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# IMPROVEMENT AND IMPLEMENTATION OF LIVESTOCK PRODUCTION AND MARKETING PROGRAM UTILIZING THE LIVESTOCK SALE BARN

FINAL REPORT



**APRIL 2008**

This publication was produced for review by the United States Agency for International Development. It was prepared by ARD, Inc.

## **Abstract**

The primary objective of this report is to propose concrete actions to develop a formal, organized marketing structure and improve production efficiencies through the Livestock Sale Barn Program (LSB). This program will link the producer, trader, consumer, and export market as well as improve health, nutrition, veterinary services, and supplies. The LSB will also include providing training programs through private extension courses for health and nutrition, and distribution of information regarding proper animal husbandry practices for the small farmers/producers and traders. This program will improve the livelihoods of the livestock producer in Yemen by increasing the domestic livestock production for food security, contributing to the improved health and productive capacity of local livestock, and upgrading the quality of livestock through a continued cross-breeding and artificial insemination program. The LSB will also assist in the development of creditworthy farmer/producer enterprises and strengthen the transparency of farm associations and their ability to effectively organize in order to receive financial services. Unfortunately, there was a travel restriction imposed by the U.S. Embassy, Sana'a two days after the author's arrival. The restrictions would not allow for him to visit key livestock marketing sectors; specifically, Sayoun, Ibb, Taiz, Al Makha, and Aden.

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## **COVER PHOTO:**

Rajil animal market; one of the largest animal markets in Hodiedah Governorate, courtesy of Mark D. La Grange III.

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## **DISCLAIMER**

The author's views expressed in this publication do not necessarily reflect the views of the United States Agency for International Development or the United States Government.



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# ACRONYMS AND ABBREVIATIONS

CACBank	Cooperative Agricultural Credit Bank
CCPP	<i>Caprine Pleropneumonia</i>
FMD	Foot and Mouth Disease
GOY	Government of Yemen
LSB	Livestock Sale Barn
MAI	Ministry of Agriculture and Irrigation
PPR	<i>Peste de Petit Ruminants</i>
SOW	Scope of Work
SWOT	Strengths, Weaknesses, Opportunities and Threats
YASP	Yemen Agricultural Support Program (USAID)

# I.0 INTRODUCTION

Yemen is located on the southwest coast of the Arabian Peninsula. Historically, it has been producing, importing, and trading livestock over hundreds of years.<sup>1</sup> The current population is estimated at 19.7 million and is predicted to increase 3.2 percent per year to reach 30 million by 2025. Today, the livestock market in Yemen is completely fragmented with no formal or organized marketing structure. However, livestock is the primary source of income for farmers, accounting for over 50 percent of their income (four selected governorates.) The small farmers of Yemen own a greater number of animals than landowners who grow cash crops such as qat, cereals, vegetables, and citrus. The day-to-day management of the livestock sector is done primarily by women; this includes cutting fodder and hand-feeding the livestock. Improvements in the livestock sector during the past 25 years resulted in rapidly declining animal husbandry practices in most rural areas of Yemen. Additionally, poor breeding practices, poor nutrition, contamination of feed and water, and parasites and disease are so rampant and unchecked that it not only affects the livestock but the children and adults who tend to their animals.

Species	Number of Head
Cattle	1,397,607
Sheep	7,754,856
Goats	7,667,547
Camels	347,440

