

PROMOTING INTRA-AFRICA TRADE IN ANIMALS AND ANIMAL PRODUCTS

A. Mankor
Consultant¹

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Summary: *The African continent accounts for about 4% of world production of animal products. However, its share in world trade in animal products is less than 1% and its consumption of animal products is among the lowest in the world.*

In terms of live animals, Africa is generally self-sufficient and is indeed a net exporter. Nevertheless, it remains a net importer of animal products, while at the same time the opportunities for intra-African trade are not fully exploited.

The majority of African countries' imports of animal products are from other continents and African exports of animal products go mostly to developed countries. To reverse this trend, for the benefit of the African continent, there is now a need to promote inter-African trade. To overcome the constraints, political measures already exist or are envisaged by individual States. Moreover, the World Organisation for Animal Health (OIE) support for trade in animals and animal products is unanimously desired.

Key words: *Africa – trade – trade in animals – trade in animal products*

¹ Dr Adrien Mankor, consultant based in Dijon, France

Introduction

During the General Session of the World Organisation for Animal Health (OIE) in May 2011, the OIE Regional Commission for Africa adopted the topic "Promoting intra-Africa trade in animals and animal products", to be presented as 'Technical Item I' at its 20th Conference, due to be held in Lomé, Togo, in February 2013. To collect information from Member Countries on this technical item, a questionnaire was prepared and was sent to each of the OIE Delegates in the Africa region. Thirty countries submitted a completed questionnaire¹.

This report summarises the findings of an analysis of the completed questionnaires and presents the results of bibliographic searches. The report is in six sections. The first section provides some basic background information on Africa's position in world trade in animal and animal products. The next two sections deal with supply and demand in Africa for animal products. Sections 4 and 5 present African trade in products and its main constraints, while section 6 considers the role that various Delegates would like the OIE play in promoting inter-African trade in animal products.

1. Africa's position in terms of trade in animals and animal products

With approximately 1 billion inhabitants, Africa has about 15% of the world's population. The African continent accounts for around 4% of world production of animal products. Its share of world trade in animal products is less than 1% and its consumption of animal products is among the lowest in the world. Africa's contribution to world trade in animal products is therefore very small.

2. Africa' supply of livestock and animal products

The African continent is rich in animal resources. However, livestock population figures are difficult to ascertain. Livestock censuses have been carried out in some States. Some of the census figures are old while others are quite recent. Between two censuses, the livestock population is estimated each year by applying, for each species, a fixed growth rate to the figure for the previous year. The statistics on livestock populations must therefore be treated with caution.

The main animal species farmed in Africa are cattle, small ruminants (sheep and goats), swine, poultry and camelids (with estimated population figures of 20 million camelids, 239 million cattle, 250 million goats, 279 million sheep, 1.5 billion poultry and 4.4 million donkeys and horses [as well as considerable terrestrial and aquatic wildlife resources]). These animals are principally raised in an extensive, family-run system. There is, however, a significant development of intensive poultry production.

In Africa, in recent years, annual meat production from ruminants was 7.5 million tonnes, of which 65% was from cattle, 32% from small ruminants and 3% from camelids.

Annual milk production in Africa is around 31 million tonnes. IGAD² produces around 40%, AMU³ 33%, SADC⁴ 15%, ECOWAS⁵ 10% and ECCAS⁶ 3%. Processed milk is almost entirely produced by the SADC.

One can also mention eggs, as well as hides and skins, which are produced in significant quantities.

However, there seems to be general agreement among authors on the low level of intensification of production systems and the insufficient exploitation of animal products. This has the effect of making African producers uncompetitive on markets at the domestic, regional and continental. Competition from extra-African exporting countries is therefore a constant threat to the development of trade in African animal products.

1 Algeria, Angola, Benin, Botswana, Burkina Faso, Central African Republic, Chad, Congo (Democratic Rep. of the), Côte d'Ivoire, Guinea, Guinea-Bissau, Kenya, Lesotho, Malawi, Morocco, Mauritius, Mozambique, Niger, Nigeria, Rwanda, Sao Tome and Principe, Senegal, South Africa, Sudan, Swaziland, Togo, Tunisia, Uganda, Zambia and Zimbabwe.

