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The U.S. Government's Global Hunger & Food Security Initiative

AGRILINKS



SPS Priorities for Sub-Saharan Africa: Opportunities for Expanding Regional Trade and Improving Food-Safety Systems

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Regional Trade Opportunities



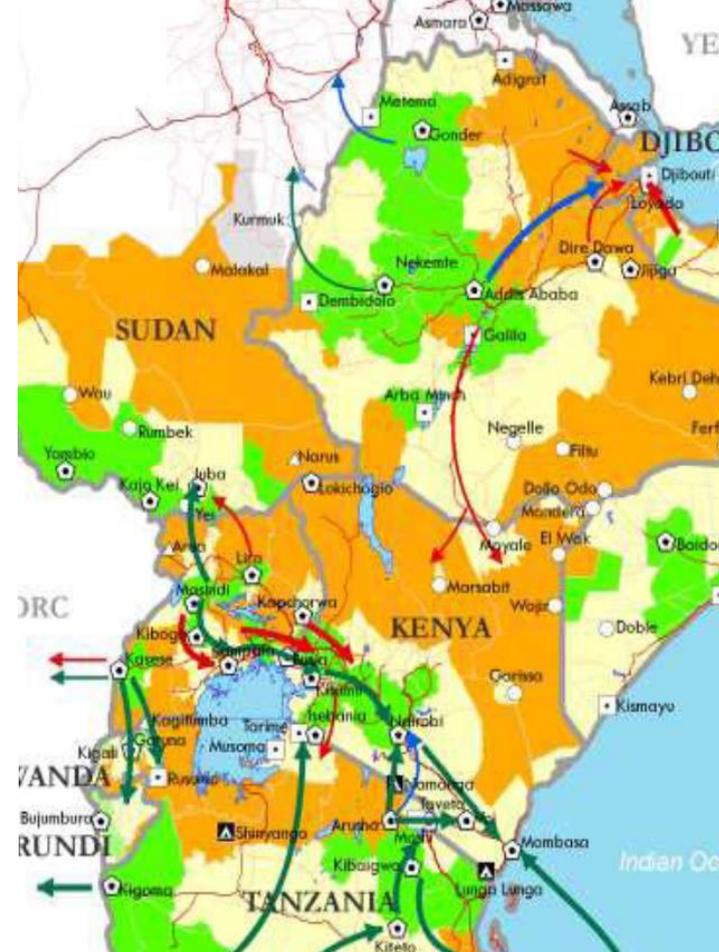


MAIZE

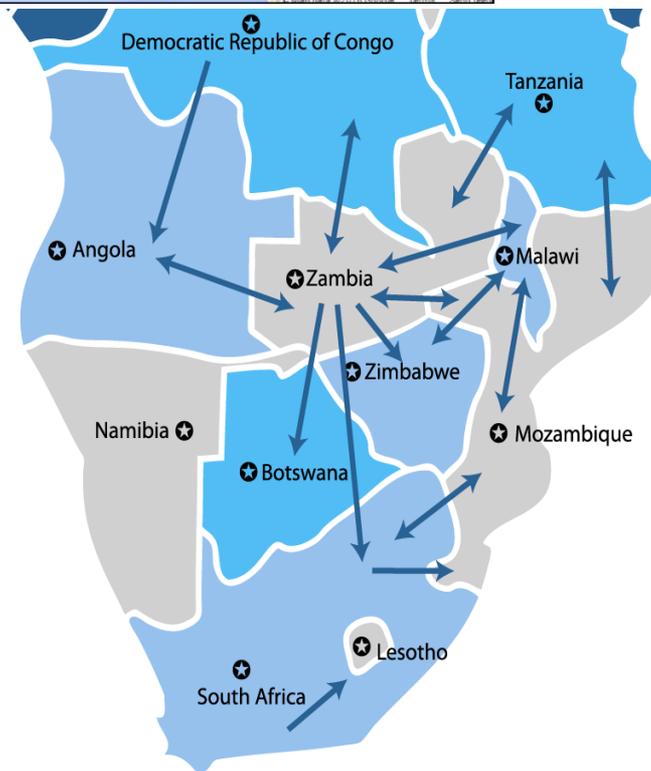
- Long-established trade is a springboard for more: Deficits → self-sufficiency → exports
 - Tanzania, Uganda, Zambia and South Africa have export potential
- The increased production needed will:
 - Increase food security
 - Focus greater attention on SPS issues
 - ✓ Which at present are not a priority
 - Boost poultry, red meat and dairy production

...but requires a consistently positive business environment.





