



African Pastoral Markets Development (APMD) Platform: Overview & Engagement of Kenya

29 January 2024

An Integrated, Prosperous
and Peaceful Africa



Introducing the African Pastoral Market Development Platform

Pastoralists are critical for inclusive agricultural transformation in Africa but are neglected and face several challenges

There is an opportunity to drive meaningful progress in the pastoral sector by emphasizing **market-focused interventions**, strengthening the **enabling environment**, and coordinating across investments, initiatives, and incentives through:

The African Pastoral Markets Development (APMD) Platform



Economic & Environmental Challenges

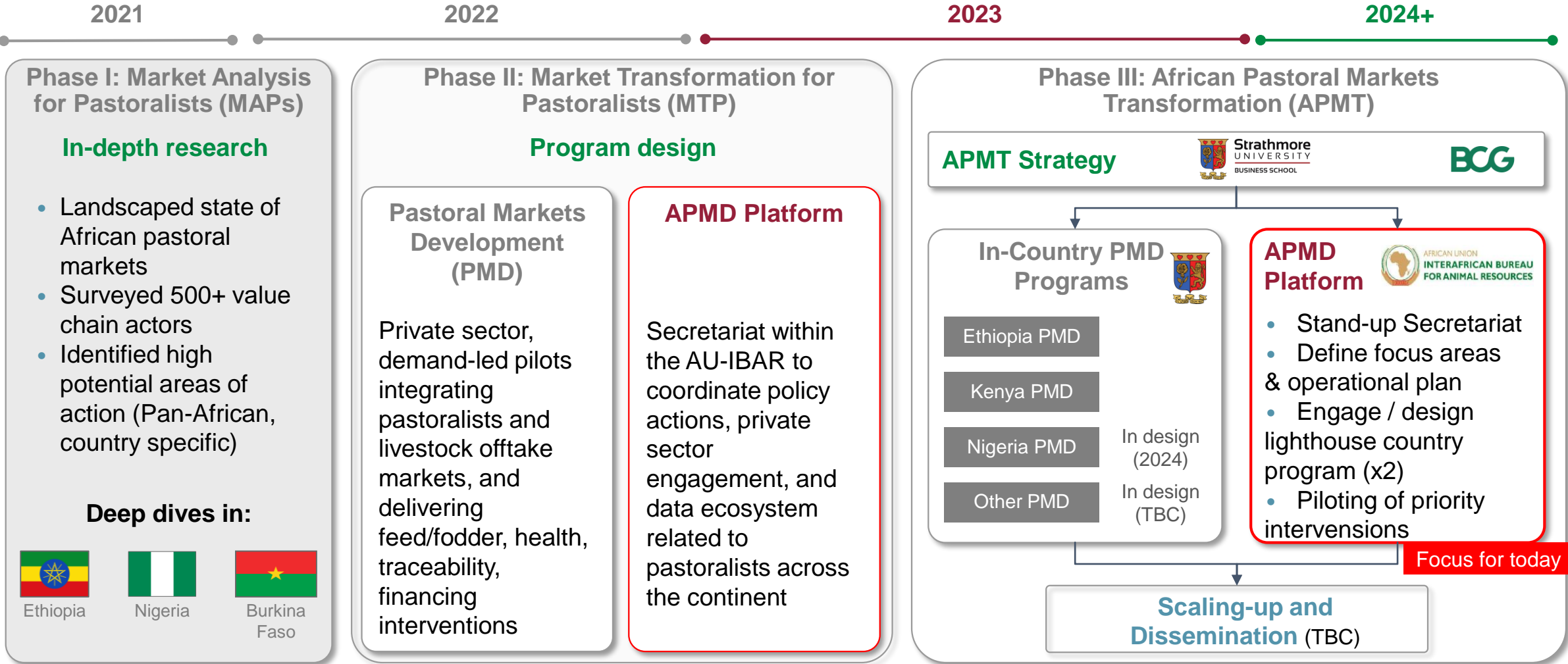
- Informal livestock trade in greater Horn of Africa was **~USD 1 billion in 2010** – often **undervalued**, and **neglected for investments**
- Droughts, political shocks have **reduced rangeland** and **water access** and have led to **significant productivity losses**
- Pastoral frameworks and national adaptation plans have **not sufficiently addressed pastoral-specific challenges** or **identified impact pathways**