2 IGAD: Inter-Governmental Authority for Development

3 AMU: Arab-Maghreb Union

4 SADC: Southern African Development Community

5 ECOWAS: Economic Community of West African States

6 ECCAS: Economic Community of Central African States

3. African demand for animal products

Demand for animal products is on the increase worldwide, due to the combined effects of the population explosion, urbanisation, changes in eating habits and rising household incomes.

In Africa, more and more people are urbanised. This situation is leading to the emergence of a middle class and a change in eating habits with an ever-increasing demand for animal products. Per capita consumption of animal products remains generally very low, which means there is a considerable margin for progression. This steady growth in demand is still not met by domestic consumption.

With effective promotion of intra-African trade, African demand for food products of animal origin could be met, in the long-term, from within the Continent.

4. African trade in animals and animal products

To meet the demand for animal products, the major production basins of the Sahel and Sahel-Saharan belt have long since developed cross-border trade in animal products with coastal countries, the consumer basins. There have been numerous studies on how this trade operates. These studies have identified various marketing channels for animal products:

- West African channels (western channel, central corridor): export of live animals (cattle and small ruminants) from the Sahel to coastal countries;
- the Central Africa channel: export of live animals from the Sahel to equatorial forest countries;
- the Horn of Africa channel: export of live animals from the Horn of Africa to Middle East countries;
- the East Africa channel: export of animals and milk products between countries of the Great Lakes region;
- the Indian Ocean channel: export of live animals and meat from East African countries to Indian Ocean countries;
- the southern Africa channel: exports of deboned meat to Europe;
- the North Africa channel: exports of live animals (small ruminants and camelids) from the Sahel to countries of North Africa.

The live animal trade corresponds to a way of life (transhumance and trade) but also to production methods that enable pastoral resources to be exploited, even when the appropriate infrastructure is lacking.

It is important to remember the low level of competitiveness of African producers in domestic, regional and continental markets in the face of imported products. The African continent thus remains a net importer of animal products.

Nevertheless, on the whole, Africa is self-sufficient and is indeed a net exporter of live animals. All the regions or regional economic communities both export and import live animals. This is an indication of the dynamism of the regions when it comes to trade in live animals. IGAD is the leading region in this respect, accounting for 42% of live animal exports, followed by ECOWAS, with approximately 35%.

In Africa, in recent years, annual imports of live animals were about 3.3 million head, of which 30% were cattle, 31% goats, 37% sheep and 2% camelids. Exports were 6.4 million head, of which 1% were camelids, 14% cattle, 33% goats and 52% sheep.

The main categories of exported meat were sheep meat and deboned beef, accounting for 47% and 33% of total exports, respectively.

Annual imports of meat from within the African continent in recent years totalled approximately 1.3 million tonnes, compared to only 109 000 tonnes of exports, 70% of which came from SADC countries.

All regions or regional economic communities are net importers of milk and milk products. The main exporting regions are SADC (44%) and ECOWAS (36%). The main importing regions are

AMU, with 50% of imports, and ECOWAS (32% of imports of milk and milk products within the continent).

There is also trade in eggs, skins and hides, but the quantities involved remain small.

The majority of African countries' imports of animal products are from other continents, and African exports of animal products (especially meat) go mostly to developed countries.

To reverse this trend, for the benefit of the African continent, there is a need to promote inter-African trade. To do so, however, a number of obstacles will first have to be overcome.

5. Constraints to African trade in animals and animal products

Africa's potential in terms of animal products is poorly exploited, due in part to the many constraints that impede the smooth running of trade between States. These constraints fall into two categories: non-sanitary constraints and sanitary constraints.

5.1. Non-sanitary constraints

The main non-sanitary constraints to commercial transactions relating to animals and animal products consist of the following: customs tariffs and inappropriate trade legislation (tariff policies that discourage trade, failure to apply community measures); difficulty for operators in animal production sectors to access credit; all types of red tape during transport (formalities, for example); dilapidated or inappropriate infrastructure and transport facilities.

Various other non-sanitary constraints are also often cited. These include the poor competitiveness of African animal products compared to products imported from abroad including seaports, the low level of organisation of operators in animal production sectors and lack of information on markets.

