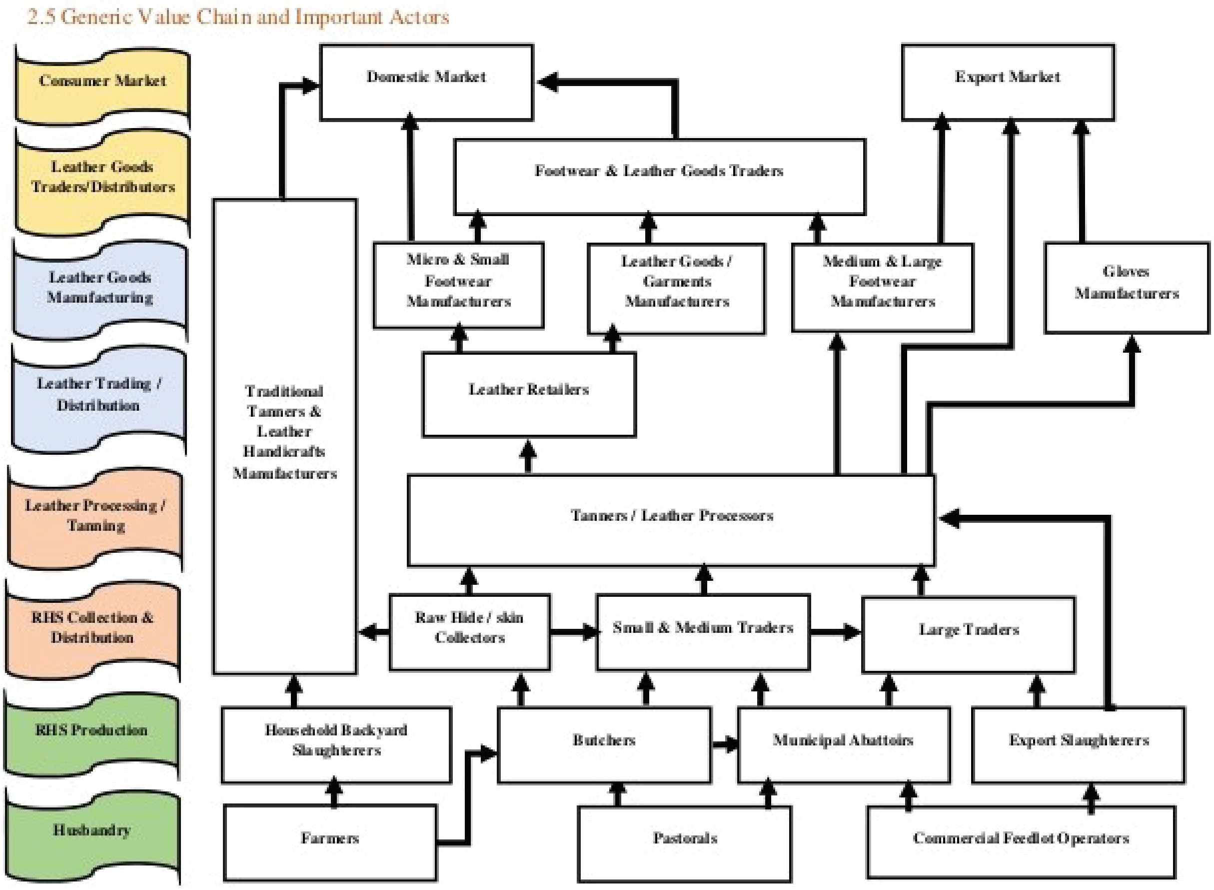


Figure 3. 6: *Generic value chain and important actors in the leather industry*
Source: *Innovation Consulting Private Limited, 2016*

3.4 Stakeholder inclusivity in the Red Meat and Live Animals Value Chain (RMLAVC)

The land and livestock ownership systems especially for cattle (sheep and goats to a lesser degree) has created an entrenched dichotomy in wealth ownership and distribution. This is further displayed in decisions taken during the livestock production cycle such as livestock acquisition, husbandry, sales and what to do with the income realized. The religious notion that women are weaker gender also has worked to preclude them from some activities such as aggregation, transportation and processing deemed to require masculine power. It is no surprise that the vulnerable communities would require some deliberate policies and efforts to redress the imbalance in the red meat and live animals value chain.

The livestock development ladder indicates that livestock could be used in addressing poverty and gender inequality. It is equally true that the same present opportunities to be deployed in addressing the gender imbalance. Women are known to be the traditional keepers (feeding and housing) of poultry and small stocks in most rural settings. Policies and programmes must therefore be put in place to entrench their interests in the small ruminant value chain. They must equally be encouraged and empowered to move higher on the livestock development ladder to participate in the beef cattle value chain. Empowerment must centre on management of flock, disease prevention and control to be knowledgeable to take informed decisions at critical times. They should also be more exposed to the real economic value of livestock.

3.4.1 Inclusion of vulnerable communities in the RMLAVC

Women are disadvantaged compared to their male counterparts across the region with the exceptions of Angola, DRC, Comoros, Mozambique, and Madagascar (Table 3.6). Laws or customs affect women's ability to acquire and/or hold land and owning high value stock such as cattle. However, SADC member states are taking steps to achieve gender equity across board. For example, in 2019, the Eswatini High Court ruled that the common law doctrine of marital power, which gives a husband the ultimate decision-making power over his wife and the matrimonial property, is unconstitutional because it discriminates against women and denies their constitutional right to equality (Annex: Eswatini Report). As a result of the changes, most women believe that they have equal rights to education and gainful employment as men, but fewer believe they have the same chance as men to own or inherit land because the traditional belief-systems prevail despite the enabling legalisation. As such the few women are involved in livestock production and processing as owners/decision makers.

Madagascar's constitution guarantees equal rights and fundamental freedoms regardless of gender, but there is no overarching policy or strategy to promote gender equality in the country. The county is in the process of developing a new policy on equality between women and men, which would be the overarching guidance document on gender equality and, hopefully ensure that gender equality is integrated in each government policy and programme (Annex: Madagascar).

South Africa has been implementing Broad Based Black Economic Empowerment (BBBEE), since 2004 and this was enacted into legislation in 2008. The act is an overacting affirmative action policy that compels business entities to have specified quotas of black people, women, and youth in board, management, and supply chain. Moreover, most government programmes have favourable terms for women and hence have created man opportunities to enter into business, including agriculture (Annex: South Africa Report).

Gender biases in the red meat sector should therefore be addressed from both the economic and socio-political angles and countries that already have enabling policies for gender equity should strengthen mechanisms to ensure that they are implemented. Entry points would include, deliberate youth and gender related policies and strategies aimed at upliftment and empowerment such as educational advancement, affirmative actions and economic empowerment with capital, land and access to market. Policy -Gender

Although countries may have affirmative policies for youth (e.g., BBBEE policy in South Africa, the gender and youth policy in Eswatini, and the national gender policy in Namibia), what is often lacking is funding to assist youth to enter into any business, more so agribusinesses.

"SADC's Member States' commitment to gender equality is demonstrated through accession to and ratification of frameworks that promote women's human rights such as the Convention on Elimination of All Forms of Discrimination Against Women which became a SADC ratified Convention in March, 2004. SADC governments are also party to the Solemn Declaration on Gender Equality in Africa through United Nations Resolution 1325 (2000) on Women, Peace and Security and the Protocol to the African Charter on Human and People's Rights on the Rights of Women in Africa (2003) and the Millennium Development Goals".

SADC Gender Policy

A growing phenomena that is taking youth away from agriculture is weak practical agricultural training in high school, colleges, and universities. Thus, even with agricultural qualification they struggle to secure opportunities in the sector because of lack of practical knowledge. There are pockets of examples of how youth can be engaged in agriculture from an early age. The Msinga case study is a good example for affirming engagements in agriculture at an early age (Alant and Bakare, 2021). The authors reported significant negative associations between internet technology literacy levels and age as well as years of experience, while significant positive associations were found between ICT literacy levels and educational level.

Table 3. 6: *Gender inequality index and youth participation in labour force in the SADC region*

Countries	Youth unemployment rate (female: male)	Labour force (% ages > 15), female	Labour force (% ages >15), male	Gender Inequality Index (GII)
Angola	0.91	76.1	78.9	0.536
Botswana	1.43	65.4	76.9	0.465
Comoros	0.77	36.6	49.9	-
DRC	0.61	60.7	66.3	0.617
Eswatini	1.12	48.5	56.8	0.567
Lesotho	1.33	60.2	75.9	0.553
Madagascar	0.89	83.4	88.9	-
Malawi	1.16	72.6	81.1	0.565
Mauritius	1.7	45.2	72	0.347
Mozambique	0.96	77.3	79	0.523
Namibia	1.07	56.1	63.3	0.44
Seychelles	-	-	-	-
South Africa	1.16	49.6	62.7	0.406
Tanzania	1.4	79.6	87.3	0.556
Zambia	1.08	70.4	79.1	0.539
Zimbabwe	1.27	78.1	89	0.527
Region	1.05	60.0	69.0	0.40

Source: *UNDP (2020)*

Segmentation of the labour market as noted in the RMLAVC continues to hinder women's empowerment. The global gap index is 69%, while the economic participation and opportunity sub-index gap stands at 58% (World Economic Forum, Global Gender Gap Index, 2020). The gap is wider in the RMLAVC, a man's domain as embedded in traditions and commerce. Access to training and vocational education and technological changes supported by relevant policies have increased economic opportunities for disadvantaged groups. The SADC gender policy is therefore a critical vehicle for improving access to economic opportunities as noted in Namibia, Botswana, Swaziland, Tanzania and to a lesser extent South Africa, Zimbabwe, and Lesotho (World Economic Forum- Global Gender Gap report, 2020).

3.4.2 Inclusivity -people living with disabilities.

There is a huge gap of knowledge and information on how the population with disability are engaged in the red meat sector both in commercial and communal set ups. This gap will be addressed by engaging in country experts to share policies and programs that are enabling people living with disability to benefit by participating in the red meat and live animal value chains. There is greater unemployment of female youths than males within the region (Table 3.6) with a regional mean of 60% and 69% for females and males, respectively.

