

# Foundation Sustainable Meat Ethiopia

Field visit report **draft version**



Commissioned by:

Foundation SME Netherlands

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## Glossary

ATA	Agricultural Transformation Agency
DOC	Day Old Chicken
ETB	Ethiopian Birr
GoE	Government of Ethiopia
LIT	Pilot project on traceability (LMD)
LMD	Local Market Development; USAID financed project for livestock sector development
RMA	Rapid Market Assessment

## 1. Introduction

This report is the final deliverable in the trajectory that F&S Ethiopia (hereafter F&S) has facilitated for the Foundation Sustainable Meat Ethiopia (hereafter SME) from the Netherlands. It was preceded by two study reports on Rapid Market Assessments (RMAs) conducted in the Ethiopian poultry and cattle/meat sectors, respectively. After executing this study, F&S has planned and facilitated the field visit conducted by SME from May 26 until June 6, 2017.

This report presents main findings from the field visit and elaborates 6 scenarios for the way forward. It also presents a number of issues that require further research/investigation.

It is the wish of SME to contribute to the sustainable development of the meat sector in Ethiopia. From an early stage, the emphasis has been placed on poultry (rapidly growing sector due to the Government of Ethiopia (GoE)'s explicit interest to increase protein intake of the population by promoting chicken meat consumption) and cattle/meat (great potential in Ethiopia, export potential increasing). This choice implies that other related sectors, notably sheep/goats and pigs have not received a similar amount of attention. They have however been taken into account as a sideline in the research and visit.

The aim of the RMA studies and the visit was to clarify a number of issues with regard to the particular situation of Ethiopia, a country with a strong Government presence and with remnants of state socialism and high Government interference in its productive sectors, specific traditional/cultural attitudes and behaviours with regard to meat consumption, and a small but growing openness to foreign capital and know how that can serve as an entry point for initiatives along the lines of SME.

Although the visit to Ethiopia was relatively short given the size of the country, F&S has endeavoured to expose SME as much as possible to the reality of the poultry and cattle/meat sector, and to get access to as much relevant information and in-depth knowledge from experts on these sectors as possible.

## 2. Methodology

To get access to relevant organisations and persons that are stakeholders in the meat sector, F&S has used its own network, as well as the links already established by SME, and the network of two Ethiopian consultants recruited for this assignment: Mr. Assegid Asfaw (feed specialist) and Mr. Samson Adefris (meat processing expert).

During this process, F&S has applied what is technically termed snowball sampling: one interviewee indicates what would be interesting stakeholders to speak with, etc. The main locations, due to the limited time the mission would be in Ethiopia, are Addis Abeba and surrounds, with a focus on Debre Zeit/Modjo area where many of the companies involved in this sector are located. Care has been taken in coordination with SME to identify and approach a balanced sample of the following types of actors supporting actors: 1. Companies in producing, processing, wholesaling and retailing of meat, 2. Abattoirs, both focusing on the local and export markets, 3. Development organizations working in these sectors, 4. Government ministries, local institutions and research institutions, 5. Representative organizations such as the poultry, meat exporters and local butchers associations.

On June 5, the mission has presented some of its main findings to a group of stakeholders at the F&S office in Addis Ababa. During this meeting, the participants have given their opinion on a number of statements, and have worked in subgroups according to their affiliation (poultry and cattle / beef sector) to give recommendations to SME about the way forward.

### 3. Main findings of the field visit

This section presents the key findings of the field visit. NB: It assumes that the reader is familiar with the content of the two RMA studies. Although some pieces of information are taken from these two separate documents, this section will not repeat the information found there. The section is divided into 1. Poultry sector, and 2. Cattle / beef sector. For each sector, current status, constraints, opportunities and probable trends are discussed.

#### 3.1. Poultry sector

The poultry sector is relatively small and easy to oversee. Therefore it does not require a lengthy introduction.