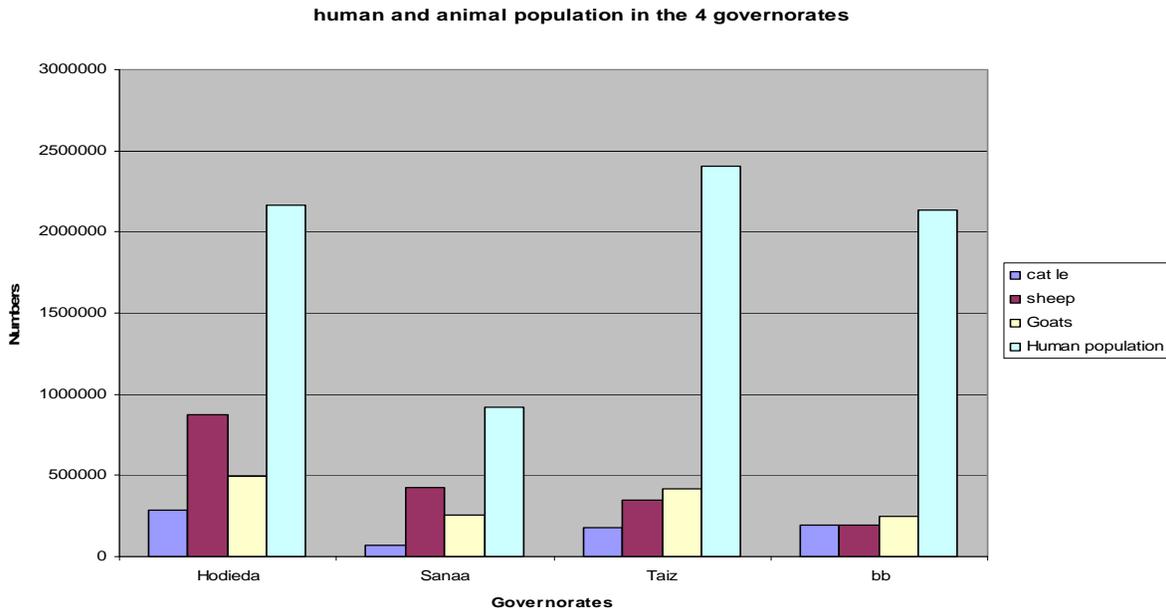
*Source: 2004 Statistical Data, Ministry of Agriculture and Irrigation*

The Livestock Sale Barn Program (LSB) will focus on implementing livestock production within a sustainable market and, specifically, leveraging the program in the four selected governorates of Hodiedah, Sana'a, Taiz, and Ibb.

Governorate	Cattle	Sheep	Goats	Human Population
Hodiedah	287,828	871,560	494,418	2,161,379
Sana'a	69,516	423,271	257,515	918,379
Taiz	176,765	347,614	417,573	2,402,569
Ibb	192,446	193,837	243,632	2,137,546
<b>Total</b>	<b>726,555</b>	<b>1,836,282</b>	<b>1,413,138</b>	<b>7,619,873</b>

<sup>1</sup> Yemen Livestock Movement and Trade Study, February 2008, Najib Al-Hammadi, DVM.

**Chart I: Human and Animal Population in Hodiedah, Sana'a, Taiz, and Ibb**



To address and implement a viable and organized livestock production and marketing program, the **Livestock Sale Barn (LSB)** will serve as the catalyst providing the necessary linkage among producer (farmer) livestock traders, processors, agricultural input suppliers, exporters, and consumers.

The LSB Program undertakes the establishment of a formal/organized sustainable livestock market center (see Diagram 1) and is designed to address the major constraints to increased productivity of the small farmers' livestock enterprises including sheep, goats, cattle, and poultry.

**Diagram I: The Livestock Sale Barn Program**



## 2.0 RATIONAL

The Yemen livestock/poultry production and marketing has been under an analytical microscope for over five (5) years with very little improvement in this sector. In fact, the domestic livestock production and market has decreased along with a decline in animal husbandry practices causing serious poverty among the small producers in Yemen.

Domestic livestock production in Yemen is an important component of the agricultural economy. Livestock generally, and especially cattle and sheep, are universally seen by small farmers as the equivalent of a savings account in the bank—a safe place to store assets and generate a small but reliable cash income. With assistance to increase the productivity of the livestock enterprise, and with access to services, supplies, and markets, the Yemen producers will invest in an additional cow or several additional sheep, and poultry as is being demonstrated under the Yemen Agricultural Support Program (YASP).

The informal markets, such as the Noqum Animal Market in the Sana'a Governorate and the Marawia and Bajil markets in Hodiedah Governorate, are extremely chaotic and a breeding ground for disease and parasite infestation. There are no veterinarian services or other agricultural input services available at the market. If there are sick livestock that are in need of veterinary services, the producer has to call and make arrangements for treatment. The sick animals are held in the same area as the healthy animals. All of these markets are located in the center of the town population, causing a high probability of cross-contamination between human and animals.