Limited Progress & Missed Opportunities

- Pastoralists account for **2 – 7% of national GDP** and contribute **60 - 80% of meat** across Africa (**up to 50% of meat exports** in many geographies)
- **Demand** for meat and milk in SSA expected to increase by more than **250% by 2050**
- Pastoralists provide **valuable climate-adaptive ecosystem services** on marginal lands, sequestering carbon, and managing water in ASAL regions
- Despite potential benefits, pastoral programs have focused on humanitarian activities instead of **integrating pastoralists with livestock markets**

APMD Platform is the outcome of three phases of work implemented by AU-IBAR, Strathmore Business School, and other key partners



APMD Platform is a pan-African initiative that seeks to support market-enabled, adaptive transformation for pastoralists



Thriving and resilient pastoral economies, fully integrated into livestock value chains, providing more affordable access to climate-adaptive, animal sourced products for more consumers and contributing to livestock sector growth, peace and security



Support improvement of quality, productivity, and consistency of pastoral livestock supply to meet growing demand for climate-adaptive, affordable animal-sourced foods, improve pastoralist livelihood, wellbeing and resilience, and grow sector GDP



To promote and coordinate the implementation of priority actions for strengthening pastoral private sector integration into livestock-markets across Africa, with support of enabling policy environment and functional data actions.

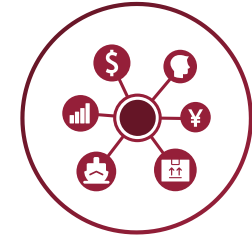
APMD Platform will ensure focus and impact by prioritizing **THREE** sector Focus Areas and **THREE** Cross-Cutting Lenses



Improve **feed security** with a focus on innovative, market-oriented mechanisms and enabling policies and data ecosystem to promote inclusive land use and governance



Facilitate **Formal Market Integration**, increase value addition/capture, and promote **investments** in pastoral livestock sector



Remove **trade barriers**, promote **harmonization** and improve **regional and international livestock trade**

Improve **economic power of women and youth** in pastoral communities

Improve **availability, access, and affordability of nutritious, quality food** in pastoral communities

Improve **climate resilience and adaptation** in pastoral communities and ASAL regions

APMD-Platform Structure

APMD Platform will work with Member States and other sector stakeholders to provide relevant support

Center (Pan-African)

Geo-Specific

1

Secretariat



AFRICAN UNION
**INTERAFRICAN BUREAU
FOR ANIMAL RESOURCES**

2



Policy Strengthening & Strategic Implementation


Private Sector Strengthening

Functional Data Ecosystems & Diffusion


3

Lighthouse Countries

Proposed lighthouses (TBC)



Kenya



Nigeria

Implementing Actors

Platform Coordinator & Partnership Forum

Coordinating Platform activities at the Pan-African level

Pillar Leads & Pillar Working Groups

Sector and topic experts coordinating Platform activities within and across pillars

Country Focal Points

Coordinating high-priority Platform activities at the national and sub-national level
(with government support)

3

Lighthouse Countries

What are Lighthouse Countries?

Countries with **significant pastoral and pastoral livestock populations**, livestock sector **growth potential**, **level of interest and momentum** for sector development, and **high potential for impact**

How were LH countries identified?

32 Sub-Saharan African countries with pastoralists were evaluated against a series of key criteria; **2 potential lighthouses and 8 strategic outreach countries** were identified based on the initial evaluation



Initial set of countries evaluated



Proposed Lighthouse Geographies

Today's Focus



Kenya



Nigeria



Ethiopia



Somalia



Burkina Faso



Cameroon



Tanzania



Namibia



Chad



Senegal

East and Southern Africa

West and Central Africa

Potential Strategic Outreach Countries

How can Platform support LH countries?

- **Working closely with government** and key stakeholders to **identify high-priority support areas**, supporting development of **actionable roadmaps**, and **coordinating implementation** of national and/or sub-national programs / proven-successful interventions to demonstrate impact
- Demonstrating **initial impact** and disseminating **lessons** to **attract further investments** into, promote growth of pastoral sector; **advance regional, Pan-Africa pastoral sector agenda** (e.g., case studies on sector success stories, learnings from prior programming, etc.)

Kenya as a Potential Lighthouse

Supporting pastoralists is critical for strengthening Kenya's livestock sector, impacting both domestic and export opportunities ...



