

AFRICAN UNION
INTERAFRICAN BUREAU FOR ANIMAL RESOURCES

AFRICAN PASTORAL MARKETS DEVELOPMENT PLATFORM (APMD)

1st African Pastoral Markets Forum

Concept Note and Programme Book

Gatsby Africa

International Chamber of Commerce

MERCY CORPS

Strathmore UNIVERSITY
Agri-Food Innovation Center (SAFIC)

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APMD Project Overview

With support from the Gates Foundation, AU-IBAR is spearheading the Africa Pastoral Markets Development Platform (APMD) Platform, a four-year continental eendeavour aimed at catalyzing investment-driven, adaptable transformation within pastoral communities. This initiative, building upon previous efforts, seeks to fortify the enabling environment for pastoralism by:

- Facilitating the integration of pastoralists into livestock markets, fostering positive investment cycles within the value chain, ensuring business resilience, and making livestock-derived products more accessible to consumers.
- Unleashing the full potential of planned pastoral investments, estimated at up to USD Three Billion, over the next 3-5 years.
- Promoting best practices and knowledge sharing to facilitate the integration of pastoralists into livestock markets.
- Identifying opportunities to redirect long-term funding and investments for improved pastoral outcomes.

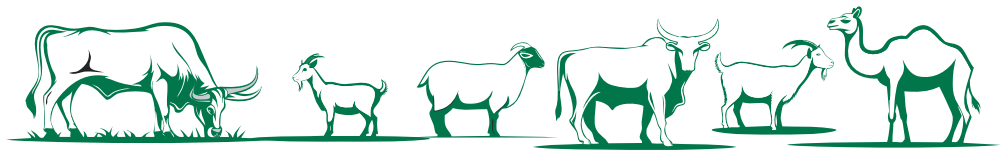
AU-IBAR recognizes the pivotal role pastoralists play in fostering Inclusive Agricultural Transformation across Africa. Pastoralists contribute significantly to national GDP (ranging from 2-7%) and provide a substantial portion (60-80%) of the continent's meat supply, with up to 50% of meat exports in certain regions. The demand for meat and milk in Sub-Saharan Africa is projected to surge by over 250% by 2050.

Moreover, pastoralists play a crucial role in preserving ecosystems, employing indigenous climate-adaptive practices on marginal lands, sequestering carbon, and managing water resources in arid and semi-arid regions. Despite their potential contributions, past interventions have predominantly focused on humanitarian aid rather than integrating pastoralists into livestock markets.

However, pastoralists face severe marginalization and are disproportionately affected by climate change. Previous investments, while substantial, have yielded limited results. In light of escalating demand for livestock products, mounting pressure on natural resources, and increasing climate-related challenges, AU-IBAR is committed to advocating for a long-term systemic approach and coordinated efforts across countries and sectors/stakeholders. This approach aims to tailor interventions to the diverse needs of pastoral communities.

The APMD Platform will strategically drive, promote, and raise awareness about market-oriented initiatives aimed at integrating pastoralists into livestock markets among key stakeholders. This will be achieved through convening multi-stakeholder forums and coordinating actions under three pillars:

- Strengthening policy frameworks and implementing strategic measures.
- Enhancing the integration of pastoralists into livestock marketing.
- Improving and disseminating functional data ecosystems.



Background and Rationale

The African Union Inter-African Bureau for Animal Resources (AU-IBAR), with funding from the Gates Foundation has established the African Pastoral Markets Development (APMD) Platform that is aimed at facilitating market-driven transformations in pastoralism and promoting inclusive agricultural transformation across Africa. It is implementing these market-focused interventions to enhance pastoral integration into livestock markets through multi-stakeholder fora. The Platform has been translating priorities to action in two Light house countries (Kenya and Nigeria) with the potential to scale to its Strategic Outreach Countries (Benin, Burkina Faso, Cameroon, Chad, Ethiopia, Somalia, Niger, Nigeria, and Tanzania). The implementation is in collaboration with public, private and social sector partners.

