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# AGRICULTURE GROWTH PROGRAM-LIVESTOCK MARKET DEVELOPMENT PROJECT

*Expanding Livestock Markets for the Small-Holder Producers*

**QUARTERLY REPORT FOR  
SEPTEMBER-DECEMBER 2012  
(FIRST QUARTER OF PROJECT IMPLEMENTATION)**

Date: January, 2013

Prepared by AGP-Livestock Market Development Project

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## ACRONYMS

AALF	All African Leather Fair
ACSI	Amhara Credit and Saving Institution
AGP	Agricultural Growth Program
AI	Artificial Insemination
APHRD	Animal and Plant Health Regulatory Directorate
B2B	Business to Business
CAADP	Comprehensive African Agriculture Development Program
CBA	Cost Benefit Analysis
CFSP	Community Farm Service Project
COMTRADE	United Nations Commodity Trade Statistics Database
COP	Chief of Party
CSA	Central Statistics Authority
CSA	Charities and Service Association
DCOP	Deputy Chief of Party
DCSI	Dehub Credit and Saving Institution
EDDP	Ethiopian Dairy Development Program
EDPPA	Ethiopian Dairy Producers and Processors Associations
EFIA	Ethiopian Feed Industry Association
ELIA	Ethiopian Leather Industry Association
ELTA	Ethiopian Livestock Traders Association
EMDTI	Ethiopian Meat and Dairy Technology Institute
EMMP	Environmental Mitigation and Monitoring Plan
EMPEA	Ethiopian Meat Processors and Exporters Association
EMPP	Environment Monitoring and Mitigation Plan
EMPPA	Ethiopian Milk Producers and Processors Association
ERR	Environmental Review Report
ESAP	Ethiopia Society of Animal Production
ESDM	Environmentally Sound Design Management
ETB	Ethiopian Birr
EVA	Ethiopian Veterinary Association
FAO	Food and Agriculture Organization (UN)
FAOSTAT	United Nations Food and Agriculture Organization Statistics Database
FBO	Farmer-Based Organization
FCA	Federal Cooperative Agency
FEED	Feed Enhancement for Ethiopian Development
FTF	Feed the Future
GEMS	Global Environmental Management Support
GFDRE	Government of the Federal Democratic Republic of Ethiopia
GRAD	Graduation Resilience to Achieve Sustainable Development
HABP	Household Asset Building Program
HIV	Human Immunodeficiency Virus
HSL	Hide, Skin and Leather
ICT	Information and Communication Technologies
IIE	Institute for International Education
IIRR	International Institute of Rural Reconstruction
ILRI	International Livestock Research Institute
IMC	International Medical Corps
JAA	J.E. Austin and Associates

LIDI	Leather Industry Development Institute
LMD	Livestock Market Development
LVC	Livestock Value Chain
M&E	Monitoring and Evaluation
MFI	Micro Finance Institution
MOA	Ministry of Agriculture
MoFED	Ministry of Finance and Economic Development
MSP	Multi-Stakeholder Platform
NAHDIC	National Animal Health and Disease Investigation Centre
NGLEE	Nutrition Global Learning Exchange and Evidence
NVI	National Veterinary Institute
PERSUAP	Pesticide Evaluation Report and Safer Use Action Plan
PIF	Policy and Investment Framework
PLHIV	People Living with the Human Immunodeficiency Virus (HIV)
PLWHA	People Living With HIV/AIDS
PMP	Performance Measurement Plan
PRIME	Pastoral Resilience Improvement Marketing Expansion
PSNP	Productive Safety Net Program
R&D	Research and Development
SANAS	South African National Accreditation System
SME	Small and Medium Enterprise
SNNPR	Southern Nation, Nationalities and Peoples Region
SNV	Netherlands Development Organization
SWOT	Strength, Weakness Opportunity and Threat
USAID	United States Agency for International Development
VAT	Value Added Tax
WAD	Women Affairs Department

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## BACKGROUND

USAID-Ethiopia's Agricultural Growth Program-Livestock Market Development project is a five-year project implemented as part of the U.S. Government's Feed the Future (FTF) Initiative. This project, together with the crop value chain project (AGP-AMDe), is USAID's contribution to the Government of Ethiopia's Agricultural Growth Program (AGP). The AGP's goal "to end poverty and enhance growth" aligns with FTF's goal to "sustainably reduce poverty and hunger." The Project aims to foster growth and reduce poverty through improving the productivity and competitiveness of selected livestock value chains: meat/live animals, hides/skins/leather and dairy. Program operations will take place in AGP-targeted woredas of Tigray, Amhara, Oromia and SNNPR, in order to effectively reach large numbers of smallholder producers. In addition, the Project will use and build upon local organizations' experience and extensive professional and social networks throughout these four regions.

AGP-Livestock Market Development project will address USAID's Strategic Objective of improving smallholder incomes and nutritional status through the achievement of three key USAID intermediate results, involving five program components. The project will apply a holistic value chain development approach to ensure that the program transforms the targeted value chains from infancy to maturity. This will empower value chains, capable of taking ownership of their own future development, by addressing systemic bottlenecks and facilitating value chain participants' own engagement and investment.

IR1: Increase productivity and competitiveness of selected livestock value chains

- Component 1: Moving from analytics to strategy to learning
- Component 2: Improve the productivity and competitiveness of livestock value chains
- Component 3: Spur investment and innovation

IR2: Improve the enabling environment for livestock value chains

- Component 4: Improve the enabling environment of livestock value chains

IR3: Improve quality and diversity of household diet through intake of livestock products

- Component 5: Enhance the nutritional status of rural households

Integrated into these components are the crosscutting objectives of engaging people living with HIV/AIDS, gender equity, promotion of ICT solutions, environmental mitigation and natural resource management.

To achieve AGP-LMD objectives, the CNFA consortium will focus development resources on creating improved, efficient flow of quality livestock and dairy and related services through the value chain, resulting in the ability of the system to more competitively compete in local and export markets.

Key themes driving the AGP-Livestock Market Development Project approach include:

- Market development
- Increased productivity and efficiency throughout the livestock value chain
- Private sector focus and investment
- Smallholder impact
- Gender mainstreaming
- Environmental conservation

The project runs from September 17, 2012 to September 30, 2017, and is being implemented by CNFA, supported by JE Austin Associates, IICD, IIE, SNV, IMC, and eight national implementing partners. The Project is being implemented in four regional states –Oromia, Amhara, Tigray, and SNNP. The projects in each regional state will be run by a Regional Coordinator, supported by Addis Ababa- office headed by the program COP.

This report is the first quarterly performance report of the project, three months into program start-up and implementation, and focuses on progress towards deliverables identified in the Contract obligations.