3.5 Gaps in the value chains

As noted in the foregoing discussions, the top three countries that trade across the region and internationally tend to have right skewed commercially oriented value chains - while the majority of the SADC countries are skewed toward informal systems and are less complex. The higher the complexity, the greater the opportunities for sector growth and integration of less valued role players like youth and women. The region is not called to push the system to the right but rather to strengthen the systems within their context and also have linkages/partnerships between the informal and formal segments for more development of a more coherent and sustainable structure.

The most significant gap in the value chain is the largely absence of the smallholder farmers. If countries are able to incorporate their smallholder producers into the mainstream livestock value chains, then local and export value chains would be huge. For example, in South Africa, Sernick Group embarked on a programme to develop smallholder farmers within the Free State province in 2018 (the Sernick Emerging Farmers Program), and as a result 660 farmers are being upskilled to viable commercial entities with their own reproductive capacity. Bureau for Food and Agriculture Policy (BFAP) projects that if South Africa implements the proposed AAMP, the value of beef exports could increase to 24% of beef production; but if not, exports are likely to remain at the current level of 10% of production. In Eswatini, the country could, increase the number of cattle that are slaughtered from 60,000 to over 100,000 per year if productivity and offtake from the smallholder farmers was improved (Annex: Eswatini). Madagascar could unlock its entire beef value chain if stock theft were reduced, and livestock trade was opened up (Annex Madagascar). As for Tanzania, beef constitute 83% of red meat throughput on the domestic markets, and the remaining proportion is from sheep and goats. Most of this production is from pastoral and agro-pastoral systems (97%) however, exports are negligible. The Tanzania master plan for livestock projects growth of 71% by 2022; hence significant interventions of the public/private and producer groups are critical (Nandonde et al., 2019)

The foregoing illustrates the region's potential to enhance its red meat and live animal value chains by unblocking the challenges that the smallholder livestock producers face. The smallholder farmers are mostly disconnected from the more formalized livestock value chain given the safety and quality of animals, frequency of sales, number of animals on offer for sale and lack of aggregation points.

Lack of access to resources for optimal production and support services were equally noted as gaps in the red meat and live animals value chain. Most of the smallholder farmers do not have access to improved breeds, sustainable rangeland, and veterinary services, among others.

It was also noted that there is absence of sustainable linkage to input supplies and markets by the majority of smallholder farmers and even commercial farmers alike. Commercial producers are more inclined to the high value niche markets while then smallholders are precluded for a number of reasons which include fragmented herd size, hygienic products, and low-grade red meat quality etc.

The public sector planning, policy and regulatory support services are not encompassing and robust enough to foster growth and development. Government policies at times do allow cheap import of red meat products to the detriment of the local markets.

Social drivers which include structures, institutions and agencies grounded in social norms and values are entrenched which often lead to non-inclusivity in the value chain.

3.6 Benefits or impacts of the PPPPs

Well-articulated and implemented PPPPs in the RMLAVC stand to be mutually beneficial to all the partners in form of profit sharing. The PPPPs reduce risks of failure as partners pool resources together and leverage on each other's' strength and weaknesses. The above will ultimately ensure food security, employment, income, and socio-economic improvement.

According to AU-IBAR (2019), application of the PPPPs plays a significant role in improving access to national and international markets; improving food safety and quality; developing niche markets; improving sector-specific infrastructure services; improving financial services; technology development and research; improving information and communication; improving physical and technical infrastructure; improving capacity building and extension services; providing bio-security and bio-safety supports; privatizing government-owned facilities and services etc.

CHAPTER FOUR: ROLES AND OPPORTUNITIES FOR THE PPPPS KEY STAKEHOLDERS

Definition of PPPPs

The PPPPs refers to any arrangement where there is a collaborative (synergy) relationship between public sector institution(s), private sector(s) and producers that:

i. harnesses all available resources, knowledge, and facilities,
ii. promote efficient, effective, affordable, accessible, equitable and sustainable delivery of services.

PPPPs addresses fundamental issues of ownership, funding, governance, and control of operations. In addition, PPPPs involves:

i. Risk sharing,
ii. Responsibilities,
iii. Benefits sharing, and
iv. Resource contribution in the partnership.

Within the SADC region, the main PPPPs in the key red meat and live animals value chains include the public sector, producers/farmers, and private sector (livestock agents, traders, processors, wholesalers, retailers, transporters, regulators etc) and consumers. The degree of sophistication of this chain varies within each country.

4.1 Roles of public sector

The public sector in most countries is responsible in setting the livestock policies and regulatory framework which the PPPPs utilise within the value chain (Table 4.1).

Table 4. 1: *Main roles of the public sector in the RMLAVC*

Value chain node	Roles of the public sector
Production	• Animal health, extension services, feed, and linkage to markets • Financing of livestock improvement & production programs, • Infrastructure development • Relief programs
Live animal trade	• Government – animal identification & traceability, stock theft monitoring. • Export documentation provision • Movement control in red zones
Finishing off livestock	• Government sale pens and feedlots • Government fattening ranches
Slaughter and processing	• Government abattoirs & slaughter slabs • Carcass inspection • Meat hygiene standards implementation
Meat trade	• Compliance & regulatory
Cross cutting issues	• Training & mentorship • Monitoring and evaluation

4.1.2 Roles and opportunities for the private sector

The RMLAVC in the region receive most support from the private sector (Table 4.2) for example financial institutions such as the International Fund for Agricultural Development (IFAD), European Union, Australian Centre for International Agriculture Research (ACIAR), ILRI and in country producer associations. In Tanzania producers have obtained funding from National Microfinance Bank (NMB), Cooperative Rural Development Bank (CRDB), and Tanzania Investment Bank Ltd. The agri-divisions of many financial institutions within the region provide funding to players in the value chain for increased productivity e.g., Nedbank Group (South Africa). The red meat industry collects levies on slaughtered animals with the collected funds being used for capacity building of producers and research in areas of interest to the industry.

Table 4. 2: *Roles and opportunities of the private sector in the PPPPs*

Value chain node	Active PPPP components	Under-explored/exploited opportunities
Production	• Animal health & feeds, extension services, and capacity development • Production Loans • Genetic improvement	• Private sector extension and product supply (pharmaceuticals, feed, and supplements). • Information sharing • Sharing genetic materials
Live animal trade	• Auctioneers service provision • Cattle sale pens and logistics	• Optimal use of facilities & logistical services
Finishing off	• Provision of feedlots	• Partnerships for economies of scale
Slaughter and processing	• Private abattoirs & slaughter slabs	• Hygiene and quality standard enforcement
Meat trade	• Transportation to markets • Inputs - processing and seasoning • Provision of old chain facilities	• Hygiene and quality standard enforcement

The public sector can leverage on opportunities that lie within the private sector such as financing, technology development, extension services, and infrastructures.

4.1.3 Producers and Producer structures

The red meat and live animal producer structures within the region vary from country to country. In order to have a functional PPPP's in some countries, the producers are linked directly to national institutions such as the Botswana Meat Commission, MeatCo & Meat Board in Namibia, Swazi Meat Industries in Eswatini, Red Meat Industry Forum in South Africa, and Livestock and Meat Advisory Council in Zimbabwe. Within the national structures are representatives of government departments such as Veterinary Services, Livestock Production, national farmers unions, national livestock producers' organisations, livestock input suppliers (stock feeds & medications), abattoir associations, livestock feed lotters, auctioneers and transporters, red meat processors, consumer associations and workers unions.

The diversity of these national structures vary depending on the extent of development of the red meat and live animals' value chains. The linkages established in these structures ensure sustainable disease-free livestock production that produces quality red meat products to meet the demands for the local, regional, and overseas markets. Collectively the industry looks after matters of common interest such as consumer assurance, consumer communication and education, transformation and development, research and development, industry liaison, production development and compliance to legislation. The linkage of livestock producers from different farmer unions has been found to be strengthened through formation of producers' forum, e.g., in Botswana (Livestock Advisory Council) & Namibia (Livestock Producers' Forum), which should be in a position to provide guidance to the farmer unions on the issues that needed to be addressed for the sector at the level of the unions.

In some SADC countries such as Zambia, Tanzania, Eswatini, and Malawi, there are no guiding frameworks designed by and for producers that provides principles and self-assessment measures that guide red meat producers towards continuous improvement and adherence to the red meat and live animals value chain. However, in other countries e.g., Botswana, Namibia, South Africa guiding frameworks have been developed and are available to producers and provides principles and self-assessment measures that guide red meat producers towards continuous improvement and adherence to. The Namibian guiding frameworks include (i) FAN Meat Pocket Guide to Producers (ii) FAN Meat Form A Stock card for Cattle/sheep and goats while in South Africa the frameworks include (i) Code of best practice, (ii) Precautionary measures to support biosecurity (iii) Predator management, (iv) Combating stock theft, and (v) Good management practices and standard operating procedures for cattle farmers.

4.2 Regional structures

Currently there are no standing regional structures for the red meat industry other than the Livestock Technical Committee (LTC) of SADC, a platform for discussing matters of common interest, such as cross-border trade policies, however, it is a passive organ. The lack of a strong regional collaboration is the weakest link in the red meat and live animals value chain for the SADC region. In addition, there is no strong private sector regional body in the red meat and live animals value chain. The lack of coordination at regional level results in some countries importing red meat products from countries such as Brazil, New Zealand, Australia, and Argentina instead of sourcing within the region or Africa to increase intra-regional trade. The red meat and live animal industry players can learn from initiatives of the Poultry Network that has increased inter-regional trade in poultry products reducing imports from external suppliers.

