



UNITED NATIONS  
INDUSTRIAL DEVELOPMENT ORGANIZATION



Programme for Country Partnership  
Ethiopia



## LIVESTOCK SECTOR DEVELOPMENT EXPERT GROUP MEETING REPORT

UPGRADING THE LIVESTOCK VALUE CHAIN  
PROGRAMME FOR ETHIOPIA





UNITED NATIONS  
INDUSTRIAL DEVELOPMENT ORGANIZATION

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## ACKNOWLEDGEMENTS

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# 1. EXECUTIVE SUMMARY

Ethiopia is home to the world's fifth largest herd of cattle, amounting to 56.7 million in 2014. Yet, the Ethiopian livestock sector accounts for only 0.75% of global exports of meat products (mainly comprised of goat and sheep meat). The development of the livestock sector has immense potential for socioeconomic development in Ethiopia but there are several constraints that hinder the sector's growth and export potential. The absence of systematized breeding, reduced fodder/feed availability and limited access to animal health services are undermining the production of meat and meat products.

In response to these challenges, UNIDO, together with the Government of Ethiopia and the Government of China, developed a large-scale programme entitled the "Upgrading Livestock Value Chain Programme (ULVCP)" to be rolled-out phase by phase. The ULVCP will be implemented within the framework of UNIDO's Programme for Country Partnership for Ethiopia (PCP-ETH). In line with the Government of Ethiopia's Growth and Transformation Plan II (GTP II, 2015-2020), the programme aims to reduce poverty in Ethiopia by improving the performance of selected livestock value chains – red meat, dairy and hides/leather.

Within the framework of the ULVCP, UNIDO commissioned a group of senior experts from China's General Administration of Quality Supervision, Inspection and Quarantine of China (AQSIQ) to undertake a 9-day mission to Ethiopia to facilitate the design and implementation of the programme (see Aide-Memoire in Annex 1).

The mission comprised five specialists in the area of quarantine, safety, inspection and food quality who undertook an intensive visit to key institutions in Ethiopia from 18 to 27 April 2017 (see the expert group meeting programme in Annex 3). The expert group was accompanied by two staff from UNIDO Vienna Headquarters, UNIDO's national livestock expert in Ethiopia and one senior expert from the Ministry of Livestock and Fisheries (MoLF) of Ethiopia (see list of participants in Annex 2).

The main institutions included in the visit comprised: the UNIDO regional office in Ethiopia; MoLF, including various directorates, centres and laboratories accountable to the Ministry; the Ministry of Industry and its subsidiary institutions; and a university farm targeted for teaching and research. Several private institutions, mainly companies engaged in the export of meat and meat by-products, were also visited. In total 19 public and 5 private institutions were covered by the mission: 2 federal ministries, 9 institutions/agencies, 9 directorates/laboratories/ quarantine stations, and 1 university farm.

At each site, relevant background information on the institutions was provided by the respective authority, either through oral briefings or formal presentations, which was followed by a site visit and feedback as necessary. At the end of the mission, the AQSIQ delegation provided their preliminary feedback during a debriefing session held at the MoLF on 26 April 2017.

This objective of this report is to provide a comprehensive description of the AQSIQ visit and present highlights of the feedback received from the mission.

## 2. HIGHLIGHTS OF THE EXPERT GROUP MEETING AND VISIT

### 2.1. UNIDO Regional office in Ethiopia (18 April, 2017)

At the UNIDO regional office in Ethiopia, the AQSIQ group of experts was welcomed by Dr. Fasil Reda, Programme for Country Partnership coordinator in Ethiopia, on behalf of the Representative and Director of UNIDO's regional office. A detailed presentation introducing PCP Ethiopia, its key components and activities, including the implementation progress made so far, was given by Dr. Fasil. The presentation also captured Ethiopia's perspectives towards industrialization, with a particular emphasis on agricultural and livestock productivity enhancement and commercialization, as a means to advance the country's vision of becoming a middle-income country by 2025.



*AQSIQ mission team leader at briefing on implementation progress of PCP Ethiopia.*

The development of integrated agro-industrial parks (IAIPs) and associated rural transformation centres will serve as a central vehicle supporting Ethiopia's industrialization efforts. Dr. Fasil highlighted that, in the first phase, the country is developing four pilot IAIPs. Ground breaking ceremonies marking the beginning of the construction phase were recently held for the parks in Bure (Amhara Regional State), Humera (Tigray Regional State) and Yirgalem (Southern Nation, Nationalities and People's Regional state) IAIPs. These large-scale projects will serve as a vehicle for advancing the country's economic vision and goals of the GTP II. UNIDO is working with the Government of Ethiopia (GoE) and partners to mobilize funding and investment for the parks. The GoE has already allocated USD 300 million for the development of IAIP infrastructure.

Following Dr. Fasil's briefing, a presentation on the ULVCP was given by Mr. Seyoum Dadi, a national livestock expert. The presentation included an

introduction to the Ethiopian livestock sector, key components of the programme, including a project on upgrading the quality infrastructure and quality assurance systems of the livestock value chain, and progress made so far.

### 2.2. Ministry of Livestock and Fisheries (19 April, 2017)

The Minister of Livestock and Fisheries, Dr. Fekadu Beyene, officially opened the expert group meeting (EGM). He welcomed AQSIQ participants and voiced his appreciation for the initiative taken by UNIDO and Government of People's Republic of China to support the development of the livestock sector in Ethiopia. Additionally, he emphasized the huge potential of the sector for the economic development of the country which, however, is underutilized due to various constraints. Dr. Beyene highlighted that China provides a huge market opportunity for Ethiopia's livestock products. Lastly, the Minister stressed that the Government of Ethiopia, and in particular the MoLF and its subsidiary institutions and laboratories, is fully committed to support the design and implementation of the ULVCP.

Dr. Misrak Mekonnen, the State Minister of Ministry of Livestock and Fisheries, also welcomed the AQSIQ team and voiced her appreciation for the support of the People's Republic of China. She mentioned that the development path of Ethiopia resembles that of China and pointed to the similarity of culture between the two countries, particularly when it comes to work culture. Dr. Mekonnen highlighted that Ethiopia ranks first in Africa in terms of livestock population and tenth in the world in terms of cattle population. The livestock sector therefore has significant potential to contribute to the gross domestic product (GDP), although currently export of livestock products is limited to a few Middle Eastern countries. Ethiopia has a strong interest of entering the Asian market, especially China.