**OVERVIEW**

The first quarter (September 17, 2012 – December 31, 2012) of AGP-Livestock Market Development (AGP-LMD) Project implementation focused on project start-up activities including mobilization of key personnel and national staff, establishing linkages and relationships among implementation partners, key industry stakeholders, securing a Tax Identification Number (TIN), procurement of equipment and project vehicles, registration of CNFA in Ethiopia, facilitation of residency status of expatriate staff, and opening the project bank account. The Project also initiated the establishment of linkages with industry stakeholders with the first AGP-LMD consortium members meeting held on October 1, 2012 followed by the federal level project launch on November 17, 2012. In addition, regional kick-off events were held in SNNPR, Oromia, and Tigray. During the post-award debrief, USAID and the COP also discussed contractual obligations and USAID’s expectations in terms of deliverables and results of the Project

<b>Number of Industry Stakeholders participated in Kick-off events</b>	
<b>Federal</b>	150
<b>Oromi</b>	80
<b>SNNPR</b>	70
<b>Tigray</b>	80

The Project moved to its permanent office on December 15, 2012 and is now sharing office space with CNFA’s Commercial Farm Service Project, also funded by USAID. The office sharing maximizes cost effectiveness while leveraging resources. Since the move into the Project’s new office, AGP-LMD has progressed with the procurement of office furniture, network and PBX installation, and computers, which are scheduled for full acquisition at the beginning of Quarter 2. The project staff is currently using their own personal computers for the project at no cost to the project. AGP-LMD appreciates its staff’s in-kind contribution to the project, which significantly expedites the project’s start-up and has allowed the project to reach its current status. This further demonstrates the project staff’s commitment to ensuring results at an early stage in the project implementation.

Another key development of this quarter is CNFA’s execution of full sub-contract agreements with the Project’s international consortium members. AGP-LMD has also developed a draft Task Order Agreement with the regional implementing partners who will serve as the project’s front-line agents driving the value chains while maintaining sustainable, locally driven market expansion to benefit a large number of smallholder farmers. The draft Task Order Agreements are being reviewed by the regional partners and are anticipated to be executed in Quarter 2. In addition, AGP-LMD has organized an implementing partners’ meeting on January 21-23, 2013 in order to discuss the SOWs contained in the Task Order Agreement and plan the initial activities.

<b>Date Signed</b>	<b>Sub-Contract with International Partners Agreement</b>
<b>JE Austin</b>	September 26, 2012
<b>IIE</b>	October 9, 2012
<b>IICD</b>	October 10, 2012
<b>IMC</b>	November 1, 2012
<b>SNV</b>	November 2, 2012

During the first Quarter, the AGP-LMD project was officially inaugurated at the Federal level. The AGP-LMD project is a pioneer and the first livestock value chain development project of its kind in Ethiopia integrating selected livestock value chains. During the official project launch, USAID Mission Director Dennis Weller presented the keynote address following an opening remark by His Excellency State Minister of Agriculture, Sileshi Getahun. The kick-off meeting was attended by over 150 people comprising Federal and Regional government officials, private sector representatives, industry stakeholders, and national and international implementing partners. CNFA’s Executive Vice President, Sylvain Roy, also attended the Project’s official launch.



Pictured left: State Minister H.E. Ato Sileshi Getahun, H.E. Ato Sani Redi, SNNPR Vice President and Head of SNNP Region Agricultural Bureau, USAID Mission Director Dennis Weller, Dr. Yirgalem Gebremeskel, COR, AGP-LMD Chief of Party Marc Steen, CNFA's Executive Vice President, Sylvain Roy and private sector representatives during the launch event.

### USAID Launches a New Livestock Project in Ethiopia—November 17, 2012

"so today it is a great pleasure for me to announce the start-up of a second project, the AGP-Livestock Market Development project, a five-year, \$38 million project in the high potential livestock areas of four regional states: here in Oromia, in Amhara, in Tigray and in the Southern, Nations, Nationalities and People's Region."

Dennis Weller, Ethiopia Mission's Director

<http://ethiopia.usaid.gov/newsroom/press-release/364>

This quarter also saw the rollout of three regional kick-off meetings in Oromia, SNNPR, and Tigray. Officials attended from the regional agricultural bureaus. Representatives from the private sector and AGP-LMD implementing partners REST, Self Help Africa – Ethiopia, and HUNDEE delivered opening statements during the one-day events held on December 13, 2012 in Mekele, December 17, 2012 in Awassa, and December 27, 2012 in Bishoftu, respectively. The regional kick-off events gathered over 240 participants engaged in the livestock sector. The AGP-LMD Chief of Party presented an overview of the project in each kick-off event to provide a synopsis of project implementation strategy followed by a plenary discussion on the overall strategy of the AGP-LMD Project, its institutional arrangement and its implementation modality while clarifying the roles, ties and responsibilities of the implementing partners (REST, Self-help Ethiopia, and HUNDEE).

During the kick-off events AGP-LMD staff shared the findings of the value chain desk study in order to update stakeholders on the current status of livestock value chain constraints and opportunities. Breakout group discussions were followed by presentations mapping the value chain actors in each region as well as identifying opportunities and constraints for the livestock sector. Consultative meetings were also held with the officials of the Regional Bureaus of Agriculture and resulted in the endorsement of the AGP-LMD project, its institutional arrangement and implementation modality. The consultations also led to a consensus on undertaking baseline studies and the approach to woreda selection. Experts from the Regional Agricultural Bureaus made presentations on the livestock strategies of the three regions, which led to a broader understanding of the regional plans and ongoing activities in order to establish alignment and linkages with upcoming AGP-LMD activities. AGP-LMD plans to conduct the Amhara Region kick-off meeting on January 9, 2013 in Bahir Dar town.

### **Key Challenges**

One of the major challenges in the smooth implementation of the project was obtaining a TIN number and a project bank account. This has negatively affected the purchase of equipment and facilities and staff employment on long-term contracts is the cumbersome process of registering CNFA in Ethiopia with the Civil Society and Charities organization. The Project CoP worked with the mission and explored ways of operating, obtained a TIN number and opened a project bank account, within the latitude of the Bilateral Agreement.

During the first Quarter, Dr. Gerald Turnbull, Livestock Value Chain Advisor, elected to terminate his tenure on December 4, 2012. Since he occupied key personnel position, CNFA quickly replaced him with Mrs. Tracy Mitchell following USAID approval. A seasoned agribusiness expert, Mrs. Mitchell will bring international expertise in livestock value chain development to the project. Mrs. Mitchell will take over the position effective January 11, 2013 with immediate responsibility to engage in the end market and value chain analysis. In the interim, the responsibility of the Livestock Value Chain Advisor Position was temporarily transferred to the DCOP.

The second quarter activities will focus on the value chain and end market analytics and the development of the regional value chain strategic interventions plans followed by immediate implementation. Also a number of quick wins or low hanging fruits will be pursued in the area of business plan development, investment facilitation, training and capacity building.