A regional red meat and live animal structure can be coordinated through Southern African Confederation of Agricultural Unions (SACAU). SACAU is a regional farmer organisation established in 1992 with the aim of fostering mutual cooperation and understanding between farmers' organisations, agricultural leaders, and the farming community in Southern Africa with a view to strengthening the voice of agriculture and promoting the well-being of farmers and the viability of agriculture in the region. The SADC farmer associations are members of SACAU and they include Agricultural Council of Tanzania (ACT), African Farmers' Association of South Africa (AFASA), Agri-SA, Botswana Agricultural Union (BAU), Commercial Farmers' Union of Zimbabwe (CFU), Coalition Paysanne de Madagascar (CPM), Madagascar-Fivondronamben'ny Tantsaha Malagasy (FEKRITAMA), Lesotho National Farmers' Union (LENAFU), Farmers' Union of Malawi (FUM), National Smallholder Farmers Association of Malawi (NASFAM), Namibia National Farmers Union (NNFU), Seychelles Farmers Association (SEYFA), Swaziland National Agricultural Union (SNAU), Unao Nacional de Camponeses (UNAC), Zimbabwe Farmers' Union (ZFU), Zambia National Farmers Union (ZNFU.)

Within the region, the PPPP's can be strengthened through sharing of expertise, and infrastructure such as abattoirs & laboratories. This will also increase information sharing and networking of the PPPP's within the SADC countries. A regional implementation of the guiding frameworks within the red meat and live animals industry is lacking and it is recommended as it enables the PPPP's linkages to be strong and ensure quality red meat production for the national, regional, and international markets.

Table 4. 3: *SWOT analysis*

Strengths
• 351,228 million ha of grazing land (83% of agricultural land) • Livestock production well distributed throughout the agro-ecological zones of the region. • Wide genetic pool and trans-boundary breeds, suitable for different production environments. • Well-developed livestock breeding programmes (e.g., RSA, Namibia). • Enforce animal health controls and veterinary public health controls, though stronger in some countries (e.g., Eswatini, Namibia, South Africa) than others (e.g., Madagascar, Malawi, Zimbabwe). • Government support services exist (e.g., extension). • World standard slaughter facilities in some countries, particularly those serving export markets. • Access to export markets such (EU- Eswatini, Botswana and Namibia), UAE (South Africa, Madagascar • Existing intra-regional trade • Good traceability systems for meat and livestock in some countries (e.g., Namibia) useful for export markets. • Good quality assurance systems in some countries (e.g., Namibia, RSA). • Well-developed local markets with safety/hygiene assurance across the value chain • Sizeable trade of livestock • Well-established industry association in some countries - cooperate amongst themselves to develop the value chain and liaise with government for appropriate support.
Opportunities
• Region attracts funding for development (SADP, 11th EU, etc) • Improved efficiency of utilisation of grazing land • Use existing knowledge from industry and research to improve feed/fodder/forage production. • Improve productivity of existing herds/flocks. • Unsaturated domestic market and lucrative regional, continental, and international export opportunities. • Middle class is growing along with appetite for animal sourced proteins - Braai/tshisa nyama/nyama Choma are big at social event.
• Differentiating country/regional livestock and meat products in order to gain competitiveness in the market (e.g., Karroo Lamb, Wagyu beef). • Digitization (e-information, e-auctions; e-trade). • Blended finance models for the sector (ranging from debt financing of value chain actors to funding development of the sector, e.g., skills development, vaccine development, compliance, etc. • Use of ad valorem taxes to support development of the sector. • Regional PPPPs in sharing infrastructure such as rail, cross border clearance, veterinary research and laboratories, harmonisation of registration of livestock medicines and feed additives, slaughter facilities, veterinary training, pest/disease control and eradication. • Regional cooperation to build on each member state's competitive advantage. • Use of available technology to attract youth for continuity in the RMLAVC • Engaging the youth in Livestock, Fisheries & Aquaculture Incubation Network (AYL-FAIN) within the RMLAVC.
Threats
• Climate change. • Deterioration of rangeland with no so easy solutions restoration. • Endemic diseases such as FMD, CBPP & anthrax and failure to develop robust control measures to enable the SADC member states to live with the diseases. • Potential of spreading zoonotic diseases such as brucellosis, tuberculosis, emerging coronaviruses (e.g. severe acute respiratory syndrome and Middle East respiratory syndrome). • Dilution and loss of indigenous breeds through genetic improvements programmes through the use exotic breeds • Reduction in water availability and water quality may result in reduced livestock productivity. • Import tariffs not high enough to discourage dumping. • Human pandemics (i.e., HIV and AIDS and COVID-19) can affect productivity across the value chains, lower economic performance and hence consumers' buying power. • Rural insecurity and stock theft. • Ageing producer community with no real strategy to attract and support youth in the sector. • Project fatigue. • Insecurity of markets

Weaknesses
• Poorly managed rangelands on communal land where smallholders raise their livestock. • Weak/no fodder flow management systems -non-existent for smallholder farmers in the region. • Uncontrolled breeding • Poor livestock improvement programmes in some countries. • Poor livestock productivity in herds on communal land (low productivity, low offtake). • Poor linkage of smallholder farmers to mainstream markets; producers are passive actors in the livestock value chain despite the fact that they hold a sizeable proportion of the herds. • Lack of finishing off and slaughter facilities closer to smallholder farmers' production areas • Weak/non-existent drought preparedness • Poor implementation of development programmes; delayed by bureaucracy (e.g., Swaziland Agricultural Development Programme (SADP) and interrupted unfavourable governing policies or ever changing polices (policy uncertainty). • Large skills gap in livestock management and marketing exacerbated by weak advisory, extension, research and development and other support services. • Particularly weak extension support for women and youth though they tend to be key role-players in rural agriculture while men seek alternative employment in cities. • Unsecure tenure on communal land resulting in poor organisation around land use for grazing and leading to land degradation. • Weak role of traditional leaders and lack of accountability in managing the grazing rangelands under their jurisdiction, leading to a vacuum in leadership over shared grazing. • Weak capability of livestock producers to work cooperatively and link to mainstream value chains. • Lack of PPPP policy and few examples of functional PPPPs that make meaningful impact. • Poor access to affordable finance for smallholder livestock farmers. • Red meat and live animals value chains not attracting/involving youth.

The PPPPs integrates the roles and responsibilities of partners thereby strengthening the RMLAVC through optimisation of opportunities, minimising or sharing risks, through application of best practices. In order to reduce the weaknesses and threats identified there is need to propose strategies and mechanisms for the PPPP relevant to the red meat and live animal value chain in order to foster collaboration and cross border trade across the SADC region.

CHAPTER 5: FRAMEWORK AND MODELS FOR PPPP

Proposed strategy/framework with models for PPPP relevant to the red meat and live animal value chain to foster collaboration cross border trade across the SADC region.

PPPPs are cooperative and collaborative arrangements which are typically long term in nature. A PPPP framework clearly articulates the procedures, rules and institutional responsibilities that determine how the public and private sector and producers initiate, implement, and manage PPPP projects (IFAD, 2016), particularly taking care to promote equitable and inclusive participation of marginalised groups such as youth, women and people living with disabilities. Given that form follows function, in this chapter, the function of the PPPPs in RMLAVC is briefly reviewed. This is then followed by a suggested framework of key building blocks for successful PPPPs, with specific application to RMLAVC.

5.1 Summary of the function of PPPPs in RMLAVC in the SADC region

Given that most African countries have signed up to the CAADP Framework and have developed country-level results frameworks for their respective National Agriculture Investment Plans (NAIPs), it is essential that the PPPP framework enhances SADC members countries' ability to implement and measure progress in the RMLAVC as part of the broader CAADP results framework. A national development plan for RMLAVC that has full buy-in and commitment from all relevant stakeholders, is implemented and tracked is important because, despite the fact that red meat and livestock are a major component of agriculture in most SADC countries, investment and successes in these value chains have been at best minimal and certainly not optimal. Instead, there tends to be fragmentary interventions that are not necessarily aligned to any long-term objectives and lack the comprehensive support that is required to make an impact. It is envisaged that PPPPs would improve evidence-based planning and development for RMLAVC by setting goals with targets and milestones; outlining clear roles and responsibilities and commitments of resources and actions in order to achieve the goals AUC-DREA and NEPAD (2019a) outline how the partnership framework could be developed at national level (Figure 5.1). In using this framework, countries should ensure that RMLAVC are adequately mainstreamed at each stage of the Country Agribusiness Partnership Framework (CAP-F) and the key outputs for RMALVC are well-articulated. Progress with the RMLAVC should be an integral part of the biennial review of progress with the CAADP NAIPs and indicate how private sector investment and producer participation have been stimulated through the PPPPs as summarised in Table 5.1.

STEP 1

Country Agribusiness Partnership Framework (CAP-F) planning
Official CAP-F government request triggered by NAIP or NAIP-refresh.

Key output: NAIP refresh integrates CAP-F

STEP 2

CAP-F kickoff
In country meetings with African Union Commission, African Union Development Agency (NEPAD), Regional Economic Communities, and Grow Africa to formally introduce the CAP-F concept.

Key output: Buy in by country's high-level officials.

STEP 3

Stocktaking
- Evaluate existing structures that could provide coordinating functions.
- Review existing policies.
- Review existing accountability mechanisms and capacity.
- Meeting with civil society organisations and development partners.

Roadmap
- Draft CAP-F implementation roadmap and stocktaking report.

Key output: Country stocktaking report and implementation roadmap produced.

STEP 4

CAP-F validation and high-profile launch
Roadmap validation workshop + communication tools

Key output: CAP-F accepted by all stakeholders.

STEP 5

Implementation
- Setup CAP-F national secretarial and governance structures.
- Develop database of investment & policy commitments.
- Establish and convene multi-stakeholder platforms to drive business case development along priority value chains.
- Develop business cases, match investors with business
- Opportunities identified and sign Term Sheets.

Key output: Public/private sector commitments database development and term sheets endorsed.