At a continental level, livestock contributes to about 25% of agricultural GDP in sub-Saharan African and accounts for 30-80% of agricultural value added in various countries therefore underscoring its centrality to the national economies and remains one of the fastest growing segments of the agri-food system, driven by rising incomes, urbanization, and dietary shifts. The livestock systems support over 268 million pastoralists and agro-pastoralists across Africa, and offers livelihoods to up to 65% of the population in production, trade and services. This, therefore, not only positioned the sector as a social safety net but as a continent-wide economic infrastructure for both rural and urban markets.

In spite of this scale, there is a disconnect between the livestock resource endowment and its commercial performance. Africa holds a significant share of global livestock resources yet contributes a small share to the global meat markets. This gap reflects systemic inefficiencies in market integration, value addition, trade and investment flows which suppresses value realization. On the other hand, it defines a clear pipeline of investible opportunities.

The African Pastoral Markets Development (APMD) Platform, is therefore designing the 1st African Pastor al Markets Forum to address this gap by repositioning pastoral livestock systems as bankable, and a trade-driven sector by creating a continental marketplace for investment, partnerships and deal-making. Further, the Forum will shift the narrative and practice from policy discourse to market activation, aligning public policy, private capital and enterprise development towards unlocking the sector's full commercial potential.

Objectives

The Forum aims to catalyse investment, strengthen market systems and unlock trade in Africa's pastoral livestock sector by bringing together investors, enterprises, policymakers and market enablers on a single continental platform.

Anchored by AU-IBAR, as the lead convenor, the Forum specifically seeks to:

a. Position pastoral livestock as an investible sector through evidence, market intelligence and business case articulation.
b. Showcase bankable business models and enterprises across livestock value chains.
c. Facilitate deal-making and investment matchmaking between investors and enterprises.
d. Align policy and regulatory frameworks with market and investment needs.
e. Promote investments in enabling infrastructure, including cold chain infrastructure, logistics and traceability.
f. Elevate livestock within continental priorities such as AfCFTA, water systems and rangeland sustainability.

African Pastoral Markets Forum design and approach

The Forum will adopt a multi-partner co-convening model that aligns continental leadership, market systems and private capital actors to deliver concrete livestock and livestock products trade and investment outcomes. The model will ensure that the Forum operates as a coordinated platform for pastoral market activation, investment facilitation and continental-scale impact in the African pastoralists livestock sector. This architecture ensures that each partner plays a clearly defined, execution-oriented role in the forum.

The approach will be private sector-led and pitch-driven, with pre-selected, investment ready enterprises presenting concise, commercially viable opportunities aligned to defined investor criteria. This will be complemented by early investor signalling where the financiers outline their risk appetite, ticket sizes and instruments therefore ensuring that the business propositions are tailored to real capital requirements.

Thematic focus

The Forum will focus on high-impact themes that directly unlock trade, strengthen market systems, and drive investments in pastoral livestock rather than technical discussions. Each theme, therefore, is framed to move beyond analysis towards commercial viability and bankable opportunities.

Ministerial segment: ***Accelerating livestock trade facilitation and market activation under the AfCFTA***

The Ministerial segment will provide a high-level platform for governments to position livestock as a priority trade commodity and unlock its full potential across Africa. The session will align with the national and regional actions with AfCFTA mechanisms to enable efficient, scalable livestock trade with the expectation of delivering clear ministerial commitments on trade facilitation, regulatory reforms and market activation measures that directly support investment, enterprise growth, and increased intra-African livestock trade.

Investment in value chains and market infrastructure

Prioritize opportunities in processing, aggregation, logistics and cold chain systems that increase value capture and enable scale.

Financing models and capital mobilization

Explore practical financing pathways for livestock enterprises, including blended finance, SME lending and trade finance. The spotlight will be in structuring instruments that de-risk investments and match the realities of livestock value chains.

Livestock enterprise development and business model scaling

Highlight proven, scalable business models across pastoral livestock systems, focusing on aggregation, commercial production, and service delivery models that can attract capital and expand across markets.

Livestock trade and market integration policies

Expand intra-African and export trade through improved corridors, harmonized standards, and efficient cross-border systems with an emphasis on reducing transaction costs and unlocking scalable, formalized livestock trade flows under AfCFTA.

Digital systems and data ecosystem

Explore investments in traceability, digital trading platforms and market information systems that enhance transparency, reduce risk and improve price discovery that are considered as enablers of consistent and efficient markets.

