

RESILIENT AFRICAN FEED AND FODDER SYSTEMS PROJECT

Abridged Report (2022-2023)



RESILIENT AFRICAN FEED AND FODDER SYSTEMS PROJECT

Abridged Report (2022-2023)

(Investment Document INV-051215: Evidence Driven Short Term Solutions to Build Resilience and Address the Adverse Effects of Crises on African Feed and Fodder Systems)

RAFFS Project Annual Report
Reporting Period: 1st December 2022 to 30th November 2023

Theme: *Engendering Greater Understanding and Setting Foundations for Enhanced Capacities to Build Resilience and Address Feed and Fodder Shortages on the African Continent*

DISCLAIMER

Fair use of this information is encouraged. Proper citation is requested. African Union-InterAfrican Bureau for Animal Resources (AU-IBAR) does not accept liability for misinterpretation and/or misuse of the information provided.AU-IBAR disclaims all expressed and implied warranties and conditions of any kind arising by statue or otherwise in law with respect to the content and use of the report, including without limitation, warranties of merchantability or fitness for a particular purpose, or warranty as to correctness, quality, accuracy or reliability of the report.AU-IBAR assumes no responsibility to users or any third party for the consequences of any errors or omissions.

The content of this report is the sole responsibility of AU-IBAR and can in no way be taken to reflect the views of Bill & Melinda Gates Foundation (BMGF) or the implementing Partners. The boundaries and designations of geographic and political entities indicated in this report do not imply official endorsement or acceptance by the African Union (AU).

Recommended citation

AU-IBAR (2023): Resilient African Feeds and Fodder Systems Annual Technical Report 01 December 2022 to 30th November 2023.

Contents

Contents iv
1. Executive Overview v
2. Background and Context 1
3. Purpose of the Report 2
4. Key Findings and Major Insights 3
5. Major Achievements and Progress 6
6. Key Challenges and Constraints 9
7. Strategic Lessons 11
8. Implications and Recommendations 13
9. Conclusion 16

1. Executive Overview

The Resilient African Feed and Fodder Systems (RAFFS) Project is a continental emergency initiative led by AU-IBAR and jointly funded by the Bill & Melinda Gates Foundation and the African Union Commission to respond to worsening feed and fodder shortages affecting livestock production, food systems, and nutrition security across Africa. Covering the period 1 December 2022 to 30 November 2023, this first annual report documents the project's foundational year, during which it focused on generating evidence, building stakeholder ownership, defining strategic priorities, and laying the institutional and analytical groundwork for future action.

The report shows that the project made substantial early progress despite operating in a complex emergency context shaped by the compounded effects of climate change, COVID-19, and the Russia–Ukraine conflict. During the reporting period, the project achieved 70% execution of Year 1 activities and 31.9% overall programme execution, while also establishing strong relevance and visibility at continental, regional, and country levels. This early momentum was driven by the project's timely focus, its fit-for-purpose Theory of Change, and its ability to bring together public, private, technical, and women-led constituencies around a neglected but highly consequential development issue.

A major contribution of the RAFFS Project in this first year was to sharpen understanding of Africa's feed and fodder sector as a critical but under-articulated economic sub-sector rather than merely a technical or drought-response issue. Through a continental survey involving 339 respondents from 42 AU Member States, as well as detailed assessments in Cameroon, Kenya, Nigeria, Somalia, Uganda, and Zimbabwe, the project generated strong evidence that feed and fodder shortages are deeply linked to livestock underperformance, market instability, livelihood fragility, weak nutrition outcomes, and policy failure. The findings also showed that most country systems remain poorly structured, with only Zimbabwe emerging slightly above the threshold into the "emerging" category after assessment.

The year's progress was especially notable across the project's four result areas. These included the establishment of a stronger knowledge and analytical ecosystem, identification of viable business and financing models, expanded support for women's participation through AWARFA-N, and important movement on policy, regulatory, and institutional reform, including decisions endorsed by the Specialized Technical Committee on Agriculture, Rural Development, Water and Environment (STC-ARDWE). At the same time, the report makes clear that this was only the beginning. It positions the first year as a foundation-building and agenda-setting phase, with the next phase expected to focus on proof of concept, coordinated action, and implementation of priority interventions.

Overall, the report demonstrates that the RAFFS Project has already helped shift the continental conversation. It has moved feed and fodder closer to the centre of discussions on livestock productivity, food and nutrition security, resilience, youth employment, women's inclusion, and agricultural transformation. The central message emerging from the first year is clear: Africa cannot stabilize livestock systems or achieve many of its broader development goals without deliberately structuring, financing, and governing the feed and fodder sub-sector more effectively.

2. Background and Context

The Resilient African Feed and Fodder Systems (RAFFS) Project emerged in response to a growing recognition that Africa's feed and fodder sub-sector, though central to livestock production and food systems, has remained inadequately articulated in policy, weakly structured in practice, and chronically under-resourced. The immediate backdrop to the project was the compounded effect of the triple global crises—climate change, COVID-19, and the Russia–Ukraine conflict—which exposed and deepened long-standing fragilities in African feed and fodder systems. These crises disrupted supply chains, raised production costs, intensified shortages, and highlighted the extent to which livestock systems across the continent depend on a poorly organized and vulnerable input base.

This context is particularly important because feed and fodder are not peripheral inputs. The report stresses that they constitute 60–70% of the total cost of livestock production, making them a decisive factor in livestock productivity, profitability, resilience, and the affordability of livestock-sourced foods. Yet, unlike many other regions where substantial land and grain production are dedicated to feeding livestock, most African countries have limited grain production specifically for feed, shrinking land for fodder, and highly fragile supply systems. As a result, livestock producers across the continent often feed animals with what is available rather than what is nutritionally or economically optimal.

The report situates this problem within a broader development crisis. Africa holds roughly a third of the world's livestock resources, and more than a third of its population depends directly or indirectly on the livestock sector for food, livelihoods, and income. The sector itself generates a major share of agricultural GDP in many countries and has strong multiplier and spillover effects into manufacturing, services, trade, and employment. However, the benefits of this large livestock resource base are constrained by weak feed and fodder systems that keep animals unproductive, vulnerable, and unable to generate their full developmental value. The report therefore argues that many of Africa's persistent livestock and nutrition problems cannot be fully understood without examining the structural neglect of feed and fodder.