She also stated that in addition to the ULVCP developed by UNIDO, the Government of Ethiopia is negotiating a USD 150 million soft loan from the World Bank to upgrade the livestock sector in the country. Moreover, Dr. Mekonnen said the Government of Ethiopia is planning to start a formal bilateral application process to facilitate the export of processed meat to China. In this regard, she asked the AQSIQ team about the application procedures for such a plan. Dr. Mekonnen also stressed the importance of pastoralist areas for supplying animals for the export market. Currently, 60% of livestock and livestock product export comes

from pastoralist areas of the country. The country exports both live animals and processed meat carcasses. To meet export requirements, animals targeted for the export market are collected from smallholder farmers, after a pre-screening of the physical condition – pre-certification inspection –, followed by animal quarantine before export or slaughter.

After the Ministers' intervention, a comprehensive presentation providing an overview of livestock production and its health situation was given by Dr. Thomas Cherinet. Dr. Cherinet highlighted the current status of the livestock and fishery sectors; overall set-up and service delivery of veterinary services, including commodity targets set by the Ministry to be achieved by the end GTP II (2020).

To facilitate this process, Ethiopia joined the World Organisation for Animal Health (OIE). He added that the largest livestock market for Ethiopia is currently the Middle East, although MoLF is working to expand market access to countries in Asia and Europe. Dr. Cherinet explained that the MoLF is organized under three State Ministries – a State Ministry for Animal Production and Feed, a State Ministry for Veterinary Services and Feed Quality Control, and a State Ministry for Livestock Trade. The State Ministry for Veterinary Services and Feed Quality Control has 6 directorates, 1 referral laboratory, 16 regional laboratories and a veterinary institute, among others.



*Group photo taken during meeting at the MoLF, 19 April 2017.*

A brief presentation on the mandates, major roles and responsibilities of the six veterinary directorates was given by the respective directors or representatives: (1) Epidemiology; (2) Disease Prevention and Control; (3) Quarantine, Inspection and Certification; (4) Livestock Identification, Traceability and Welfare; (5) Veterinary Public Health; and (6) Export Abattoirs and Certification.

The Epidemiology Directorate is one of six directorates under the State Ministry for Veterinary Services and Feed Quality Control. The directorate's mission is to "establish a strong and robust internationally credible Animal Health Information System which uses modern information and communication technologies for efficient and effective early warning and response to

support the control of and reduce the risk of diseases". The Directorate cooperates with various stakeholders including governmental, non-governmental, regional and international organizations. The directorate, together with other stakeholders, is piloting an automated disease control system called Animal Disease Notification System across 280 sites. A national strategy was developed to improve the overall animal disease surveillance system, priority animal diseases identified, a risk-based animal disease surveillance plan developed, and sanitary requirements for different livestock products defined.

Dr. Alemayehu Mekonen highlighted the role and function of the Disease Prevention and Control Directorate. The Directorate aims to create modern and robust disease prevention and control services that comply with international standards. To achieve this vision, the Ministry, together with other public and private stakeholders, developed disease prevention and control strategies for the following: contagious bovine pleuropneumonia rabies, bovine tuberculosis, rift valley fever, trypanosomosis, newcastle disease, bovine spongiform encephalopathy, and foot and mouth disease (FMD). As a preventive measure, a framework was prepared to ban the production and importation of feeds of animal origin and importation of cattle from countries affected by diseases. At national level, different legal frameworks were also prepared to ensure animal disease prevention including: animal disease prevention and control No. 267/2002 Proclamation No. 267-2002; Proclamation for Veterinary Drugs and Animal Feed Administration and Control; Meat Inspection No. 274/1970/No. 428/1972 and Meat Inspection amendment No. 81/1976. Additionally, draft regulations were prepared for disease prevention and control, movement of livestock and livestock products, and registration of veterinary professionals prepared.

Dr. Gedion Yilima, Director of the Export Abattoir Inspection and Certification Directorate, highlighted that Ethiopia is the leading small ruminant meat exporting country in Africa, with increasing meat exports over the last 15 years. The country doubled its earnings from meat export from USD 50,000 in 2010 to USD 100 million in 2015.

In spite of these patterns, Ethiopia's world market share remains very small (1.3%). At present, the country has 13 functional export abattoirs all with ISO 22000-2005 certification. Six additional export abattoirs are under construction. To maximize the sector's potentials, the Government of Ethiopia is prioritizing value addition processes as a means to increase the export of processed meat. Today, chilled goat and sheep carcasses constitute more than 95 % of the total export of meat, while the share of cattle beef export is very limited.

To ensure the quality of meat exports, Ethiopia set up an inspection process and approvals system. All inspection activities are centralized at the federal government level and the only competent authority for inspection and certification of meat destined for export is the federal Export Abattoirs Inspection and Certification Directorate.

The inspection and certification process starts with the approval of sites selected for the establishment of export abattoir, followed by approval of the design of export abattoirs and the oversight of the construction and installation of facilities. Once the facility is granted provisional approval, the MoLF invites competent authorities of potential importing countries to approve the provisionally approved facilities. In addition to the approval of the facility, inspection at the export abattoirs also involves inspection of animal and processed meat. To facilitate this activity, the Ministry assigned veterinary personnel to each export abattoirs. The directorate also coordinates and undertakes yearly audits using a standard checklist and, every 1-2 years, invites competent authorities of importing countries for inspection.

With regard to the export quarantine system of Ethiopia, Dr. Hadgu Mandefro highlighted that the country is improving its quarantine facilities. He added that the specific objectives of establishing quarantine facilities are to control trade related animal diseases; apply importing country requirements and other international standards to live animal export; prevent bans as a result of trade-related animal disease; and sustain and further develop markets for Ethiopian live animals by increasing competitiveness on international markets. Due to disease outbreak and the absence of a proper quarantine system, the country has been subject to several bans in the past; (1983 RP KAS; 1997/98 RVF Gulf States; 2000 RVF KSA and others; 2001 FMD KSA; 2006 FMD Egypt; 2007 RVF UAE; 2009 KSA sanitation; 2013/14 UAE sanitation). In addition to export bans, competition with countries compliant with health and quality standards, difficulties in accessing higher-priced markets; compliance with sanitary and phytosanitary measures; and a market share limited to the Middle East region are some of the existing challenges. Dr. Mandefro also stressed the commitment of the Government of Ethiopia to modernize the quarantine system. A new quarantine system according to international standards and with the required biosecurity system is under construction in Mile, in Afar region. The Mile quarantine facility is being established on 600 hectares of land, of which 48 hectares is already developed. The facility has 87 pens, of which 11 are for small ruminates and 76 for larger stock (44 for cattle and 30 for camels), with a capacity of 10 quarantine cycles per year (390,000 animals).

Ethiopia is also working on modernizing the tractability system as animal identification systems are becoming prerequisites for international trade. The Animal Identification, Traceability and Welfare Directorate is coordinating a livestock identification and traceability system. The Directorate aims to maintain a position on the current export market while working to penetrate new meat markets, increasing the volume and value of meat trade by boosting consumer confidence, and support measures to detect and control animal diseases.