8.8M pastoralists¹

Inhabiting 13 arid and semi-arid counties, mostly reliant on ~3 months of rainfall

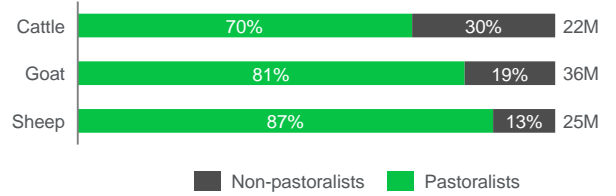
13% Contribution to National GDP⁶

\$834M Value of Pastoral Livestock²



● Counties with pastoral population
▲ Major terminal livestock markets³

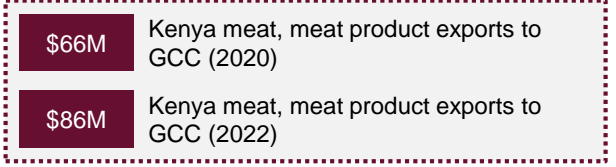
Manage ~80% (65M) of the national herd^{1,4} ...



Produce ~36% of domestic meat⁵ ...



Key exporters of goat, sheep meat to GCC



Immense untapped potential

Through livestock exports (to GCC and beyond) as well as domestic markets



- \$6-9B** Projected annual market for domestic red meat by 2030^{7,8}
- \$300M+** Potential opportunity for addressing domestic beef deficit⁸
- \$100M+** Potential opportunity for the GCC/ME to invest in Kenyan pastoralism
- 3x+ (Up to \$1k)** Potential increase in pastoral HH income from market integration*
- Up to 30%** Decrease in livestock-related GHG emissions intensity*
- Up to 40%** Participation of female pastoralists, greater economic power*

1. [Accounting for Pastoralists in Kenya](#) (2020) 2. CELEP. (2017). Recognizing the Role and Value of Pastoralism and Pastoralists. The Coalition of European Lobbies for Eastern African Pastoralism, Policy Brief. 3. [Major Livestock Marketing Routes](#) (2016) 4. [National Information Platform for Food Security and Nutrition](#) (2020) 5. [Policies and Strategies to Address the Vulnerability of Pastoralists in Sub-Saharan Africa](#) (2006) 6. [The value of pastoralism in Kenya](#) (2019) 7. FAO. (2017). Africa Sustainable Livestock 2050 - Country Brief: Kenya. FAO, Rome 8. Gatsby Africa, Investment Opportunity for Kenya Meat Sector (based on FAOSTAT data). * Initial estimates, to be validated based on specific interventions

... but Kenyan pastoralists face several barriers that prevent realization of this untapped potential

Climate Change

- 2050 projections suggest **temperature rise of 2.5°C** while **rainfall becomes more intense, less predictable**
- **2.5M livestock in Kenya died** due to recent drought in 2022, causing **economic losses of more than \$1.5B¹**
- Poor livestock conditions led to distressed sales, with **prices falling 98% (30k KES to 500 KES per head)**
- **High mortality rates** (estimated at 50% from birth to sale) due to **drought, endemic and epidemic diseases**

Market Integration

- Livestock passes through **5-6 actors before final buyer**, pastoralists only receive **30-40% of value²**
- **82%** of pastoralists travel **25km+** to access **animal health input services³**
- Limited certifications to access export markets leading to quality perception issues (e.g., landed price for Kenyan sheep/goat meat **~\$6 per kg (compared to \$10 for Australia)**)

Policy Challenges

- High degree of **informal livestock trade** (up to 90%) due to porous borders (e.g., via Somalia)²
- **Difficulty in coordination, priority setting** due to legislation by different levels of government²
- **High levels of cess** (up to 10% of total distribution costs per animal)⁴
- **No price floors** for livestock (compared to Ethiopia, for instance)²

Lack of Data

- Last **livestock census was conducted in 2009**

Few Market Investments

- **\$1.2B+** invested in Kenya's pastoral sector since 1968⁵ but mostly in **humanitarian assistance**
- Few market investments, limited long-term impacts (e.g., failure of \$35M Moyale feedlot)

Looking Forward: APMD-Platform Implementation In Kenya

What can APMD Platform do?