**REGIONAL
TRADE
OPPORTUNITIES:
MAIZE**



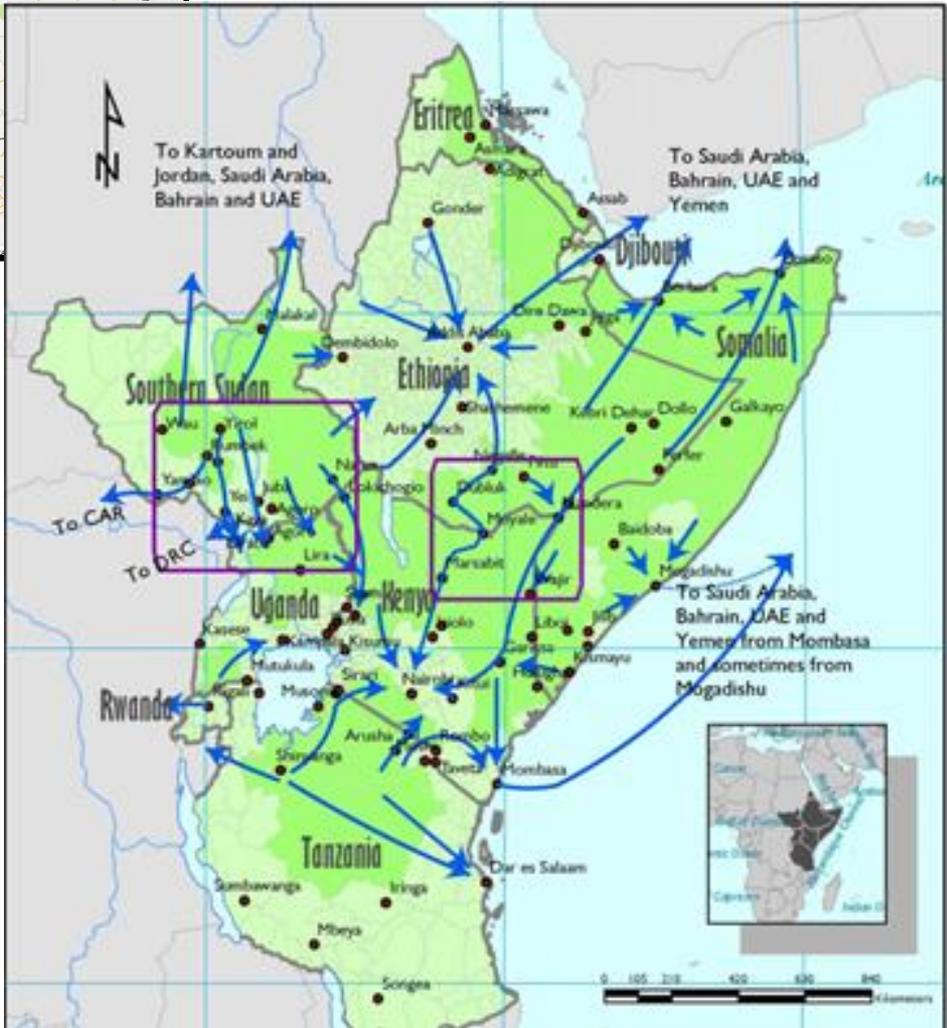
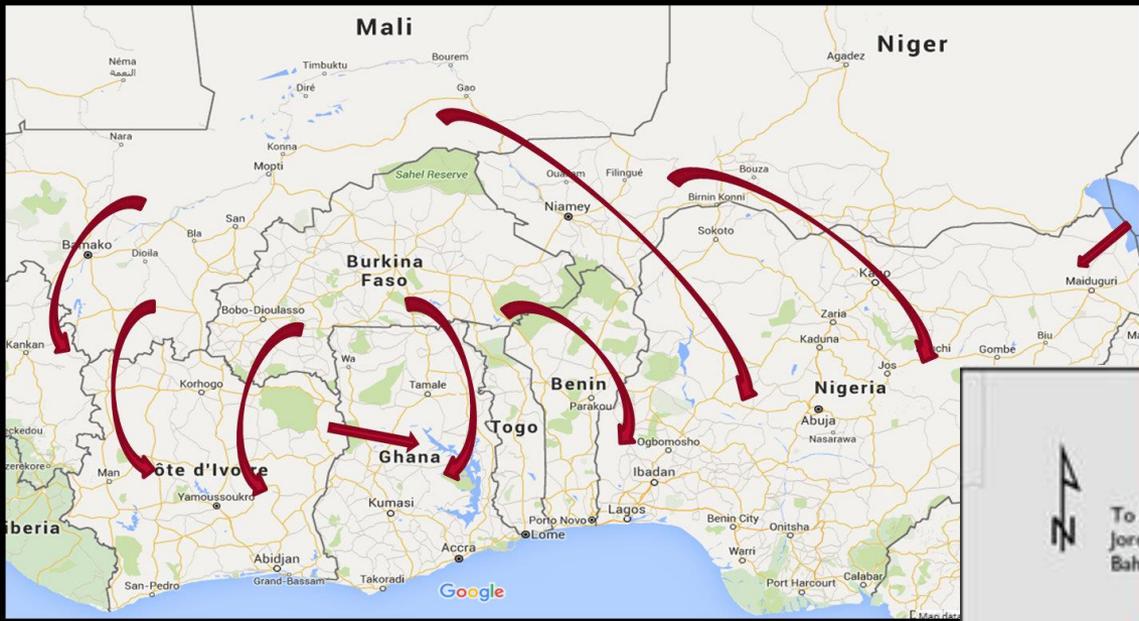