##### *Current status*

Currently poultry consumption in Ethiopia is very limited, among the lowest in Sub Saharan Africa, at 0,4 kg / capita / year. Most of the consumption of chicken is limited to special occasions, such as Fasika (Easter) and New Year, and often in the form of *doro wot*, a traditional dish that takes time and is relatively costly. Due to this, poultry is perceived as expensive. Recently, the Ethiopian Poultry Producers Association (EPPA) has set a floor price for eggs: 2,4 ETB / piece and meat: 67 ETB / kg, making it in theory a cheap alternative to beef which starts at 200 ETB / kg.

The poultry sector in Ethiopia, both for layers and broilers, is developing relatively rapidly. Main drivers for this sector development are:

1. GoE policy to promote egg and poultry meat consumption, coupled with its strategy of import substitution of chicken meat (currently the high end market segments import their chicken);
2. Urbanization and demand for fast food type chicken products; major chains are exploring the market but unable to enter as their quality standards are not met; Ethiopian airlines has an incentive to source locally but cannot do so yet for the same reason;
3. Technology transfer from foreign (often Dutch) companies, stimulated by trade missions and trade facilitation financed by the Dutch Embassy in Ethiopia;
4. Increasing attention from the development sector that has many projects/initiatives focusing on poultry for smallholder farmers; and
5. Presence of a number of medium to large sized companies of Ethiopian entrepreneurs, that see poultry as a good investment and that are keen to work with smallholder farmers to expand their business.

##### *Constraints*

The poultry sector in Ethiopia, although developing, is characterized by a number of weaknesses. These include (from production to consumption):

1. Fragmented value chains, with limited service provision and serious bottlenecks (e.g. availability of parent stock, day-old-chicks (DOCs), very limited and often rudimental slaughtering facilities)

2. As a consequence of 1. above, Ethiopian owned companies do not specialize but try to integrate (all stages from feed milling to incubation to slaughtering) though they clearly lack the capital and skills to do all these things well.
3. High feed prices: it was mentioned to the mission that feed price can be up to 70% of the costs in the poultry business, hence reducing margins.
4. Seasonality of demand as a result of 2 long fasting periods per year. This can be managed by well timed production cycles, but generally companies are not able to manage these well (also due to bottlenecks mentioned).
5. Demand is mediated by the presence of brokers, that play an important role in serving the retailers but also charge high prices; they are making the market system less efficient.
6. No professional slaughter lines: much of the poultry currently consumed is slaughtered by hand in unhygienic conditions.
7. No quality control in the chains; cooling is not present and although much chicken is deep-frozen at retailer level (also to bridge the demand gaps due to fasting) this is no guarantee for freshness given frequent power cuts and old freezers.
8. Low quality awareness of consumers and perceived costliness of chicken meat.

#### *Opportunities*

1. Smallholder farmers have been proven to earn well with egg and chicken sales, if they can get access to pullets, vaccination, feed and advice on chicken rearing.
2. Linking them with larger sized chicken farms such as AMEL, ELERE, BORA and comparable provides most or all of these inputs; also for the larger companies the business is remunerative
3. Business links with Dutch and other international companies (parent stock, DOC supply, equipment, knowledge) has been established and is functional, although it remains challenging and costly to import into Ethiopia.
4. Investment at the right moment coupled with knowledge transfer can significantly improve the business skills and business capacity of the medium to large sized Ethiopian companies.
5. Several companies have already acquired slaughtering lines (Passion in Modjo, ELERE, and BORA) and when they manage to be operational they will fill a gap in the market.
6. More attention for local consumption of chicken meat coupled with increase in disposable income is likely to grow the market in the time to come.
7. Some support can be expected from Ethiopian national and local government institutions / research centres and it makes sense to cultivate good relations with these entities.

#### *Probable trends*

1. If the sector managed to improve slaughter facilities and quality control in the value chains, larger buyers are likely to start sourcing in the country. These include Ethiopia Airlines, which is pushed by the GoE to source locally, and fast food chains such as Kentucky Fried Chicken and comparable companies which have been eyeing the market for a while now.