To refine and support your priorities to strengthen pastoral markets in Kenya

*The **few potential activities** below have been developed based on initial consultations with Kenyan stakeholders, “look forward to **understanding your priorities** and working with you/your system to **support those through the APMD Platform**”*

Policy Strengthening & Strategic Implementation Activities

- Support adoption and implementation of key livestock and pastoral policy frameworks (e.g., PFPA, LiDESA, RMPS)
- Advocate for harmonization of trade regulations for pastoral sector among IGAD and ECOWAS
- Advocate for supporting mechanisms (inc. finance, insurance, marketing standards, channels, and services/providers)
- ... and more

Private Sector Strengthening Activities

- Facilitate collaboration among value chain actors through sector coordination activities
- Promote investment by linking pastoral production to livestock value chain
- Facilitate pastoralist capacity building and market education by development awareness materials, training curriculums, and learning modules
- ... and more

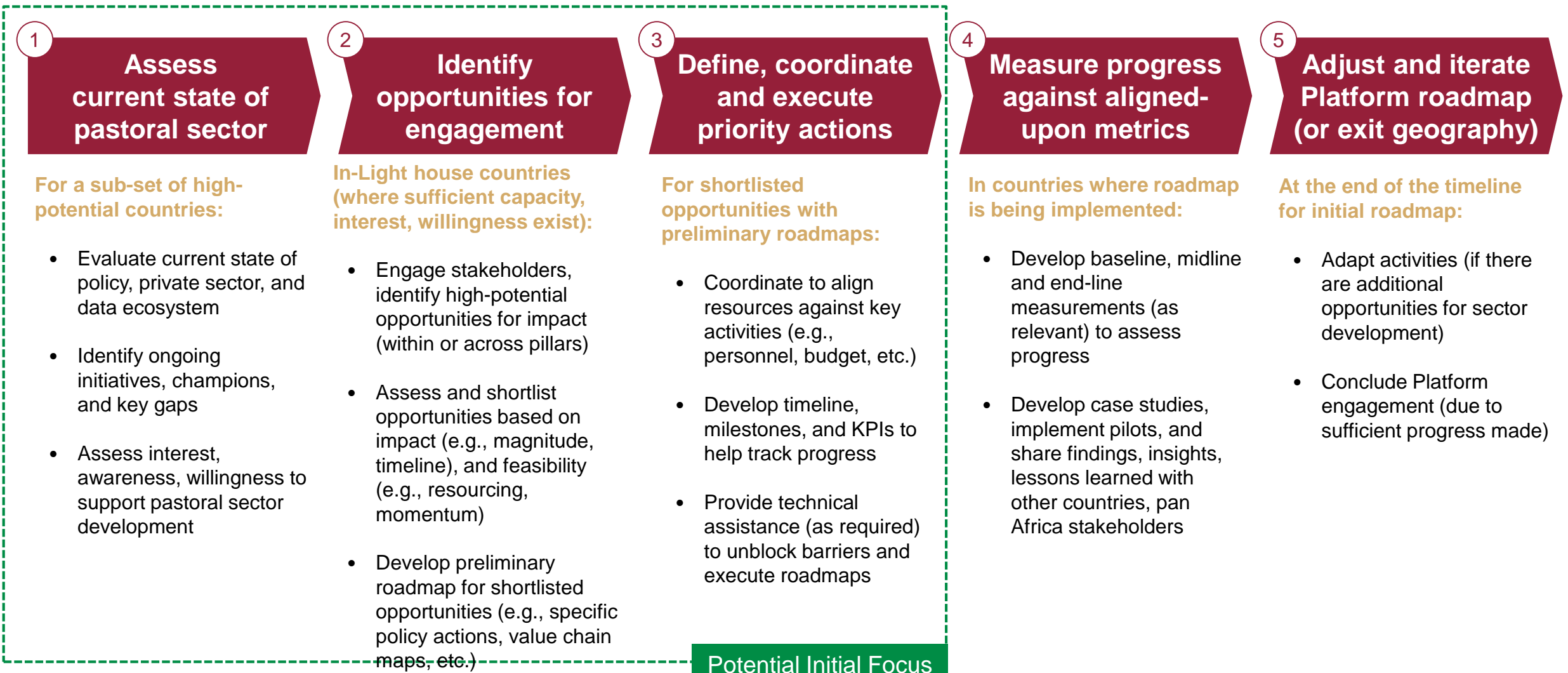
Functional Data Ecosystems & Diffusion Activities

- Build data management capacities among key national stakeholders
- Establish and sustain private sector knowledge sharing mechanism for the pastoral sector
- Promote and scale interventions to support livestock markets (e.g., LITS)
- ... and more



Country engagement plan in the APMD-Platform Actions

Engagement plan includes assessing, identifying, defining, and coordinating actions to enable pastoral sector development