- The majority of livestock are imported from Somalia and Ethiopia, and have passed through a quarantine process at the port of entry. The quarantine process in Yemen is in complete disrepair, and there is a complete lack of financial and technical support at the quarantine facilities. There is no testing of livestock disease, with animals only observed for two days before being released into the general Yemen animal market. See Annex 1: Al Mukalla Quarantine Center for a snapshot of typical problems that need to be addressed with animal quarantine centers.
- The remaining livestock are domestic animals that come from the surrounding area of farmers/producers. It should be noted that the majority of the domestic cattle and sheep are smaller in weight and size compared to the imported stock.
- The majority of the domestic stock shows signs of malnutrition, parasite infestation, and poor genetic vigor.
- Quarantine for sick animals is up to the individual traders, and they usually are held in the same area as the healthy animals.
- The sale of under-finished (term used to describe animals who have obtained full weight) and immature, poor-health domestic stock is prevalent in these informal markets throughout Yemen.

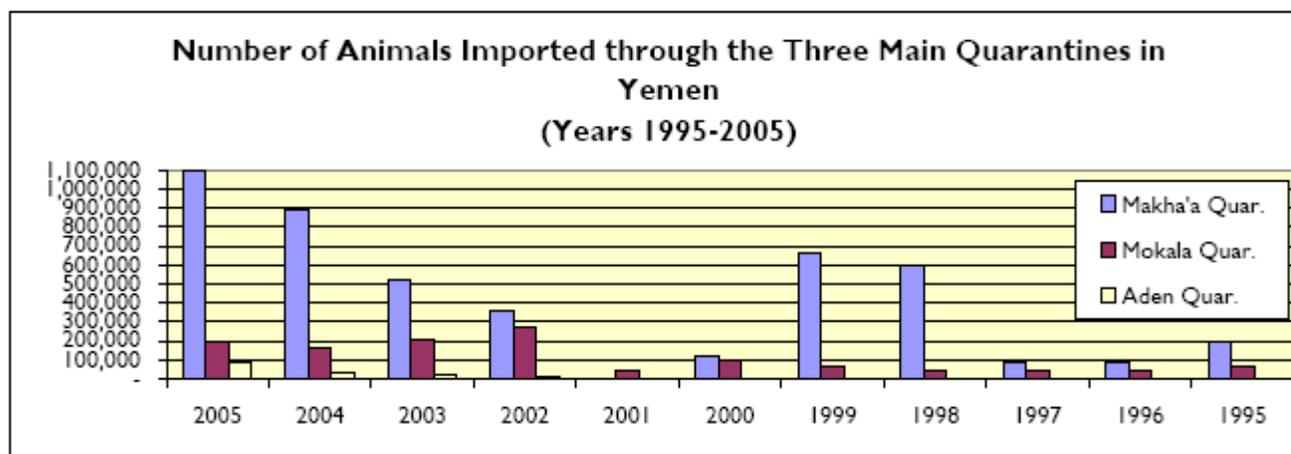
The small farmers and producers' need for money to buy food for subsistence puts them at the mercy of the scalpers and traders. The scalpers/traders at these markets will wait until mid-day into the market day, then bid half the value for the stock knowing full well the farmers cannot afford to stay overnight or take their stock back to the village unsold.

There is a severe decline in the domestic animal market in Yemen compared to the overall market demand in Yemen. In the present livestock market, imported livestock are far more profitable for the traders than buying and selling in the domestic market.<sup>2</sup> During the 10-year period 1995 to 2005, there was a 643 percent increase

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<sup>2</sup> Yemen Livestock Movement and Trade Study for the Yemen Agricultural Support Program, February 2008.

in the number of livestock **imported** into Yemen. This figure alone illustrates the decline in domestic livestock production in Yemen.



Factors that contribute to the decline in the domestic animal production in the Yemen livestock sector are:

- A lack of forage and feed grains that force producers to sell immature animals in the marketplace.
- Diseases such as PPR (*Peste de Petit Ruminants*), Sheep and Goat Pox, Foot and Mouth Disease (FMD), Brucellosis, and contagious *caprine pleuropneumonia* (CCPP), that are widespread and the greatest source of economic losses in livestock. Human health is also threatened directly by these diseases, specifically Brucellosis. Infestation of the external and internal parasite *clostridium* is also prevalent, as well as mange and liver fluke. All of these contribute to a high mortality of livestock, ranging from 40 to 60 percent and up to 90 percent for poultry. Illustrations of some of these diseases are shown in the photographs below.
- Malnutrition – Mineral deficiencies due to poor soil and loss of nutrients in poor-quality forage has a direct effect on fertility and vigor in sheep and cows.