Water, rangelands and productive assets

Position water and rangelands as economic infrastructure that underpins livestock productivity, supply reliability and long-term investment sustainability as aligned with continental priorities such as the AU Theme of Water and the International Year of Rangelands and Pastoralists (IYRP).



Forum structure

The Forum will be held for a duration of 5 days, structured as follows:

Day 1: Establishing the investment case

The Forum opens under the leadership of AU-IBAR, setting a strong continental mandate and positioning livestock within Africa's economic and trade agenda. Thereafter, led by the Research and Knowledge partners, the Forum will be grounded on data-driven insights, framing the scale, demand and growth trajectory of livestock markets.

The conversation will then be shifted from theory to commercial viability demonstrating how pastoral systems supported by water and rangelands function as productive, revenue generating assets. Business models will be spotlighted where practical scaleable enterprises illustrate how value is presently captured and where investments can accelerate growth.

Day 2: Converting market constraints into opportunities

The sessions will be structured to translate bottlenecks into investible opportunities thus strengthening market systems and trade dynamics led by trade-focused partners. The integration of continental trade frameworks will ensure that the opportunities are anchored on real, scalable market pathways.

Day 3: Building the investment pipeline

With clearly defined opportunities, the Forum will shift into pipeline creation through curated pitch sessions, presenting investment ready opportunities directly to financiers. This will be reinforced by investor signalling where capital providers clarify their requirements to align with the business propositions and financing expectations.

Investors and enterprises will then engage directly to refine and shape viable deals.

Day 4: Deal making and investment matchmaking

Structured investment roundtables and pre-matched business-to-investor meeting to create space for focused negotiations, supported by financial and technical expertise.

In parallel, there will be policy and trade clinics to ensure that regulatory market barriers affecting deals are addressed in real-time thus linking policy action directly into investment execution.

Day 5: Consolidation and commitments

Insights from across the Forum will be synthesised and consolidated. With the leadership of AU-IBAR these will be formalized through a policy and investment communique ensuring alignment between governments, investors and market actors on the next steps required to scale the sector.

Expected outcomes

- Increased visibility and exposure of the livestock sector to investors.
- Bankable pipeline of livestock enterprises with active investor engagement, including initiated deals, expression of interest and financing pathways.
- Commitments to market-oriented policy and regulatory reforms that directly support private sector investment and trade facilitation.
- Validate commercially viable business models, and stronger linkages between enterprises, financiers and market actors.

Target participants

The Forum will intentionally target 90 participants including private sector actors, public sector representatives from 15-member states (Benin, Burkina Faso, Cameroon, Central African Republic, Chad, Ethiopia, Kenya, Namibia, Niger, Nigeria, Senegal, Somalia, Sudan, Tanzania and Uganda), RECs (COMESA, EAC, ECOWAS, IGAD) and development partners.

PROVISIONAL AGENDA

The African Pastoral Markets Development Platform (APMD) Project

1st African Pastoral Markets Forum

13th - 17th July 2026 | Addis Ababa, Ethiopia

Time	Agenda item	Facilitator	Technical Lead	Format	Output
DAY 1					
Session 1: Setting the continental ambition for pastoral livestock markets					
0830hrs- 0900hrs	Registration and networking	APMD	AU-IBAR	Plenary	Strategic and political alignment
0900hrs- 0930hrs	Welcome remarks	Gates Foundation AU-IBAR Federal Ministry of Agriculture, Ethiopia			
0930hrs- 0945hrs	Overview of the APMD Platform, objectives, expected outputs, and Agenda.	APMD			
0940hrs- 10hrs	Introductions and recognitions of the participating institutions	APMD			
1030hrs- 1100hrs	***Group Photo and Health Break***				
Session 2: Making the economic value of pastoral livestock visible					
1100hrs- 1145hrs	Market size, demand trends, growth trajectory of the pastoral livestock economies in Africa	BITC	FAO	Data presentation	Market baselines
1145hrs- 1230hrs	Livestock socio-economic contribution across Africa's pastoral belt	APMD DTWG		Plenary	
1230hrs- 1400hrs	***Lunch Break***				