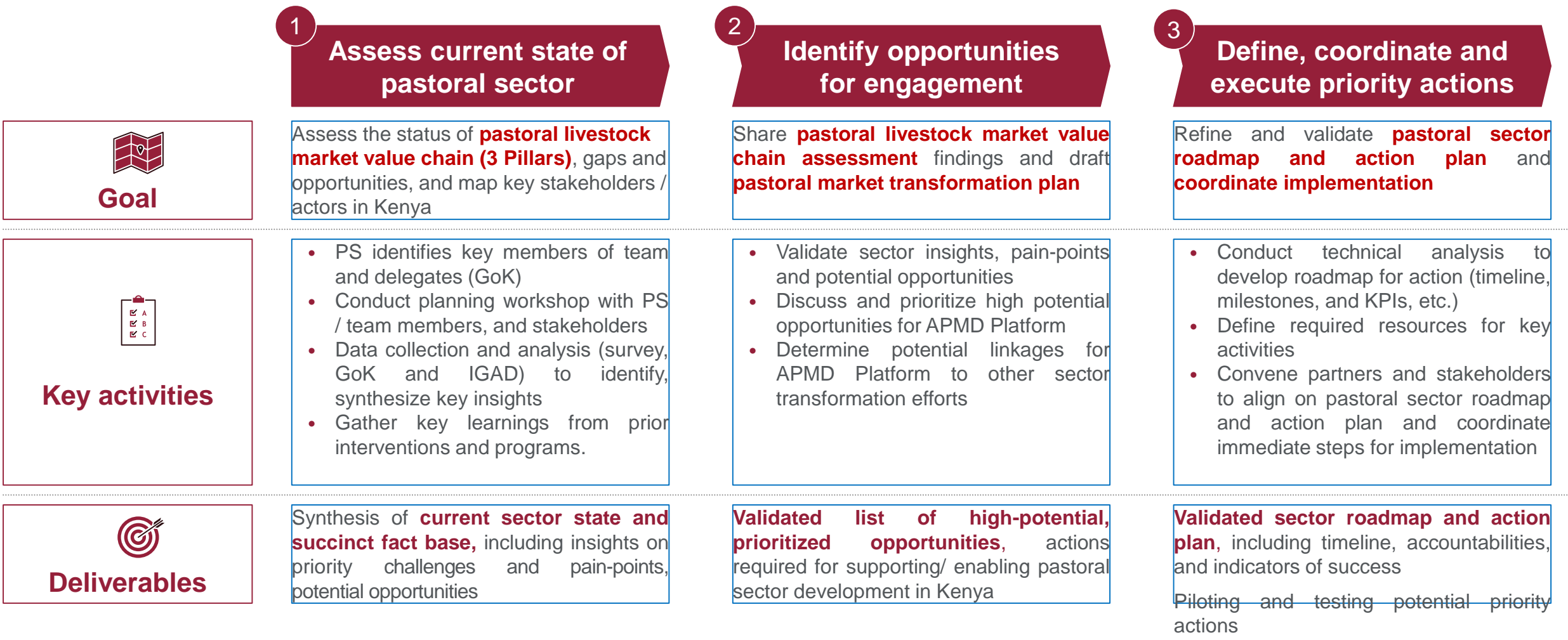


Potential Initial Focus in Kenya

How can the APMD-Platform do that in Kenya, within the scope of the RMPA?