**Sheep & Goat Pox**



**Foot & Mouth Disease**



***Peste de Petit Ruminants***



MARK D. LA GRANGE III, ARD, INC.

This young, poorly fed calf, common among cattle herds in Yemen, lacking adequate nutrition-rich feed will more easily fall victim to disease.

- Drought conditions, which force sale of livestock.
- Low genetic vigor—small and weak bone structure, poor food conversion, and low tolerance for disease and parasite infestation.
- High mortality rates in the domestic livestock sector, which leaves producers with a lack of motivation to adopt livestock improvement initiatives that would ultimately improve production.

The following section outlines key objectives that must be developed and implemented in order to establish a strong foundation and successful livestock market throughout Yemen.

## 2.1 OBJECTIVES

### I. Organization of the Livestock Market

- Increase the supply and demand, and ultimately create a sustainable and profitable market within the value-added chain, through improved integration between producers and traders working simultaneously at the farm and industry level.
- Strengthen the capacity of livestock farmers/producers to increase production through sound and basic animal husbandry practices.
- Provide a viable, value-added chain among producers/farmers, traders, and consumers.
- Assist in organizing farm business associations/cooperatives among livestock producers and traders in the various marketing regions throughout the private sector.

## **2. Productivity**

Successful increases in productivity will lead to an increase in health, nutrition, veterinarian supplies and services, and overall improvement in livestock genetics through increased productivity.

- Provide access to improved feed, minerals, vaccinations, and improved genetics (e.g., artificial insemination).
- Develop quality livestock that are disease-free, produce good cut-out value for the Yemeni consumer, and create demand for the regional export market.
- Increase weight gain in sheep, goats, and cattle as well as milk production in cows. This will lead to an increase in extra meat and milk for the producer/farmer that will ultimately pay for the additional cost. Thus, farmers will learn the economic benefits of improved livestock production practices.
- Improve veterinarian services. A veterinarian service outlet will be contracted by the LSB. Vet services will include offering programs in improved animal health practices for the producer and providing vaccinations, medical supplies, artificial insemination, and distribution of feed supplements and mineral blocks. These units will all be contracted by the LSB.

## **3. Education**

- Support training programs for health and nutrition. This should include the targeted distribution of information regarding proper animal husbandry practices to producers/farmers and traders.
- Develop private sector agricultural inputs to link producers/farmers and traders.
- Improve the genetic profile of the local breeds through sire selection and artificial insemination.

## **4. Public Health Issues**

- Official Yemeni Agencies need to be given the authority to quarantine and/or condemn imported and domestic animals that carry disease and/or other ailments.
- Promote and assist in upgrading the quarantine centers (e.g., confinement pens, laboratory equipment, etc.) at each center.

## **5. Finance**

- Provide access to credit at the farm level which is extremely critical for the sustainable success of the LSB Program.
- Organize and/or reorganize farm cooperatives or associations to enhance their ability to obtain financing.
- Work through and assist farm associations, in cooperation with other programs, to support the development of associations and cooperatives.

## **2.2 BENEFICIARIES**

- Livestock producers in the four designated governorates.
- Livestock traders who work within the LSB marketing region.
- Yemeni consumers.
- Agricultural input suppliers (private sector).
- The General Direction of Animal Resources Department within the Ministry of Agriculture and Irrigation.



## 3.0 IMPLEMENTATION

This type of program would best be implemented either through a grant or contract mechanism with minimal staff but in partnership with CACBank, pre-identified private sector interests, a select number of livestock associations/cooperatives that would be required to put up their own capital, and minimal GOY/MAI/DGAR involvement except perhaps to shape policy environment regarding the import/export of livestock and preparation to qualify for WTO accession.