A central contextual argument in the annual report is that feed and fodder security is inseparable from human food and nutrition security. The report makes the case that the continued inability of many African countries to end hunger and reduce malnutrition is tied, in part, to the poor structuring of the feed and fodder sub-sector. Livestock-sourced foods remain unavailable or unaffordable for many low-income households because producers face high feed costs, unstable supply, and limited incentives to develop the sector. The report links this directly to the broader failure to make nutrition-dense foods more accessible, noting that livestock products often function as luxury goods rather than essential foods for those who most need them.

The background section of the report also emphasizes that Africa's response to feed and fodder shortages has historically been distorted by a climate disaster paradigm. What becomes visible to policymakers and humanitarian actors is often the dramatic impact of shortages during drought—mass livestock deaths, market collapse, and emergency food insecurity. But once rains return, attention shifts away, leaving the deeper structural weaknesses unaddressed. This cyclical pattern has prevented long-term development of the feed and fodder sub-sector as a viable economic and institutional domain. Even in countries where feed industries appear to exist—especially for poultry, dairy, aquaculture, and other monogastric systems—the recent global crises revealed how shallow that development often is, with heavy dependence on imported grains, additives, and vulnerable external supply chains.

It is against this backdrop that the RAFFS Project was conceived. The report explains that the project was designed not simply to respond to shortages, but to interrogate the deeper market failures, policy asymmetries, and institutional gaps that have kept feed and fodder systems weak across the continent. Early project thinking was guided by critical questions: Why has Africa struggled to stabilize livestock production despite repeated investments in the sector? Why do feed and fodder shortages continue to generate recurring losses, inefficiencies, and market instability? What policy, legal, regulatory, institutional, financing, and data systems are missing? The report presents RAFFS as a project intended to answer these questions with evidence and then translate that evidence into implementable action.

The report further highlights that the RAFFS Project's distinctiveness lies in its willingness to go beyond technical production questions and confront the misarticulation, disarticulation, or under-articulation of the feed and fodder sub-sector itself. It argues that Africa has not sufficiently recognized feed and fodder as a separate economic sub-sector requiring its own institutional frameworks, incentives, data systems, and supply-chain architecture. Livestock systems have long been developed without commensurate development of the feed and fodder systems that sustain them. This failure, the report suggests, has contributed to persistent fragility, market inefficiencies, underinvestment, and vulnerability across the livestock economy.

The project background also reflects a growing political and stakeholder recognition that this situation must change. During the reporting period, stakeholders validated the project's relevance and urgency and affirmed that it was helping to surface a more accurate understanding of how feed and fodder shortages relate to broader failures in productivity, livelihoods, nutrition, youth employment, women's inclusion, and resilience. In this sense, the report presents the project not only as an emergency initiative, but as the beginning of a transformative agenda to better understand, organize, and elevate Africa's feed and fodder sub-sector within the continent's development and policy architecture.

3. Purpose of the Report

This annual report was prepared to document and communicate the progress made in implementing the Resilient African Feed and Fodder Systems (RAFFS) Project during its first year, covering the period 1 December 2022 to 30 November 2023. It serves as the principal institutional account of what the project set out to do, what it accomplished during the reporting period, and what strategic direction is emerging from the evidence, stakeholder engagement, and early implementation experience.

More specifically, the report was designed to capture the project's foundational work in establishing a stronger understanding of Africa's feed and fodder sector in the context of the triple crises of climate change, COVID-19, and the Russia–Ukraine conflict. It documents how the project sought to generate an evidence base for short-term solutions while also laying the groundwork for a more transformative agenda aimed at strengthening resilience, improving access to affordable and quality feed and fodder, and ultimately supporting the sustainable production of livestock-sourced foods.

The report also functions as a structured record of progress across the project's four result areas. These include the establishment of a knowledge and analytical ecosystem for evidence-based solutions, the identification of viable business models and strategic partnerships, the empowerment of women to participate more gainfully in feed and fodder and livestock-sourced food supply chains, and the promotion of policy, regulatory, and institutional reforms needed to build a more organized, sustainable, and resilient feed and fodder industry. In this sense, the report is not only descriptive; it is also intended to show how the different pillars of the project are contributing to a broader systems-change agenda.

A further purpose of the report is to present the project's early outcomes and learning in a form that can support decision-making. It therefore goes beyond listing activities to capture key findings from the continental survey, the six-country assessments, self-profiling exercises, stakeholder consultations, business model reviews, communications work, and policy engagement processes. The report uses these to clarify what has been learned about the structure, functionality, and vulnerabilities of the feed and fodder sector, and to identify where urgent attention and investment are needed.

The report is also meant to provide a basis for accountability and forward planning. It includes reporting on implementation progress, knowledge management, communications and visibility, monitoring and evaluation, financial performance, challenges, lessons learnt, recommendations, and the way forward. In doing so, it helps stakeholders assess what was achieved during the first year, what gaps remain, and what priorities should shape the next phase of implementation, which the report describes as moving increasingly toward proof of concept and more action-oriented interventions.

At a broader level, the report seeks to influence how stakeholders understand the feed and fodder sector itself. It was written not only to report on project delivery, but also to contribute to a shift in narrative: from seeing feed and fodder shortages mainly as periodic technical or humanitarian problems, to recognizing them as symptoms of a deeply under-structured sub-sector whose development is essential for livestock productivity, food and nutrition security, resilience, livelihoods, and broader agricultural transformation. That strategic reframing is one of the report's most important underlying purposes.