Last but not least, a presentation was also made on the Veterinary Health Directorate of the MoLF. The mission of the latter is to enhance animal health, public health, food safety, and welfare services in compliance with international standards and thus contribute to increased food security, poverty alleviation and socioeconomic growth. The Directorate has a team for the control of raw animal products quality and safety as well as teams for zoonotic disease prevention and control. The Directorate has prioritized five zoonotic diseases – rabies, anthrax, brucellosis, leptospirosis and echinococcosis – for joint intervention (MoLF and MoH). Additionally, a National Strategic Emergency preparedness and response plan against avian-human influenza (MoH & MoA) and a draft Rift Valley Fever contingency plan (MoH & MoA) were also prepared.

After the presentations, a brief discussion followed on institutional capacity, accessibility and modes of veterinary service delivery, and strategy for disease prevention and control. The discussion mainly focused on transboundary animal diseases, vaccination procedures and coverage, particularly for foot and mouth disease.

Concerns were raised related to regulatory requirements of the Chinese market and a brief response mentioning five key steps was provided by the AQSIQ delegation. Additionally, while acknowledging the current challenges of FMD control in Ethiopia, the delegation members mentioned possibilities of exporting frozen meat to China. The five key steps to enable trade and the export of various types of livestock products to China include:

1. Submitting a formal application through the Chinese Embassy in Ethiopia specifying the types of meat products the country wishes to export to China;
2. Completing a questionnaire related to animal disease issues;
3. China will send a team of experts to conduct an on-site risk assessment, to be followed by the drafting of a report and discussions between the two parties;

4. Discussions on a protocol to be signed between the two trading partners focusing on issues such as disease control and quarantine, and the signing of a protocol if agreement is reached; and
5. Issuance of a health certificate and the registration and certification of export facilities.

Finally, the delegation expressed their appreciation for the warm welcome received, the comprehensive presentations on the situation of animal health in Ethiopia as well as the activities of each veterinary directorate within MoLF.

### 2.3. Veterinary Drug and Feed Administration and Control Authority; Ethiopian Meat and Dairy Industry Development Institute and National Veterinary Institute (20 April, 2017)

#### 2.3.1. Veterinary Drug and Feed Administration and Control Authority

The delegation was welcomed by Dr. Terzu Daya, Director of the Veterinary Drug and Feed Administration and Control Authority (VDFACA). In his welcome address, Dr. Daya underlined the significance of relations between Ethiopia and China and voiced his appreciation to UNIDO for bringing on board this trilateral engagement to upgrade the livestock value chain in Ethiopia. The Director described that VDFACA was established in 2011 and is currently composed of 4 directorates and 1 quality control laboratory. The Authority has 280 employees (2017). Some of the key challenges currently facing VDFACA include: (1) limited capacity especially in the quality control laboratory; (2) absence of local companies producing veterinary drugs and vaccines; and (3) lack of companies producing premixes and vitamins for livestock feed; and (4) the presence of illegal and substandard veterinary drugs in the market.

Following Dr. Daya's briefing, Dr. Ali Worku who is in charge of the Veterinary Drug and Feed Quality laboratory, delivered a presentation on the status of the laboratory. A brief visit of each laboratory ensued, followed by a wrap-up meeting at the end of the visit. Preliminary feedback from the AQSIQ delegation includes:

1. The laboratory is still under construction, nevertheless its potential is significant;
2. In the biological laboratories, safety cabinets need to be upgraded to comply with safety requirements;

3. The toxicology department lacks important testing equipment;
4. Equipment must meet environmental safety requirements, especially regarding temperature control;
5. The procurement and installation of equipment should take into account future demand. Management and other operational systems have to be well developed; and
6. Human resource capacity needs to be upgraded through capacity-building training, and operating procedures need to be upgraded.



*Group photo with VDFACA staff.*

Dr. Daya and managers of the laboratory highlighted that there is an air conditioner in each laboratory for temperature control, and that each apparatus has a temperature and humidity control system. Additionally, the laboratory has an appropriate waste management system ensuring environmental safety. It was also raised that the Authority was unable to obtain certain laboratory equipment through local purchase and it was asked from the mission to look into possibilities of purchasing this equipment from China. Finally, Dr. Daya and his team expressed their heartfelt thanks to UNIDO and requested capacity-building support in fully operationalizing the laboratory.

#### 2.3.2. Ethiopian Meat and Dairy Industry Development Institute

The mission was welcomed by Mr. Haileselassie Weres, Director General of Ethiopian Meat and Dairy Industry Development Institute (EMDIDI) who expressed interest in working with UNIDO and the People's Republic of China. The Director explained that EMDIDI's role is to offer consultation and investment promotion services, especially in meat and dairy processing plants, as well as training services for small and big commercial farms engaged in meat and dairy production. EMDIDI also assists export abattoirs in producing chilled and frozen meat destined for foreign

markets. Mr. Tadesse Guta, Deputy Director of EMDIDI complemented the briefing of the Director General by noting that more focus and support ought to be put in place regarding institutional capacity for processing of livestock products, support in provision of land, access to loans, technical training and market facilitation, research and traceability aspects.

Mr. Kelifa Hussien, Deputy Director for investment and technology support, also indicated the importance of providing specialized training for partners engaged in meat processing, dairy processing and honey processing, as well as microenterprises engaged in processing of animal products. The mission also conducted a brief visit to EMDIDI's research facility.



*Director General of EMDIDI with EGM participants.*

### 2.3.3. National Veterinary Institute

The delegation was welcomed by Dr. Marta Yami, Director of the National Veterinary Institute (NVI). She expressed a warm welcome to the mission and highlighted the institute's readiness to work with UNIDO and relevant institutions in China. In her briefing Dr. Yami underlined that the NVI is a public enterprise with 60 years of experience. The NVI currently produces 22 vaccines mainly for the domestic market. With ISO 92008 certification, the institute has a good production capacity for all vaccines except for FMD vaccines, of which it is currently producing only O, A and SAT-2. In terms of the foreign market, their product is destined for African and Middle Eastern countries.

The institute has comprehensive units for vaccine production with a research and development department, and is preparing to obtain certification in Good Manufacturing Practices (GMP). Led by the Director General and governed through a board, NVI is a non-public enterprise supported by income generated from sales of products. Besides vaccines, it plans to enter into production of veterinary drugs. Following the Director's briefing, a visit to each institutional facility was made by the mission. At the

end of the visit, the mission provided positive feedback on the institutional capacity of NVI.



*Dr. Marta Yami, Director of the National Veterinary Institute, with the AQSIIQ team.*

## 2.4. Export abattoirs (21 April, 2017)

### 2.4.1. Mojo Modern Export abattoir

Dr. Yoseph Tamirat, the export abattoir inspection and certification team leader, delivered a welcome address and briefed the mission on the Mojo Modern abattoir. In 2016, a total of 730,000 heads of animals were slaughtered, with products exported to countries in the Middle East. Following the briefing, a quick visit to each facility and wrap-up discussion ensued. The delegation was briefed on the fact that animals are certified by a veterinarian at the primary market and at the abattoir. In the wrap-up discussion, Dr. Tamrat mentioned he attended a five-month training course offered by AQSIIQ and requested additional capacity-building opportunities for the abattoir.