2. Local consumption is likely to increase, but mostly in the higher market segments unless more awareness raising is done on chicken meat consumption in the lower income market segments.
3. Quality control in the higher market segments is set to increase as more controls from the food and drugs administration take place and consumers demand proof of quality and food safety. This process needs to be helped along by an entity that stimulates this systemic change.

### 3.2. Cattle/Beef sector<sup>1</sup>

For this report, we focus on that part of the (much broader) livestock sector concerned with cattle; therefore we call it the cattle/beef sector. The cattle sector is more complex and much larger than the poultry sector. This is caused by several factors, not least the fact that Ethiopia has traditionally been a cattle-rearing country and that consumption of beef in the particular way of the country is deeply ingrained in its culture.

#### *Current status*

Although Ethiopia has one of the largest livestock populations in Africa and even in the world, the production, processing and consumption stages of the chain are still largely informal, un-mechanized, and traditional. For the GoE the livestock sector is a strategic growth sector, expected to earn foreign currency. Geographically, the sector covers much of the country with a large difference between lowland cattle reared in arid areas in traditional pastoralist style and highland cattle, often used as draught animals and to a very limited extent as dairy cows. The GoE exerts relatively strong control over the sector. Even though extension services are often patchy, they are the only option for many pastoralists. The cattle sector is also strongly linked to drought, a recurring phenomenon in Ethiopia, which frequently decimates the lowland herds.

It needs to be kept in mind when reading this section that almost all exports (90%) are currently sheep and goats, and that Ethiopia has been consistently underperforming in terms of disease management, quality, traceability, consistency of supply and other crucial factors preventing the country from serving more remunerative markets. There are currently 11 out of 14 licensed export abattoirs operational. The mission visited Organic Export in Modjo, which has recently expanded and will soon open a professional line for cattle and camels. The exception to this is Verde Beef, a foreign owned and managed company that exports beef of young steers to the Middle East markets – Dubai, Qatar, Bahrein, Saudi Arabia among others. A second similar operation called Alana is due to start operations in the same area (Adami Tului near to Ziway Lake) but will focus on older cattle. Export abattoirs are not allowed to serve the domestic market legally.

As for the domestic market, this is dominated by traders and their networks supplying mostly oxen to city butchers, almost without exception slaughtered in Addis Ababa Municipal Abattoir in Kera (also visited). Quality standards are limited; infrastructure in the abattoir is decrepit and practices old fashioned. The carcasses are not cooled at any stage in the process, but rather transported quickly to the cities' butchers and consumed preferably the same day. This is similar in all large cities in the country. There is an active lobby of the

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<sup>1</sup> The outcomes of the group exercise during the final meeting on June 5 have been taken into account here.

National Butchers Association – visited during the mission - to improve the slaughtering facilities as these have a negative impact on their business due to malpractices and costliness.

### *Constraints in the cattle/meat sector*

Main constraints in the sector (from production to consumption) are the following:

1. Low access to feed / fodder in lowland production areas;
2. Limited access to improved genetic resources and higher performing breeds; the traditional Ethiopian cattle breeds such as Borena are dual purpose (neither meat nor milk cows, or both depending how one looks at it)
3. Seasonality of supply animal feed due to dependence on natural available pasture; which is subject to risk of drought.
4. Lack of adequate animal health services, especially in remote areas;
5. Informal trading networks often make use of (illegal) export routes; much cattle leaves Ethiopia on the hoof.
6. Official exports suffer from lack of quality control mechanisms, quarantine facilities, disease management systems, and therefore lack of confidence from final buyers. The GoE aim of 1 billion dollars in exports/year has been met by 10-15 % only; trade bans on Ethiopian meat are common.
7. Domestic market is served by informal sector, without regard for quality mostly slaughtering worked-out oxen.
8. Slaughtering facilities, except in the most modern export abattoirs, are obsolete in many respects and form a danger to food safety; the AA Abattoir is a prime example.
9. Quality control practices and systems are below par when referenced with international standards; lack of proper laboratory facilities both on-site and off (there is 1 national reference lab and 15 regional labs which do not function well; the private laboratory we heard about, called Bless, is expensive)
10. Ethiopian meat consumption habits (much of it raw, fresh meat) not conducive to establishment of quality chain; organ meat is consumed hardly at all.
11. Supermarkets are there but have limited meat departments and central buying and quality control / quality care systems seem to be absent