Session 3: Positioning livestock as an investible market system					
1400hrs- 1500hrs	Enterprise and business model showcase	KPMD	APMD	Plenary	Evidence-based models
1500hrs- 1600hrs	Livestock as an economic asset class (value chains, revenue models, investment returns)	Gates Foundation, IFC, WB, FAO-CFI, AfDB, IFAD Panel	APMD	Panel	Investment thesis
1530hrs- 1615hrs	Pastoral Voices- market realities, innovations and opportunities	Community representatives		Plenary	Real-time opportunities and challenges of pastoral producers
1615hrs- 1650hrs	Unlocking women and youth-led enterprises in pastoral livestock markets	SDK Farms, Livemo, Genco, ABF United, Siwole Trading Company	SNV	Panel	Inclusivity of women and youth
1650hrs- 1700hrs	Key insights and positioning		APMD	Plenary	
1700hrs – 1800	***Health Beak***				
End of Day 1					
DAY 2					
Session 4: Turning trade constraints into investment opportunities					
0845 – 09:00	Recap and framing	Facilitator	TradeMark Africa	Plenary	Sessional alignment
0900hrs- 0945hrs	Trade flows, bottlenecks and corridor mapping	Mercy Corp		Plenary presentation	Corridor opportunities
0945hrs- 1030hrs	Infrastructure investment track (cold chain, logistics, aggregation hubs)	AfDB, IFC, Gates Foundation		Panel	Infrastructure assets
1030hrs- 1100hrs	***Health break***				

1100hrs – 1130hrs	What traceability means in the pastoral markets Technology showcase of Livestock information and traceability systems (LITS)	NamLITS	APMD	Plenary presentation	Need for LITS
1130hrs- 1215hrs	Leveraging on compliance, standards & traceability systems for competitive livestock and livestock product marketing	NamLITS, BMC, Flocker, Megacorp, ETLITS, ANITRAC		Panel	Market enablers
1215hrs- 1300hrs	Technology showcase of Livestock information and traceability systems (LITS)	ANITRAC, NAITS, ETLITS		Demonstra-tion	Practical grounding of LITS
1300hrs- 1400hrs	***Lunch break***				
Session 5: Opening regional and continental markets for livestock trade					
1400hrs- 1410hrs	Opening framing: APMD Policy Pillar and the logic of the Policy-to-Action Track	APMD	Facilitator	Plenary	Shared understand-ing of how policy will support trade, investment and market activation
1410hrs–1430hrs	Aligning pastoral livestock market development with CAADP, Kampala CAADP, NASIP/NAIP and livestock investment planning	APMD	APMD	Technical presentation	CAADP/NASIP livestock policy and investment entry points identified
1420hrs- 1440hrs	African livestock trade and non-trade policy landscape: lessons from the Horn of Africa and wider continental experience	IGAD-ICPALD	APMD	Plenary presentation	Key policy and regulatory bottlenecks mapped
1450 hrs – 1510 hrs	Q&A		Facilitator		

1510 hrs – 1600 hrs	Economic Policy Reforms for Unlocking Investment and Sustainable Growth in Africa's Pastoral Livestock Economy	SDLD, Kenya MoA, Ethiopia FMLD, Nigeria Equity Bank, Kenya Sterling Bank, Nigeria Other	AU-IBAR	Plenary	Identify successful financing systems could be aligned for pastoral livestock
1600hrs–1630hrs	Opportunities for AfCFTA implementation in the livestock sector: lessons from Guided Trade Initiatives and implications for livestock corridors	AfCFTA Secretariat		Plenary presentation	AfCFTA-aligned livestock trade pathway identified.
1630hrs–1700hrs	Standard harmonization in the facilitation of continental-based livestock trade under the AfCFTA	ARSO		Plenary	Harmoniza-tion of the standards
1700hrs	Key insights and positioning	APMD		Plenary	Summary of the day
17:30-18:00	***Health Beak***				
End of Day 2					
DAY 3					
Session 6: Building credible pastoral livestock investment pipeline					
0845 – 09:00	Recap and framing	Facilitator	Gatsby Africa	Plenary	Sessional alignment
0900hrs- 0945hrs	Financial modelling and de-risking of pastoral livestock development	Strathmore University		Keynote	Alignment of livestock financing and de-risking mechanisms
0945hrs- 1025hrs	Pastoral livestock de-risking and other risk sharing mechanisms	ZEP-RE		Keynote	
1025hrs- 1100hrs	Investor signalling (ticket sizes, projected returns, instruments, risk appetite and liquidity)	Equity, ABSA, KCB, DBE, Sterling Bank, NIRSAL, Premier Bank		Panel	Private capital clarity
1100hrs- 1130hrs	***Health break***				
1130hrs – 1200hrs	Investment case: ABF United	ABF United	Strathmore University	Deal Room Pitch	Investment pipeline
1200hrs- 1230hrs	Investment case: ABIS Group	ABIS Group			
1230hrs- 1300hrs	Investment case: Al-Nakheel	Al- Nakheel			