4. Key Findings and Major Insights

i) Africa's feed and fodder sector remains critically under-articulated and under-structured

One of the clearest findings of the report is that Africa's feed and fodder sector has long been treated as a marginal or residual part of the livestock economy rather than as a strategic economic sub-sector in its own right. The report shows that this has resulted in weak institutional recognition, inadequate policy attention, poor allocation of public goods and services, and limited incentives for sector growth. Livestock systems across the continent have therefore been developed without commensurate development of the feed and fodder base that sustains them. The project's evidence strongly suggests that many recurring livestock, nutrition, livelihood, and market failures are rooted in this structural neglect.

ii) Feed and fodder insecurity is a major barrier to food and nutrition security

A central insight running through the report is that feed and fodder shortages are not only livestock-sector problems; they are also fundamental food and nutrition security issues. Because feed and fodder account for **60–70% of livestock production costs**, weak feed systems make livestock-sourced foods expensive, unstable in supply, and inaccessible to many households that need them most. The report links the unaffordability of dairy, meat, and other livestock products to the persistent inability of many African countries to reduce hunger and malnutrition. In this framing, feed and fodder security becomes an essential but often overlooked foundation for wider human development outcomes.

iii) The triple crises exposed deep structural weaknesses in African feed and fodder systems

The reporting period confirmed that the combined effects of climate change, COVID-19, and the Russia–Ukraine conflict did not create feed and fodder problems from scratch; rather, they exposed and intensified long-standing fragilities in the sector. The report shows that African feed and fodder systems are highly vulnerable to external shocks because they are weakly organized, poorly diversified, and often dependent on fragile domestic and imported supply chains. Even in places where feed sectors appeared more developed—especially in dairy, aquaculture, and monogastric production—the triple crises revealed shallow domestic production capacity, inadequate grain-for-feed prioritization, limited additive production, and heavy exposure to disruptions in trade and logistics.

iv) The continental survey and country assessments generated a new evidence base

A major finding from the first year is that the project successfully generated one of the strongest recent evidence bases on the feed and fodder sector in Africa. Through a continental survey involving **339 respondents from 42 AU Member States** and detailed assessments in Cameroon, Kenya, Nigeria, Somalia, Uganda, and Zimbabwe, the project was able to move the discussion from assumption to evidence. These processes not only produced new data and analysis, but also created a platform for bringing together key actors around a shared understanding of the sector's baseline vulnerability, crisis impacts, and operational resilience gaps. The evidence generated is one of the report's most important contributions because it begins to fill a long-standing knowledge deficit in the sector.

v) Most assessed country systems remain weakly structured

The country self-assessment exercise produced one of the report's most revealing findings. After national assessments were completed, five of the six core countries were still ranked below 50 percent and therefore classified as Unstructured. These included Nigeria (35%), Uganda (35%), Somalia (39%), and Kenya (44%), while Zimbabwe (51.5%) was only marginally above the threshold and was described as Emerging. These findings are significant because they show that feed and fodder sector weakness is not incidental or isolated; it is systemic across multiple regional contexts. The self-profiling exercise also served as an important immediate learning tool, helping stakeholders recognize the true condition of their sectors and the scale of the reforms required.

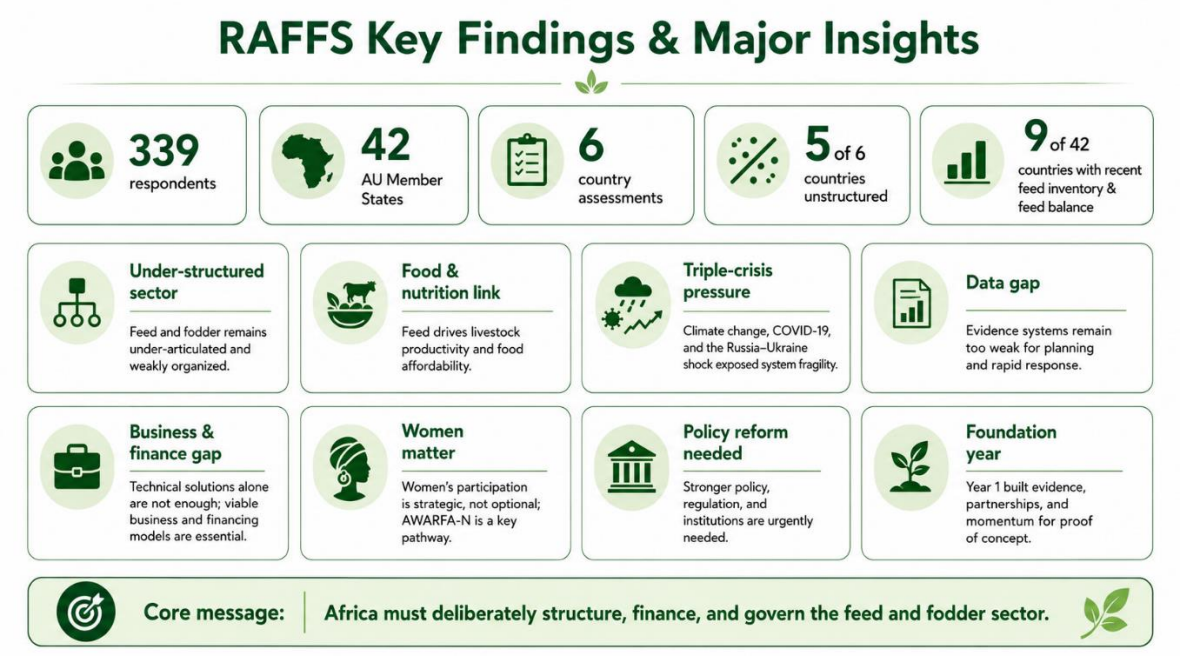
vi) Data systems for the sector are extremely weak

Another major insight is the extent of the sector's data deficit. The report notes that only 9 out of the 42 AU Member States that responded to the survey reported having recently conducted a feed inventory and generated a national feed balance and feed outlook. This means that in most countries, decisions and investments in feed and fodder are being made with inadequate evidence, weak analytical tools, and limited capacity to anticipate shortages or define remedial action. The report treats this as a foundational systems problem, since without better data, countries cannot effectively plan, invest, regulate, or respond to crises in the sector.

vii) Business and financing gaps are central to the sector's dysfunction

The report shows that feed and fodder shortages cannot be solved through technical production fixes alone. The continental survey and six-country assessments brought out major gaps in business models, financing arrangements, insurance options, supply-chain organization, and investment pathways. The project identified several candidate business models and distilled three as most viable, including the five-actor commercial off-taker anchored model, the cooperative model, and the Perfometer model

for selected contexts. This is a major insight because it reframes the sector as a business and investment system, not just a production system. The report makes clear that coordinated action, viable financing, and better commercial structuring are essential if the sector is to move beyond chronic fragility.



viii) Women's inclusion is both a justice issue and a strategic systems issue

The report surfaces an important insight about the exclusion of women and youth from more gainful and structured participation in the feed and fodder supply chain. Although women and youth are heavily involved in feeding animals and in related value-chain roles, they have historically been under-supported in terms of finance, insurance, formalization, and enterprise growth. Through using AWARFA-N as a vehicle for engagement, the project was able to document women's roles more systematically and begin identifying practical approaches for financial inclusion, business strengthening, and more beneficial participation. The report's broader insight is that strengthening women's and youth's participation is not an add-on; it is part of what makes the sector more responsive, innovative, and sustainable.