### 3.1 SHORT-TERM OBJECTIVES AND GOALS

- The **Livestock Sale Barn Program (LSB)** will develop a formal marketing structure as well as a viable production and marketing system linking producers and traders to the consumer.
- The LSB will provide services such as veterinarian services and supplies and a domestic quarantine facility that includes a simple and efficient testing program for livestock diseases.
- The LSB will provide educational extension services regarding basic sound nutrition and forage practices along with a more formal livestock pricing mechanism.
- The LSB will provide instructions on animal health. This includes livestock vaccination against major disease and preventive actions against parasitic diseases and other health-related activities. This focus will enable rapid mobilization of veterinary resources into extensive vaccination and preventive treatment campaigns.

The activities above are needed to increase livestock production numbers. The *immediate* goal of the project includes preventing further deterioration of the animal health services system due to withdrawal of external support.

Moreover, in the short term, the private sector will also need to provide access to much-needed commercial feed, concentrates, supplements, and mineral blocks. Additionally, the private sector will need to assist in organizing and implementing an effective and efficient quarantine program for imported livestock.

### 3.2 MID-TERM OBJECTIVES AND GOALS

- The mid-term focus of the project is on business development and strengthening organizational structure that will enable the LSB Program and System to grow ultimately towards an independent private sector operation.
- At the same time, geographical coverage should be extended and the scope of the interventions should broaden because livestock health is directly related to nutrition and the productive capacity of livestock.
- The project should also focus on improving livestock reproduction through artificial insemination and cross-breeding extension programs. This includes counseling on animal nutrition and husbandry methods.

### 3.3 LONG-TERM OBJECTIVES AND GOALS

Yemen has the potential to substantially increase livestock production (especially small ruminants) for both the domestic and Gulf Cooperation Council (GCC) export markets. However, to do so, it must undertake major investment in improving in order of priority (a) its domestic animal production capacity (both in terms of larger herd production efficiency and dispersed smaller-scale production at farm household level); and (b) its animal health, quarantine, and animal import systems and policies.

- The long-term focus of the project is to reach the required degree of self-sustainability for a service system network that can operate largely or totally independent of external support.
- Ministry of Agriculture and Irrigation officials have already expressed their consent to have clinical services be implemented by the private sector.
- The established private sector animal health services should be utilized for collection and dissemination of livestock market information as well as enabling the introduction of updated animal husbandry practices along with extension-type services on education.
- The livelihoods of the livestock producers in Yemen should be improved with an emphasis on balancing crop with livestock farming business mutually reinforcing each other.
- The domestic livestock production should be increased for food security and contributing to the improved health and productive capacity of local livestock.
- Livestock should be upgraded through continued cross-breeding and artificial insemination programs. If successful, this will eventually lead to some import substitution opportunities for Yemen producers.
- Expanded formal animal and meat exports to GCC countries are possible if quarantine and other animal production and animal health system components are improved in Yemen. This will require close collaboration among all production and health units in MAI, and innovative Yemeni private operators. These parties should encourage the development of vertically integrated partnerships between Yemeni enterprises and livestock and meat professionals in target GCC countries.

The long-term sustainability of the LSB Program will depend on increased private sector investment and farmers' access to credit. Private sector investment in this program will also be promoted by the LSB. Specifically, farmers' access to credit will be developed in close collaboration with an oversight committee with USAID and the Cooperative Agricultural Credit Bank (CACBank)'s financial services program. The role of the LSB Program will be to develop creditworthy farm enterprises and to strengthen the capacity and transparency of farm associations and their ability to organize in order to receive financial services. CACBank will also need to develop the appropriate credit mechanisms and financial services.

Simultaneously, the work in all of the above components of the LSB Program will be implemented through farm associations with the direct goal of strengthening not only their service delivery capacity, but also their ability to assist farmers to access credit when it becomes available. The LSB Program association strengthening is not an add-on activity, but rather part and parcel of how all of the services will be delivered and results achieved. It is expected that selected farm associations will effectively help their members to access credit through the CACBank or other financial institutions working in Yemen.

# ANNEX I: AL MUKALLA QUARANTINE CENTER

Al Mukalla is located on the Arabian Sea in Hadramout Governorate with a population of over 800,000 inhabitants. The quarantine center is located in a major residential area with open sewage running across the road that accesses the quarantine center.