STEP 6

Mutual accountability + M&E
- Track progress of public & private sector commitments
- Integrate results in Joint Sector Review + AUC biennial review.
- Undertake joint CAP-F implementation review meetings

Key output: Buy in by country's high-level officials

Figure 5. 1: *Operationalisation of Country Agribusiness Partnership Framework (CAP-F).*
*(**Source:** AUC-DREA and NEPAD., 2019)*

Table 5. 1: Measurement of private sector investment in agriculture in the CAADP Biennial Review

Malabo commitment	Commitment performance category	Objectives	Indicator
Enhancing investment finance in agriculture	Domestic Private Sector Investment in Agriculture*.	Put in place or strengthen mechanisms to attract domestic private investment in agriculture*	Ratio of domestic private sector investment to public investment in agriculture*.
	Foreign Private Sector Investment in Agriculture*.	Put in place or strengthen mechanisms to attract foreign private direct investment in agriculture*.	Ratio of foreign private direct investment to public investment in agriculture*.
Halving poverty through agriculture by 2025	Inclusive PPPs for commodity value chains*.	Promote approaches via PPP arrangements to link smallholder producers to value chains of priority agricultural commodities*.	Number of priority agricultural commodity value chains for which a PPP is established with strong linkage to smallholder agriculture*.

**Commitments, objectives and indicators for red meat and live animal value chains should be developed and tracked in each of these instances.*
***Source:** AUC-DREA and NEPAD (2019a, b)*

At project level, the PPPPs should ensure inclusive development of specific components of the RMLAVC. The projects translate the national plans into smaller actionable projects, which form building blocks to the broader national goals and objectives. They would be buoyed by the honouring of commitments that are made to support the broader RMLAVC and agricultural development plans (e.g. building of appropriate infrastructure, opening up of market opportunities, enhancement of veterinary services, etc). These project level PPPPs should particularly ensure inclusion of smallholder producers who produce more than 80% of the livestock in the SADC region; women who tend to be the main minders of livestock while men are employed elsewhere; youth who the burgeoning population group in the region and are the future drivers of the subsector, as well as enable ease of entry by people living with disability.

The African Union (AUC-DREA and NEPAD, 2019b) summaries the objectives and potential benefits of Agri-PPPs as follows:

Common objectives of agri-PPPs

i. Develop agricultural value chains.
ii. Combine agricultural research, innovation, and technology transfer.
iii. Build and upgrade market infrastructure.
iv. Deliver business development.

Potential benefits of agri-PPPs to agricultural development:

i. Improve operational and economic efficiency.
ii. Incorporate the social interests of communities.
iii. Improve market access, increase productivity, improve product quality and facilitate adoption of new technologies by smallholders.
iv. Increase the capacity of producer organisations.
v. Generate on- and off-farm employment.

vi. Strengthen public sector institutions.
vii. Increase sales for firms involved.
viii. Increase affordability by pooling funds from various sources.

According to IFAD (2016) the building blocks for a successful PPPP are as illustrated in Figure 5.2. The next section will unpack these blocks to propose a framework for PPPPs at planning level as well as at project implementation. The recommendations are drawn from the research conducted by Simela and Marwa (2020), which unpacked the establishment of public private partnerships for financial inclusion.

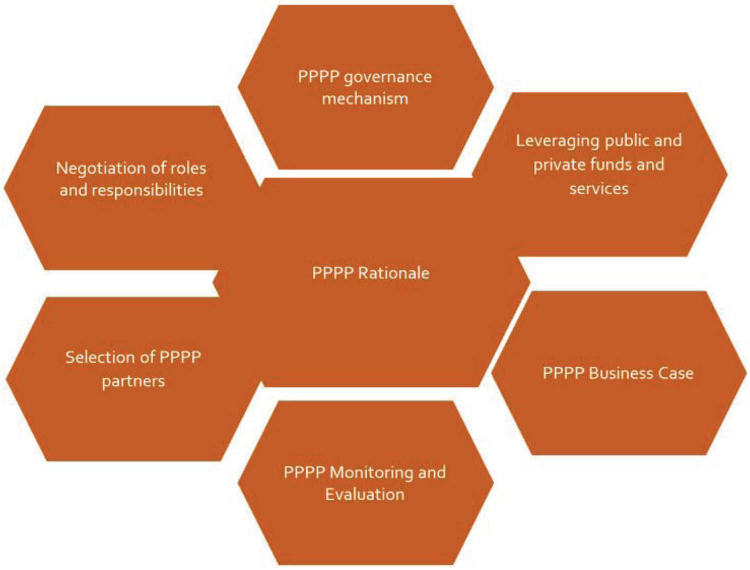


Figure 5. 2: *Building blocks of a successful PPPP*

5.2 PPPP Governance mechanism, goalsetting and negotiation of roles and responsibilities

5.2.1 PPPP inception

Relevant key stakeholders should be invited to be part of the process which is preferably led by both government and industry representatives. The facilitators could either be internal (especially if both parties have extensive collaboration and partnership experience) or facilitated by external partnership brokers. Sector role-players such as IFAD, ILRI, NEPAD, SNV could play this role provided they are able to allow the parties to develop their own plan and are not compromised by their own institutional agendas. A third alternative would be professional partnership brokers, though these may be hampered by inadequate understanding of the industry and the partners at play. The partnership broker should be able to allow all stakeholders to express themselves (especially the marginalised groups, such as smallholder producers, women, and youth) and have their input reflected in the strategic intent of the partnership, through to the details of how the partnership would be managed and the project implement. The key role of the partnership broker (whether internal or external) is to facilitate a win-win arrangement for all parties by identifying the collaborative advantage, securing buy-in of principals and key decision-makers of the participating institutions and eliminating perceived areas of conflict.

5.2.2 Identification and selection of partners

At national strategic level to develop a national framework for the RMLAVC, the partners would be the representative organisations of the interested parties; such as producer organisations, industry associations, lead government ministries and the related ones (such as ministries responsible for environment, water, energy, trade, etc) and traditional/rural authorities. The CAADP country process (AUC-DREA) and NEPAD, 2019) provides ample guidance on how the partnerships at this level should be established.

The RMLAVC tend to be weak in National Agricultural Investment Plans (NAIPS) because it difficult to establish baselines of the state of livestock production and development, and thence develop models to test the impact of proposed interventions (Michael et al., 2018). As a result of such constraints, there has generally been no clear road map for RMLAVC development in most SADC member states. However in recent times, a number of countries have formulated sector specific plans such as the Tanzania livestock master plan (2017/2018 – 2021/2022) (Michael et al., 2018); Ministry of Agriculture Strategic Plan (2018-2023), Mistry of Agriculture (Eswatini) (2018), and the South African Agriculture and Agro-processing Master Plan, which is still work in progress. Key for the success of these plans would be that each partner meets their commitments towards the implementation of the plan and the ability to track and measure progress, reflectively learn and improve of the plan and implementation.

In project specific partnerships, the partners depend on the nature of the project, where it is and who has vested interest in its success. They may be self-selecting or following a guiding framework, as for example in the multi-stakeholder partnership in Zimbabwe projects or they may be selected through a competitive, scouting or due diligence process. The latter is most likely to be led by the partnership broker, with clear guidelines on the criteria for the required partners. Where smallholder producers and other marginalised groups (e.g., women, youth and people living with disability) are brought on board, there should be a capacity development plan to enable them to understand what is expected from them, how they will benefit from the partnership, what role should they play in the process and what they should expect from other partners.

5.2.3. Setting of strategic goals and co-creating partnership agreement

The strategic intent of the partnership should be clearly articulated right from the outset (i.e., what the partners want to do and why). Failure to articulate the strategic intent of the partnership and to recognise the role of the partnership in their overall strategy is the root causes of partnership failure.

In addition, the created value (i.e., the output of the collaboration) should be clearly articulated with clear milestones for achieving the outputs. This is important because shared goals tend to be resilient to partnership friction and enable the partners to invest in the relationship to achieve success. The created value for each of the partners need not be the same but complementary and achievable through the partnership (Figure 5.3). For example, government tends to be developmental, and its created value may be the development of smallholder producers in strategic remote areas. On the other hand, commercial producers and other role-players in the private sector may see development and opening up of new markets for red meat and live animals as priority area that creates a pull effect, opens space to develop production and supply the required products. The parties should be able to marry their expectations such that the outputs of the collaboration serve all parties concerned.

NB:

- Created value – Results of value transfer amongst the partners
- Transfer activities – How the partners collaborate and mutually transfer value.
- Desired value from the partnership

Figure 5. 3: *Partnership canvas (Source: adapted from Doorneweert,2017)*

Once the strategic goals and created value of the partnership have been established, partners should co-create a partnering agreement that sets out clear roles and responsibilities along with objectives and a governance/decision-making structure that ensures proper accountability and efficient delivery.

The co-creation of partnerships described here is usually one of the main weaknesses in attempts to establish partnerships. In the observation made in the course of this study, in most "partnerships" that are designed to develop smallholder producers, there is no equitable contribution and expectation out of the partnership. In instances that the partnership is private sector led, government and smallholder producers may be passive participants. Reciprocally, if the project is government led, private sector and the smallholder producers may be expected to be signatories of a document that they hardly had a role in its formulation. And, if it is development organisation-led, internal stakeholders might not see their role nor be able to make time for the project. Consequently most "partnerships" fail at inception or do not last beyond the project life cycle.

5.2.4. Embedding the partnership

At the inception of a partnership, there should be buy in from the principals and key decision-makers of the partnering institutions. Hidden or conflicting agendas should be eliminated and there should be firm establishment of mutual trust and respect. Over and above the definition of clear goals, objectives, priorities and milestones, persons that will be responsible for the partnership should be assigned as such at the onset and empowered to undertake their responsibilities.

Cultural fit or partner complementarity; particularly between public and private sector institutions and the producers would be one of the key challenges to PPPPs. Common prejudices are that on one hand, private sector partners are perceived to lack community relationships, rely excessively on technical solutions and only pursue commercial interests. On the other hand, public sector partners seemingly lack reliable funding and technical resources, are riddled with corruption, high staff turnover, ineffective bureaucracy, and resistance to change. And producers are perceived to be persistently seeking opportunities to benefit themselves without giving much into the partnerships. Whereas the private sector players may be slow to make initial decisions, they tend to expect instant action and delivery once they have acceded to the partnership. Meanwhile public sector partners may be quicker to agree to a partnership, but decision-making be mired by bureaucracy. Such differences, emanating from divergent sectoral logics and culture, may hamper communication and the development of the mode of the collaboration process. These snags can be avoided in partnerships where there is an effective lead organisation (e.g., the government organisation, private sector institution or producer association), reduced where there is an effective administration organisation (i.e., an independent party is appointed to manage the partnership project) between the partners but occurs frequently where the partners attempt to share governance (Stadtler, 2012).