ix) Policy and institutional reform is urgently needed

A further major finding is that the existing policy and institutional environment in most countries is not adequate to support feed and fodder sector development. The report shows that the unstructured nature of the sector is reinforced by limited legal, regulatory, and institutional reform, as well as by the absence of frameworks specifically designed to guide feed and fodder development as an economic sector. This finding culminated in the project's successful support to the STC-ARDWE, which endorsed decisions calling for guidelines for sector development, improved emergency response based on feed and fodder indicators, the establishment of a continental alliance of multi-stakeholder associations, and a monitoring and mutual accountability framework. These endorsed decisions represent one of the strongest signs that the project has begun shifting the policy conversation at continental level.

x) The first year established a strong foundation, but the real test lies ahead

Taken together, the findings suggest that the first year of the RAFFS Project was primarily a foundation-building year. The report shows that important progress was made in generating evidence, clarifying country and continental priorities, building ownership, developing tools and models, and creating momentum around policy and institutional reform. At the same time, the report is clear that these are still early outcomes. The deeper challenge lies in moving from understanding and agenda-setting to proof of concept, implementation, and sustained institutional change. In that sense, the biggest insight from the first year is twofold: first, that the feed and fodder sector is far more strategically important than it has been treated; and second, that meaningful transformation will require longer-term, better-financed, and more coordinated effort beyond the initial project phase.

5. Major Achievements and Progress

i) Result One: A stronger knowledge and analytical ecosystem was established

The most significant achievement of the first reporting period was the establishment of a much stronger evidence base for understanding Africa's feed and fodder sector. This was the flagship area of work during Year 1. The project successfully designed and implemented a continental survey covering 42 of the 55 AU Member States, with a total of 339 respondents drawn from 19 stakeholder categories. This was complemented by detailed assessments in six core countries—Cameroon, Kenya, Nigeria, Somalia, Uganda, and Zimbabwe—selected because of the importance of livestock to livelihoods, incomes, and national economies, and because of the potential to mobilize coordinated action and investment. Together, these processes generated one of the strongest recent evidence bases on the effect of the triple crises on African feed and fodder systems.

The project also made important progress in helping countries and stakeholders better understand the structure and functionality of their own feed and fodder sectors. Through the self-assessment and profiling exercise, stakeholders were able to assess their sectors before and after the national assessments, which produced a clearer appreciation of baseline vulnerability, crisis impact, and operational resilience. This was not merely an analytical exercise; it also helped shift awareness and exposed the extent to which feed and fodder systems remain weakly structured in most contexts. The resulting country profiles gave the project and its stakeholders a stronger basis for identifying priority areas for intervention.

A further achievement under this result was the beginning of work to strengthen the sector's data infrastructure. The project articulated relevant feed and fodder indicators, identified advanced tools and software to improve data collection and analysis, and initiated processes to define how countries and AU-IBAR could upgrade feed and fodder data management systems, integrated platforms, and ecosystems. Draft guidelines on feed and fodder data management were developed to inform country action plans for subsequent implementation. This was a strategically important step because the report shows that poor data, weak access to information, and underdeveloped analytical systems are among the most serious constraints to decision-making in the sector.

ii) Result Two: Viable business models and coordinated investment pathways were identified

A second major achievement of the reporting period was the project's progress in identifying business and financing pathways for the sector. Rather than treating feed and fodder shortages only as technical or humanitarian problems, the project deliberately integrated business components into both the

continental survey and the six-country assessments. Business actors, financial institutions, insurance institutions, input suppliers, traders, off-takers, and women's business networks were included in the analytical process. This made it possible to identify important gaps in existing business solutions, financing arrangements, and investment approaches across the six core countries.

Based on these findings, the project documented and assessed multiple business and financing models according to criteria such as value proposition, target clients, delivery channels, financing methods, revenue models, product costing, and risk management. From five models identified, three were distilled as the most viable, with the five-actor commercial off-taker anchored model emerging as especially suitable across countries. The report also notes the relevance of the cooperative model in Kenya and the Perfometer model in Kenya, Uganda, Zimbabwe, and Nigeria. Draft implementation guidelines for these models were prepared to support action in subsequent years. This was an important achievement because it shifted the discussion toward commercially viable and coordinated solutions rather than isolated interventions.

The project also made progress in defining tools that link technical evidence to business and investment decisions. It established that most countries have not recently undertaken feed inventories or generated national feed balances, and that even where such tools exist, they are rarely used to inform feed outlooks, investment profiling, or emergency response systems. The report notes that the project planned support for countries such as Cameroon, Nigeria, and Somalia to undertake feed inventories and national feed balances, while helping all six countries build capacity to use these tools more strategically. In addition, the pre-El Niño sensitization campaign in Kenya and Uganda was a notable catalytic intervention. By drawing attention to the risk of fodder losses during excessive rains and promoting stockpiling and coordinated action, the campaign helped position the project as an agile actor capable of stimulating rapid upstream response.

iii) Result Three: Women's participation was better understood and more deliberately supported

Under Result Three, the project made important progress in positioning women as more visible and potentially more gainful actors in the feed and fodder and livestock-sourced food supply chains. A major achievement was the decision to build on the existing African Women in Animal Resources Farming and Agribusiness Network (AWARFA-N) as the principal platform for women's inclusion. Through the continental survey, country assessments, and chapter-level dialogues, the project generated more systematic information on women's roles and participation in these supply chains. This was accompanied by capacity-building efforts aimed at strengthening women's business capacities at both corporate and individual enterprise level, and supporting formalization, mobilization, and database development.

A further important achievement was the identification of strategic financing and insurance partners that AWARFA-N chapters could engage in order to improve women's financial inclusion and business growth. Based on country-specific information, the project documented a range of possible mechanisms such as incubation and mentorship programmes, guarantee funding, and working-capital financing. These were not yet full-scale interventions, but they represented an important step toward building more appropriate finance and insurance packages for women's enterprises in the sector. The report suggests that this work laid the groundwork for AWARFA-N chapters to select priority financing and business-development interventions for implementation in the following phase.

iv) Result Four: Policy and institutional reform momentum was generated

One of the most important achievements of the first year was the project's success in generating policy and institutional momentum for a sector that has historically received limited strategic recognition. The continental survey and country assessments showed clearly that the feed and fodder sector remains weakly structured in most countries and that only limited policy or legislative changes had been made to address feed and fodder supply-chain problems in response to the triple crises. In response, the project helped frame and advance a Call for Urgent Action to Address Feed and Fodder Shortages on the African Continent and to Avert Future Feed Related Disasters.