RUMINANTS



- West Africa: Red-meat market-segmentation potential
 - Live animals and meat (coastal capital cities)
 - Beyond West Africa (Central & Northern Africa & Middle East)
- East Africa: Export potential supplements local demand
 - Live animals (Sudan, Ethiopia, Somalia)
 - Meat cuts & processed meats (Kenya, Ethiopia)





REGIONAL TRADE OPPORTUNITIES: RUMINANTS

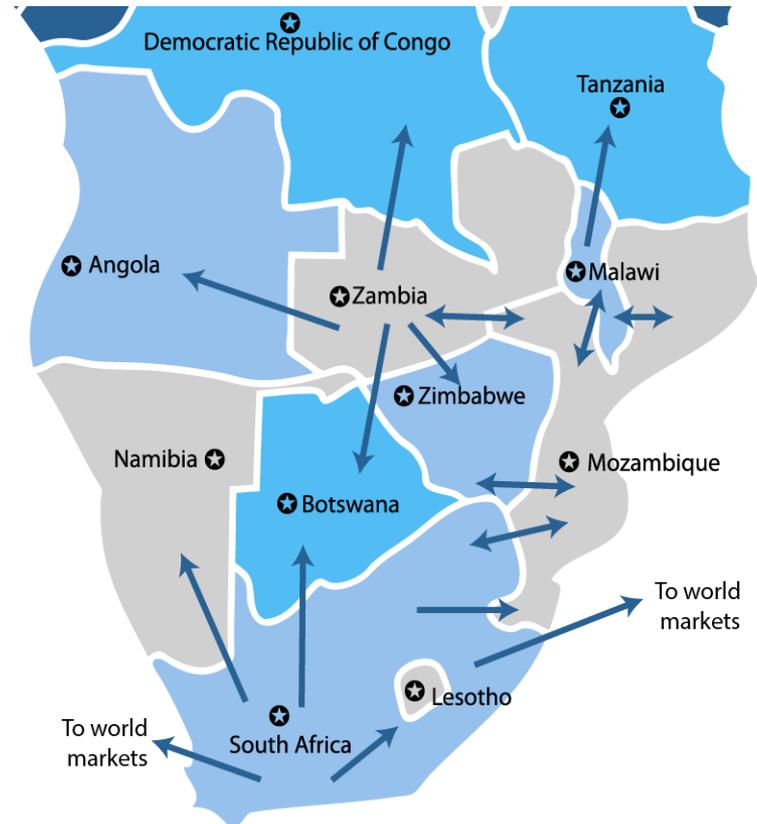


GROUNDNUTS IN SOUTHERN AFRICA

- Cross-border trade thrives
- ...but formal trade and trade in value-added products (peanut butter & groundnut seeds) are limited.