5.2.5. Boundary management

Boundary management is about bridging the gaps between the partner organisations and balancing the interests and backgrounds of the partners. It includes making decisions on governance that minimise transaction costs for each party, maximise crucial external strategic relationships, maximise the value of the partners' resources and create coherence between the identity of each participating entity and its activities. Boundary management includes management of power distribution amongst the partners. The tendency is that within a partnership, organisations with power may for example command prices in their favour while those with lesser power are price takers. Partnership boundary management includes management of the power dynamics within the partnership and ensuring transparency and accountability.

5.2.6. Trust

Trust is described trust as, "positive expectations about another's motives with respect to oneself in situations entailing risks". Das and Teng (1996). It is the feeling of certainty that the partner is going to behave according to your expectations and not let you down. Trust is one essential element of a partnership that cannot be written into a contract. It reduces uncertainty among partners and the fear of opportunism. It enhances cooperative behaviour, and so contributes to higher partner satisfaction and partnership efficacy. It minimises the effort required for contract negotiation and monitoring, and through such mechanisms reduces transaction costs as well as the subjective risk of entering into a relationship. Yet, common practice is that suspicion rather than trust is a starting point of a collaboration.

At the end of the negotiation process, a certain level of trust needs to be established for parties to actually proceed to the final step, which is partnership formation. Without trust or the will to build trust, intending partners are less likely to reach agreement. The lower the level of trust, the stricter the memorandum of agreement that would be formulated by the partners. The higher the level of trust, the less the perceived risks that should be mitigated; and hence the more likely it is that negotiations will go smoothly and be efficient.

In order to build trust with a PPPP, it is recommended that the partners start with a small project and scale it up as they build trust amongst themselves. Partnership agreements should have an exit strategy that provides a way out in the event that the partnership fails. Communication is a key element that permeates trust building.

5.2.7. Communication

Key communication aspects in developing and maintaining partnerships are the quality of the information that is shared, systematic sharing of relevant information and participation in joint planning and goal setting. Open and prompt communication between partners enhances trust. It helps partners to collect information about the credibility and trustworthiness of the intended partner. Dialogue provides a basis for continued interaction with partner, which further develops common values and norms. Deployment of formal control mechanism undermines trust, but quality and systematic communications establish trust and mutual respect.

Key to communication is the deployment of people with the correct skills-set, willingness to collaborate and who are appropriately positioned within the organisation to drive the partnership. All concerned parties should be part of the dialogue and consider themselves as partners and not as being talked to.

5.2.8. Partnership management capability and experience

When partners anticipate setbacks (e.g., from previous experience), they engage in preventive roles to avert the setback. One partner may deliberately stall the process or step back on commitments if they perceive greater momentum for failure. Relational attachment increases the effort that partners put into averting potential failure, but this may be eroded by complacency and partner disillusionment, and hence affect momentum for success. Thus, partnership success (or failure) hinges on the partners' motivation (or lack of) to sustain momentum towards success by developing a stronger degree of relational attachment, which in turn mitigates relational risk and unlocks partners' capabilities to tap into unexpected synergies.

A cooperative mindset is key to developing collaborative advantage. The longer organisations collaborate the more confident they become with each other and mutual collaborating abilities. For an entity that is exposed to several partners, a tendency to make comparison judgement of one partner against others should be avoided. Focus should rather be on appropriate metrics that have been developed for that specific partnership.

5.2.9. Expertise and capabilities

Although partnerships are increasingly touted as enablers for transformational interventions in agriculture and other sectors, many of them struggle to manage the relationship so as to achieve their goals. Partnerships fail in part because the parties assume that they will find good partners, be able to capture sufficient economic gains and continue benefiting from the partnership overtime. However, mastering partnership management is a learning process, which involves articulation, codifying, sharing and internalising knowledge in the form of best practices Mamavi, Meier and Zerbib (2015). Thus, the ability of entities to actively capture and leverage partnering experience is a key success factor. A dedicated partnership management function with expertise to embed partnership capability and culture across the organisation is recommended. For example if an agribusiness, such as an abattoir participates in a development programme to increase the supply of livestock from the developing sector, it would be advantageous that the abattoir sets up a separate business unit with appropriate expertise to manage that development programme as its core business than to entrust such a function to members of staff who already have other key functions in the business. Similarly, the participating producers would be best served if they are organised amongst themselves (e.g.as an association, cooperative, etc.) and have/develop the prerequisite expertise to deliver on the partnership objectives. Government could facilitate and enable the partnership through one of its appropriate units (e.g., extension and advisory services). The crux is that partnership management should be handled by personnel with appropriate expertise than left to happen by default.

Example of national PPP management framework

South African Framework for PPP management

The South African PPP Unit coordinates and manages all PPP programs and reports to Budget Office of the National Treasury. The key functions include formal approval at three different stages of project preparation to ensure compliance with Treasury regulations; in-depth technical assistance to departments throughout the PPP project cycle; assistance to departments in appointing transaction advisors; development of policy, guidelines, and instructions, including the PPP Manual and the Standardized PPP Provisions (contract terms); training courses and workshops and public awareness on existing PPPs.

5.3 Selected case studies of PPPP and PPPP-like models and learnings from them

There are not many examples of typically PPPP models, which are cooperative and collaborative arrangements with clear procedures, rules and institutional responsibilities that determine how the public and private sector and producers initiate, implement, and manage PPPP projects in RMLAVC. Examples where there are some forms of partnerships have been selected and summarised as cases studies 1 – 6.

What is clear from the cases studies that were gleaned from the region is that the RMLAVC projects are initiated by either the public or private sector or global development agencies. In such instances, the other parties in the project, more so the smallholder producers, either toe the line or make verbal commitments with variable follow through in practice. It is not all instances where the parties formalise a working relationship. For instance, if the private sector initiates a development project, government extension and veterinary services may serve the producers in the project though not through a formalised contractual arrangement to do so (e.g. Zambeef, Nyama World and Sernick). Similarly individual producers that participate in the projects may/may not have a formal agreement with the private sector partner, and the producers might not be organised into a formal structure that represents their interests. Private sector initiatives may grow and be long-lasting where there is a business case that attracts other role players to cooperate and collaborate, and the policy environment allows them to continue (e.g. Zambeef, Nyama World and Sernick). Unforeseen policy directives, such as import/export restrictions can have detrimental effects on the projects (e.g. BoViMa in Madagascar). Other operational and implementational challenges to PPPPs listed by AUC-DREA and NEPAD (2019b) include the following:

- Poor capacity and low motivation of public partners.
- Lack of a coordination and oversight bodies, leading to poor or lack of execution
- Weaknesses in organisational frameworks.
- Bureaucracy and/or inflexible operational procedures which delay the formalisation and operationalisation of partnerships and, for example, the releasing of funds.
- Difficulties in attracting and retaining qualified professionals.
- Risk of excluding smallholder producers as partners.
- Risk of creating dependency by the beneficiaries.
- Technical issues during implementation such as innovation failures, pest and disease outbreaks that cannot be controlled, negative impacts of weather, low uptake of technology by producers and a lack of traceability and quality control procedures.

Project name	Multi-stakeholder innovation platforms for agricultural value chain development
Project type	Innovation platforms are a people-centred approach that brings in multiple stakeholders in the value chain to resolve specific bottlenecks. Readers are encouraged to look up and read the International Livestock Research Institute's (ILRI) briefs on innovation platforms, which can be accessed at https://cgspace.cgiar.org/handle/10568/33667/recent-submissions.
Description	An innovation platform is a group of individuals (who often represent different organizations) with different backgrounds and interests: farmers, traders, food processors, researchers, government officials etc. The members come together to diagnose problems, identify opportunities, and find ways to achieve their goals (Figure 5.4). They may design and implement activities as a platform, or coordinate activities by individual members. Innovation platforms are particularly useful for addressing the complex issues in in agriculture. They involve different biophysical, socioeconomic, and political factors, and various formal and informal institutions. By bringing together stakeholders from various sectors and different levels, innovation platforms may be able to identify and address common concerns more effectively. Innovation platforms can be used to explore strategies that can boost productivity, manage natural resources, improve value chains, and adapt to climate change. Some innovation platforms focus on single issues while others deal with multiple topics.
Implementing authority	Implemented by the ILRI, International Crops Research Institute for the Semi-Arid Tropics (ICRISAT), SNV and other development organisations as a research and development approach to connect different stakeholders to achieve common goals.
Type of PPP	Innovations are true PPPPs in that they bring stakeholders from all spheres to cooperate and collaborate in order to initiate, implement and manage specific projects.
Outcomes	Innovation platforms have been successful in identifying issues, finding ready-made solutions, and channeling information and resources to those who need them. Where the solution is not obvious, innovation platforms identify the most important issues, select promising ways to solve them, and test these promising solutions through research. They are also a platform for negotiation, persuasion and reaching consensus. If the solution lies with a third party, the innovation platform gathers evidence of the problem and evidence that it can be resolved and uses that to lobby the third party for the appropriate solution. Innovation platforms have been successful uses to link smallholder livestock producers to markets and prevailing value chains. They can be used to address equity dynamics by ensuring that the marginalized groups, such as women are represented and given space to speak for themselves
Limitations	• Difficult to achieve impact because the problems that the innovation platforms solve for are complex, involving divergent interests, conflict and uncertainty. Finding a workable solution many take a long time. • Hard to measure impacts and benefits because many are intangible, difficult to quantify, involve many actors and it is difficult to attribute an impact or benefit wholly to the innovation platform's intervention. • Innovation platforms are hard work, often set up as 3 – 4-year projects but actual impact may be realised 8 =10 years down the line. • If resolving problems takes too long, some role-players might lose interest and pull out, making the innovation platform ineffective.