### *Opportunities*

1. Production side is supported by Ministry of Livestock and Fisheries (MoLF); recently established but with large mandate and qualified people; also NGO led projects focus on this part of the chain and are introducing interesting business models (e.g. the case of the GRAD project of SNV) such as collection points where cattle is fattened.
2. Processing is also being worked on; e.g. the AA Abattoir will relocate to a new site where a new site is prepared that will be more modern. Timing however remains to be seen; funding seems to be in place but process is slow.
3. Domestic market prices are interesting at US\$ 8-10 per kg. However as long as companies established by foreign investment are not allowed to serve the domestic market, this remains a potential only (even for Verde Beef, which was rumoured to be allowed to serve the domestic market, but the GoE has cancelled this)
4. Demand for processed beef products as well as cuts is likely to be high and is relatively untapped due to expensive imports and lack of producers in the country;

- new actors are entering this market (Luna Abattoirs with Fresh Corner outlets; Holland Meat which will use its existing distribution channel to the supermarkets)
5. The meat in Ethiopia is relatively unspoilt: no antibiotics are used, no GMO feed, etc. It could be called 'organic' by default. This situation is very different from the overdeveloped meat sector in many developed countries, where practices are factory-like and disease and contamination risk is huge.
  6. High end market segments tend to import beef, for example from South Africa.
  7. Attention for quality control is increasing, especially in the high end market segments of the domestic market.

#### *Probable trends*

1. Given the great shortage of foreign currency, it is unlikely that the GoE will allow any of the more modern export abattoirs to serve the local market (although informally they will do so as this is very lucrative).
2. Ethiopian meat consumption habits will not change in the near future, except for higher income market segments.
3. An underserved demand for quality processed meat and cuts is present there, waiting for actors to serve it.
4. Traceability (especially for export) is likely to become more prevalent; already ATA and LMD are working on this with the GoE in a pilot project called LIT; this could be one of the factors in establishing a quality control system in a number of value chains (but not in the entire sector as this will take more time). As described by Dr. Wondwossen the policy advisor of LMD, traceability is 'a moving target'

## 4. Scenarios for the way forward

This section describes the scenarios that F&S has identified for next steps in the work of SME in Ethiopia. They are based on our own understanding of the sector, the lessons learned during the field visit as well as our understanding of the aims of SME. It needs to be noticed that during the mission, it became clear that SME is a young organization that is still clarifying its objectives and approach. This section is designed to contribute to this process, by thinking through the scenarios and their objectives, implications for partner choice, timelines and budget involved. Again, the section is divided in poultry and cattle / beef.

### 4.1. Poultry sector

#### SCENARIO 1: Chain development *without* investment in a company:

In this scenario, SME will still work with 1 or more companies, but will limit itself to an advisory role. This will focus on the broiler producers, in order to be able to make use of the meat expertise of SME. The company can be used as an entry point to access smaller farmers that work with the company. Advice will focus on quality production methods, possibly linked with slaughtering.

As an extension of this scenario, it can be considered to establish contact with the large Dutch poultry producers (Alema, Maranatha) for learning purposes.

A link in the chain that will have to be given attention is the retailers; buyers of the chickens play an important role in quality control.

#### **Objectives:**

1. Establishing a value chain that focuses on quality and consistency in supply, which can serve as an example for similar companies in the sector and their value chains
2. Creating awareness of quality production and quality care throughout the value chain
3. (Later) allowing the company to access higher value market segments, increasing its income as well as that of its outgrowers (smallholder farmers).