Trade flows of groundnuts





POULTRY IN WEST AFRICA

- Poultry self-sufficiency possible, but dependent on:
 - Ample low-cost maize (for poultry farms)
 - Veterinary services (for free-range production)

SOY IN SOUTHERN AFRICA

- Regional trade in beans and meal is small but promising, with increasing urbanization and rising demand for meats
- Most beans are consumed by domestic consumers
- No identifiable trade-related SPS issues



SPS Systems and Regional Trade Constraints





SPS SYSTEMS

- Governments setting SPS regulations, individually or collectively.
- SPS agencies have uneven capacity and lack coordination
- Governments selectively enforce existing regulations.
- Southern & East Africa lack regional regulations, but there is a common regional standard for aflatoxin.
- Food safety crises often trigger systemic reforms.
- The formal private sector drives most SPS advances and should be more involved in the SPS agenda.

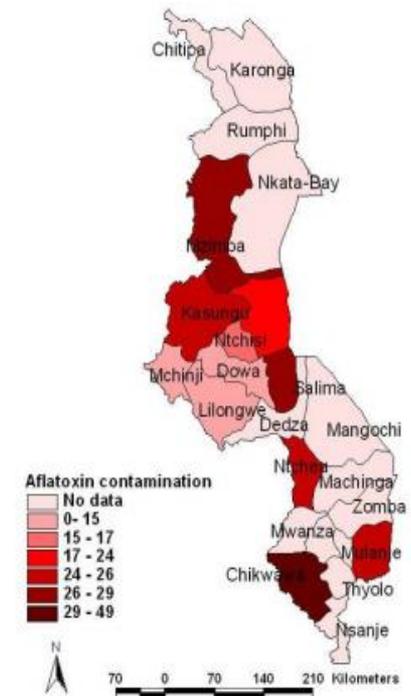


MYCOTOXINS

- Impacts: Cancer & stunting and avian mortality and morbidity
- Most consumers are unaware of aflatoxin risks
- Testing capacity is limited.
- Lack of policy and enforcement for contamination
- Few African buyers require proof that levels are low
- Aflatoxin in groundnuts constrains extra-African exports



Figure 14: Incidence and Degree of Severity of Aflatoxin Contamination in Malawian Groundnuts



Source: ICRISAT (2010). Scale measures parts per billion.



MAIZE LETHAL NECROSIS (MLN)

- MLN can kill 50-90% of the affected maize crop
- Countries are at different levels of preparedness for MLN
- Organizing national SPS systems to respond to MLN in advance could greatly limit damage to national economies



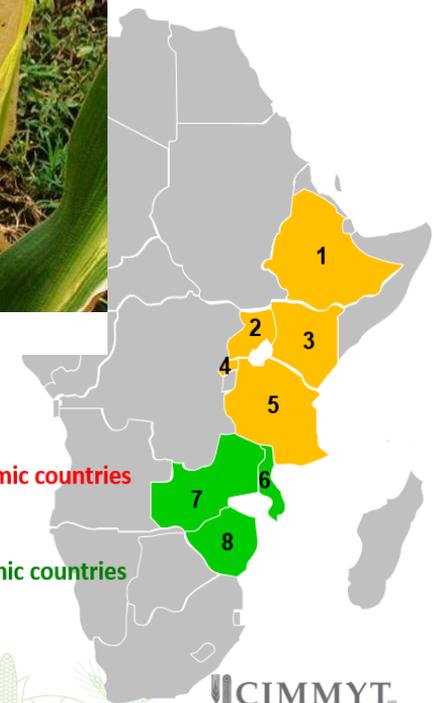
Source: www.monitor.co.ug

Target countries

1. Ethiopia
2. Uganda
3. Kenya
4. Rwanda
5. Tanzania
6. Malawi
7. Zambia
8. Zimbabwe

MLN-endemic countries

Non-endemic countries





WEST AFRICA'S MAIZE-SEED CONSTRAINT

- Low region-wide maize productivity:
 - Drives up poultry prices
 - Decreases food security & diminishes SPS concerns
- The maize seed market is segmented & protected
 - Governments unable to get national breeders' seed to commercial multipliers
 - Lack of regionally harmonized certification limiting regional trade of improved seed
 - Bias against improved seed from multinationals