## PROJECT START-UP ACTIVITIES

### Mobilization of Project Staff

Following signing the contractual agreement between USAID and CNFA, CNFA's Vice President for Program Development, Patrick Norrell, deployed to Ethiopia on September 17, 2012 to lead the start-up activities and mobilization of project staff, and to develop the relationship with USAID. Patrick Norrell engaged a local consultant, Kelem Solomon, as well as a local legal consultant, Teshome Gebre-Mariam, to assist in securing office space, tailoring CNFA policies to conform to Ethiopian law, and expediting CNFA's registration in Ethiopia. Temporary offices were leased until the project moved into its long-term offices on December 15, 2012. Currently, office facilities are being furnished for the project staff and STTA consultants. Applications for utilities such as telephone and internet have been made with the pertinent offices.

Patrick Norrell successfully mobilized the project's Chief of Party, Marc Steen on September 24, 2012. The Chief of Party assumed his in-country position and immediately took over Project leadership resulting in the mobilization of the majority of the national staff. Until the end of the reporting period, all five key staff and 21 of 34 professional staff members have joined the project; 2 staff will start on January 1<sup>st</sup>, 2013 and 7 candidates for replacement were submitted to USAID/Ethiopia for approval. This progress was also due to the recruitment of Ethiopian national Mr. Nega Berecha on October 1, 2012 to provide home office backstopping in support of the field office. Nega Berecha supported the mobilization of the two expatriate positions in the project while continually supporting the day-to-day operations of the project. Residence permits for expatriate CNFA employees have been facilitated and The Ministry of Foreign Affairs issued a special residency card to Marc Steen and Earle Johnson in this quarter.

*Table 1: Key Personnel Mobilization*

NAME	POSITION	START DATE
Marc Steen	COP	September 24
Girma Kassa	DCOP	November 13
Tracy Mitchell	Livestock Value Chain Advisor	January 11, 2013 (replaces Dr. Gerald Turnbull)
Meskerem Shiferaw	Pro-poor Value chain expert	November 7
Earle Arthur Johnson	Administrative and Finance Manager	October 15

### Project Intervention: Woreda Selection

AGP-LMD placed careful emphasis on the selection of the project's implementation woredas following rigorous selection criteria. A woreda selection system was developed and used to propose potential AGP-LMD's intervention woredas. The system closely follows the AGP woreda selection system with a further refinement and focus on livestock and livestock-based production and processing potential. Key variables considered in the selection process include livestock growth corridors, or clusters of woredas, and the concentration of targeted "middle of the value chain" actors (cooperatives, FBOs, processors, exporters) to ensure that AGP-LMD's interventions enhance the capability of these middle of the value chain drivers in order to provide better business relationships and market access that will directly benefit small-holders. The selection process was based on the following criteria: household landholding, food security status, feed availability, livestock contribution to nutrition, livestock contribution to cash income, livestock population and availability of infrastructure. Date: January, 2013

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ture. Based on these criteria and being vigilant in order to maximize benefits to a large number of small-holders rather than being sporadic and exerting large investments in non-potential woredas, the selection considers 46 prospective woredas out of the 95 AGP woredas. At USAID/Ethiopia's request, AGP-LMD also included non-AGP, high livestock potential woreda's in the selection process. The selection criteria include: livestock resources, availability of grazing area, access to market, role of animals as income source and livestock contribution to nutrition of households, which resulted in the identification of 16 additional woredas. The final selection of 10 deep investment woredas will be done in collaboration with USAID, the regional AGP coordinators and the regional bureaus of agriculture..

*Table 1: Summary of proposed intervention woredas*

Region	AGP Woredas	Proposed AGP Woredas	Additional identified Woredas
<b>Oromia</b>	<b>39</b>	<b>13</b>	<b>7</b>
<b>Amhara</b>	<b>25</b>	<b>11</b>	<b>4</b>
<b>SNNPR</b>	<b>22</b>	<b>16</b>	<b>2</b>
<b>Tigray</b>	<b>9</b>	<b>6</b>	<b>3</b>
<b>Total</b>	<b>95</b>	<b>46</b>	<b>16</b>

### **Project Mobilization Work Plan: First Six Months**

CNFA's Livelihoods and Food Security Advisor, Elisabeth Farmer, traveled to Ethiopia to support the Chief of Party in launching program implementation, and particularly the development of the Project Year 1 work plan. AGP-LMD submitted the first draft on October 17th. The work plan is a 31-page document that presents a brief overview of the three LMD value chains – live animals and meat, dairy, and hides, skins and leather - and outlines the LMD team strategy and plan for Year 1. Much of this strategy is centered on the value chain and end market analytics planned for the first six months of the project, which will set the vision for the overall program. The work plan includes a detailed narrative on Component 1 (Moving from Analytics to Strategy to Learning) as well as a Gantt Chart for project start-up and coordination that includes all five project components and the cross-cutting issues of gender, information and communication technology (ICT) and environment/natural resources management (NRM).

### **Finance and Administration**

During the reporting period, the AGP-Livestock Market Development project has completed several logistical tasks to enable a rapid start-up. This includes the travel of CNFA's Financial Controller, Mr. Babu Ramasamy, to Ethiopia from December 1 to 8, 2012 to build on the AGP-LMD's accountable and transparent financial systems in line with CNFA's corporate financial policy and to synchronize the project's financial system with USAID's financial regulations and procedures. During his time in Ethiopia, Mr. Ramasamy delivered intensive one-on-one training to the AGP-LMD's Senior Accountant and other key staff members on CNFA's financial policy and USAID financial regulations while building on rigorous financial system to fit the local environment. Mr. Ramasamy contacted TMS and other national accounting firms to craft AGP-LMD's accounting system within the guidelines of the Ethiopia's financial policy and framework while maintaining USG regulations. The project's Accountant and Innovation Grants Manager also participated in these meetings. Key outcomes of Mr. Ramasamy's trip included setting up a procurement system, local travel authorization policy, and financial rules for domestic travels, and determining accounting practices that the project needs to consider in the years ahead.

CNFA's registration as a non-profit organization in Ethiopia is still in process. Application packages were submitted to the Ministry of Foreign Affairs through the Ethiopian Embassy in Washington, D.C. to register

CNFA as a not for-profit organization in Ethiopia. The Ministry of Foreign Affairs is currently reviewing the application package for subsequent transfer of the application to Charities and Service Association (CSA) for final approval.

The Project successfully secured a TIN from the Inland and Revenue Authority with the mission's support and has begun the process of reviewing Request for Quotes for the procurement of office equipment. In this regard, AGP-LMD appreciates the geographic code privilege that the contract provides for the possibility of local procurement. Taking advantage of this, AGP-LMD has taken several procurement steps for the purchase of vehicles, computers and laptops, a network server, office equipment, and accessories. Procurement of furniture, in connection with the move into the permanent facility, is ongoing and expected to be completed in January 2013.

