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Annual List of Target Investments in Market Logistics Infrastructure with a "Mini Strategy" for Facilitating Public/Private Investment for each Target Investment Livestock (FY 2011)

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ANNUAL LIST OF TARGET INVESTMENTS IN MARKET LOGISTICS INFRASTRUCTURE— LIVESTOCK FY 2011

USAID AGRIBUSINESS AND TRADE PROMOTION (ATP) PROJECT



October 2011

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DISCLAIMER

The authors' views expressed in this publication do not necessarily reflect the views of the United States Agency for International Development (USAID) or the United States Government

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ACRONYMS

ATP	Agribusiness Trade Promotion Project
AU-NEPAD	African Union's New Partnership for Africa's Development
CAADP	Comprehensive Africa Agriculture Development Program
USAID	United States Agency for International Development

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- Virginia Schippers: Project Specialist—team leader and lead field researcher
- Laura Busch: Economist—research task manager

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- Jeffrey Edue: project driver

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EXECUTIVE SUMMARY

In October 2010, the Agribusiness and Trade Promotion (ATP) Project undertook a transport and logistics study that examined the costs associated with transport of livestock along key trading corridors in West Africa. As a part of project outcome I, "Significant reduction of the incidence of physical and policy-related barriers to intra-regional agricultural trade in West Africa," this transport and logistics study was designed to help articulate how various transport constraints associated with regional trade in West Africa interact with the overall operation of the livestock value chain.

Through the initial study, ATP and its stakeholders gained a better understanding of how inefficiencies in the transport and logistics process relate to overall costs (and competitiveness) in the livestock value chain along the corridors and at key markets. The study also generated a list of the highest-priority market infrastructure and road infrastructure investments needed in order to address the most glaring inefficiencies.

This second study, undertaken in September 2011, updates the findings of the original study, focusing on what has changed in market logistics infrastructure since the initial study was completed approximately one year ago.

The main finding of this livestock market logistics infrastructure update is that all observed livestock markets on the trade corridor, other than that of Fada N'Gourma, are ill-equipped for transport and trade of livestock. The original study found that the largest cost associated with the regional trade of livestock in West Africa is weight loss and death in transit and at market, and that this is primarily caused by a lack of suitable infrastructure at market locations. This infrastructure specifically includes loading ramps, feeding and watering facilities, and veterinary services. It is at the markets that lack this important infrastructure (Pouytenga, Parakou, and Nikki) that the animals lose the most weight and die the most frequently. Therefore, improving infrastructure in these markets is of high priority to improve the efficiency of the livestock value chain.

I. INTRODUCTION

The ATP project is a four-year regional initiative funded by the United States Agency for International Development (USAID). Launched in 2008, ATP has focused on three agricultural value chains: maize, onion, and ruminant livestock/red meat. ATP aims to increase the value and volume of intra-regional agricultural trade through value chain development and associated activities along the major commercial corridors linking Senegal, Mali, Burkina Faso, Benin, Togo, Ghana, Côte d'Ivoire, and Nigeria. ATP is designed to contribute to achieving the 6 percent annual agricultural growth target set under the Comprehensive Africa Agriculture Development Program (CAADP) of the African Union's New Partnership for Africa's Development (AU-NEPAD).

Livestock has always been vital to food security in the West African region. As an important source of protein in the diets of many West Africans, meat is generally recognized as a staple food and is commonly acknowledged as important commodity in food security and improved nutrition.

It is important to note that food security in the region is dependent not only on farmers' ability to produce a surplus of livestock for trade, but also on the commodity's ability to move efficiently from production zones to consumption markets. Inefficiencies in West Africa's transport and logistics systems are a recognized constraint to trade within the region. These constraints include, but are not limited to, bureaucratic procedures at border posts; excessive road checkpoints; haphazard application of regional interstate transport and transit treaties; lack of coordination among value chain actors; inadequate road and market logistics infrastructure; overloading of trucks; lack of competition in trucking services; and insufficient competition in market logistics services. These inefficiencies increase supply chain costs for traders directly (high transport prices, informal payments) and indirectly (time to market, product spoilage/loss).

Therefore, understanding the transport and logistics component of the livestock value chain is crucial to identifying some of the most important constraints to regional trade and represents a crucial piece of the puzzle of West African food security.

Suitable infrastructure in wholesale and retail livestock markets contributes greatly to reducing product losses (weight loss/death) in the time between arrival in the market and the final sale, and therefore contributes to the efficiency of trade along the corridor. In many cases, the key markets for regional trade in livestock lack this necessary infrastructure, resulting in high product losses and destruction of value. This study focuses on the state of the infrastructure found in each of the livestock markets along the ATP livestock corridors. It identifies the highest-priority infrastructure needed to decrease inefficiency and reduce losses.