Case study 1: Multi-stakeholder innovation platforms for agricultural value chain development

Source: *Birachi, van Rooyen, Some, Maute, Cadilhon , Adekunle and Swaans, 2013; Duncan, le Borgne, Maute and Tucker, 2013; Mulema, Snyder, Ravichandran and Becon, 2015.*

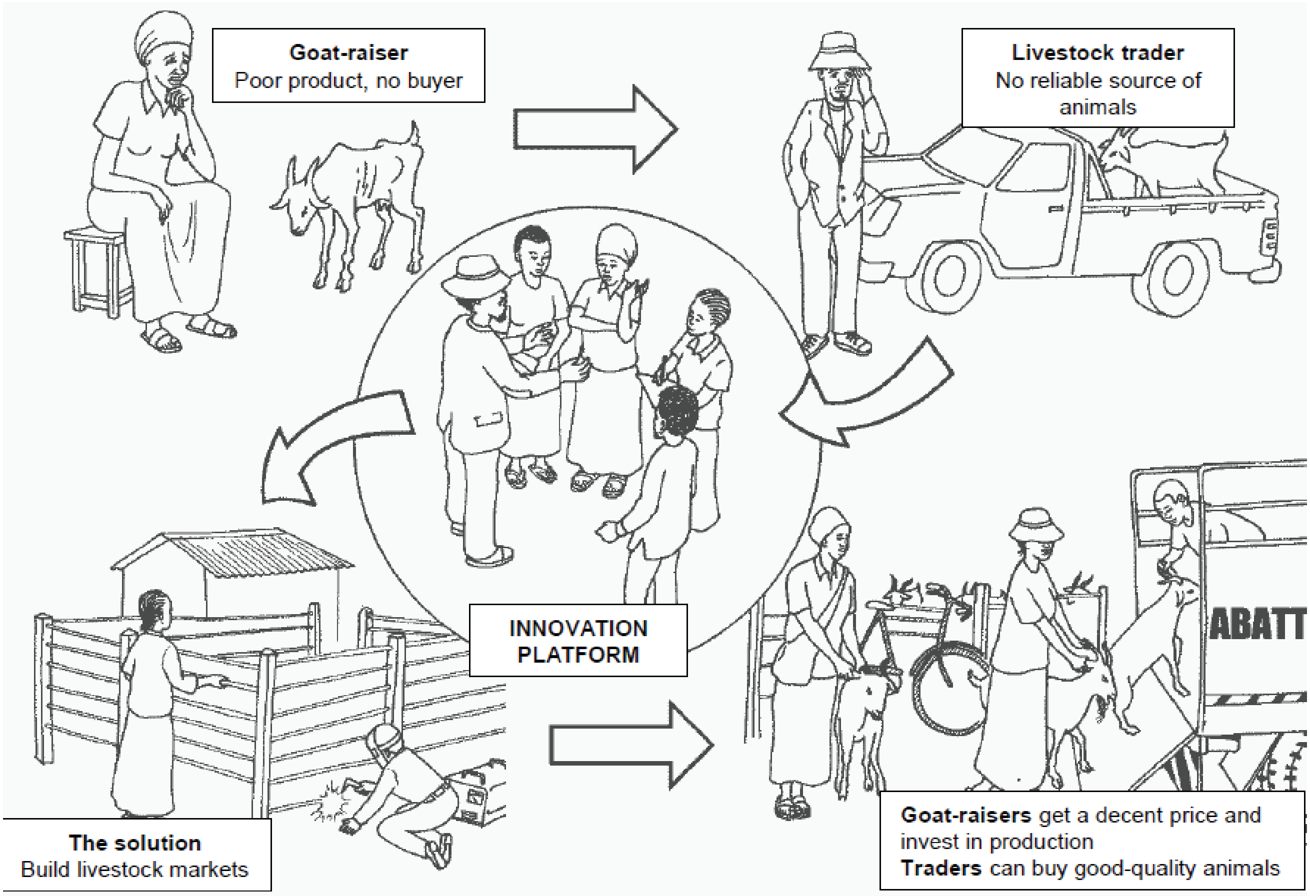


Figure 5. 4: *An example of a goat value chain innovation platform*
*(**Source:** Birachi et al., 2013)*

Project name	Sernick Emerging Farmer Programme
Project type	Developing commercial cattle producers
Description	The Jobs Fund (a challenge fund implemented by South Africa's Department of National Treasury) and Sernick Group partnered in the Sernick Emerging Farmers Programme. The R502.6 million project comprised R165 million Jobs Fund grant funding, R237.6 million matched funding contribution by Sernick and R100 million that was provided as a loan by other funding partners. The initiative is a comprehensive intervention in which emerging black farmers are recruited, trained, capacitated, and provided with supply opportunities through integration in Sernick's value chain. But the farmers are not restricted to only trade with Sernick. Sernick implements the projects and provides detailed reports on progress to the Jobs Fund, based on which funding flows (Figure 5.5). Six hundred and sixty farmers were recruited, given accredited training and an opportunity to exchange their old stock with good quality cattle that fetch higher prices in the market. Of those 300 were selected and equipped with technical skills to enable them to develop their own herds while maintaining healthy cash flows to meet their working capital requirements. They were also supported to eventually own and run their feedlots. A further 50 farmers were selected from the 300 and progressed into viable commercial entities. Some of these farmers acquired shares in Sernick wholesale and abattoir.
Implementing authority	Sernick Group LTD PTY -South Africa
Type of PPP	Public-Private partnership with wilful participating of the producers who apply and are selected to participate in the project.

Project name	Sernick Emerging Farmer Programme
Life span	3-year partnership between Sernick and Jobs Fund but can continue if further funding is secured.
Outcomes	Farmers progressed from entry level with a few breeding cows to commercial cattle farmers, with quality breeding herds, high productivity and improved income for the farmers.
Limitations	Funding of the farmer development programme for continuity.
Key lessons	Stepped intervention in the developing of smallholder farmers with a clear growth pathway.

Source: *Sernick Group, 2019a,b*

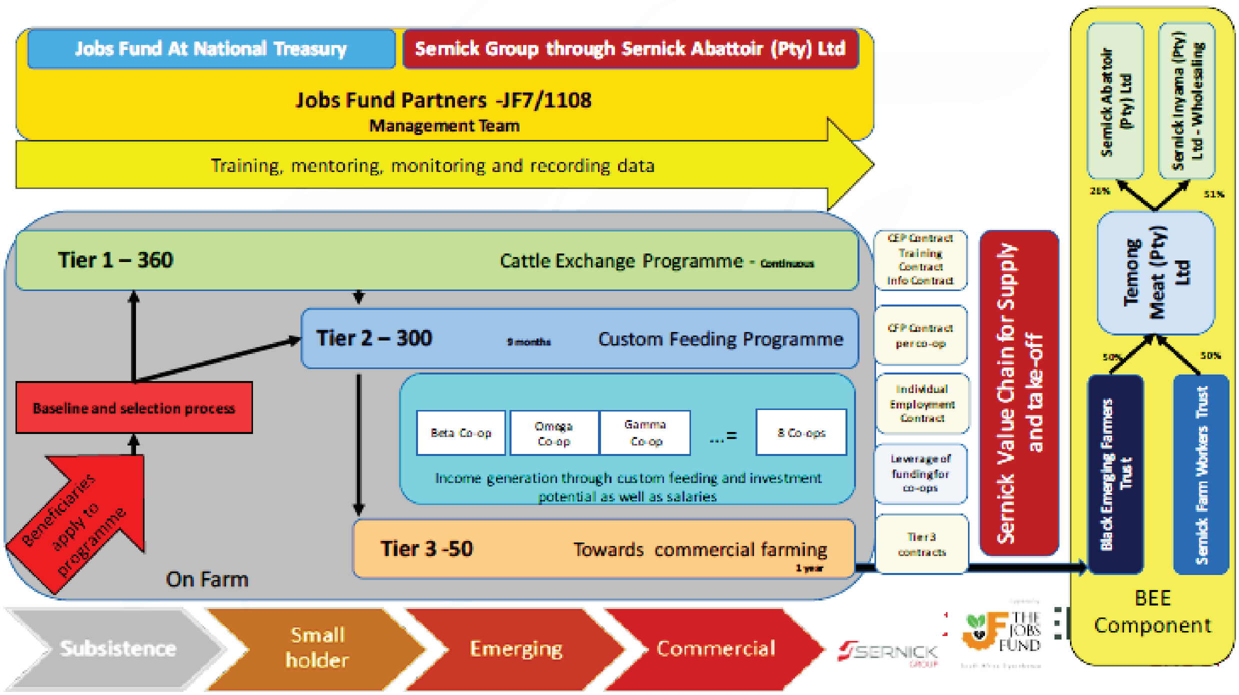


__Figure 5. 5:__ Sernick emerging farmers development programme

Source: Sernick Group, (2109b)

Case study 3: Zimbabwe AgLivelihoods Innovation Project (ZALiP)

Project name	Zimbabwe AgLivelihoods Innovation Project (ZALiP)
Project type	Commercialisation of goat production
Description	The project aims to increased goat productivity and strengthen the goat value chain in Beitbridge district. The objective is to out scale forage and feeds technologies and feeding strategies for increased small stock production in Beitbridge district with the broader aim of improving food and nutritional security and income of smallholder farmers, especially women and the youth. The build—grow project aims to support at least 2,500 rural smallholder farmers to participate more fully in food security and agricultural economic growth activities to protect and grow their productive assets and move steadily out of poverty towards secure and prosperous agricultural livelihoods
Implementing authority	Zimbabwe AgLivelihoods Innovation Project (ZALiP) in partnership with ILRI
Type of PPP	PPP- producers are beneficiaries
Life span	5 years
Outcomes	No clear outcomes
Limitations	• Who initiated it? When were the partnerships established, if at all?
Key lessons	• Cannot be clearly articulated

Source: *Zambeef Products PLC (2016, 2017, 2020)*

Case study 5: Commercialising smallholder livestock and increasing agricultural diversification in Malawi