This culminated in a major policy achievement: the presentation of related decisions to the Ministerial-level Specialized Technical Committee on Agriculture, Rural Development, Water and Environment (STC-ARDWE), which endorsed key recommendations. These included the formulation of guidelines for development of feed and fodder sectors or industries, guidelines for emergency response based on feed and fodder indicators, the establishment of a continental African Alliance of Multi-Stakeholder Feed and Fodder Associations, and the institution of a monitoring and mutual accountability framework to produce annual status reports on the sector. These endorsements gave the project an important continental policy foothold and signaled that feed and fodder was beginning to be recognized as a strategic area requiring institutional attention.

The project also supported concrete enabling-environment actions at country level. It contributed to defining a minimum list of indicators to monitor investments in feed and fodder and livestock-sourced food supply chains. It also supported policy-regulatory processes in Kenya and Uganda, including stakeholder engagement around the Kenya Animal Feed Regulations 2023 and review input into the Uganda Animal Feeds Bill 2023. In both cases, the project pushed for stronger positioning of feed and fodder as an economic sub-sector and for more coherent emergency and development frameworks within the legislation.

v) Cross-cutting achievement: Knowledge management, communication, and visibility were effectively operationalized

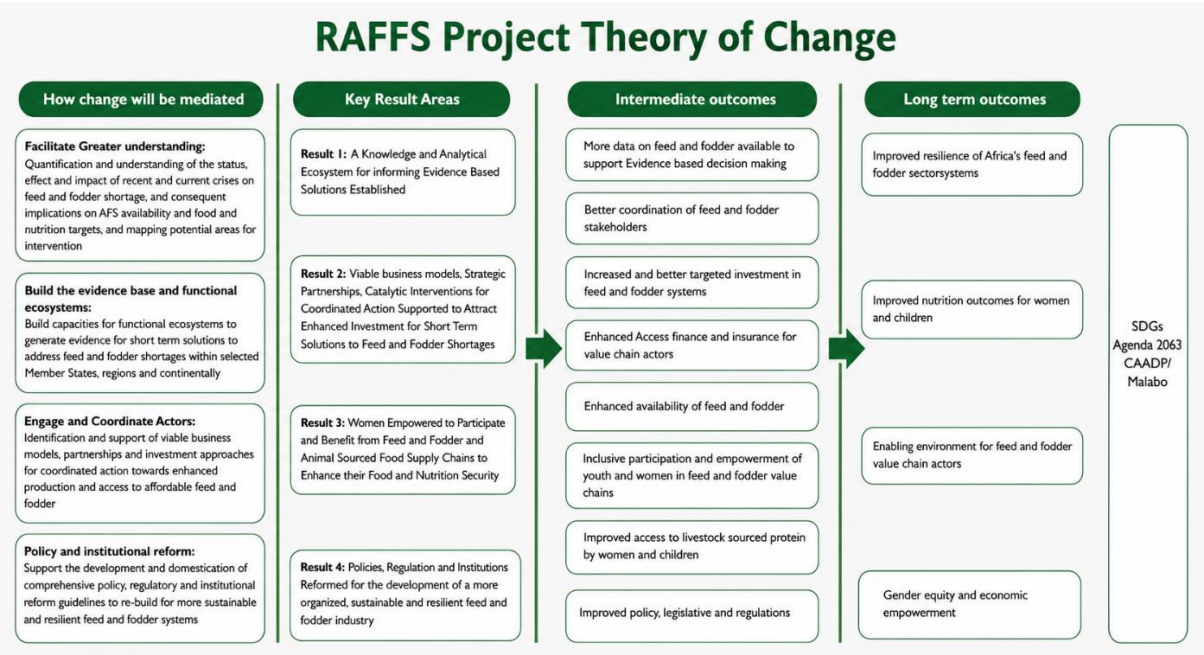
The project made notable progress in rolling out its knowledge management, communications, and visibility agenda. A comprehensive strategy was developed and operationalized to guide project work in these areas, including incorporation of the RAFFS microsite into the AU-IBAR website, establishment of the project repository, and operationalization of an online ecosystem platform that began recording steady growth in registered users. The project also used advocacy strategically to improve participation in the survey, support preparation for the predicted El Niño rains, and mobilize ministers and key decision-makers around urgent action on feed and fodder shortages.

The report also highlights strong communications performance. The project developed relationships with country, regional, and continental media actors, built journalists' capacity to report on the sector, and achieved broad coverage across television, radio, print, and social media. Its communication outputs—short videos, social media content, tailored narratives, and coordinated campaigns—generated over 1 million social media impressions during the reporting period. This was an important cross-cutting achievement because the project's transformative ambitions depend not only on technical work, but also on changing how the sector is narrated, understood, and prioritized.

vi) Cross-cutting achievement: Monitoring, evaluation, and strategic framing were strengthened

The first year also saw progress in strengthening the project's own management and learning architecture. After concerns were raised about the measurability of some indicators, the project

revised its indicator framework with stakeholders to include clearer impact, outcome, and output indicators. Baselines were populated using the continental survey and country assessments, creating a stronger basis for tracking future implementation progress. In parallel, the project updated its Theory of Change to strengthen the linkage between project results and medium- and long-term outcomes, including AU-IBAR strategic objectives, the Livestock Development Strategy for Africa, the CAADP / Malabo commitments, Agenda 2063, and the Sustainable Development Goals.



Taken together, these achievements show that the first reporting period was not merely an inception phase. It was a substantial year of analytical, institutional, strategic, and political groundwork. The project did not yet transform the sector, but it did achieve something essential: it established the evidence, partnerships, policy traction, communications reach, and implementation architecture needed to move into a more action-oriented phase.