2. METHODOLOGY

This study is a follow-up (or “update”) to the original livestock transport and logistics study that was conducted in October 2010. While the original study examined all of the cost breakdowns and product losses along the entire value chain (including on-farm losses, loading/unloading and transport fees, losses due to truck breakdowns and delays at borders, bribes and other formal and informal payments, and losses at the market due to inadequate or lacking infrastructure), the update to this study is more targeted, focusing specifically on changes that have been made in the market logistics infrastructure component of the study since the original research was collected and analyzed.

2.1 PRELIMINARY RESEARCH

The findings of the original study led to initial recommendations for priority areas in market logistics investment. Based on these recommendations, ATP made decisions on the allocation of resources for key interventions.

This annual update examines improvements and changes in market logistics infrastructure after one year. Prior to beginning field work, the consultants closely reviewed the original key findings and recommendations for livestock market logistics infrastructure. In addition, through discussions with ATP project teams, the consultants gathered information about project implementation of the original recommendations. Through this preliminary research, the consultants developed a matrix of key information to be collected during field work.

2.2 FIELD WORK

The original livestock transport and logistics study was conducted along the main trade corridors (identified by ATP) for the livestock value chain:

- Fada N’Gourma, Burkina Faso–Parakou, Benin–Nikki, Benin
- Fada N’Gourma, Burkina Faso–Tamale, Ghana
- Ouagadougou, Burkina Faso–Accra, Ghana

These are the roads that link the main production zones to the large consumption markets.



Therefore, the update to the transport and logistics study followed the same corridors to evaluate the market logistics infrastructure in each of the markets located along this route. (See map above).

Along this corridor, there were a total of five distinct markets visited during field work for the update to the original livestock study:

- Tamale, Ghana
- Pouytenga, Burkina Faso
- Fada N’Gourma, Burkina Faso
- Parakou, Benin
- Nikki, Benin

The field work for this update started at the southernmost point (Accra, Ghana), and followed the corridor up to the northernmost point (Madaoua, Niger).¹ The team was comprised of team leader Virginia Schippers, three data collectors (Ali Issaka for onions, Labi Dahoui for livestock, and Dieudonne Kam for maize), and one driver (Jeffrey Edue). Schippers traveled with Issaka from Accra, Ghana, to Techiman, Ghana to update the onion sub-corridor. Kam joined the team in Techiman. Schippers, Issaka, and Kam continued together to northern Ghana, leaving Issaka at Bolga, Ghana. He continued alone to Pouytenga, Burkina Faso to update information about the Bolga, Ghana–Pouytenga, Burkina Faso onion sub-corridor. Kam and Schippers continued on to Ouagadougou, Pouytenga, and Fada N’Gourma in Burkina Faso, where they rejoined Issaka. Next, the three traveled together to Niamey, Niger, where they rejoined Dahoui. Schippers, Kam, and Issaka then traveled from Niamey to Madaoua-Galmi to update the Niamey–Madaoua onion sub-corridor and then returned along the same route. Dahoui traveled from Niamey to Fada N’Gourma, then to Parakou and Nikki in Benin to update the Fada N’Gourma–Nikki livestock sub-corridor. This field work took a total of seven days, including travel along the corridors and visits to all of the markets.

¹ Field work for updates to the maize and onion studies was undertaken concurrently.

3. OVERVIEW OF VALUE CHAIN, CORRIDORS, AND MARKETS

Livestock plays a key role in the economies of West African countries, where it provides up to 44 percent of agricultural GDP, and in the livelihoods of their populations. With 60 million cattle and 160 million small ruminants, the Sahel and West Africa contain 25 percent of the cattle, 33 percent of the sheep, and 40 percent of the goats in the whole sub-Saharan African region.²

Livestock-rearing is one of the main economic activities upon which the poorest populations depend for subsistence and income. United Nations Food and Agriculture Organization statistics from 2006 indicate that about 675 million of the world's rural poor, including nearly 170 million in sub-Saharan Africa, are entirely or partially dependent on livestock production to feed themselves or obtain financial remuneration. Furthermore, livestock represents more than half the capital held by rural inhabitants in sub-Saharan Africa,³ so it also plays an important role in insuring against risk for populations highly dependent on rain-fed agriculture and thus vulnerable to changes in climatic conditions.

For these reasons, intra-regional trade represents a significant economic opportunity for livestock producers to expand their market shares, increase their incomes, and create substantial competition for meat product importers external to the region, reducing the likelihood of price shocks.