Given the increase in project implementation dynamics, AGP-LMD strives for the recruitment of Human Resources, Logistics, Administration, and Finance Assistant positions in the immediate future in order to provide prompt project management services. As such, candidates have been interviewed for first level screening; second level interview and final recruitment will be completed in the next quarter of the project implementation. These positions fill a wide gap that the project is facing as a result of its rapid deployment, and the AGP-LMD expects that the positions will speed-up the project's implementation in the next quarter.

Following securing TIN, AGP-LMD took an immediate action to open a Project Bank Account with the mission's support, and thus has discontinued the interim ad-hoc arrangements it had in place since September 17, 2012.

***Finance and Administrative Plans for the Second Quarter:***

- System building in operations and administration
- Grants Manual Development
- Facilitate the recruitment of national staff on long-term contracts

**Communications and Outreach**

During the recently completed first quarterly period, AGP-LMD also commissioned an international multimedia consultant, Ms. Kelley Lynch, to develop an electronic library of photography and short video clips accompanied by appropriate testimonies, quotes and captions, as related to the three project value chains: 1) live animals/meat, 2) dairy and 3) hides and skins, as well as their supporting markets (e.g. animal health, information and communication technology (ICT), and access to finance) and the cross-cutting themes of HIV/AIDS and gender integration and environment/NRM/climate change mitigation.

On October 17, 2012, the project submitted its Branding and Marking Plan to USAID. USAID Ethiopia reviewed and provided extensive comments on the draft plan. The comments and feedback were incorporated and re-submitted to USAID on November 29, 2012 for final approval. Additionally, the USAID Ethiopia Mission provided the project's communications and outreach specialist and other key staff members one day of training on USAID branding and marketing training to create awareness and to comply with USAID regulations.

Communication and Outreach materials were produced during the reporting period. These materials were cleared by USAID before production. These materials included: banners in four languages used for federal and regional kick-off events, project brochures, project letterhead, business cards, and press releases during the kick off events.

The Communication and Outreach Officer also established contacts with regional media organizations, and facilitated the coverage of the regional kick-off events. These events were televised on regional television networks. Footage of two of these broadcasts are on-file with the Project. Media briefings and fact sheets were prepared for the regional media personnel in order to inform them about the event and the Project. A follow-up was made to ensure that the news was televised. A media contact list is being updated and consolidated.

Moreover, a photographic documentation of the regional kick-off events was made and will be uploaded on the server once the project server is in place.

## **INTERMEDIATE RESULT 1: INCREASED PRODUCTIVITY AND COMPETITIVENESS OF SELECTED LIVESTOCK VALUE CHAINS FOR THE BENEFITS OF SMALL-HOLDERS**

### **COMPONENT 1: MOVING FROM ANALYTICS TO STRATEGY TO LEARNING**

The first six months of AGP-LMD are planned for analytical work and strategy development of component 1 of the project, which will define strategies for value chain upgrading and domestic and international market expansion. Component team consortium lead, JE Austin Associates, and the national consulting firms BCaD Management Consult, Precise International Consult, and TREG Consult PLC supported by AGP-LMD technical staff, have worked on the livestock value chain desk study with a focus on drawing knowledge from secondary sources, engaging with value chain actors and stakeholders, and planning and preparing the value chain and end market analysis.

#### **Livestock Value Chain Desk Study**

The Project completed the value chain desk study during the first Quarter. The desk study is a compilation of the current constraints and opportunities of the livestock sector in the country and provides insight on the design of value chain and end market assessment field work planning. To prepare for the desk study activity, J.E. Austin Associate's Kent Ford, the team leader of the value chain study, provided training to the three local consulting firms and AGP- LMD's technical staff. The training included value chains concepts and approaches to value chain research methodologies. The training also defined the responsibilities of each participant in the desk study. Following the training, AGP-LMD and the three local consulting firms BCaD Management Consult, Precise International Consult, and TREG Consult PLC conducted an extensive desk study analysis of the three value chains: meat/live animals, dairy, and hides skins and leather over a five-week period. The study involved over 100 sources of secondary documentation accompanied with statistical evidence drawn from Government of Ethiopia's Central Statistical Agency (CSA) and other internally accepted data sources such as FAOSTAT and COMTRAD. Additional supporting evidence was pulled from a wide array of sources including extracts from reports and publications of the Ethiopian Society of Animal Production (ESAP), the Ethiopian Veterinary Association (EVA), the Ethiopian Feed Industry Association (EFIA), the Ethiopian Meat Processors and Exporters Association (EMPEA), the Ethiopian Live Animal Traders Association (ELTA), and the Ethiopian Dairy Producers and Processors Associations (EDPPA).



Dera livestock market, Adama. (Photo Kelly Lynch, AGP-LMD)

The completed desk study provided AGP-LMD with useful insights regarding constraints impeding the development of selected livestock value chains in Ethiopia while furnishing potential intervention areas in the next phase of the project implementation. The study covers multiple topics including gender integration in the livestock value chain programming, livestock related policy bottlenecks in Ethiopia and possible investment segments along the value chains. In addition, the desk study includes useful information from the experiences of other countries such as Namibia, where the Namibian livestock development strategy was able to successfully penetrate the stiff and stringent European meat markets. The desk study also provides an inventory of lessons learned from past livestock related programs funded by USAID and other international donor agencies. AGP-LMD shared the preliminary findings of the desk study in regional kick-off events and incorporated feedback from the stakeholders, making the process participatory and inclusive. This study was undertaken as a first step to a more comprehensive analysis process of the livestock value chain, which will involve primary field research in Ethiopia and end market analysis in eight primary export target countries as well as the domestic market. AGP-LMD submitted the draft report of the desk study to USAID on November 17, 2012.

### **Value Chain and End Market Field Research**

In early November, JE Austin Associates, under the Chief of Party's guidance, deployed Kent Ford to Ethiopia to participate in the project work planning sessions and sketch out the next steps for the value chain analysis. At that time, Kent Ford provided value chain analysis training to relevant implementing partners and AGP-LMD staff and provided additional guidance and planning for the value chain field work including the end market analysis, which is scheduled to be conducted in the second Quarter.

#### **Component 1 Plans for the Second Quarter:**

- Conduct value chain and end market field research and analysis, both in the domestic and international markets
- Conduct Federal and Regional validation workshops with MSPs to present the findings of the value chain and end market study

- Develop value chain strategies outlining priority interventions in each value chain
- Prepare rapid rollout plan for value chain strategy implementation
- Prepare final value chain analysis reports for each value chain, incorporating end market analyses
- Incorporate and integrate gender considerations within value chain analyses
- Prepare gender equity strategy
- Conduct ICT assessment
- Integrate ICT considerations into value chain analyses
- Develop learning plan
- Conduct monthly staff learning days

## COMPONENT 2: IMPROVE THE PRODUCTIVITY AND COMPETITIVENESS OF SELECTED VALUE CHAINS

Component 2 of the project will develop the value chain actors' ability to increase their business activities. As a result of expanding smallholders' market access and market linkages, Ethiopia's livestock industry will have increased economic opportunities and stakeholders will play a larger role in the industry. When a value-chain's linkages are improved, cost-competitive, quality products and services are generated and move into the markets. Market expansion results in increased revenues that are reinvested in new technology, expanded capacity, and increased employment - all of which build a stronger foundation for continuous market-based development.