The quarantine center is overseen by the GOY military and receives between 25,000 to 30,000 animals per month with 90 percent of the stock being small ruminants, sheep, and goats; 8 percent cattle; and 2 percent camels. “Officially” all of the imported stock from Somalia arriving at this quarantine center came through the port facility approximately 10 km away. There is no designated livestock area at the port facility. The livestock, along with human food, equipment, etc., are unloaded on the same docks. The dock area itself has very limited space. There are no veterinary lab testing facilities at the dock—when animals arrive, the traders load the livestock in trucks and are to go directly to the quarantine center 10 km away.



Observing the activity at the quarantine center and the docks, the author seriously doubts if 40 percent of the incoming livestock actually arrive at the quarantine center. A high percentage of sheep and goats are off-loaded at a secluded dock along the coast and go directly to feeders/producers in Sayoun and the surrounding area in the Hadramout Governorate.

The quarantine center's physical layout is adequate to handle 25,000 head per month. However, the location is neither conducive for receiving nor effective in processing and providing isolation of the imported stock until tests have been completed. Contamination of human habitat, water, and feed is very prevalent. The following outlines additional problems with the present location and condition of the quarantine center:

- Livestock must travel through town to the quarantine area located in a residential area.
- Animal pen sizes are adequate for sheep and goats, but do not have sufficient shade available. Additionally, many of the pens have wire separation, which allows contamination through direct contact.
- The forage available is very poor quality and low in Total Digestible Nutrients (TDN). The Yemeni Military provides the forage at no charge to the traders. It was reported that the forage was brought in from Sayoun.
- The water is also supplied by the Yemeni Military. However, the surrounding area is polluted with human sewage runoff; hence, the water provided to the animals is contaminated.
- Lastly, sheep, goats, and cattle were running loose together inside the main compound and drinking out of the same water trough.

The Al Mukalla Quarantine Center also has major deficiencies that must be resolved before the quarantine center can be functional, effective, and beneficial for the livestock sector of Yemen.

Actions to address these deficiencies include:

- Relocate the quarantine center from the residential area closer or near the port facility.
- Identify a dock that is specifically designated for unloading livestock and keeping them isolated from the general cargo being unloaded.
- Provide more personnel for vets to do initial screening/testing of livestock before disembarking from the ships or dockside holding pens.
- Provide a complete laboratory facility at the quarantine center for testing and for allowing samples to be tested immediately.
- Develop and enforce solid quarantine rules and regulations.



**Goats roaming freely outside of their pens at the quarantine center.**



**Forage provided for livestock at the quarantine center is very low in nutritional quality and not chopped to increase digestibility.**

# ANNEX 2: PEOPLE INTERVIEWED

## Meeting with Animal Traders and Concerned Individuals to Develop Livestock Markets in Yemen

Date: March 27, 2008

Place: Directorate General of Animal Resources

No.	Name	Profession	Location
1	Saeed Saeed Al-Basheeri	Trader	Sana'a
2	Mohammed Ali Qishr	Trader	Hodieda
3	Abdulla ALmajarri	Veterinary Assistant	Almokha
4	Ali Husain Qaten	Animal trader	
5	Haiel Saeed Albasheeri	Trader	
6	Rizq Hadi Rafeeq	Trader	
7	Dr. Rasheed Almorshedi	Veterinarian	DGAR
8	Dr. Esam Abdulkareem	Veterinarian	General corporation for slaughterhouses and meat markets
9	Abdulkareem Alhammadi	Vet Assistant	Slaughter/ private pharmacy
10	Shaker ALqadasi	Vet Assistant	DGAR
11	Dr. Abdulla Almaqtari	Veterinarian	DGAR
12	Dr. Dirhem Ahmed Shamsan	Veterinarian	DGAR
13	Abdo Alazzani	Trader	



# ANNEX 3: SCOPE OF WORK

<b>Project:</b>	Yemen Agricultural Support Program (YASP)
<b>Consultancy:</b>	International Livestock Production/Agribusiness Specialist
<b>Activity:</b>	Improve livestock marketing and production system
<b>Duration:</b>	Up to 21 working days, including two days international travel, three days in Sana'a to meet with the Livestock Specialist at YASP, and Ministry and other authorities; 10 days for field travel; two days to prepare and make separate oral presentations to USAID then MAI; and four days for data analysis and drafting the initial report.