6. Key Challenges and Constraints

i) Implementing an emergency project within a complex institutional environment

One of the main challenges documented in the report was the difficulty of operationalizing an emergency project within existing institutional systems. The RAFFS Project was designed as a rapid-response initiative, yet many of the issues it sought to address required consultation, governance alignment, and institutional preparation that do not always move at emergency speed. The report notes that this tension created delays and complexity in defining appropriate modalities for implementation at country, regional, and continental levels. In effect, the project had to balance urgency with the need to build legitimacy, ownership, and technical rigor.

ii) Identifying and aligning the right actors was not straightforward

The report makes clear that the feed and fodder sector is not only under-structured in policy terms; it is also difficult to map institutionally. One challenge encountered during implementation was the identification of the right actors and constituencies to engage across the supply chain. Because the sector cuts across livestock production, business, finance, women's networks, data systems, policy institutions, and emergency-response structures, there was no single ready-made stakeholder

architecture to plug into. This made it necessary for the project to invest significant time and effort in stakeholder identification, engagement, and alignment before coordinated action could begin.

iii) Data and operational constraints affected evidence generation

The project's emphasis on evidence generation was one of its strengths, but the reporting period also showed the operational difficulty of collecting reliable data in a sector with weak systems. The report highlights **internet connectivity limitations in some countries**, which affected interviewing and data collection processes. More broadly, the low availability of feed inventories, feed balances, and regularly updated feed and fodder data across most countries meant that the project had to work in a context of weak baseline information and limited prior analytical infrastructure. This not only made evidence generation harder, but also reinforced the very data constraints the project was trying to address.

iv) Existing policy processes left little room for rapid project preparation

Another challenge noted in the report was the limited flexibility of existing policy and legislative processes. In several contexts, ongoing policy frameworks and institutional timelines left little room for rapid adaptation or early incorporation of project priorities. This affected how quickly the project could influence or align with national-level processes. The report therefore suggests that even when the project's recommendations were relevant and timely, the policy environment was not always agile enough to absorb urgent change. This was especially important because many of the reforms needed in the sector have budgetary and institutional implications that require strong political commitment.

v) Political will and financing remain major constraints to deeper change

The report repeatedly underscores that many of the changes needed in the feed and fodder sector go beyond technical fixes and require political will, institutional buy-in, and sustained financing. This was identified as a major challenge during Year 1. The project could build evidence, raise awareness, and stimulate policy discussion, but implementation of some of the more urgent and structural reforms—especially those with financial implications—depends on decisions and resource commitments that lie beyond the project's immediate control. The report is therefore candid that progress in structuring the sector will require stronger political commitment and significantly more financing than is currently available.

vi) The dynamic crisis environment increased uncertainty and pressure

The RAFFS Project was implemented in what the report describes as a highly dynamic and high-risk environment. Feed and fodder systems across Africa remain fragile, and new crises or shocks can emerge quickly. This meant that the project was not operating in a stable development context, but in a real-time environment of ongoing stress. The report suggests that this created pressure for agility and fast-tracking, while also increasing the difficulty of maintaining a clear and stable implementation rhythm. In this sense, the project had to work within an environment where the conditions it was analyzing were also continuing to evolve.

vii) Important conceptual and analytical gaps remain

The report identifies several substantive gaps that still constrain the project's effectiveness and the sector's development. These include:

i) the need for greater clarity and harmonization of definitions and terminology;
ii) the need for stronger coverage of the livestock-sourced foods supply chain and rangeland development;

iii) the need for more agility in communication and policy work in a fast-changing environment;
iv) and the need for stronger links and partnerships with strategic actors in the sector. These gaps show that, while the first year generated valuable evidence and momentum, the knowledge base and collaborative architecture around the feed and fodder sector are still incomplete and require further strengthening.

viii) Project scope, time, and resources were limited relative to the scale of the problem

A final and overarching constraint was the mismatch between the scale of the challenge and the scale of the project's current mandate. The report openly states that the RAFFS Project has limited scope in terms of *resources, time, and geographical reach,* even though feed and fodder shortages are evident across much of the continent. The six-country focus is intended to provide *proof of concept*, but the report recognizes that wider continental change will require far more extensive financing, longer time horizons, and engagement with more Member States. This challenge is not a weakness of implementation so much as a reflection of the scale of the problem: the project has begun the work of reframing and structuring the sector, but the size of the agenda exceeds what can be fully achieved within a short emergency initiative.

7. Strategic Lessons

i) Evidence generation is not a preliminary exercise; it is the foundation of sector transformation

One of the strongest lessons from the first year is that meaningful reform in the feed and fodder sector must begin with evidence. The project's continental survey, six-country assessments, self-profiling exercises, and stakeholder consultations did more than generate data; they fundamentally changed how many actors understood the sector. Having Clarified baseline vulnerability, crisis impacts, and operational resilience gaps, the project showed that structured evidence can help countries see the feed and fodder sector more accurately and define more realistic priorities for action. A major lesson, therefore, is that building a robust evidence base is not a background activity—it is a prerequisite for credible policy, investment, and coordination decisions.

ii) The feed and fodder sector must be treated as a distinct economic sub-sector

A core lesson emerging from the report is that the long-standing tendency to subsume feed and fodder under broader livestock or climate-disaster frameworks has weakened both analysis and action. The project's first-year work demonstrated that many of the sector's persistent failures stem from the fact that it has not been sufficiently articulated as a separate economic and institutional domain. This has limited investment, blurred responsibilities, weakened data systems, and prevented the creation of sector-specific legal, regulatory, and policy tools. The strategic lesson is clear: unless feed and fodder is recognized and governed as a distinct sub-sector, many of the underlying problems of fragility, inefficiency, and underinvestment will persist.

iii) Technical solutions alone are insufficient

The first year showed that Africa's feed and fodder problem cannot be solved through technical production interventions alone. The report repeatedly highlights structural issues relating to market asymmetry, weak financing, inadequate incentives, poor data systems, and limited policy support. This led the project to incorporate business actors, financial institutions, insurance providers, women's business networks, and supply-chain actors into its diagnostics and planning. A major lesson, therefore,

is that feed and fodder sector transformation requires a systems approach that combines technical knowledge with finance, business models, policy reform, communication, and institutional coordination.

iv) 7.4 Early stakeholder engagement is essential to building ownership and managing expectations