AGP-LMD has undertaken several field visits to identify marketing constraints and opportunities. Although, activities planned in component 2 are expected to be further developed by the findings of the end market and value chain analysis, the project staff has conducted preliminary meetings with value chain actors and is preparing for the provision of technical assistance to several livestock clients. These meetings and visits served as a starting point to identify areas of future collaboration and to strengthen linkages. These visits have led to the identification of a number of so called "low hanging fruit", or short term opportunities for the AGP-LMD project to achieve rapid impact and outcome results in each of the three sectors. These opportunities will be further developed in the second Quarter.

### MEAT/LIVE ANIMALS VALUE CHAIN

The meat/live animal team consulted with various stakeholders during the first Quarter to develop linkages and to ensure that the Project is effectively coordinated and highly visible. The team visited feed processors and feedlot operators in and around Debre Zeit, Modjo and Adama. Meetings were held with Alema Koudijs Feed PLC, Moges Assefa Livestock Exporter, Gebre Egziyabiber Feedlot, Mujib Feedlot, Wonji Union, and Ethio Feed Plc. The conclusion of the field visits to feedlots revealed that the cost of feed is in part due to high taxation levels of imported minerals and vitamins premixes. Feedlot operators reported that adding minerals and vitamins premixes in the feed ration increases the cost of production by 25 percent, with an ultimate decrease in producers' gross margin per animal. A key conclusion from these visits was that "taxation and feed cost" be included as a potential agenda item for the upcoming multi-stakeholder platforms (MSPs) to improve the enabling environment and increase competitiveness.



**Milking Cows in Adama.**(Photo Kelly Lynch, AGP-LMD)

“An issue that became apparent during the feedlot visits was that the feed was highly inconsistent in particle size and purity of the ingredients. After brief discussions it was clear that the owners and operators have a limited knowledge of nutrition. To potentially address this issue a training program may be developed to address these issues.”

“Another problem that was discussed during field visits was the lack of available water at the feedlots. The current feedlot locations have limited water and the operators transport water to the feedlots. This has led to inefficiency and limited production. By organizing themselves, the feedlot operators could approach the municipality of Adama for assistance in addressing water availability.”

Synopsis from Meat Value Chain Manager’s field visit report

The meat/live animals team visited the Modjo meat-processing plant, and met with Adama-based live animal exporters. The team also visited the newly constructed Hawassa municipality slaughterhouse which could in the future serve as a model for other municipality slaughterhouses that sustainably supply high quality meat to local consumers.. The slaughterhouse has state-of the-art skin storage and treatment facilities annexed to the main abattoir. A quick win for AGP-LMD is to support the slaughterhouse in developing their upstream and downstream business linkages to facilitate full operation.

Another key initiative of AGP-LMD during the first quarter is to establish linkages with USAID’s funded PSNP-GRAD program in order to develop the push-pull strategy, which supports PSNP graduates to further integrate in the livestock value chain markets. AGP-LMD’s pro-poor advisor also initiated relationships with Pastoralist Resilience Improvement Marketing Expansion (PRIME)/Mercy Corps, Graduation Resilience to Achieve Sustainable Development (GRAD),the Household Asset Building Program (HABP) and Productive

Safety Net Program (PSNP) of the government under the Ministry of Agriculture (MOA) to explore areas of future collaboration and create synergy.

***Meat/Live Animals Plans for the Second Quarter:***

- Identify key value chain drivers (lead firms) in the meat/live animals sub-sector
- Conduct detailed needs assessment of meat/live animal value chain drivers in order to provide individual level technical assistance.
- Develop forward linkages to foreign end markets (e.g. trade missions and reverse trade missions) and promote investment (from end market investors, Diaspora, etc.)
- Develop backward linkages to livestock suppliers
- Provide training to regional partners re: skills to assist FBOs in business management
- Undertake awareness creation campaigns on best practices in production and value addition
- Develop and implement feed development strategy for LMD
- Adapt CNFA agro dealer/agro vet model to Ethiopia
- Provide support to strengthen animal health service delivery
- Establish linkages with APHRD and identify priority SPS interventions
- Establish linkages with EMDTI and develop strategy for meat technology improvements
- Evaluate client firms and prioritize lending capital requirements for enterprise growth
- Establish linkages with PSNP-GRAD to develop push-pull strategy for PSNP graduates
- Establish linkages with PRIME to develop push-pull strategy for pastoralists graduates from the push program.

**HIDES, SKIN, AND LEATHER (HSL) VALUE CHAIN**

AGP-LMD visited various Hides, Skins and Leather value chain related industry and service support institutions to introduce the project while building the project's network and promoting collaboration. Institutions visited include National Animal Health Diagnostic and Investigation Center (NAHDIC), Ethiopian Leather Industries Association (ELIA), Leather Industry Development Institute (LIDI), COMESA-LLPI, National Veterinary Institution (NVI), Pittards PLC.

ELIA has requested AGP-LMD to collaborate in showcasing the Ethiopian Leather industry in the upcoming All African Leather Fair, which will be held in Addis Ababa in the second Quarter.

**South African National Accreditation System Awards Accreditation to Ethiopia Leather Industry Development Institute**

The South African National Accreditation System (SANAS) awarded the Ethiopia Leather Industry Development Institute (LIDI) with third phase accreditation for conducting international standard laboratory tests and issuing quality grades for leather products. LIDI is pleased that the award will enable the Ethiopia leather and leather products to access the European Union markets. According to LIDI officials, the accreditation mandates LIDI to conduct over 150 types of tests including health effects on leather products, the chemicals used for testing and professional accreditation for competencies. Such accreditation is believed to enhance the competitiveness of the Ethiopian leather industry in the international markets.

Excerpts from DCOP's field visit report

***HSL Plans for the Second Quarter:***

- Identify key value chain drivers (lead firms) in the HSL sub-sector
- Conduct detailed needs assessments of HSL value chain drivers in order to provide individual level technical assistance
- Undertake awareness creation campaigns on best practices in hides, skins and leather production and value addition
- Evaluate client firms and prioritize lending capital requirements for enterprise growth
- Participate in the AALF in order to introduce and provide visibility to the project for diverse stakeholders participating in and visiting the fair.
- Strengthen newly developed association for raw hides and skin traders
- Train small footwear manufacturers with the goal of building their capacity

**DAIRY VALUE CHAIN**

AGP-LMD visited key dairy processing plants during the first quarter to establish contact and identify initial support activities. The team visited the Biftu Berga Milk Production and Marketing Union, Almi Fresh Milk, Velocity Dairy, Ada'a Dairy Cooperative, Dairy Unions in the great Addis Milk Shed, and Guts Enterprise. These businesses play critical role in the middle of the dairy value chain by connecting producers to consumers.