### 2.4.2. Allana Mojo Export Abattoir

Mr. Afzal Aziz, President-International Business Development, Allansons Private Limited, gave a welcome address. He underlined that Allana is an Indian-based reputable company working in 65 countries around the world. He also highlighted that Allana is eager to enter the Chinese market, noting that "the current visit to our company would be an input towards our future destination market". Following the President's welcome address, Dr. Shirish Shrisat, Chief Executive Officer (CEO) for Allana, Frigorifico Boran Foods PLC, Addis Ababa, Ethiopia, showed a video introduction to the company, its facilities, products and market destinations.

Allana Mojo has 134 employees and every 8 hours it slaughters 2,000 animals. Allana had their first shipment to the UAE on December 22, 2016 and

since, several tons of products have been exported to countries in the Middle East. The overall briefing was complemented by a visit to each facility and an introduction to the process, procedures and types of products the company produces. The visit demonstrated that the company has modern facilities, procedures and capacities to produce safe and quality products for the export market.

### 2.4.3. Allana Adamitulu Export abattoir

Mr. Aziz, welcomed the AQSIQ mission. The Allana Export abattoir is located in Adamitulu, 176 km south of Addis Ababa on the way to Hawassa. The abattoir is currently under construction with a total investment worth of USD 75 million. The abattoir will be become fully operational in the next two months.

In terms of facilities and capacity, it is the first of its kind in Africa and has the capacity to slaughter 8,000 heads of animals per day. The mission had the opportunity to visit the company's facilities, guided by Dr. Shirish Shirsat, CEO of Allana. Besides state-of-the-art facilities for meat processing, the company has facilities for offices, training, residential areas and future expansion areas.

## 2.5. Jig Jiga Quarantine Station and Fafen export abattoir (22 April, 2017)

### 2.5.1. Jig Jiga quarantine station

The mission was received by Mr. Abdulahi Jewhar, Core Process Head of the Somali Pastoralist and Livestock Bureau of Animal Health, who briefed participants on the station's facilities and overall capacity. The introduction was followed by a brief visit of the facility. In the wrap-up discussion, the AQSIQ delegation raised concern that pastoralists'/farmers' animals must be at least 3 km away from the quarantine station. The local authorities responded that the station is currently under construction, but such precautions will be implemented once it becomes fully functional.

### 2.5.2. Jig Jiga Export slaughter house

The mission was welcomed by Dr. Abdiqani Farah Mohamed, General Manager of Jig Jiga Export slaughter house. In his welcome address, Dr. Farah highlighted that the company has a strong track record of working with China. All the facilities were imported from China and installed by Chinese experts. The abattoir has modern facilities for slaughtering, meat processing and meat by-products. Additionally, the waste management and sanitation system in the abattoir

is according to international standards. Challenges encountering the abattoir include inconsistent supply of animals, especially during drought, and shortage of reliable electricity supply. In the wrap-up session, the General Manager expressed his eagerness to work with UNIDO, the GoE and the People's Republic of China. The AQSIQ mission provided positive feedback on the visit and encouraged the company to join efforts in upgrading the livestock value chain in Ethiopia.

## 2.6. Haramaya University Farm (23 April, 2017)

Haramaya University is one of the oldest agricultural universities in Ethiopia. Currently, it hosts eight specialized schools, among which the School of Animal and Range Science and the Faculty of Veterinary Medicine are pertinent to the livestock sector. The mission was welcomed by Dr. Meseret, representative of Dr. Yoseph Tadesse, Head of the School of Animal and Range Science. Dr. Mesert explained that the school is engaged in teaching, research and community service.

In terms of teaching, the school offers graduate courses, post-graduate and PhD studies in various fields related to animal science. A brief visit was made to an indigenous beef cattle farm (Ogaden breed), goat farm (indigenous breeds of the Hararghe highland, Ogaden and the crosses of indigenous x boar breeds).



*Hararghe highland indigenous goat breeds, Haramaya University.*

## 2.7. Shinile Zone

Following an administrative reform, the name of the former Shinile Zone was changed to the City Zone. The visit focused on two districts of the City Zone, the Harawa and Dak districts which host a total of 15 and 16 villages respectively. Harawa is located 36 km away from Dire Dawa, while Dak is 20 km away from Dire Dawa.



*Ogaden indigenous cattle breeds, Haramaya University.*

### 2.7.1. Harawa district

At Harawa, the AQSIQ delegation was received by the administrator of the district, followed by a brief visit to the veterinary post. The delegation asked questions on the types of services the pastoralists are getting from the veterinary post. The personnel explained that vaccinations and treatment of sick animals is offered by the veterinary post. The delegation also asked why they were unable to see the animals. The personnel responded that during the day, animals are about 10 km away from the village where they can graze and get water. It was underlined that animals are at the homestead only from the evening hours until early in the morning. The delegation verified by looking into the barn and only a few lambs and kids were present at the homestead. In addition to the veterinary post, the GoE has been developing an irrigation facility of 6,000 ha for feed and food crop production.

### 2.7.2. Visit to the Dak district

The mission was welcomed by the district head and a brief visit to veterinary post was made at this site. Personnel at the veterinary post managed to give adequate explanation on the types of vaccines, services and records held. The delegation was satisfied with the infrastructure and types of services rendered to the community and appreciated the effort of the GoE in improving animal health service delivery.

## 2.8. Dire Dawa regional veterinary laboratory

The delegation was welcomed by Dr. Esmail Woresemi, Microbiology Department, head of the regional laboratory. Dr. Woresemi gave an overall briefing on the status of the laboratory. Following the briefing, a quick visit to each laboratory was made.

During the visit, the delegation asked whether the regional laboratory undertakes analysis on FMD. Dr. Esmail responded that this task is performed by the referral laboratory in Sebeta.