Project name	Nyama World (NW)
Project name	Nyama World (NW)
Project type	Funding of Nyama World by Norfund to develop a beef value chain in Malawi.
Description	Norwegian Fund (Norfund) provided support to Nyama World's expansion strategy by providing finance, expertise and support through a grant facility.
Implementing authority	Nyama World, Ministry of Agriculture, Water and Irrigation, Lilongwe University of Agriculture and Natural Resources
Type of PPP	Nyama World led, with funding from Norfund, IFAD and Malawi innovation Challenge Fund for establishing smallholder farmers' clubs.
Life span	Long term
Outcomes	Financing for Nyama World has contributed to the realisation of key elements in the company's expansion and export plan. A modern European Union standard export quality non-stun halaal abattoir in the city of Mzuzu has been constructed. NW has purchased 50 Bonsmara bulls for the smallholder beef improvement programme among the smallholder cattle farmers. The bulls each serve around 100 cows every year and help to secure a steady supply of high-quality meat from smallholder livestock farmers. A feedlot has been developed on 10 ha of the company's farm giving NW the capacity to receive and fatten 3,000 animals. Refrigerated vehicles and heavy-duty generators have been acquired through the funding enabling NW to distribute red meat products in Malawi. NW's target is to import 500 bulls by 2026, and to integrate 30,000 smallholder farmers into their value chain. Norfund further provided a grant to NW to co-finance the establishment of 40 new farmers' clubs with 2,000 members. The new clubs targeted young men (50%) and women (50%) in the Mzimba district. These smallholder farmers 'clubs receive a Bonsmara bull to breed with their Zebu cows. Smallholder farmers' clubs are also funded by IFAD and Malawi Innovation Challenge Fund and the project is implemented by Lilongwe University of Agriculture and Natural Resources and Ministry of Agriculture, Water and Irrigation.
Limitations	Although government support provides support services to the programme (extension and veterinary service) but do not have a formal arrangement with Nyama World to do so. Threats: loss of indigenous genetics due to uncontrolled out breeding

Source: *Norfund, (2018).*

Case study 6: Bonne Viande de Madagascar

Project name	Bonne Viande de Madagascar
Project type	Feedlot and abattoir intended to provide a market for zebu cattle in the southern districts of Madagascar
Description	The IFC and the Global Agriculture and Food Security Program (GAFSP) supported a local agribusiness to establish Bonne Viande de Madagascar (BoViMa), a modern feedlot and abattoir, which is intended to improve the livelihoods of more than 20,000 zebu cattle farmers and herders in Madagascar's impoverished south, and directly employ 200 people as well as increase meat production and export from Madagascar. Furthermore, the World Bank provided funding to the Malagasy government, to enable them to improve local infrastructure and veterinary services; and hence certification of export beef. Smallholder farmers in BoViMa's supply chain would receive technical assistance through an IFC-supported outgrower programme.
Implementing authority	Private agribusiness entity with the support of IFC, World Bank and Malagasy government
Type of PPP	Private sector, global development organisations and Malagasy government. Zebu cattle farmers were expected to benefit from the project by supplying slaughter stock and the fact members of surrounding communities could get jobs at the feedlot and abattoir.
Outcomes	Limited flow of cattle for fattening and slaughter due to a number of constraints as listed below.
Limitations	• Possibly inadequate engagement of zebu cattle farmers as key suppliers and failure to address cattle rustling, which is the biggest threat to cattle farmers. • Government changes is trade policy for live animals and meat in order to curtail cattle rustling and depletion of the zebu herd impacted on performance. • The performance of the feedlot and abattoir was compounded by the limitations in global movement and trade imposed in response to covid-19.

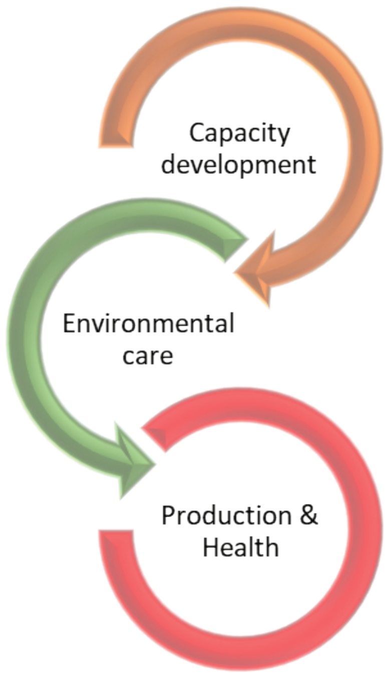
Source: *Vyawahare (2020), GAFSP (2018).*

CHAPTER SIX: BEST PRACTICES FOR STRENGTHENING PPPPS IN RMLAVC

6.1 The scope for Best Practices

Best practices which are also referred to as "Good practice, better practice or intelligent practice are sets of principles derived from experiences in different context that are extrapolated for application in another context to achieve better results in a desired direction (Overman and Boyd, 1994). The PPPP RMLAVC framework must be built on environmentally and technically sound, and socially responsible norms that value natural resources, prioritise animal health and welfare while recognising the role of people for improved efficiency and innovation. As such the proposed best practices for each of the role players are built around programs within the context of defined national strategic goals (chapter 4). Table 6.1 -6.3 captures these best practices expected for each role player (producers, private, and public) based on the four pillars defined below. Crosscutting issues including training are covered in Table 6.4.

6.1.2 The three pillars for best practices in RMLAVC



6.1.2 Increased production and health

Higher Efficiencies in the production cycle enhance the ability of producers to adapt to natural disasters and socio-economic challenges. Application of land management practices that conserve and enhance the health of ecosystems and monitoring to achieve continuous improvement is critical. Partners must oversee protection of grazing areas from land conversion caused by urbanization, and degradation from overgrazing. Responsible and efficient utilisation of water resources is embedded, and soil health is maintained or improved through implementation of best practices for forage/pasture production.

6.1.3 Animal Health and Welfare

Compliance with national and international regulations on animal health and welfare in line with the International des Épizooties (OIE; the World Organisation for Animal Health) is mandatory. Partners must be held responsible for animal welfare to point of slaughter. Transportation and handling of live animals has to be consistent with OIE guidelines and animal welfare procedures and once at processing facilities -slaughter procedures are aligned to the OIE terrestrial animal health code (OIE, 2013).

6.1.4 Capacity building

Compliance with applicable laws to respect rights of all human beings, and recognition of diverse cultural heritage in accordance with the UNGPBHR (2012). The PPPPs positively engage with and support the local community, develop safe and healthy work culture aided by relevant training, mentorship, and appropriate equipment to reduce accident risks.

6.2 Best Practices- Producer and Producer organizations

Main actors are commercial/emerging and communal farmers. Table 6.1-6.2 lists proposed best practices as noted from review of literature, case studies and questionnaire surveys.

Table 6. 1: *Proposed Best Practices for Producers and associated organizations.*

Pillar	**Best Practices**
1. Increasing productivity and efficiency	a. a. Producers must be organized into local structures that can easily access support i.e., technical assistance to understand markets and improve linkage to markets and enhance: • access affordable finance to support production, • group marketing of livestock, • management and optimization of grazing and water resources. • Implementation of animal health programs-adhering to standards and norms through community-based animal health care programs • Access to breeding schemes – that can access certified bulls from approved local breeders
	b. Access resources for production (land, water, and livestock) which enable producers to access affordable financial resources that drives production
	c. Continually investigate viable alternatives to wealth storage (convert cattle to wealth) to mitigate climate change risks
	d. a. Continued education for skills development through training and mentorship. • How to run a profitable livestock enterprise with focus on youth and women • Livestock improvement through breeding • Livestock finishing off methods (market orientated feeding) • Compliance with animal health management practices. • Effective trading on all market platforms including virtual auctions
2. Sustainable linkages to input supplies and markets	• Migrate digital systems to link to information sources, input suppliers and markets.
	• Exposure to new innovations in the market through engagement in industry events
	• Commit to PPPPs through legally binding contractual arrangements
3. Accountability	• Landcare to prevent land degradation, pollution of water resources, waste disposal and transmission of diseases which impede trading (e.g. environmental certification, veterinary records and water and nutrient recycling especially on concentrated animal feeding areas -feedlots)

Key role players include, farmer organizations & community groups, Traditional leaders (land authorities), Extension and veterinary services, NGO, Breeders associations (private sector)

6.3 Best Practices-Private Sector

Main players include input suppliers, auctioneers, and traders, agri development funders, innovation and technology developers, industry regulators and lobbying entities. Table 6.2 provides a list of proposed best practices as noted from review of literature, case studies and questionnaire surveys.

Table 6. 2: *Proposed Best Practices for private sector.*

Pillar	Best Practices
1. Consistence in supply of high-quality live animals	• Training producers to build capacity so that they can provide consistent supply products of acceptable quality. • Breed improvement through bull and cow selection functional merit and application of artificial insemination and MOET and sometimes replacement of economically inferior breeds
2. Transparency in input supply, classification, and marketing	• Transparency in supplying of inputs such as feeds and veterinary supplies and animal resources (genetics-good quality bulls and semen, cows, and forage seed) especially to smallholder producers • Transparent pricing mechanisms e.g., auctioneers and brokers • Transparent grading of live animals and harmonized meat classification systems for cattle, sheep, and goats • Sharing of risk in financing producers (contract buying e.g. grass-fed beef/lamb/chevon) -all partners carry a certain amount of risk to minimize impact of loss on producers • Transparency in auditing of production system for quality assurance-clearly defined and unbiased assessment tools applied by independent evaluators. • Create market stability-establish self-regulating systems to prevent creation of artificial shortages and hoarding to influence prices.
3. Improving markets	• Promote quickest and shortest value chain, linking farmers directly to input suppliers and offtake markets (e.g., Sernick Farmer Development Program and Innovative Platforms in Zimbabwe[2]; NyamaWorld in Malawi • Strengthen farmer self-help initiatives through local associations/ cooperatives/ and Community Based Animal Health Workers (CAHWs) e.g the Afrivet Diptank project (Amthonjeni) for communal area producers in the KwaZulu Natal province (South Africa) for disease surveillance, recording and animal readiness for markets. • Consistence in product supply and quality • Lobbying and identifying new markets • Technology and innovation (e.g., creating new products for current consumers and new tastes)
4. Improving success of trade (local & export)	• Develop and market products, • Brand promoters -market country, and regional brands (e.g., certified Karroo lamb, Wagyu beef, Proudly South African, happy cows (animal welfare), buy local, Botswana's organic free-range beef[3], • Participate as Brand certifying authorities
5. Accountability	• Implement and self-regulate environmental care programs to mitigate effects of climate change on natural resources. • Implement and self-regulate breeding systems to prevent loss of indigenous genetic materials and or gains • Waste management- implements and self regulates. • Consumers- ensure fairness of prices back to producers of legally traded and products and brands.
6. Collaborative support to regulate industry	• Influencing the regulatory framework -where procedures are not clear, private sector should collaborate in developing SOP, providing data to enable regulatory/ compliance, or vendor declaration to certify adherence to procedures.