#### **Partner choice:**

1. Medium to large sized Ethiopian company/companies such as AMEL, ELERE, BORA but there are more options, that can be the key partner
2. Supermarket chain and / or hotel / restaurant chain if sufficiently large and linked with company
3. The Netherlands consortium Holland Africa Poultry Partners has, with financial inputs from both the Ethiopian and Dutch government built a practical training Centre: the National Poultry Training Centre (NPTC) in Debre Zeit. This seems not very active but links need to be established to find out how to collaborate.
4. Ministry of Livestock and Fisheries for GoE link and support on methodology; also when taken on board this can be part of the sustainability of the project as they can take over some roles
5. (Potential) a to be identified NGO that would like to work on this as a project and can be a funding partner
6. F&S as local partner; more details on its role see below in section 4.4.

### **Timelines:**

This scenario can be started quickly. Depending on the scope of the project, it can be a multiple year effort.

### **Budget:**

- Some of the work can be done at a distance, after links have been established with stakeholders. Visits twice per year are recommended. Linking with the Dutch poultry sector for equipment, advice etc. is recommended.
- Depending on the scope, the budget can be co-funded by an NGO or by fundraising in NL.
- A minimum amount required for the implementation is estimated at 30.000 - 50.000 euros per year; the more funds are raised the larger the scope of the project can be.

### **SCENARIO 2: Chain development *with* investment in a company:**

This scenario can have similar objectives as the first scenario. Investment in the company has 2 main benefits: 1. This will allow the company to make the recommended changes more easily; 2. Greater influence on its operations, more lasting impact on the company and thus on the chain.

### **Objectives:**

1. Capitalization of the company through taking equity (loans are not allowed in Ethiopia), allowing it to make purchases, have more working capital, hire required staff etc.
2. Improving the day-to-day and financial management of the company
3. Revolving the investment: when successful the money returns and can be re-invested

### **Partner choice:**

The partners of the AgriBusiness Booster (AbB) are candidates (AMEL, ELERE, BORA) which have already been explored and on whose business much data is available. However they are not necessarily the only choice.

Investment can be done directly from SME although it needs to create a legal entity in NL to do so (cannot be done by the Foundation); also direct investments in an Ethiopian company are subject by law to a minimum investment of 150.000 US \$.

Investment can also be done through the investment vehicle that F&S / AbB are setting up in Ethiopia. In this case, when a basket fund construction is used in NL, smaller investments can be done in the Ethiopian company or companies.

### **Timelines:**

When investing directly, the timeline is in the hands of SME.

When the choice is made to invest together with AbB, this will have to wait until AbB is set up in Ethiopia. This will realistically take at least a few months; earliest starting date October 2017 although preliminary discussions can take place before this, and in the Netherlands.

### **Budget:**

Subject to the requirements of the companies. It is our estimation that AMEL and BORA would greatly benefit from 100.000 – 150.000 US \$. ELERE being a large company with larger

ambitions is probably in need of 300.000 to 500.000 US \$. NB these sums do not have to come from one investor only, and the owners will also be requested to invest.

### SCENARIO 3: Combined scenario

Under this scenario, a combination of 1 and 2 is made, i.e. investment in a company as well as a chain development trajectory using this company as an entry point. This means that 2 separate initiatives need to be set up: 1. The project on chain development and 2. The investment initiative in the company.

In this case the investment requirements of the companies outlined in Scenario 2 need to be complemented by the project costs mentioned under Scenario 1.

## **4.2. Cattle / Beef sector**

### SCENARIO 4. Chain development *without* investment

Under this scenario, SME sets up a project that works on meat quality care.

#### **Objectives:**

1. Improving food safety
2. Exploring possibilities for quality meat chains, with integrated quality care system
3. Improving market access for the actors involved

#### **Partner choice:**

This scenario is complicated by the fact that well structured export businesses that have an incentive to work on these issues are not allowed to serve the local market.

Entry points could be the Butchers Association, or individual high-end butchers such as Abafani Meat (Sammy), or the butchery departments in the supermarket chains. From this point SME could work its way downward.