## 2.9. National Animal Health Diagnostic and Investigation Centre (25 April, 2017)

The delegation was received by Dr. Solomon Gebre, the technical Director of the centre. The National Animal Health Diagnostic and Investigation Centre (NAHDIC) was established in 1995. It was originally established as the Central Disease Investigation Laboratory under the Ministry of Agriculture, with the aim of providing referral diagnostic services on animal health problems beyond the capacity of regional laboratories and providing an overall coordination role. In 1997, when the National Agricultural Research System was reformed, the centre's name changed to the National Animal Health Research Centre (NAHRC), along with a change in its prime responsibility and accountability. During this period, it was accountable to the Ethiopian Agricultural Research Organization, currently the Ethiopian Institute of Agricultural Research. In 2007, the mandate of center shifted from research to development and it was renamed the National Animal Health Diagnostic and Investigation Centre and made accountable to the Livestock Resource Development sector of the Ministry of Agriculture. Currently, NAHDIC is an ISO 17025 accredited national reference laboratory, as well as a designated regional support laboratory for the East Africa region. NAHDIC has ISO 17025 accreditation for the investigation of 14 diseases. The mandate of the NAHDIC includes:

1. Certification of export animals, animal products and by-products;
2. Coordination and performing national surveillances and diagnosis of transboundary animal diseases of economic and public health importance;
3. Technical capacity-building for regional laboratories;
4. Training services for regional laboratories, abattoirs as well as control of hides and skin diseases, particularly external parasites;
5. Regional diagnostic service for Avian Flu and Newcastle disease and technical support to East African regional laboratories;
6. Offer advisory support for post-graduate and undergraduate students enrolled in veterinary faculties/colleges; and
7. Participate in the preparation and implementation of animal health policies.



*AQSIIQ EGM participants with the Vice General Director of NAHDIC.*

In terms of facilities, NAHDIC was noted to have eleven laboratories that actively function in various disciplines. Four of the laboratories are engaged in the field of microbiology (viral and bacterial serology, mycology and bacteriology, virus isolation laboratories), three are engaged in parasitology (protozoology, acarology, entomology- helmantology laboratories), and one for pathology and another one for molecular diagnosis. NAHDIC has one BSL-3 laboratory for diagnosis of zoonotic disease. NAHDIC also has laboratories for pharmacology and toxicology diagnosis.



*AQSIIQ experts looking at the specific disease test result catalog at the NAHDIC.*

Following the briefing, the delegation conducted a brief visit to each laboratory. At the end of the visit, the delegation raised their concerns regarding the absence of a biosafety cabinet, particularly in the bacteriology laboratory, and the need to strengthen and support regional laboratories. Dr. Solomon highlighted that the centre has biosafety cabinets, especially in biosafety level 3 labs, and safety cabinets are placed where they are most needed. He also requested assistance

in terms of an experience-sharing visit to China and capacity-building for managing and making effective use of next- generation sequencing.

## **2.10. Ministry of Industry (26 April, 2017)**

The delegation was welcomed by Mr. Ayalneh Abawa Advisor to the State Minister of Industry (Moi). He underlined that Ethiopia is an agrarian country, with agriculture serving as the backbone of the economy and a key source of raw materials for industry. He further highlighted the importance of upgrading value chains of key agricultural commodities to support agro-industry. International and national consultants have been engaged in undertaking value chain analysis of key commodities to improve the supply chain.

In order to spur industrialization, the GoE has launched the development of integrated agro-industrial parks. For this purpose, 17 corridors were identified and, in the first phase, four IAIPs will be established in the regional states of Tigray, Amhara, Oromiya and the Southern Nation, Nationality and People's region, respectively. The ground breaking ceremony for three of the parks has already taken place. He also mentioned that each IAIP is supported by RTCs. Mr. Moges Mesfin, a UNIDO expert on IAIPs, further elaborated on components of IAIP implementation: (1) productivity enhancement; (2) construction; (3) social integration; (4) institutional set up and capacity- building; (5) investment promotion; and (6) resource mobilization.

Mr. Moges mentioned that in addition to state-of-the-art technology in IAIPs, backward and forward linkages must be strengthened. The RTCs will play a crucial role in providing support services to smallholder farmers and connecting them to markets. In all four IAIPs, livestock is a focal commodity. Upgrading the livestock value chain is in line with the strategic directions of the Ministry. In his final remarks, Mr. Ayalneh Abawa promised to report to Dr. Mebratu Meles, State Minister of Industry, and offer whatever support is necessary for the success of this trilateral initiative on upgrading the livestock value chain in Ethiopia.

### 3. INITIAL FEEDBACK OF THE GENERAL ADMINISTRATION OF QUALITY SUPERVISION, INSPECTION AND QUARANTIN EXPERT TEAM (26 April, 2017)

The debriefing session was chaired by Dr. Thomas Cherinet. The AQSIQ delegation, through its team leader, provided the following initial feedback.

#### 3.1. General remarks

The AQSIQ mission team leader acknowledged the visit has enabled them to obtain a deep understanding on how public and private institutions engaged in the livestock value chain operate in Ethiopia. On behalf of the AQSIQ team, he expressed appreciation for all the arrangements made and for those who accompanied the team and helped bring the mission to reality.

The importance of the livestock sector in Ethiopia was reiterated through various representatives: (1) the GoE accords a high value to livestock sector development and has invested considerably towards in this regard; (2) the volume of the livestock population, diversity and gene pool is an asset to forthcoming development; and (3) there is immense potential to produce high quality meat products.

The AQSIQ team leader cited the following practical examples that testify to Ethiopia's progress:

1. Presence of export abattoirs with ISO certification;
2. Presence of routine surveillance and certification systems by the government;
3. Presence of large companies with the capacity to produce safe and quality products;
4. Management of large companies, such as Allanasons Private Limited, which uses state-of-the-art technology and facilities that meet regulatory requirements; and
5. The solid framework for animal health service delivery that encompasses even village-level services.

#### 3.2. Challenges observed and the way forward

Despite the aforementioned potential, there are still some challenges to be addressed. Based on their observations and experience, the AQSIQ team leader highlighted several issues that need to be addressed in order to upgrade livestock quality infrastructure. This includes:

1. Strengthening the animal disease control and prevention system to deal with important diseases such as FMD and African Horse sickness;
2. For fast and effective testing and early response, enhance the capacity of regional laboratories for testing FMD and other diseases;
3. Most regulations on livestock health were revised long time ago and therefore need to be reviewed and updated;
4. Improving the identification and traceability of cattle, sheep and goat to facilitate transport and export;
5. Control of breeding of free-ranging animals and use of preventive drugs needs further attention;
6. Use of 280 pilot villages seems to be a huge task, therefore needs some review;
7. In terms of the management system for meat, besides the requirement of importing countries, exporters must guarantee product quality; and
8. Improving regulatory aspects of export abattoirs by implementing the following interventions:
  - Labelling of animals and health certification, product handling should be improved;
  - Bleeding of animals has to be separated from the processing unit;
  - Entrance and exit to the slaughterhouse should be organized/monitored in some way;
  - There should be standard indication and traceability of the carcasses for export; and
  - The government should be strict with regard to regulation of export abattoirs.