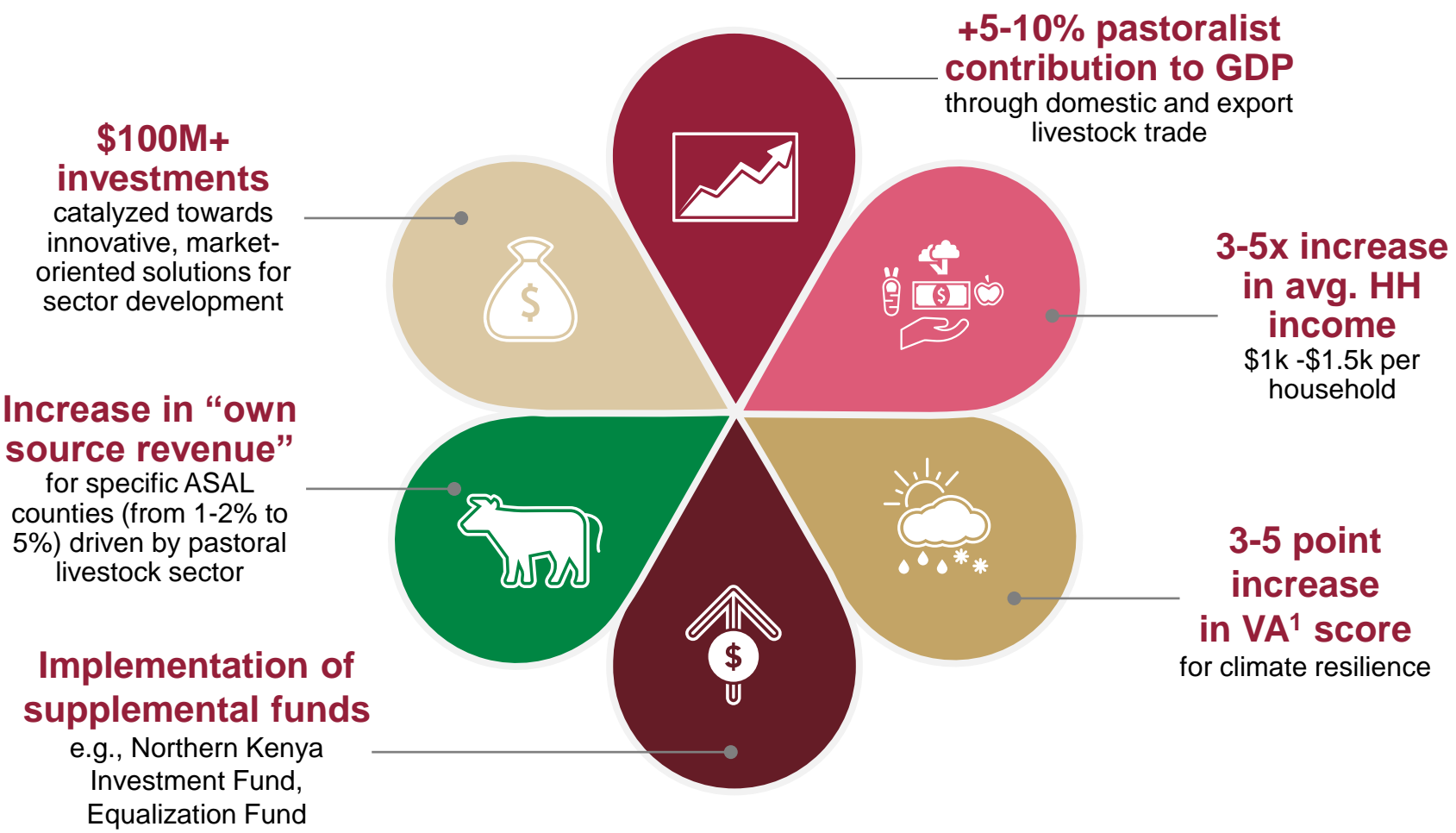
APMD-Platform can collaborate with the GoK to accelerate the development and implementation of a Country Pastoral Sector Transformation Strategy/ Action Plan, focusing on the **THREE Pillars**.

Potential Engagement Model



What could success look like?
Some illustrative impact Indicators / Metrics

Platform will work closely with GoK to identify the indicators/metrics that are most critical for assessment and M&E.




1. Vulnerability assessment




The **DRIVE project**: a regional initiative aimed at enhancing access to financial services to livestock farmers for drought risk mitigation, including them in the value chain, facilitating livestock traders in the Horn of Africa, and ensuring inclusion of marginalized and vulnerable groups such as women in the sector. The project is expected to benefit over **250,000 households** representing **1.6 million pastoralists** and their dependents across Kenya, Ethiopia, Somalia, and Djibouti over a five-year period


REPUBLIC OF KENYA



MINISTRY OF AGRICULTURE, LIVESTOCK, FISHERIES
AND COOPERATIVES



**RANGE MANAGEMENT AND
PASTORALISM STRATEGY**
2021 – 2031



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Project introduction

Drylands cover 40 % of the global land area, host 2 billion people, and support approximately 50% of the world's livestock population. In the drylands of East Africa, pastoral and agropastoral livelihoods are prominent.

In Drylands Transform we will investigate the links between land health, livestock-based livelihoods, human well-being, and land management and governance. We will contribute with new knowledge for transformative change and sustainable development of rangelands in the border region between Kenya and Uganda.

Through strong stakeholder engagement in interdisciplinary research, we set out to explore the challenges and pathways towards a social-ecological transformation in drylands that optimizes synergies among the sustainable development goals (SDGs) while minimizing the trade-offs.

How Kenya see the Potential Implications of the APMD-Platform on the Pastoral Livestock Sector: Perspectives and integration with tools and initiatives



Thank you



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