LIVESTOCK SPS CONSTRAINTS

- Ruminant & poultry value-chains are almost totally informal
 - Traders bridle at measures seen as more costly or longer, unless there is a clearly larger benefit.
- Animal health is poor:
 - Low vaccination rates mean poor herd/flock health
 - Vet medicines can be adulterated or expensive
 - Remote & insecure areas have thin veterinary cover
 - Laboratories are ill-equipped and poorly linked to front-line services
- Poor abattoir hygiene without reinvestment:
 - Public-sector management & traditional butchers





LIVESTOCK & POULTRY SPS CONSTRAINTS

- Public-sector failings in trade regulation
 - Costs/delays of corruption
 - Disregard for sanitary regulations
 - Poor infrastructure/little equipment
- Upmarket sales to African and extra-African supermarkets are limited because buyers cannot assess health risks
- Poultry: avian flu (West African outbreaks: 2006 & 2015):
 - Livestock Service tests and destroys diseased flocks
 - Informal traders continue to import some birds across porous borders despite bans





Investment Opportunities





SPS SYSTEMS INVESTMENTS

- Encourage regional public-private fora to upgrade SPS compliance
- Detailed national SPS action plans coordinating national plans with regional priorities
- Blending of government monitoring & regulatory SPS activities with private-sector supply of paid-for solutions in expanding markets
- Surveillance & risk modeling to generate early warning indicators for mycotoxins and MLN
- Promotion of awareness to drive market incentives to address specific SPS issues
- Improved risk monitoring of livestock disease to reduce import bans imposed by extra-African countries





MYCOTOXIN INVESTMENTS

- Support aflatoxin risk-awareness campaigns
- Develop climatic models to predict high-vulnerability aflatoxin areas
- Encourage mitigation methods (*Aflasafe*, hermetic storage, proper drying, relevant clays in animal feed, dehulling)
- Test (using private-sector labs, where possible)
- Explore alternative uses of contaminated maize, and the systems needed to handle it
- Inform the public about aflatoxin risk to build support and identify “champions”
- Increase frequency of end-product testing (maize meal, peanut butter)





MAIZE LETHAL NECROSIS

- Assist national SPS committees to organize to combat MLN:
 - A study tour followed by development and implementation of national and regional strategies
 - Surveillance, field-testing capability, outreach to farmers
 - Development of a national MLN plan
- Demonstrate to the private sector why it needs to help co-finance greater MLN testing





WEST AFRICA: MAIZE INVESTMENTS

- Develop private commercial seed markets
 - Nationally: conditional licensing of multiplication and distribution rights of public-domain seed to firms
 - Regionally: harmonizing national seed policies





LIVESTOCK INVESTMENTS

- Re-establish para-vet system, with supervision of licensed veterinarians, public &/or private
- Facilitate private abattoirs targeting high-end markets
- Shorten the regional red-meat VC between producer & abattoir





TOP TAKE-AWAYS

2

Detailed national SPS action plans

Coordination with regional priorities; full use of private-sector services; awareness raising; risk modelling and monitoring.

5

Maize in West Africa

Development of private commercial maize-seed markets through licensing of multiplication and distribution rights of public-domain seed & regional harmonization of national seed policies.

3

Mycotoxins

Risk-awareness campaigns; climatic modelling; mitigation methods; testing for presence in soil, crops, poultry; consumer ready foods, uses of contaminated crops.

6

West African livestock

Better animal health and improved abattoir hygiene; firms targeting up-market clientele; traceability systems; irrigated fodder crops; integrated feed markets; exotic-indigenous cross-breeds.

1

Private sector

The formal private sector demands strong SPS controls to safeguard its brand and thus its profits. Include it in setting priorities.

4

Maize lethal necrosis

Development of a national MLN plan; awareness campaigns; identifying 'champions'; showing the private sector its self-interest in co-financing testing.

7

Integrate regional commitments into national policymaking





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Questions and Answers



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