The report identifies prior stakeholder engagement as one of the most important lessons from the first year. Since the project was entering a sector that was poorly structured and involved many different actor groups, early engagement proved essential in building legitimacy, clarifying the project's niche, and aligning expectations. Stakeholders at country, regional, and continental levels strongly validated the relevance and urgency of the project, which in turn strengthened ownership and made later engagement more productive. The lesson here is that in a politically and institutionally fragmented sector, broad-based stakeholder involvement is not optional; it is fundamental to both implementation and sustainability.

v) Capacity gaps must be identified quickly and addressed pragmatically

The report explicitly identifies a solution-oriented approach to capacity gaps as one of the two major lessons learned during Year 1. In practice, this meant that when constraints emerged—whether technical, institutional, or operational—the project had to move quickly to either provide support directly or identify partners who could help close the gap. This suggests that emergency and fast-track initiatives in complex sectors cannot wait for ideal conditions; they must diagnose capacity problems early and act pragmatically to prevent those gaps from blocking progress.

vi) Women's inclusion is more effective when anchored in organized platforms

Another important lesson is that women's participation in feed and fodder systems can be strengthened more effectively when it is anchored in an existing structured platform rather than approached in a scattered or purely rhetorical way. By working through **AWARFA-N**, the project was able to move beyond abstract discussions of inclusion and begin identifying practical financing, insurance, and business development pathways for women's enterprises. The lesson is that organized women-led networks can provide an effective vehicle for formalization, capacity building, partnership-building, and more gainful market participation, especially in a sector where women have historically been present but under-supported.

vii) Communications and knowledge management are central to sector change

The first year demonstrated that changing the feed and fodder sector is not only about research and implementation; it is also about changing how the sector is narrated, understood, and prioritized. The report shows that advocacy, communications, and visibility work were instrumental in improving survey participation, preparing actors for El Niño risks, engaging media, and mobilizing support around urgent action. A key lesson, therefore, is that knowledge products, communication strategies, and media engagement are not peripheral activities. In a sector that has long been invisible or mis-framed, they are part of the transformation process itself.

viii) Agility is essential when working in a real-time crisis environment

The project's first-year experience underscores the importance of agility. The report notes that feed and fodder systems remain exposed to ongoing and emerging crises, and that the project is operating in a highly dynamic environment where external triggers can occur at any time. This means that implementation cannot be overly rigid. The lesson is that emergency-oriented work in fragile systems

requires fast-tracking, flexibility, and the ability to respond to evolving risks and opportunities without losing strategic direction.

ix) Proof of concept is a practical pathway to larger continental reform

A further strategic lesson emerging from the report is that large-scale continental reform may need to proceed through well-documented country-level proof of concept. Given the project's limited resources, time horizon, and geographical scope, the six-country focus was treated as a way to generate evidence, models, and implementation lessons that can later support wider policy work and scale-up. This reflects a practical lesson for continental initiatives: where resources are constrained, carefully selected country demonstrations can help build the case for broader adoption and investment.

x) Transformation of the sector will require longer-term commitment

Perhaps the broadest lesson of all is that meaningful restructuring of Africa's feed and fodder sector cannot be completed through a short-term emergency initiative alone. The report makes clear that the first year succeeded in generating understanding, ownership, evidence, models, and policy traction, but also that the scale of the challenge far exceeds the current project's immediate reach. It therefore recommends expanded financing, stronger partnerships, and even the possibility of evolving into a longer-term programme. The lesson is that while emergency action is necessary, durable transformation of the sector will require sustained, multi-year institutional commitment.

8. Implications and Recommendations

i) Implication: Feed and fodder must be elevated from a marginal concern to a strategic policy priority

A central implication of the first year's findings is that Africa's feed and fodder sector can no longer be treated as a secondary technical issue or a problem that only becomes visible during drought. The evidence generated during the reporting period shows that feed and fodder shortages are directly linked to livestock underperformance, weak nutrition outcomes, livelihood instability, market failure, and vulnerability to crisis. This means that governments, regional institutions, and development partners must recognize the sector as a strategic economic and development sub-sector that deserves explicit policy, legislative, regulatory, and institutional attention.

Recommendation:
Governments and continental bodies should formally reposition feed and fodder within agricultural and livestock policy frameworks, with clearer institutional mandates, stronger regulatory support, and deliberate recognition of its role in food and nutrition security, resilience, and economic growth.

ii) Implication: Better data systems are essential for planning, investment, and emergency response

The report makes clear that one of the most serious weaknesses in the sector is the lack of reliable, up-to-date, and usable data. With only a small number of countries recently conducting feed inventories and generating national feed balances, most decisions in the sector are being made without adequate evidence. This limits investment planning, weakens emergency-response systems, and reduces the ability of countries to anticipate and respond to shortages before they become crises.

Recommendation:
The project's planned work on feed and fodder data ecosystems should be accelerated and institutionalized. Countries should prioritize:

i) regular feed inventories,
ii) national feed balances and feed outlooks,
iii) stronger data management infrastructure,
iv) integrated platforms and ecosystems,
v) and clearer frameworks for data accessibility and data as a service. These systems should be treated as essential infrastructure for both policy and investment decision-making.

iii) Implication: Solutions must be country-priority driven and proof-of-concept oriented

The first year showed that although the feed and fodder challenge is continental in scope, the actual conditions, institutional capacities, and priority solutions differ across countries. The report therefore implies that broad continental goals must be translated into country-specific, priority-driven interventions if real change is to occur. The six-country work was designed precisely to generate proof of concept that can later inform wider scaling.

Recommendation:
Implementation in the next phase should focus on a smaller number of high-impact, country-defined priorities capable of producing visible results. Action planning at country, regional, and continental levels should remain consultative but tightly focused on interventions with the highest transformative potential.

iv) Implication: The sector requires coordinated business, financing, and market solutions

A major implication of the report is that feed and fodder shortages will persist if the sector is approached only through production-side technical support. The first-year evidence shows that the sector is constrained by weak business models, limited financing options, poor market organization, and inadequate insurance and investment pathways. This implies that the future of the sector depends on coordinated business and financing solutions that make feed and fodder commercially viable and scalable.