“Biftu Berga Milk Production and Marketing Union in Holeta, Oromia Region is one of the 6 dairy cooperatives’ unions in Ethiopia and a number of supporting organizations helped them to reach this stage. The major constraints of the union involve market outlet shops, credit availability, processing plant and milk collection centres, and poor linkage and lack of trust with processors.”

“Almi fresh milk is the only processing plant in Awassa town constrained by lack of finance for working capital to procure adequate volumes of packing/pouching material.”

“Velocity dairy is a new dairy firm in the start-up phase. Velocity dairy has secured 23 hectares of land for milk processing from Chanchoworeda administration. The company has submitted its business plan to the Development Bank of Ethiopia for working capital and investment financing. The bank is reviewing the application and the company is ready to start milk processing as soon as a loan is secured.”

“Ada dairy cooperative has 421 members (65 % women) with an average daily milk procurement capacity of over 8,000 liters through its 11 satellite collection centers. It is constrained by the lack of finance for new investment, lack of qualified managers, low leadership capacity, members’ lack of skills in marketing, record keeping, dairy technology and animal husbandry.”

Synopsis from FBOs Organizer’s field visit report

The Project team met with additional dairy value chain actors to introduce the project, identify their operational constraints and to discuss project interventions that will enhance their production and improve market linkages. These businesses included Hiwot Dairy Union, Selale Dairy Cooperative, Timret Agro Industry, Yoha cattle breeding and Animal fattening PLC, and Kassaye Mekuria Agriculture Enterprise. Field visits were also made to USAID's FEED project at Wonji Kuriftu which works in animal fattening. The purpose of the visit was to establish linkage with the project and identify possible synergies in the future.

#### **Dairy Plans for the Second Quarter:**

- Identify key value chain drivers (lead firms) in the dairy sub-sector
- Follow-up on Almi Dairy processing Industry for their Business Plan
- Follow-up on Guts Enterprise Strategic Plan
- Follow-up on Dairy cooperatives which have already been visited
- Further discussion with Ada Cooperative on their business proposal
- Arranging meeting with Ethiopian Dairy Development Program (EDDP)
- Conduct detailed needs assessment of the dairy mid-level value chains
- Evaluate client firms and prioritize lending capital requirements for enterprise growth
- Provide training to regional partners re: skills to assist FBOs in business management
- Undertake awareness creation campaigns on best practices in production and value addition
- Establish linkages with FEED project and identify synergies, sources of feed for dairy producers
- Establish linkages with EMDTI for R&D and technology transfer for new and affordable dairy technologies
- Develop and implement strategy for AI service provision
- Establish linkages with PSNP-GRAD to develop push-pull strategy for PSNP graduates
- Discussion on the World Milk Day with CIAFS' Chief of Party

A high-level stakeholders consultation workshop was conducted in December focused on the livestock subsector. The workshop provided a forum for private sector actors to discuss challenges and opportunities with policy makers in an effort to improve the enabling environment in the subsector. These government officials included:

- H.E Mr. Tefera Deribew, Minister, Ministry of Agriculture,
- H.E.Mr.Wondirad Mandefero State Minister of Ministry of Agriculture
- Honorable Abadula Gameda, Speaker of House of Representatives and Honorable Members of Parliament Standing Committee for Agriculture.

Private sector leaders included:

- Ethiopian Meat Producers and Exporters Association (EMPEA)
- Ethiopian Leather Industry Association (ELIA)
- Leather Industry Development Institute (LIDI).
- Ethiopian Meat and Dairy Technology Institute (EMDTI)

**Innovation in Dairy Business to Improve Women’s Incomes: Guts Enterprise**

Guts Enterprise is a food processing company that produces milk and milk products. During the recent AGP-LMD’s field visit at Guts Enterprise, it was reported that the enterprise has fluctuations in the quality and quantity of its milk supply making its business unsustainable. To remedy this situation, Guts Enterprise is undertaking a feasibility study that will build a 5000 head members milk producer cooperative. The company proposes to purchase milk from the women and provide feed inputs that will improve production levels. Guts Enterprise’s plan is to start with 500 women and increase to 5000 members in three years. Guts Enterprise’s proposed business innovations could solve the current supply constraint the company is facing while sustainably improving the income of women-managed smallholders dairy producers. AGP-LMD advised Guts Enterprise to develop its strategic plan to critically identify weaknesses and strengths, opportunities and threats before full-scale implementation.

Excerpt from FBOs Organizer’s field visit report

### COMPONENT 3: SPUR INVESTMENT AND INNOVATIONS

AGP-LMD will spur innovation and investment in the livestock value chains through an Investment and Innovation Partnership Program by spearheading innovation grants. This component aims to incite investment in livestock value chains through the provision of targeted matching investment grants in order to stimulate innovation in the livestock industry in Ethiopia. During the first Quarter, AGP-LMD's Innovation Fund Manager adapted CNFA's grants manual, procurement guidelines, grant application form and scoring form to the Ethiopian context, and specifically the AGP-LMD beneficiaries. AGP-LMD plans to finalize the document in the second Quarter in preparation for receiving grant applications.

Understanding lending practices in the conventional financial market is an integral part of AGP-LMD's effort to sustainably upgrade livestock value chains via increased investments supported by access to financial sources. During the first quarter, AGP-LMD collected information on the lending practices of MFIs including loans to Productive Safety Net Program graduates and pastoralists. ACSI and DECSI MFIs confirmed that they are lending to livestock value chain actors and PSNP graduates. Wassasa MFI has experience within-kind lending to dairy farmers in Selale area. However, the in-kind loan product service never made it beyond a pilot stage.

#### *Innovation Grants Plans for the Second Quarter:*

- Finalize the grant manual and procurement guidelines in conjunction with the Investment, Finance and Credit Manager
- Identify priority investment areas in each value chain and establish cost-benefit analysis tools
- Train local outreach partners in grant application and management
- Conduct outreach campaign identifying priority investment areas
- Receive first round of grant applications
- Identify and exploit opportunities to collaborate with other funds/programs (involved in triggering investment and facilitating finance to the livestock sector)
- Work with various financial institutions to facilitate credit access

## **INTERMEDIATE RESULT 2: IMPROVED ENABLING ENVIRONMENT FOR LIVESTOCK VALUE CHAINS**

### COMPONENT 4: IMPROVE THE ENABLING ENVIRONMENT OF LIVESTOCK VALUE CHAINS

To address AGP-LMD's objective of creating an enabling environment that facilitates and supports the growth and improves the competitiveness of the livestock value chains, the project focused on the collaboration with GFDRE during the first Quarter. Activities have included preparatory work for mobilization of GFDRE for undertaking participatory analysis whereby the value chain analysis will have an enabling environment focus that highlights key bottlenecks as well as opportunities within the livestock sector-enabling environment. In this regard, the Project developed checklists for data collection that will be conducted under the value chain field study reported in IR 1.