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## Purpose

Livestock is an integral part of the social and economic livelihood of rural areas in Yemen, accounting for more than 50% of the total value of farmers' income. Poor farmers throughout Yemen own greater numbers of animals than landowners who grow cash crops. An estimated 1,000,000 animals enter the country each year from the Horn of Africa, with the importation of cattle and small ruminants estimated to account for 25% and 40%, respectively, of the total meat consumed in Yemen.

However, rearing of sheep and goats is more widespread as it is felt to be more secure compared with the possible failure of crops, and hence a guaranteed source of income and livelihood. In addition, livestock management is primarily handled by women, whose share of work for livestock is estimated to be over 90%. Women are fully responsible for managing the livestock at the household level, including cutting fodder and hand-feeding cows. YASP has been offering some support to the selected farmers in the five targeted governorates (Sada'a, Shabwa, Marib, Amran, Al-Jawf) in terms of animal health, production, and nutrition. However, the **livestock marketing system is still a major constraint in Yemen.**

## Background

YASP recently undertook an Animal Movement and Trade Study to improve the understanding of animal movements and trade between Yemen and other countries, and within the country for the purpose of giving decision makers in the MAI Animal Resource Directorate General of Animal Resources, and others, information with which they can plan and implement policies and regulations to improve the national food security and health safety for people and animals in Yemen.

USAID/YASP has been helping farmers in the five targeted governorates in the interim to improve animal health and nutrition, husbandry, production, and the marketing situation through improved extension work for about 15 months. This helps farmers to increase animal health by decreasing death caused by rampant diseases; increase income of livestock owners by at least 25% per person, most of whom are women; and increase animal production by over 25%, improving the marketing status of the livestock through better selection of forage varieties, using the concentrated feed, genetic improvement, and marketing systems. These activities are coordinated by YASP working out of their office in Sana'a. This Scope of Work is prepared specifically for the international Livestock Production/Agribusiness Marketing Specialist.

## Objectives

The consultant will collaborate with the ARD/YASP Livestock Specialist and other YASP local extension staff in the targeted governorates to accomplish the following objectives: (1) Profile and assess the production and marketing value chain in the five targeted governorates and obtain information on the constraints; 2) Conduct a livestock value-chain analysis to determine market strengths and weaknesses in the five targeted governorates; and 3) Strengthen institutional capacity to support livestock sector growth, especially improved marketing with targeted farmers and SGP recipients in the five governorates. In addition, the consultant will examine export potential for livestock. The methodology used by the consultant to accomplish these objectives will be to work with a team of local experts in the sector; review relevant literature, reports, and documents; conduct site field visits; meet with GOY officials (national, regional, local), traders, farmers, individuals who work in livestock business, and collect primary data for analysis to be used for proposed activities.

## Tasks

- Review relevant literature on the status of livestock marketing, processing, and trade in Yemen.
- Based on the review, prepare a livestock profile including SWOT analysis.
- Advise on short- and long-term livestock value chain investment opportunities.
- Develop an overall plan for livestock marketing and trade including detailed descriptions and timelines for proposed activities.
- Conduct capacity-building training that results in an Action Plan for short-term livestock marketing activities.
- Propose a scope of work for a local hire staff to supervise and manage livestock marketing activities.
- Propose quality control standards for domestic and export markets.
- Determine agribusiness opportunities to export meat to the neighboring countries.
- Provide related technical assistance as requested.

## Deliverables

- Detailed livestock marketing SWOT analysis.
- Capacity-building training resulting in detailed Livestock Marketing Action Plan:
  - Detailed subsections to report that outline quality control standards, a SOW for local livestock marketing specialists, and agribusiness export opportunities.
  - Two oral presentations: one for USAID and second for Government of Yemen. Presentation should include the current status of the livestock sector in the five governorates, preliminary findings, and plausible recommendations.
  - The Final Report, submitted to ARD/YASP by mission end inclusive of all deliverables.

### **Method of Report Submission**

- Two hard copies and two electronic copies of all written deliverables.
- Electronic copies of text should be submitted in MS Word format; figures should be submitted in MS Excel.
- Photographs and maps should be submitted in high-quality jpeg format.

### **Skills Required**

- Education: Graduate level university degree in animal production, marketing, agribusiness or related subject.
- Ten plus years' practical experience working overseas in livestock marketing and meat/dairy value chain.
- Arabic speaker is preferable.
- Prior experience working in Livestock Sector in Yemen is preferred.



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