In West Africa, trade in livestock and animal products flows from north to south. Three countries—Burkina Faso, Mali, and Niger—supply the bulk of such products to end-markets in Gulf of Guinea countries. Consequently, the Fada N’Gourma, Burkina Faso–Parakou, Benin–Nikki, Benin; Fada N’Gourma, Burkina Faso–Tamale, Ghana; and Ouagadougou, Burkina Faso–Accra, Ghana transport corridors are vital to livestock trade in the region.

The livestock data collector, Labi Dahoui, visited five key markets along the corridors during the study.

- The first market visited along the corridor was the **Tamale** market in northern Ghana. This market is not yet functional and has very minimal infrastructure built. It was conceived by the governments of Fada N’Gourma and Tamale, which hoped to create a sister market to the one already existing in Fada N’Gourma. Unfortunately, the financing needed to finish the market and operate it is still missing.
- The next market visited was the **Pouytenga** market in Burkina Faso, located about 100 km west of the Fada market. It is one of the key consolidation points supplying the Fada market.
- Following this was the **Fada N’Gourma** market in Burkina Faso, which is largely acknowledged as one of the best examples of an efficient and well-equipped market in West Africa. If the financing is found to complete the Tamale market, it will be based on the structure and operation of this Fada market.

² Livestock and regional market in the Sahel and West Africa: Potentials and challenges, ECOWAS/SWAC/OECD 2008.

³ Livestock and regional market in the Sahel and West Africa: Potentials and challenges, ECOWAS/SWAC/OECD 2008.

- The next two markets, **Parakou** and **Nikki** (both in Benin) are two small transit markets where cattle stop only temporarily on their way to Nigeria for final sale.

4. KEY FINDINGS IN MARKET LOGISTICS INFRASTRUCTURE—ORIGINAL STUDY

The original livestock transport and logistics study found that lacking or insufficient infrastructure in markets caused significant loss of product. The most important transport and logistics cost driver was found to be animal weight loss, injury, or death between farm and final sale. Most frequently, these three things are caused by absent or insufficient infrastructure in market areas. Therefore, market logistics infrastructure was found to be of vital importance to the livestock value chain. The study made several recommendations for investments for improvements.

While in market areas, the largest causes of weight loss is the lack of paddocks and/or adequate feeding and watering facilities. Additionally, markets often have insufficient veterinary services and other facilities for maintaining the health of the animals. This contributes to animal weight loss and mortality, as animals suffer from untreated illnesses. The study also noted that in most livestock markets, services and livestock holding areas are insufficient. Furthermore, it was found that poor handling practices and inadequate handling infrastructure at markets result in death and injury in transit due to overloading and poor loading. In particular, the lack of loading and off-loading ramps is a serious issue as livestock must be hauled manually, frequently resulting in injury or death of the animal.

The consultant who conducted the original study claimed that, with the exception of the market at Fada N’Gourma, livestock markets in Ghana, Burkina Faso, and Benin were poorly built and have insufficient infrastructure. The specific infrastructures for each market observed during the original study are listed below:

4.1 FADA N’GOURMA

Equipment and infrastructure in the Fada N’Gourma market in Burkina Faso is outstanding in comparison to other markets in West Africa. It is considered by all actors to be a success story to be replicated in other markets of the region. At the time of the original study, the market included:

- 16 buildings
- 32 cattle stalls
- 64 stalls for goats and sheep
- 2 stalls for donkeys
- Poultry pens
- Solar pumps
- Toilets
- A hotel
- A parking lot
- Offices
- Commercial space for customers to view the commodity
- Loading docks
- Ramps
- Fences

4.2 POUYTENGA

Equipment and infrastructure in the Pouytenga market in Burkina Faso includes:

- A fenced market area that is broken in several places
- Holding pens for the animals, which are largely defective
- A loading/unloading ramp that is in disrepair

4.3 PARAKOU

In the Parakou market in Benin, the equipment and infrastructure that existed at the time of the original study included:

- 2 holding pens
- A loading ramp in good condition and fully functional with two access points
- 2 cattle drinking facilities
- A loading dock for small ruminants
- 6 public toilets
- A hotel with 5 bedrooms for traders
- An empty hangar
- A meeting room
- A mosque
- Posts for tying animals

4.4 NIKKI

In the Nikki market located in Benin, there was no infrastructure noted in this market except for:

- An adjoining pasture
- An observation area

4.5 TAMALE

The idea for the Tamale livestock market was created in 2007 as part of a sister city relationship with Fada N’Gourma. This market is meant to facilitate trade in animals destined for southern Ghanaian cities; the objectives of the market are to create access to hygienic meat for Tamale; improve the quality of meat by avoiding long travel that weakens livestock; promote animal trade with the southern and northern parts of Ghana in collaboration with Burkina Faso; and promote the supply of high-quality animals and animal products. At the time of the original livestock transport and logistics study, the market was partially completed with the construction of only cattle, goat, and sheep holding bays. The market infrastructure that would be, but is not yet, completed includes:

- Veterinary inspection rooms
- A revenue records office
- Guest rooms for 20 people
- Utility services for water
- An access road to the market
- A grazing field
- A mosque
- An animal feeding room
- A toilet facility
- A banking hall

5. KEY FINDINGS IN MARKET LOGISTICS INFRASTRUCTURE— FY 2011 UPDATE

This section provides an update to the market logistics findings of the original study. The key observation from this update is that at each of the livestock markets examined, there is still a consistent lack of adequate infrastructure to run the markets efficiently.

5.1 FADA N'GOURMA

As was the case in the original study, the update found that the Fada N'Gourma market was the best and most well-equipped market for livestock trade and that it is outstanding by comparison to the other four markets visited. All of the infrastructure observed in the original study was still there and functional, contributing to a well-run and efficient market.



The lack of abattoir for the market does entail some problems, as any animals that need to be slaughtered have to be taken into town to a private butcher.

Additionally, the market remains unpaved, causing health problems to the animals during the dry season. On market days, when the market is full of cattle and small ruminants, the animals kick up large amounts of dust from the unpaved ground, which settles in their eyes, ears, and mouths, as well as in their watering facilities. This causes many animals to get sick, causing weight loss and death—a source of direct loss to the value chain actors.

Another infrastructure lack that caused inefficiencies and losses is the lack of feed stores in the marketplace. Currently, there are only two feed stores located around the periphery of the market, which sell feed to individual traders during the dry season. (During the wet season, animals are taken out to graze in the bush.) These feed stores are privately run (not an official part of the market) and they are unable to keep up with the demand for feed during the dry season.

Finally, the loading ramp at the Fada market is only adapted to cattle, not small ruminants. Because of this, the goats and sheep have to be manually unloaded, causing some inefficiencies and injuries during the loading/unloading phase.



5.2 TAMALE

In 2007, the creation of the Tamale livestock market was conceived as a part of a sister city relationship with Fada N’Gourma. The idea behind this market was to facilitate transit trade in animals destined for southern cities in Ghana such as Kumasi, Techiman, and Accra. The objectives of this project were:

- To create access to hygienic meat for the people of Tamale
- To improve the quality of meat by avoiding long travel that weakens livestock
- To promote animal trade with the southern and northern parts of Ghana, in collaboration with Burkina Faso
- To promote the supply of high-quality animals and animal products

At the time of the original study in 2010, the consultant noted that although only the holding pens had been built, the construction of many other infrastructures was scheduled to begin soon. Upon completion of this market’s construction, the market would be comparable to that of the Fada market. Unfortunately, other than the creation of a dirt road from the main corridor to the market and the construction of buildings for administration and veterinary facilities, no progress has been made in the market construction since October of 2010. The construction of this market has been delayed for so long, with the land remaining unused, that the area within the holding pens has become overgrown, essentially turning back into bush although it was once cleared. It was noted that someone had even started to farm on the land inside the holding pens.



Financing for this market's construction has not been found, and the mayors of Tamale and Fada N'Gourma are still having discussions about the roles that each city will play in the creation of the market. However, in discussions with stakeholders at the Fada market in Burkina Faso, it was unanimously proclaimed that trade to Tamale would not be interesting for Burkinabé livestock traders, even if the Tamale market were to become fully functional. The reason for this is that transport costs to Ghana are more expensive than to Nigeria and the market in Nigeria is also much bigger than in Ghana. This is perhaps a more compelling explanation for why the market in Tamale has yet to be built, as it is simply not a viable business opportunity for private sector investors

5.3 POUYTENGA

Upon arrival at the Pouytenga market, it was immediately apparent that all of the infrastructure is completely dilapidated. The market's actors are functioning with very little existing infrastructure, which is either partially or entirely broken.

- All of the holding pens for cattle are in disrepair (fences are broken in dozens of places).



- The loading ramp has started crumbling and is no longer in use, so animals are loaded and unloaded manually.



- The two weighing scales (one for a fully loaded truck and one adapted to weigh individual cattle) were never installed and are (and always have been) rendered entirely useless.
- There are no feeding or watering facilities for the animals.
- The unpaved market floor causes deep pools of mud and water to form and mix with the animals' urine and feces. This creates extremely unsanitary conditions, especially when the animals drink from these pools of water due to the lack of watering troughs.