1130hrs- 1200hrs (parallel)	Recap of Session 5: Prioritization of issues, what should be endorsed at Sub-national, National, Regional and Continental levels; From policy diagnosis to implementation instruments	Facilitator	IGAD ICPALD	Technical framing	Build consensus on Priority policy issues and practical policy instruments identified for alignment from Session 5
1200hr-1300hrs (parallel)	From investment cases to policy reforms: policy barriers affecting livestock enterprises, investors and corridor trade	Gatsby Africa, TradeMark Africa, Agricultural Policy Dialogue, FANRPAN	APMD	Interactive discussion	Deal-linked policy barriers captured
1300hrs- 1400hrs	***Lunch break***				
1400hrs- 1430hrs	Investment case: Genco Livestock Limited	Genco Livestock Limited	Strathmore University	Deal Room Pitch	Investment pipeline
1430hrs- 1500hrs	Investment case: Livemo Investment Limited	Livemo Investment Limited			
1500hrs- 1530hrs	Investment case: Luna Slaughterhouse	Luna Slaughterhouse			
1530hrs-1600hrs	Investment case: Sowle Trading Company	Sowle Trading Company			
1600hrs-1630hrs	Investment case: WRIS	WRIS			
1400hr – 1530hrs (parallel)	Regional and continental pathways for livestock trade facilitation, harmonization and AfCFTA implementation		APMD	Expert Panel	AfCFTA recommendations for the Policy-to-Action Matrix
1530hrs–1700hrshrs (parallel)	Policy-to-Action Matrix: converting gathered information into practical policy actions matrix	Working group members, chairs, rapporteurs		Plenary Synthesis	Draft action points by policy priority
1630hrs- 1650hrs	Q & A	All			
1650hrs- 1700hrs	Summary, key insights and positioning	APMD			
17:00-18:00	***Health Beak***				

End of Day 3					
DAY 4					
Session 7: Securing political leadership for livestock trade and market activation					
0845 – 09:00	Recap and framing	Facilitator	AU-IBAR	Plenary	Sessional alignment
0900hrs- 0930hrs	Ministerial briefing	APMD		Plenary	Ministerial alignment
0930hrs- 1030hrs	Ministerial speeches	Ministerial delegate		Panel	
1030hrs- 1100hrs	***Health break***				
1100hrs- 1300hrs	Ministerial segment: Accelerating livestock trade facilitation and market activation under the AfCFTA	Ministerial delegate	AU-IBAR	Panel	Advanced discussions
1300hrs- 1400hrs	***Lunch break***				
1400hrs- 1600hrs	Financial structuring (co-investment, blended finance syndication and credit enhancement, DFIs)	AfDB, IFC, SNV Commercial banks, ICC	ILRI APMD	Roundtable	Financing pathways
1600hrs- 1700hrs	Networking	All		Plenary	Deals and networking
17:00-18:00	***Health Beak***				
End of Day 4					
DAY 5					
Session 8: Consolidating commitments and post-Forum delivery pathway					
0845 – 09:00	Recap and framing	Facilitator	APMD	Plenary	Sessional alignment
0900hrs- 1000hrs	Deals announcements and pipeline summary (Deals, EoI, pipeline value)	Facilitator		Plenary	Investment visibility
1000hrs- 1030hrs	Scalability and sustainability of the Pastoral Markets Forum			Plenary	M&E framework, sustainability strategy
1030hrs- 1100hrs	***Health break***				
1100hrs- 1200hrs	Communique		APMD		
1200hrs- 1300hrs	**Closing remarks**	AU-IBAR Federal Ministry of Agriculture, Ethiopia			
1300hrs- 1400hrs	***Lunch break*** **- End of workshop and departure**				

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