AGP-LMD and USAID's strong desire to work jointly with government representatives-APHRD and EMDTI- in the value chain and end market analysis was included as an operational element in the Project during the first Quarter.

AGP-LMD has aggressively pursued creating relationships with high-level industry stakeholders to discuss major policy barriers that undermine the competitiveness and potential of the livestock industry. By removing these barriers, these business can effectively serve as an engine to economic growth and provide sustainable income sources to small-holder producers. Initial ground work executed during this quarter has provided AGP-LMD with access to high level government and private

sector leaders for discussing policy barriers, opportunities for improving policies, and the next stage in the planning process. AGP-LMD firmly believes that discussions with the public and private sectors will create an understanding of the interests of both parties such that AGP-LMD is an active player in narrowing the distance between these key stakeholders.

***Enabling Policy Environment Plans for the Second Quarter:***

- Finalize the value chain analyses with an enabling environment perspective
- Establish multi-stakeholder platforms (MSPs) at regional and federal levels
- Facilitate quarterly MSP meetings in each region
- Consolidate policy implications
- Conduct research on policy options
- Provide support to industry associations (e.g. EMPPA, EMPEA, ELTA, ELIA, EVA), including development of sustainability strategies
- Support establishment of Dairy Board

**INTERMEDIATE RESULT 3: IMPROVED QUALITY AND DIVERSITY OF HOUSEHOLDS DIET THROUGH INTAKE OF LIVESTOCK PRODUCTS**

**COMPONENT 5: ENHANCE THE NUTRITIONAL STATUS OF RURAL HOUSEHOLDS**

Component 5 activities target the three pillars of nutrition: improving availability, access and utilization. The Project had intended to conduct several activities during the first Quarter which were not possible due to the nutrition staff's delay in joining the project. These intended activities include undertaking nutrition analytics, which includes overlaying nutrition data on the AGP woreda and value chain stakeholder map, conducting anthropometric and Dietary Diversity Surveys and conducting the KAP survey.

***Nutrition Component Plans for Second Quarter:***

- Overlay nutrition data on AGP woreda & VC stakeholder map
- Conduct anthropometric and Dietary Diversity Survey
- Conduct KAP survey
- Conduct barrier analysis
- Conduct preservation and storage assessment
- Develop nutrition strategy incorporating food access, availability and utilization
- Design SBC methodology based on survey results
- Design and introduce innovations and policy pilots to improve access to and affordability of livestock products (meat and dairy)
- Promote and support adoption of product preservation and storage technologies
- Review Economic Strengthening Assessment and strategies for PLWHA developed under EDDP
- Conduct Economic Strengthening Assessment
- Develop economic strengthening strategy for PLHW
- Identify HIV-affected households to be linked to market opportunities

**CROSS CUTTING ACTIVITIES**

**Gender Mainstreaming**

Historically, livestock development funds have emphasized assisting farmers to increase production. While there is a need to continue this assistance, it is evident that an approach that places equal importance on marketing and promotion as well as improving production and processing efficiencies throughout the value chain is required. This broader approach provides more opportunities to directly involve and benefit women. With

this in mind, AGP-LMD's Gender Advisor supported the gender component of the value chain desk study in the first quarter. The Gender Advisor reviewed the results of the value chain desk study from a gender perspective, prepared a gender-based checklist for the planned value chain field study, and contributed to the development of a gender questionnaire for the value chain and end market studies.

The Gender Advisor devoted considerable amount of time creating awareness on gender among a wide range of AGP-LMD's stakeholders while building on networking opportunities through relevant meetings hosted by partners. AGP-LMD's Gender Advisor attended several meetings and learning events including:

- Meetings with private producers and processing firms in order to understand gender composition and roles with focus on drawing strategic approaches that increase the participation of women in livestock related businesses
- Regional kickoff events and presentation on gender perspectives from AGP-LMD's gender perspective
- Meeting with the Ministry of Agriculture's Women's Affairs Department (WAD) and AGP Coordination Unit gender focal person to learn what has been done and what information is available regarding gender in the livestock sector. The objective was to identify what resources are available and how AGP-LMD can benefit from these resources while identifying existing gender gaps in livestock programming for possible intervention design.
- Book luncheon event organized by International Institute of Rural Reconstruction (IIRR)

#### **Lessons learned**

- The ensuing discussion resulted in a recommendation to conduct an inventory of what has been done on gender interventions by different partners, to identify gaps and build on next stage interventions and capitalize on best practices into AGP-LMD's interventions.
- Attend meetings organized by relevant institutions to benefit from information exchange and keep posted emerging gender mainstreaming practices and policies.

Finally, two crosscutting themes will be interwoven throughout the life of the project's activities: women's empowerment and environmental conservation. Women play an important role in livestock farming, value-added processing and marketing. As such, the AGP-LMD's consortium will take an active approach to ensure that women receive the knowledge and skills necessary to benefit from their labor both economically and socially. Furthermore, the consortium will address threats to the environment associated with livestock value chain interventions.

#### ***Gender Plans for the Second Quarter:***

- Prepare and implement gender equity strategy

#### **Natural Resource Management and Environment**

As AGP-LMD moves forward with project implementation, environmental sustainability will be considered as a cross cutting issue. During the first quarter, AGP-LMD commissioned a short-term environmental expert, Barney Popkin, to develop an Environmental Mitigation and Monitoring Plan for the project. Under the lead of consultants, AGP-LMD has assessed and evaluated potential environmental risks associated with anticipated interventions and activities in support of the livestock value chains. The environmental assessment involved field level visits with various livestock value chains drivers such as veterinary drug shop stores, and livestock processing plants. In addition, the consultant provided hands-on training to AGP-LMD's technical staff in the application of the environmental monitoring plan and reporting. AGP-LMD submitted the draft EMMP to USAID on November 17, 2012.

The Project Environment and Natural Resources Advisor participated in the following meetings and visits:

- Discussions with USAID Ethiopia mission officers
- Meeting with Community Farm Service Project (CFSP)

- Meeting with consultant and USAID regional advisor
- Training on Environmentally Sound Design Environmentally Sound Design) organized by USAID-Ethiopia in collaboration with Global Environmental Management Support (GEMS)
- Visits with private livestock drug and equipment retail traders with a consultant
- Presented on the environment and USAID Environmental Procedure during internal monthly learning event
- Collected and reviewed relevant environmental related documents

#### **Lessons learned**

- The need to work on environmental awareness at various levels and with different stakeholders
- The importance of considering Cost Benefit Analysis in AGP-LMD's intervention related to environment
- The need to create linkages with other USAID supported projects to create synergy and leverage skills and resources

#### **NRM and Environment Plans for the Second Quarter**

- Organize learning event on USAID Environmental procedures for partner organizations
- Share environmental related documents with partners
- Work on value chain analysis activities
- Apply environmental mitigation measures in AGP-LMD's interventions

## **PERFORMANCE MONITORING AND EVALUATION**

During the first quarter, AGP-LMD worked on contractual deliverables and developed internal monitoring and evaluation systems to measure progress made in reaching AGP-LMD's overall development objective through performance indicators for each intermediate result. During the review quarter, AGP-LMD laid the basic foundation to incorporate the culture of monitoring, evaluation, and learning into its program while consistently following USAID's requirements.