Of perhaps the most serious concern is the abattoir, which poses serious health concerns due to the facility's unsanitary conditions. Currently, the abattoir is simply a slab of concrete on the ground with hooks on wire to hang the freshly slaughtered meat. There is no cleaning or hygienic practices conducted between slaughters, and there are animal parts left in the surrounding space. It is worth noting that this abattoir is located only a few meters away from a primary school, on top of which dozens of vultures perch, waiting to pick up the remaining animal parts). The unsanitary conditions of this abattoir and its proximity to a school are a cause for concern.





Finally the lack of veterinarians or veterinary facilities means that any sick animals that arrive in the market are brought straight to this abattoir to be slaughtered instead of being treated for their illnesses, resulting in lower prices to value chain actors.

5.4 PARAKOU AND NIKKI

These two markets in Benin are transit markets for livestock that are on the way to Nigeria from Fada N’Gourma for final sale. All of the infrastructure that existed at the time of the original study is still there, but nothing new has been built since October 2010. While these markets are only stopping points for animals before they reach Nigeria, minimal infrastructure for maintaining the health of the animals (e.g., feeding, watering, and veterinary facilities) would go a long way in raising prices for livestock value chain actors. Nikki does not have any of this infrastructure, and although Parakou does have some (watering facilities, loading ramp, etc.), the equipment is very old, in disrepair, and in need of maintenance and construction.

6. RECOMMENDATIONS

6.1 ANNUAL LIST OF TARGET INVESTMENTS IN MARKET LOGISTICS INFRASTRUCTURE

1. Support facilitation of investment or credit for total repair and reconstruction of the Pouytenga market
2. Support facilitation of investment or credit to build priority infrastructure in the Parakou and Nikki markets
3. Support facilitation of investment or credit to construct an abattoir and pave the Fada market

6.2 “MINI STRATEGY” FOR FACILITATING PUBLIC/PRIVATE INVESTMENT FOR EACH TARGET INVESTMENT

1) Support facilitation of investment or credit for total repair and reconstruction of the Pouytenga market

This market is in complete disrepair, with the infrastructure (or lack thereof) causing weight loss, injury, and death to animals that are brought to and kept in this market space. In order to avoid this, significant investments need to be made to totally reconstruct the market. The highest priorities are the loading ramp, holding pens, food and watering facilities, and introduction of veterinary services. Additionally, construction of a new, modern abattoir is needed to avoid the extremely unsanitary conditions under which the animals are currently slaughtered.

ATP could provide financial and technical assistance to the various associations that manage this market (*Association des bouchers du Pouytenga, Association des commerçants du Pouytenga livestock market, etc.*) to support the construction and rehabilitation of these necessary facilities.

2) Support facilitation of investment or credit to build priority infrastructure in the Parakou and Nikki markets

The Parakou and Nikki markets are important markets for trade in livestock originating in the Sahel and transiting onward to Lomé or Cotonou. Nikki market is strategically located for exports to Nigeria, with traders continuing on foot with their livestock across the border to Ilesha, which is 200 km away. It is similar in size to Parakou market. It is managed by a committee of elected actors: breeders, dealers, butchers, and conveyors. Although these are important markets for exported livestock, Parakou market has very little infrastructure, and that which it does have is old and in disrepair. The Nikki market has no infrastructure to speak of.

Both Parakou and Nikki are in need of major infrastructure and equipment upgrades. The highest priorities are loading ramps, holding pens, food and watering facilities, and veterinary services. Given the importance of these two markets to regional livestock trade, ATP could provide financial and technical

assistance to the various associations that manage the markets to support the construction and rehabilitation of these necessary facilities.

3) Support facilitation of investment or credit to construct an abattoir and pave the Fada N’Gourma market

While the Fada N’Gourma market is the best-equipped livestock market in West Africa and sets the standard for all other markets in the region, pavement of the market floor and construction of an abattoir would increase the market’s efficiency and help traders receive higher value for their animals. During the dry season, the unpaved market floor causes many animals to fall ill when large amounts of dust enter their eyes, noses, and mouths. Additionally, this dust falls into their watering troughs, which also promotes sickness in the animals. Paving the market floor would reduce this problem. The construction of a modern abattoir would increase the market’s efficiency, since slaughtering could be performed on-site rather than by a private butcher outside of the market. ATP could provide financial and technical assistance to the various associations that manage this market to support the construction and rehabilitation of these necessary facilities.