### 3.3. Preliminary suggestions for increasing meat exports

1. Follow international protocols of the OIE with regard to fulfilling importing country requirements;
2. Conduct training courses on GMP, Hazard Analysis and Critical Control Points (HACCP) and OIE regulations for auditors;
3. Provide training to management staff, personnel and other workers in the slaughterhouse and involved in animal transport;
4. Testing capacity of regional laboratories has to be substantially improved to undertake daily testing (re-testing can be done by a central referral laboratory);
5. Issuing of certificates for export abattoirs should be improved;
6. Facilitate the implementation of disease control plan; and
7. Build the capacity of the VDFACA by training management and technical staff.

Finally, on the behalf of the mission, the team leader of AQSIQ thanked UNIDO, the GoE and MoLF for trusting AQSIQ and promised to prepare technical report of the mission. He also expressed his wish to keep close collaboration to expand Ethiopian meat exports to more countries so that others can also enjoy Ethiopian meat.

In response to the feedback, Dr. Thomas, the chairperson of the session, acknowledged the feedback forwarded by the team and noted that most of the recommendations are in line with the procedures and strategic directions of the Ministry. The chairperson made the following additional remarks:

1. With respect to the role of the referral laboratory, it is meant for confirmative purposes. Strengthening regional laboratories through capacity building is important for prompted diagnostic and control of diseases. He also mentioned the presence of small laboratories in abattoirs.
2. In order to access large markets, Ethiopia needs to follow internationally accepted procedures, such as HACCP and procedures of the OIE.
3. A project worth of USD 10 million USD aimed at strengthening inspection requirements with the support of Chinese experts is under development.

At the end of the discussion, a brief introduction to the control strategy for FMD, prepared by the Agricultural Transformation Agency, was presented. Additionally, a request for specific requirements of the Chinese market and related issues were raised. In the interest of time, it was agreed that further questions should be forwarded to the team through UNIDO.

With the chairperson's promise to formally report and transmit AQSIQ feedback to the attention of the Minister and State Minister in charge, the AQSIQ expert group mission to support the design and implementation of the livestock value chain programme in Ethiopia was successfully concluded.

# ANNEX 1

## AIDE-MEMOIRE

### BACKGROUND

Ethiopia is one of the pilot countries of the Programme for Country Partnership (PCP), UNIDO's innovative model aimed at accelerating inclusive and sustainable industrial development in Member States. The PCP for Ethiopia focuses on three light manufacturing sectors: agro-food processing; textiles and apparel; and leather and leather products. These sectors were chosen due to their prospects for job creation, strong linkages to the agricultural sector, high export potential and capacities to attract private sector investment.

Ethiopia is home to the world's fifth largest herd of cattle – 56.7 million in 2014 – though accounted for only 0.75 per cent of global exports of meat products (mainly comprised of goat and sheep meat). Ethiopia is the largest live animal exporter in Africa, with an estimated export of 2,323,500 live animals. The export of live animals reduces the country's opportunities for in-country value addition and inputs for other value chains, such as hides and leather.

The meat value chain holds considerable potential for poverty alleviation; however, there are critical development challenges, such as limited international market access, facing the sector. The prevalence of disease in the national herd inhibits red meat export to countries that demand veterinary certification and food chain traceability. The main safety constraints facing the red meat value chain in Ethiopia are:

1. Absence of structured identification and traceability system (tools, policy and legislation)
2. Limited application of quality certification, standardization and grading systems
3. Limitation in quarantine system meeting international requirements
4. Absence of meat hygiene and sanitation policy
5. Insufficient animal health providers and vaccines in the country
6. Insufficient product transportation system with storage and preservation facilities
7. Limited institutional capacity to address sanitary and quality assurance systems
8. Limited capacity in controlling livestock diseases
9. Limited capacity of laboratories to implement quality assurance tests to international best practices

### OBJECTIVE

The purpose of the expert group meeting is to facilitate the design and implementation of upgrading the livestock value chain program of Ethiopia. The expert group meeting participants will:

1. Visit potential project locations, and undertake pre-feasibility study and suitability assessment in potential project site;
2. Exchange experiences with key actors involved in livestock quality infrastructure and quality assurance system; and
3. Observe and review the capacity of key institutions, export abattoirs and feed processing industries

### COMPOSITION

Participants attending this expert group meeting in Ethiopia are composed of five (5) experts nominated by the General Administration of Quality Supervision, Inspection and Quarantine (AQSIQ) of China, in consultation with UNIDO, and are based on the following criteria:

1. Should be a staff member of AQSIQ or its affiliate organization
2. Responsible to provide advice, guidance and training on quality supervision, inspection and quarantine.
3. Should have advanced university degree in veterinary medicine, animal science, food quality management or other related field
4. Should have 8 years of experience in one of the following: (a) meat quality inspection; (b) quarantine system design, operation and management; (c) animal disease control and surveillances; (d) compartment/disease free zone design and operation; and (e) food safety laboratory operation and management
5. Fully knowledgeable about setting up quality and safety improvement programme involving meat/ food production
6. Should have good knowledge of English and be able to converse in the same.

## SPECIFIC TASKS

### **i. Propose disease free system establishment**

The expert group will undertake a pre-feasibility study for the establishment of disease free zone; compartmentalization or commodity based trade including proposing boundary mapping based on preliminary assessment of the situation of Transboundary Animal Diseases. It will also identify critical constraints of meat quality and safety by assessing the existing animal registration, identification and traceability system. The experts will also exchange experiences about disease control system and epidemic status with the Livestock Identification and Traceability and Welfare Directorate and Disease Prevention and Control Directorate of the Ministry of Livestock and Fisheries (MoLF).

### **ii. Visit quality and safety control facilities**

The expert group will visit NAHDIC and other relevant laboratories that carry out surveillance of residues, infectious diseases, contaminants and pathogenic agents and observe the application of “Good Laboratory Practices (GLPs). The group will discuss the institutional, equipment and human resource requirements of establishing pilot quality control and residue monitoring lab in selected region and propose a plan for improvement.

### **iii. Propose quarantine system establishment**

The expert group will visit the existing quarantine establishments, collection site and holding grounds and assesses their suitability to improve the quality of meat. It observes equipment, human resource and bio-security system of the existing quarantine facility and shares their experience with the Quarantine Inspection and Certification Coordination Directorate of MoLF and other stakeholders.

### **iv. Meat safety inspection assessment**

Visit export abattoirs and feed industry to assess the requirement and implementation of HACCP as well as Good Manufacturing Practices (GMP). The expert group will also assess the existing quality audit system including safety guidelines and identify supports required for export abattoirs and feed industry to satisfy international quality certification and propose improvement action plan. It will also discuss with key

stakeholders to identify their capacity and pinpoint the constraints in the application of Sanitary and Phytosanitary Measures.

## OUTCOMES OF THE MISSION

Detailed meat quality/safety improvement proposal for export market that cover disease free zone establishment, quarantine system, inspection and audit system that enable successful design and implementation of livestock quality improvements program based on the requirements of trading country (China).