AGP-LMD began the implementation of M&E by responding to an urgent monitoring request from USAID's Feed the Future (FTF) in early October 2012. AGP-LMD conducted a series of brainstorming sessions with AGP-LMD's technical staff, validated ideas generated during the brainstorm sessions with secondary resources, statistical sources, and external professional advisors to come up with targets and baseline for the USAID's FTF indicators. The absence of baseline data limits AGP-LMD's ability to forecast accurate future targets; however, AGP-LMD has made considerable efforts to determine reasonable targets for the FtF and PPR indicators for the PY 2013 and PY 2014, and PY 2015, based on several assumptions. These targets are, however, subject to change based on AGP-LMD's anticipated baseline survey results and based on feedback gathered during project implementation. In consideration of these facts and underlying assumptions, AGP-LMD submitted 15 relevant indicators to USAID on November 15, 2012.

During the first quarter, the project developed a comprehensive Performance Management Plan (PMP) describing the processes that AGP-LMD will use to track performance indicators throughout the project life, a key contractual obligation for AGP-LMD. AGP-LMD designed a unique M&E approach which attempts to mainstream M&E in the entire project system such that all the technical staff including the COP share responsibilities and are part of the broader M&E systems. In addition, the regional implementing partners will lead the process of collecting and recording program data.

### **M&E Plans for the Second Quarter:**

- Conduct Baseline Survey
- Verify that reported activities in monthly and quarterly reports follow the work plan
- Design M&E Systems, procedures and protocol
- Provide M&E training to staff and stakeholders to acquaint AGP-LMD M&E systems

**Annex I. Woredas proposed for AGP-LMD activities**

Region	Non AGP Woredas	AGP Woredas
<b>Oromia</b>	Akaki	Goma
	Adama	Shirka
	Sululta	Munesa
	Sashamene	Dodola
	ArsiNegele	Adaba
	Tiyo	Horo
	Robe Bale	G/Jarso
		Weliso
		Bedele
		Ada'a
		Lume
		DiglunaTijo
		Ambo
<b>Amhara</b>	DebreBerhan town	SeminAchefer
	Gondar Zuria	Bahir Dar KetemaZuria
	Fogera	Basonawrana
	Limo Kemkem	DebubeAchefer
		Dejen
		Enmaye
		Taqusa
		Metema
		Dera
		TarmaBer
		Awabel
<b>SNNP</b>	HawassaZuria	Enemornaener
	Shone (Badewacho)	Debub Ari
		Semen Ari
		Wondo Genet
		Chena
	Endegeng	

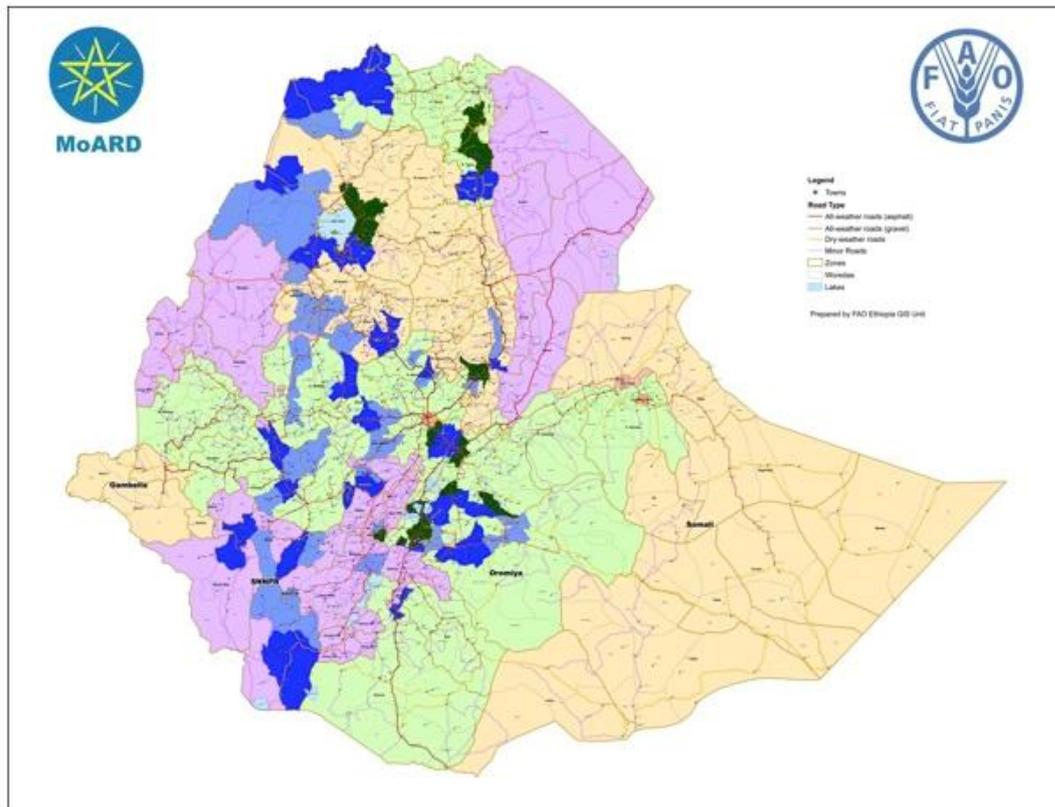
AGP-LIVESTOCK MARKET DEVELOPMENT PROJECT QR1 QUARTERLY REPORT

		Mirab-Azernet
		Gorche
		Melga
		Konta
		Debub Bench
		Sheye Bench
		Bule
		Gedeb
		YemliyuWoreda
		Alecho
<b>Tigray</b>	Enderta	Raya Azebo
	HintaloWajirat	Ofla
	KilteAwulaluo	Endamohoni
		KaftaHumera
		TahatayeAdiyabo
		AsgedeTsimbale

**Annex II. List of woreda clusters selected for value chain field study**

<b>LIST OF WOREDA CLUSTERS SELECTED FOR STUDY</b>	
1.	West Tigary
2.	East Gojam
3.	East Oromia
4.	East SNNPR
5.	North Gonder
6.	North Shewa
7.	South Gonder
8.	South SNNPR
9.	South Tigay
10.	South West Oromia
11.	West Oromia
12.	West SNNPR

**Annex III. Map of proposed AGP and non-AGP woredas**



Annex IV Map of Major Livestock Value chain actors

AGP-LMD Major Value Chain Actors