Recommendation:
The project and its stakeholders should fast-track the next phase of work on viable business and financing models, including:

i) commercial off-taker anchored production systems,
ii) cooperative and perfometer models where contextually appropriate,
iii) stronger financial and insurance products,
iv) investment profiling,
v) and functional feed emergency alert and remedial systems linked to economic planning. Engagement with financial institutions, development banks, and private investors should be deepened to move the sector from chronic underinvestment toward more structured commercial development.

v) Implication: Emergency response must shift from reactive crisis management to anticipatory action

The report repeatedly shows that current emergency systems remain weak because they rely too heavily on indicators external to the feed and fodder sub-sector and often respond only once livestock losses are already visible. This reactive pattern contributes to repeated disaster cycles and prevents

remedial action from being taken in time. The implication is that emergency response in livestock systems must be grounded much more explicitly in **feed and fodder sector indicators and tools**.

Recommendation:
Continental and national actors should develop and adopt:

i) guidelines for emergency response explicitly based on feed and fodder indicators,
ii) clearer remedial actions linked to those indicators,
iii) and feed and fodder sector emergency systems that connect more directly to human food and nutrition security outcomes.

The report's recommendation for urgent action to avert future feed-related disasters should be treated as a high-level priority, not a supplementary agenda.

vi) Implication: Women's participation must be supported through practical financial and institutional mechanisms

The project's work with AWARFA-N suggests that women's inclusion in the feed and fodder and livestock-sourced food supply chains cannot be strengthened through rhetoric alone. Meaningful change requires organized platforms, financial inclusion, enterprise development support, and deliberate institutional engagement. The implication here is that women's participation is not only a social-equity issue; it is also a practical development and sector-performance issue.

Recommendation:
The project and its partners should support AWARFA-N chapters and similar platforms to identify and implement priority interventions in:

i) financing,
ii) insurance,
iii) guarantee schemes,
iv) incubation and mentorship,
v) formalization,
vi) and business-capacity strengthening.

These efforts should be integrated into wider sector-development plans so that women are positioned not at the margins, but as active contributors to sector growth and resilience.

vii) Implication: Communications and knowledge products are necessary to change the sector narrative

Another major implication is that transforming the feed and fodder sector requires changing how it is understood and discussed. The first year showed that communications, advocacy, and knowledge management are central to raising awareness, mobilizing actors, engaging the media, and shaping policy discourse. In a sector that has long been invisible or mis-framed, the production and dissemination of strong knowledge products is itself a strategic intervention.

Recommendation:
The project should continue investing in:

i) wide dissemination of findings,
ii) stronger generation of knowledge products under each result area,
iii) peer-reviewed publications,
iv) narrative reframing work,
v) and communication strategies that challenge old paradigms and mainstream the new understanding of feed and fodder as a strategic sub-sector.

viii) Implication: Partnerships are indispensable for scale and sustainability

The report makes clear that the project's resources and time horizon are too limited to fully address the scale of feed and fodder challenges across Africa. This implies that future progress depends heavily on building stronger links with strategic partners, including development banks, technical institutions, regional bodies, governments, women's networks, and the private sector. Without wider partnerships, the project's evidence and momentum may not translate into the scale of financing and action required.

Recommendation:
The project should intensify efforts to:

i) build partnerships with strategic sector actors,
ii) mobilize additional financing,
iii) bridge implementation gaps,
iv) and create mechanisms for broader investment in urgent action.
This includes working with development partners and financing institutions to expand support for feed and fodder system strengthening beyond the current six-country scope.

ix) Implication: The current project should be seen as the foundation for a longer-term programme

The report itself suggests that the scope of the challenge far exceeds what can be achieved within the limits of a short emergency initiative. While Year 1 has successfully generated evidence, ownership, and early momentum, the sector's structural weaknesses are too deep to be addressed through a brief project cycle alone. The implication is that the RAFFS Project should increasingly be viewed as the foundation of a longer-term continental programme.

Recommendation:
Stakeholders should begin planning for a longer-term programme framework, potentially extending over a decade and involving more African Union Member States. Such a programme should retain the evidence-driven, systems-oriented logic of RAFFS while expanding its reach, financing base, and implementation depth. The report's suggestion of scaling to at least 15 additional Member States provides a strategic direction for future planning.

x) Strategic synthesis

Taken together, the first year of the RAFFS Project points to a clear strategic agenda: structure the sector, strengthen the evidence base, prioritize high-impact country interventions, reform the policy environment, support viable business and financing models, invest in women's participation, and mobilize partnerships and resources for long-term change. The report's recommendations are therefore not isolated technical proposals. They amount to a broader call to reposition feed and fodder at the centre of livestock, nutrition, resilience, and agricultural transformation agendas across Africa.

9. Conclusion

The first year of the Resilient African Feed and Fodder Systems (RAFFS) Project demonstrates that Africa's feed and fodder challenge is both more serious and more strategically important than it has often been treated. The annual report shows that feed and fodder shortages are not isolated technical problems, nor are they issues that arise only during drought. They are symptoms of a deeply under-articulated and weakly structured sub-sector whose neglect has wide-ranging consequences for

livestock productivity, food and nutrition security, livelihoods, employment, market stability, and resilience.

Over the reporting period, the project succeeded in building an important foundation for change. It generated a strong continental and country-level evidence base, clarified the extent of sector fragility, helped identify viable business and financing models, created stronger pathways for women's participation, and secured important policy momentum at continental level. Just as importantly, it began to shift how stakeholders understand the feed and fodder sector—away from a narrow drought-relief lens and toward recognition of its role as a strategic economic sub-sector within the livestock economy.

At the same time, the report is clear that this first year was only a beginning. The evidence points to deep structural challenges that cannot be resolved through short-term interventions alone. Most assessed country systems remain unstructured, data systems are weak, policy and financing gaps are substantial, and the wider institutional architecture needed to support a resilient feed and fodder sector is still underdeveloped. The task ahead is therefore not simply to continue project implementation, but to move deliberately into a phase of proof of concept, coordinated action, policy uptake, and scaled investment.

The broader significance of the report lies in its message that Africa's livestock systems—and many of the continent's wider development goals—cannot be stabilized without a stronger feed and fodder base. If the sector remains invisible, fragmented, and underfinanced, recurring crises will continue to undermine hard-won gains in food systems, livestock production, women's inclusion, youth employment, and economic resilience. But if the evidence, partnerships, and policy traction established in the first year are converted into sustained action, the RAFFS Project can serve as a powerful proof of concept for a wider continental transformation.

In that sense, the annual report is more than an account of Year 1 progress. It is an early statement of what must change: Africa must deliberately structure, finance, govern, and value the feed and fodder sub-sector if it is to build more productive livestock systems, more resilient livelihoods, and more secure food and nutrition futures.