At the conclusions of the expert group meeting and after returning home, travelers must submit a final report prepared in English language.

## DATE AND PLACE

The expert group meeting will take place from April 18, 2017 to April 27, 2017. The expert group meeting will take place in Addis Ababa, Dire Dawa, Oromia Region and Somali Region.

## LANGUAGE AND REQUIREMENTS

The working language of the expert group meeting will be English. All documentations should be prepared in English.

## ANNEX 2

### LIST OF PARTICIPANTS OF THE EXPERT GROUP MISSION

No	NAME	INSTITUTIONAL AFFILIATION
1	Mr. Zhu Shaozhi	Vice director of the Zhuhai Entry-Exit inspection and Quarantine bureau, AQSIQ
2	Mr. Liang Qiping	Vice director of the Yinzhou Entry-Exit inspection and Quarantine bureau, AQSIQ
3	Mr. Bo Qingru	Vice director of Technical center, Zhuhai Entry-Exit inspection and Quarantine bureau, AQSIQ
4	Mr. Liu Guanjian	Chief of the inspection and Quarantine section, Binzhou Entry-Exit inspection and Quarantine bureau, AQSIQ
5	Mr. Wang Xin	Official of Division of America and African Affairs, Department of International Cooperation, AQSIQ
6	Mr. Zhao Jie	UNIDO HQ, Industrial Development Officer
7	Mr. Eneyew Abera	UNIDO HQ, Associate Project Coordinator
8	Mr. Seyoum Badiye Dadi	UNIDO National Consultant, Addis Ababa, Ethiopia
9	Dr. Sintayehu Minda	Senior Veterinarian (MoLF) Addis Ababa, Ethiopia

## ANNEX 3

### PROGRAMME FOR EXPERT GROUP MEETING

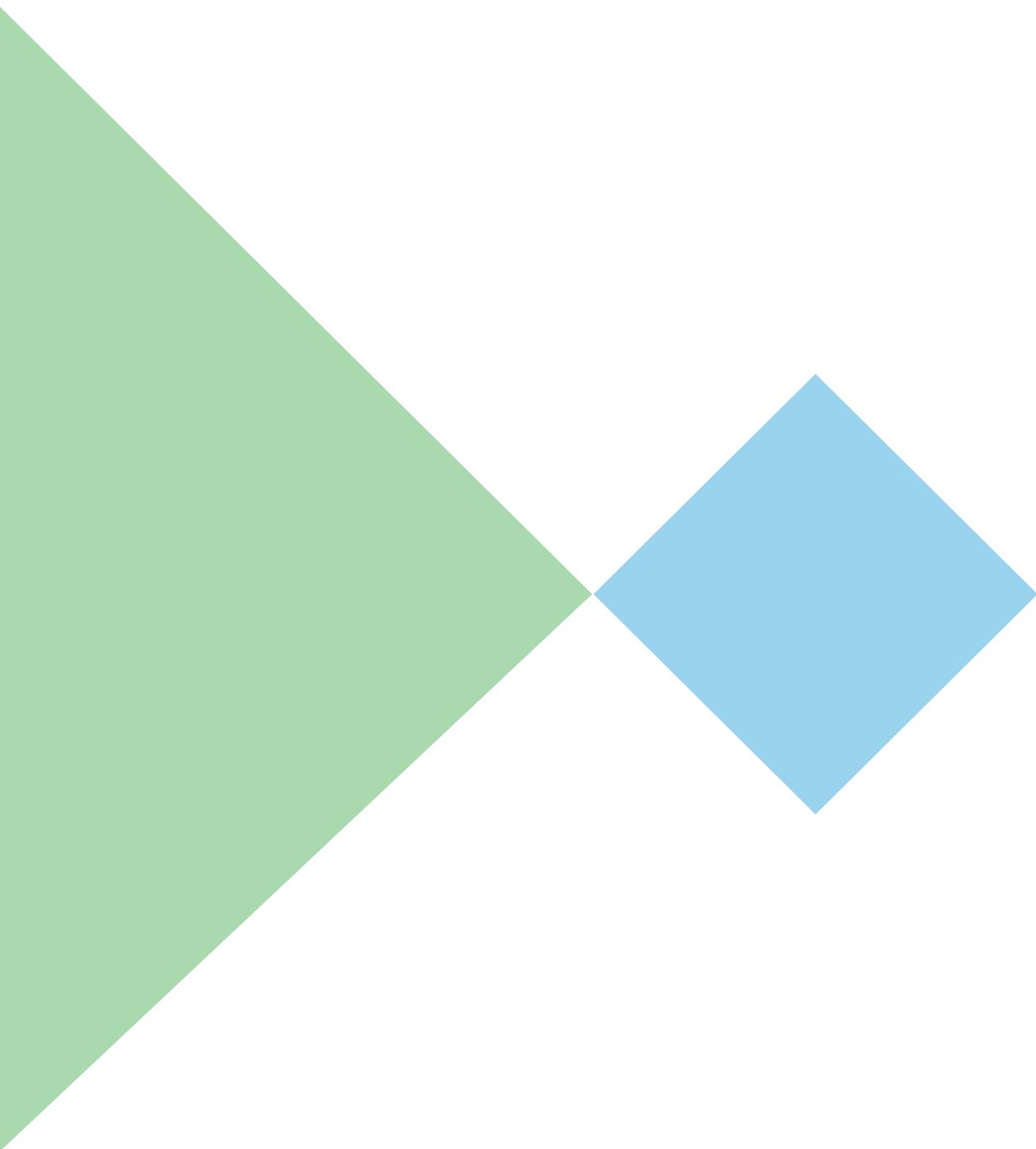
18-27 April, 2017

Tuesday, 18 April		
Addis Ababa		
Arrival in Addis Ababa and visit UNIDO Regional Office in Ethiopia		
Time	Activity/place	Contact person
06:20	Arrival at Bole airport, Addis Ababa	Hotel Shuttle Bus, Eneyew
07:00	Departure from Airport to Elily International Hotel	
08:00	Arrival at Elily International Hotel	
08:00-13:20	Free time	
13:20	Departure from Elily International Hotel	Seyoum Semu (Phone: +251911243897) Eneyew Abera
13:40	Arrival at UNIDO Regional Office in Ethiopia	
15:00	Welcome and introduction by Mr Gustavo AISHEMBERG, UNIDO Representative and Director, Regional Office in Ethiopia	
15:45	Discussion on PCP Ethiopia and ULVCP	