If SME can get access to the new project on the AA Abattoir, this would be a significant leverage point.

Again, fundraising can be considered when clear project scope and objectives have been identified.

#### **Timeline:**

Depends on the scope of the project. A small pilot project can be created first, then scaled up.

#### **Budget:**

Pilot can be done for around 15.000 euros (including 1 visit to Ethiopia and a series of stakeholder visits).

### Scenario 5. Chain development *with* investment

Investment in one of the companies currently working on meat processing (Holland Meat, Abafani Butcheries), or new ones that have to be identified, can be considered.

*Objectives, partner choice, timelines and budget for this scenario have to be further developed.*

#### SCENARIO 6. Expert advise to local and export abattoirs, including laboratory services

Under this scenario, SME is making use of its technical expertise on meat quality care systems and meat processing. This scenario can take 2 forms: 1. Commercial and 2. Non-commercial. In the commercial scenario, SME establishes or invests in a laboratory facility that can serve the industry, possibly with ambulant or decentralized staff located on the site of the abattoirs / processors. This requires a further market study, and SME will be subject to basic rules of investing in Ethiopia (license, 150.000 US \$ minimum, etc.). The timeline will be not less than 1 to 1,5 years since this is a highly specialized sector. It needs to be checked if in fact this sector is open to foreign investment.

In the second sub scenario, SME seeks to make similar services available, but in a non-profit way. Main entry points are the Government ministries such as MoLF but also the Ministry of Health, and most likely EMDIDI which is charged with further developing this type of services. Large donor projects such as LMD or its successor may also be an entry point, as they are always in search of good international expertise.

When focusing this service on 1 particular company, the PUM method can be used; this implies that SME establishes a partnership with PUM in NL and in Ethiopia and searches for a matching beneficiary through PUM's system.

*Timelines and budget depend on choice of sub scenario and desired scope; this needs further work to define.*

#### **4.3. Role of F&S Ethiopia / AgriBusiness Booster Ethiopia**

In all scenarios described above, F&S can play the following roles:

1. Representative of SME in Ethiopia
2. Conceptual support on further development of the scenarios
3. Facilitation of project set-up: identification of partners, identification of forms this project can take in accordance with Ethiopian law
4. Advice on fundraising: identification of funding opportunities in its own networks in NL and Ethiopia
5. Logistic support during field visits
6. Budget management in Ethiopia

AgriBusiness Booster can play the following roles:

1. Completing company scans and developing the business plans of the investees through business development trajectories (this is currently ongoing and already funded)
2. Setting up the investment deals

3. Co-investing in the companies
4. Representing the consortium of investors as board members of the investee company

## 5. Subjects for further research

- 1. Network expansion and management:** Many of the organizations and contacts visited during the field mission have only been contacted once. If relations need to be built, this requires frequent follow up to keep people's attention. Also, there are several interesting leads that have not been followed up during the mission due to lack of time. When further developing the scenarios mentioned in chapter 4, this will be necessary in order not to miss anyone that could be of value to the initiative.
- 2. Further market research:** the size and scope of the RMA was insufficient to do in-depth market research. There is no reliable data on meat consumption, disaggregated by income segment, which would be very interesting for all those willing to invest in either sector.
- 3. Further mapping of investors in the sectors:** there are new projects and investors that are looking to invest in the poultry and cattle / beef sectors. These need to be approached and their willingness to co-invest with SME / support SME's objectives need to be identified. This task extends to the Netherlands, and perhaps also some of the other regular investors in Ethiopia: The USA, Germany, New Zealand (dairy), etc.