To overcome these non-sanitary constraints, the main solutions put forward by the Member Countries that completed the questionnaire, included: free movement of people and goods; raising awareness of State officials (police, customs officers, etc.); building or upgrading of infrastructure (abattoirs, roads, means of transport for animals and meat, transport routes, etc.); easier access to credit for operators; harmonisation and effective implementation of legislation and regulations.

Political measures exist or are planned: livestock census; policies to build or upgrade transport infrastructure; building programmes for abattoirs and livestock markets; legislation on livestock routes; institutional organisation of industry operators; easier access to credit, harmonization of legislation and regulations in the context of sub-regional organizations etc. Moreover, information already exists on markets at national or regional level.

5.2. Sanitary constraints

Sanitary constraints relate as much to animal health as to food safety. In terms of animal health, the main constraints are: animal diseases (persistence of major epizootic diseases and zoonoses); lack of quarantine infrastructure; compliance with standards and regulations (SPS measures) and the lack of product control laboratories.

In terms of food safety, the constraints most frequently referred to by the Member Countries that replied were: lack of laboratories for the control of residues and contaminants; labelling deficiencies; absence or non-compliance of certificates of origin.

To overcome these constraints, political measures already exist or are envisaged by individual States. These include laws and decrees relating to: veterinary medicine and protection of animal health; control of animal diseases; veterinary inspections at border posts; notifiable diseases; sanitary safety of plants, animals and food; specific rules on the organisation of official controls for products of animal origin intended for human consumption; animal health checks; risk analysis in animal health; animal movement control; animal identification and traceability, etc.

6. Role of the OIE in promoting trade in animal products

According to the questionnaire responses, African Member Countries are unanimous in wanting OIE support for trade in animals and animal products.

The OIE is thus invited to help consolidate cooperation between its Member Countries in the veterinary domain, through the following:

- facilitating information exchanges on sanitary aspects of methods of preparing, processing and manufacturing animal products;
- cooperation and technical assistance between the laboratories of Veterinary Services of different countries;
- capacity-building for technical services, in terms of disease surveillance, notification, diagnosis and control;
- capacity-building for laboratories controlling the quality of products of animal origin;
- organisation of symposia and seminars aimed at achieving enhanced ownership, at national level, of OIE standards, in association with measures contained in the Agreement on the application of sanitary and phytosanitary measures (SPS Agreement) of the World Trade Organization.

The OIE might also contribute to:

- bilateral and sub-regional harmonisation of standards, reference systems and procedures governing trade in animal products;
- improving and strengthening of quarantine services;
- promoting better training for sanitary control inspectors.

The OIE could also provide technical support, where it is appropriate, with the preparation of dossiers for countries wishing to apply for official recognition of a given disease-free status and with the implementation of livestock identification and traceability programmes.

Conclusion

The African continent accounts for about 4% of world production of animal products. However, its share in world trade in animal products is less than 1% and its consumption of animal products is among the lowest in the world.

The main animal species produced are cattle, small ruminants (sheep and goats), swine, poultry and camelids, and there are also considerable resources of terrestrial and aquatic wildlife. Livestock are principally raised according to an extensive, family-run system. There is, however, a significant development of intensive poultry production.

Nevertheless, there seems to be general agreement among authors on the low level of intensification of production systems and the insufficient exploitation of animal products, which has the effect of making African producers uncompetitive.

An increase in demand for animal products is now underway in Africa, due to the combined effects of the demographic explosion, urbanisation, changes in food habits and rising household incomes. Domestic production is not yet able to meet this steady growth in demand.

With effective promotion of intra-African trade, African demand for food products of animal origin can be met, in a long-term, by the continent's own production. Numerous studies have been carried out on the way this trade functions and have identified various marketing channels for animal products.

In terms of live animals, Africa is generally self-sufficient and is indeed a net exporter. Nevertheless, it remains a net importer of animal products, while at the same time the opportunities for intra-African trade are not fully exploited.

The majority of African countries' imports of animal products are from other continents and African exports of animal products (especially meat) go mostly to developed countries. To reverse this trend, for the benefit of the African continent, there is now a need to promote inter-African trade. Before this can be done, however, there are a number of obstacles that need to be overcome. These constraints fall into two categories: non-sanitary constraints and sanitary constraints.

To overcome these constraints, political measures already exist or are envisaged by individual States. Moreover, OIE support for trade in animals and animal products is unanimously desired.

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