[2] *Tui, S., H-K., Senda, T., Dube, T. & Van Rooyen, A., 2019. Empowering Women in Integrated Crop-Livestock Farming through Innovation Platforms: Experience in Semi-arid Zimbabwe. Technical Report. Available at: https://www.researchgate.net/publication/333608842*
[3] *https://mrsdoodlestravels.wordpress.com/2017/01/13/botswanas-abundance-of-organic-free-range-beef/*

Pillar	Best Practices
7. Monitoring the value chain	• Stringent monitoring for quality and safety assurance and correctness of red meat products that flow through the value chain e.g. prevent donkey, horse and dog meat passing for red meat and hamburgers and sausages • Ensure that correct and legally traded products move through the value chain (traceability to mitigate trading of stolen or illegally obtained livestock and products) • Ensure that production systems do not result in loss of indigenous genetic resources.

6.4 Best practices –Public sector

Table 6.3 lists proposed best practices as noted from literature review, case studies and questionnaire surveys.

Table 6. 3: *Proposed Best Practices for the Public sector*

Pillar	Best Practices
1. Creating competitive advantage	• The public sector should make use of competitive advantages of member states to strengthen intra- regional trade (e.g. export of sheep and goats to South Africa; beef to the Islands, etc.) • Initiate and sign trade protocols with external partners.
2. Coordination of development programs	• Coordination of all development programs towards one long term goal, such as a National Agricultural Investment Plan or equivalent with specific national deliverables and time frame. • Regional coordination platforms (e.g., within SADC and SACAU) to share best practices of PPPP policies.
3. Performance Indicator framework	• Develop performance indicator framework with key indicators that demonstrate relevance and efficiency of actions for the RMLAVC (e.g., CAADP biennial review)
4. Development support for producers and private sector	• Partner with local producers to set up required infrastructure (e.g., pay for dipping tanks but have the locals build them; pay for fencing but have the locals erect the fences, build infrastructure and private sector use them in supporting industry development e.g., feedlots in disease endemic areas -FMD etc.) • Provide input subsidies guided by national strategic goals for RMLAVC
5. Accountability	• Environmental care by adhering to commitments toward reduction of greenhouse gases e.g., climate change indices for countries; environmental impact assessment; water access rights;
6. Regulating the RMLAVC	• Developing the regulatory framework -development of SOP, enforcing regulations, certification
7. Demonstration of success	• Support progressive individuals/change champions who will demonstrate results quickly.
8. Monitoring and evaluation	• Provide adequate budget to cover regular monitoring and evaluation of the RMLAVC • e.g. Quality and safety assurance and correctness of red meat products that flow through the value chain e.g. prevent donkey, horse and dog meat passing for red meat and hamburgers (adulteration) e.g. Perishable Product Control Export Boards (PPECB in South Africa) • Assurance that only correct and legally traded products move through the value chain (traceability to mitigate against trading of stolen livestock and products)
9. Consumer protection	• Fairness of prices to producers for legally traded products
10. Regional trading	• Trade control through border management -quarantine for disease control and deter illicit trade in the RMLAVC

Table 6. 4: *Proposed Best Practices on Cross cutting issues*

Pillar	Best Practices
1. Affirmative policies	• Government should develop and implement a women and youth affirmative policy that cuts across all ministries and public sector (e.g., BBBEE policy of South Africa) • Support progressive women and youth who will demonstrate results quickly. • Youth involvement in agriculture at an early age • Affirmative finance for people living with disability
2. Demonstration of success	• Demonstrate financeable projects, focusing on profitability and risk mitigation (create track record of success)
3. land tenure security	• Government develop and enforce policies that support tenure security for all land users (secure lease agreements, title deeds, user rights (permission to occupy- local authorities)
4. Risk mitigation	• Increased role and accountability of security forces in minimizing stock theft and illegal livestock trade within and across borders (security) • Droughts (contingent measures and emergence responses) • Disease pandemics e.g. covid19 (contingences and response measures
5. Skills development	• Training & mentorship • Skills development plans • Capacity to implement effective skills development programs • Continuous learning opportunities
6. R&D	• Technology development and dissemination
7. Trust	• Non- disclosure agreements, contracts, and code of conducts signed by all parties (Producer/Public and Private)

CHAPTER SEVEN: CONCLUSION

Thorough review of literature was done to examine economic value of cattle, sheep, and goats value chains, determine strengths, weaknesses, opportunities, and threats and propose a structural framework for effective PPPPs, best practices and measures for checking sustainability. In general, the SADC region is characterised by smallholder RMLAVC that are both supplier and buyer-driven chains, that have poorly coordinated governance structures. The producers are dependent on major buyers that exercise more control and oversight and filter goods into a vertical chain. In essence, the role players have minimal interaction beyond exchange of goods and services and assume the greatest risk in the value chain. On the other hand, there are relatively well-developed market based commercial structures that are vertically integrated. Although these are limited to a few countries, they provide platforms for input supplies and opportunities for better market integration. Power asymmetry, however, is higher in these hierarchical systems, hence issues of poor transparency, lack of trust and accountability discussed in this report.

The proposed framework does not only centre on main producers of final goods and products but also includes input suppliers, financiers, equipment services (for quality control), generation and adoption of new technologies, and logistics, and markets. Strengthening of PPPPs therefore demands application of best practices to reinforce linkages, consolidate relationships among players, and improve capabilities of the institutions that provide support such as universities, research centres, business associations and certification bodies, and farmer organizations among others).

The general structure of the framework was conceived from the CAADP Framework and adapted based on interventions in live animal and red meat value chains that are currently functional and with positive impact. The proposed framework should therefore be a good fit for new RMLAVC or value chains under consideration for development with a focus for incorporating small producers into productive processes, cognisance of gender, youth, and care for natural resources. The public sector therefore must assume the main role of organizing and identifying needs and capabilities of stakeholders, institute public interventions by providing mechanisms for incentivising collaboration and association to deal with bottlenecks in RMLAVC value chain linkages. Representatives of private and public sector will require training and workshop engagements to improve their capacities in driving PPPP reformation processes in their countries.

CHAPTER EIGHT: RECOMMENDATIONS

8.1 PPPP as RMLAVC strengthening instrument.

In terms of productive development, SADC regional countries generally suffer from low productivity and growth in the RMLAVC, due to difficulties in linking producers, especially the smallholder sector to the vertically integrated segment of RMLAVC and persistent social deficits. Profound changes of the productive structure in the SADC countries are therefore required to shift relations toward balanced PPPPs that will transform the composition of participants to more inclusive systems, improve employment and trade patterns in the region. Mechanisms for strengthening PPPP for sustainable RMLAVC proposed in this study are intended to be high-level, and should be guided by national strategies, which are themselves linked to regional and international value chains. More context-specific levels of indicators, and best practices e.g., specific management practices and plans within each value chain segment are not included in this report as these would be only applicable in a narrow range of environments and systems and therefore need to be developed at the local country level. The private sector together with the public sector must take the lead to communicate successful ventures and the full benefits delivered to all parties and the communities. This consultancy developed a SCORE CARD through which country agriculture partnership frameworks can be evaluated and existing and new PPPP are benchmarked against best practices for the RMLAVC.

8.1 The country and PPPP self-assessment SCORE CARD

The self assessment SCORE CARD (Annexure 3) is a mechanism for determining country readiness for RMLAVC PPPPs and measuring strenghth of accounting tools -best practices across the value chain. The score card was developed from a synthesis of information gathered through literature review and questionnaire surveys, in depth studies of the RMLAVC in the seleceted nine (9) countries, and from information shared though the surveys and the validation workshop with experts from the SADC countries. The score card enables member states to measure the alignment of PPPPs to CAPF (components 1 and 2) and determine adherence of partners in active PPPPs to best practices with regard to utilization of resources inclusive of natural, financial and human resources.

Who can use the SCORE CARD?

- Experts in the RMLAVC
- Public sector managers and executives overseeing the agriculture sector
- Partners in the PPPs
- Stakeholders with interest in the RMLAVC

How to use the SCORE CARD

There are six components.

- Components 1 and 2. Reflects country readiness and should not be less than 90% otherwise PPPPs fail to align to national strategies and will not benefit from buy-in of key stakeholders
- Component 3: Reflects level of capacity developed and functionality. It also includes best practices by producers and processors for continuous improvement to enable more efficiency production of safe

animal products. The score of 75% is a benchmark for long term sustainability

- Component 4: measures the extent to which the private sector is contributing toward building capacity (financial, infrastruture, markets), value chain regulation and equitable growth.
  - benchmark of 80% will enable equatable growth and access to resources and markets.
- Component 5 relates to readiness and ability of the public sector to support PPPPs. The benchmark is at 90% as the public sector is a key stakeholder that creates an enabling environment and also regulate the value chains.
- Component 6 measures commitments of all partners towards buidling capacity -cross cutting issues. All partners have equal responsibility to effect policy, and social change to achieve inclusive growth. The PPPPs needs 90% compliance for sustainability of interventions.

Each component has a column for capturing responses/score as either 1 (one) or 0 (zero) and the sub-total is automatically generated at the bottom. This subtotal is captured and reflected in the SCORE CARD summary spreadsheet. The benchmarks are reflected and there is space to indicate necessary remedial actions to improve functionality of the partnerships and country readiness.

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LIST OF ANNEXURES

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