## 6. Annexes

### 6.1. Visit schedule

Final Version Visit schedule Foundation SME							
Day	Day	Date	Time	What	Where	Details	
1	Friday	May-26	02:40	Arrival and Airport Pickup	Addis Airport		
		May-26	13:00	Lunch	Azmera Shiro		
		May-26	14:00 - 16:00	Meeting at F&S office	Laphto Mall	Welcome and planning meeting	
		May-26	17:00	Sammy (Butcher)	EU area		
2	Saturday	May-27	10:00	Marc Steen LMD	Hilton Hotel	Local Market Development - USAID program	
			afternoon	Supermarkets and retailers: Bambis, Fantu, Shoa.	Addis		
3	Sunday	May-28		FREE DAY			
4	Monday	May-29	07:30	Departure to Debre Zeit	DZ		
			09:00	EMDIDI	DZ		
			12:00	Holland Meat	DZ		
			16:00	Alema Koudijs Feed factory, Harry Schimmel	DZ		
			evening	Dr. Wondwossen, Dr Woket, Gijs van 't Klooster	DZ		
5	Tuesday	May-30		Night in DZ			
			08:00	Abyssinia Export Abattoir	Modjo		
			11:00	Alfa Fodder Farm	DZ		
			14:00	ELERE farms (chicken) DZ (Fanta Terefe EPPA)	DZ		
			17:00	BORA Farm (chicken)	DZ		
			18:00	Travel back to Addis			
6	Wednesday	May-31	09:00	Ethiopian Butchery Association	Addis		
			11:00	EMPEA	Addis, Bole	Ethiopian Meat Processors and Exporters Association	
			MISSED	14:00	Agricultural Transformation Agency	Addis, Meskel Flower	Dr Yoseph Mekasha 0913112203. Has worked for ILRI project in SNNP state on cattle fattening
			16:30	Mrs Tsigereda Poultry Director MoFL	Addis, Meganagna	Ministry of Fishery and Livestock	
7	Thursday	Jun-01	09:00	Addis Abeba Abattoir	Addis, Kera	With Samson	
			11:00	Tadesse Asefa SNV	Addis, Tracon Tower	GRAD program officer livestock	
			13:00	Stijn van Geel, Solidaridad	Addis, Kazanchis	Country Director	
			Afternoon	Meeting with Melaku, Assefash	Addis, Blue Nest		
			17:00	Second visit AA Abattoir	Addis, Kera		
8	Friday	Jun-02	08:30	Meeting at F&S office		Preparation Final Meeting	

			10:00	Dreamliner Hotel, Rediat Mengistu	Addis, Meskel Flower	
			11:00	Efrem Bora at Dreamliner		
			13:00	Ingrid van Ginkel, Sales Manager	Addis, Bambis station	
			Afternoon	Free time		
9	Saturday	Jun-03	09:10	Arrival Arnoud and airport pick up by hotel	Addis Airport	
			11:00	Departire Sululta		
			Afternoon	Visit apple seedling / dairy farmer in Sululta	Sululta	
10	Sunday	Jun-04		FREE DAY; meeting for preparation of final meeting	Addis, Blue Nest	
11	Monday	Jun-05	09:00 - 12:30	Final meeting	F&S Office	
		Jun-05	14:00 - 16:00	Meetings ELERE, BORA	F&S Office	Detailed planning and business plan discussion
			16:00 - 18:00	Evaluation meeting	F&S Office	
12	Tuesday	Jun-06	03:45	Return flight (night)	Addis Airport	

## 6.2. List of interviewees

Contact List Ethiopia					
	Name	Function	Organisation	Email	Telephone Number
1	Ingrid van Ginkel	Sales Manager	Verde Beef	<a href="mailto:ingrid@camdenbeef.com">ingrid@camdenbeef.com</a>	+251929905761
2	Rediat Mengistu	Sales and Marketing Manager	Dreamliner Hotel	<a href="mailto:marketingmanager@dreamlinerhotel.com">marketingmanager@dreamlinerhotel.com</a>	+251938002288
3	Harry Schimmel	Manager Operations & Sales	Alema Koudijs Feed Plc.	<a href="mailto:hschimmel@deheus.com">hschimmel@deheus.com</a>	+251942167468
4	Worku Behonegne	Country Director	SNV	<a href="mailto:wbehonegne@snvworld.org">wbehonegne@snvworld.org</a>	+251926718744
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