17:00	Departure from UNIDO Regional Office in Ethiopia	
18:30-20:30	Welcome dinner hosted by UNIDO at Elily International Hotel	
	Elily International Hotel ( 1 <sup>st</sup> night)	
<b>Wednesday, 19 April</b>		
<b>Addis Ababa, Ministry of Livestock and Fisheries</b>		
Time	Activity/place	Contact person
09:00	Departure from Elily International Hotel	Seyoum Dadi (Phone: +251911173293) Eneyew Abera
09:30	Arrival at Ministry of Livestock and Fisheries	
09:40	Welcome and introduction by HE Dr Misrak, State Minister of Veterinary services and feed quality control	
10:40	End of discussion	
10:45-11:30	Briefing on Epidemiology Directorate	Dr. Yismashewa Wegayehu
11:35-12:30	Briefing on Disease and prevention control Directorate	Dr. Alemeyehu Mekonen
12:30-13:30	Individual lunch	
13:30-14:45	Briefing on quarantine, inspection and certification Directorate	Dr. Zerihun Mesfin
14:45-15:30	Briefing on veterinary public health Directorate	Dr. Wendoson Bekele
15:30-16:30	Briefing on export abattoirs and certification Directorate	Dr. Gedion Yilma
16:30-17:30	Briefing on livestock identification, Traceability and welfare Directorate	Dr. Hadgu Mandefero
17:30	Departure to Economic & Commercial Counsellor's Office of The Embassy of P.R.China	Mr. Luo Pengcheng Mobile:+251912205649 Tel:+25113728782
18:30	Counsellor Welcome dinner	
20:30	Departure from restaurant	
21:00	Arrival at Elily International Hotel (2 <sup>nd</sup> night)	
<b>Thursday, 20 April</b>		
<b>Debrezeit/Bishoftu, Veterinary Drug and feed administration and Control Authority (VDFACA), Ethiopian Meat and Dairy Industry Development Institute, National Veterinary Institute</b>		
Time	Activity/place	Contact person
08:20	Departure from Elily International Hotel	
09:00	Arrival at VDFACA's Veterinary Drug and Feed Quality Lab	
09:10-09:40	Welcome and introduction	Dr Terzu Daya, Director
09:40-11:00	Visit to Veterinary Drug and Feed Quality Lab	Heads of respective labs
11:10	Departure from Veterinary Drug and Feed Quality Lab	
12:10	Arrival at Debrezeit (Bishoftu)	
12:15-13:15	Individual lunch	
13:30-15:00	Visit to Ethiopian Meat and Dairy Industry Development Institute	Haileselasse Weres, Director
15:15-16:50	Visit to National Veterinary Institute	Dr Marta Yami, Director
16:55	Departure from Debrezeit/ Bishoftu	

18:30	MoLF Welcome Dinner	
20:30	Arrival to Elily International Hotel ( 3 <sup>rd</sup> Night)	
<b>Friday, 21 April</b>		
<b>Mojo and Adamitulu, Mojo Modern Export abattoir and Allana export abattoir</b>		
Time	Activity/place	Contact person
08:00	Departure from Elily International Hotel to Mojo	
09:30	Arrival to Mojo	
09:30-10:30	Visit to Mojo Modern Export abattoir	
10:45	Departure from Mojo to Adamitulu	
12:30	Arrival to Allana Export abattoir	
12: 30-13:30	Individual lunch	
13:30-14:30	Visit to Allana Export abattoir	
14:45	Departure to Addis Ababa	
17:30	Arrival at Elily International Hotel (4 <sup>rd</sup> night)	
<b>Saturday, 22 April</b>		
<b>Jig Jiga, Quarantine station of Jig Jiga and export abattoir</b>		
Time	Activity/place	Contact person
06:00	Departure from Elily International Hotel	
06:30	Arrival at Bole International Air port	
07:30	Departure from Bole International Air port	
09:30	Arrival at JigJiga air port	
09:45-10:45	Visit to JigJiga quarantine station	
10:45-11:45	Travel to Fafen	
11:45-12:45	Visit to Jigjiga Export abattoir	
12:45-13:45	Arrival to Harar	
13:45-14:45	Individual Lunch	
16:00	Arrival at Samrat hotel Dire Dawa (5 <sup>th</sup> Night)	
<b>Sunday, 23 April</b>		
<b>Dire Dawa, Samrat Hotel</b>		
08:30	Free time	
12:30-17:30	Individual lunch	
17:30	Free time	
19:00	Samrat Hotel (6 <sup>th</sup> Night)	
<b>Monday, 24 April</b>		
<b>Dire Dawa, Visit to Shinile site and Dire Dawa Regional Veterinary Lab</b>		
Time	Activity/place	Contact person
08:30	Departure from Samrat hotel	
09:00	Arrival at Shinile	
09:00-12:00	Visit around Shinile	
12:00- 13:00	Individual lunch	

<b>13:30-14:30</b>	<i>Visit to Dire Dawa Regional Veterinary Lab</i>	
<b>14:45</b>	<i>Arrival to Samrat hotel</i>	
<b>14:45-15:15</b>	<i>Arrival at Samrat hotel and check out</i>	
<b>15:20</b>	<i>Departure from Samrat hotel</i>	
<b>15:40</b>	<i>Arrival at Dire Dewa Airport and check in</i>	
<b>17:45</b>	<i>Departure from Dire Dewa</i>	
<b>18:45</b>	<i>Arrival in Addis Ababa</i>	
<b>19:00</b>	<i>Departure from Bole Airport to Eliliy International Hotel</i>	
<b>19:30</b>	<i>Arrival at Eliliy International Hotel (7<sup>th</sup> Night)</i>	
<b>Tuesday, 25 April</b>		
<b>Sebeta, National Animal Health Diagnostic and Investigation center</b>		
<b>Time</b>	<b>Activity/place</b>	<b>Contact person</b>
<b>08:30</b>	<i>Departure from Eliliy International hotel</i>	
<b>09:30</b>	<i>Arrival at National Animal Health Diagnostic and Investigation center</i>	
	<i>Welcome and Introduction</i>	<i>Dr. Mesfin Sahle, Director</i>
<b>09:30-12:00</b>	<i>Visit</i>	<i>Heads of respective labs</i>
<b>13:00</b>	<i>Arrival to Eliliy International Hotel</i>	
<b>13:00-14:00</b>	<i>Individual lunch</i>	
	<i>Night at Eliliy International Hotel (8<sup>th</sup> Night)</i>	
<b>Wednesday, 26 April</b>		
<b>Addis Ababa, Debriefing and Ministry of Industry</b>		
<b>Time</b>	<b>Activity/place</b>	<b>Contact person</b>
<b>08:20</b>	<i>Departure from Elily International Hotel</i>	
<b>09:00</b>	<i>Arrival at Ministry of Livestock and Fisheries</i>	
<b>9:00-11:00</b>	<i>Debriefing and way forward</i>	
<b>11:00</b>	<i>Departure from Ministry of Livestock and Fisheries</i>	
<b>11:30</b>	<i>Arrival at Ministry of Industry</i>	
<b>11:30-12:30</b>	<i>Visit Ministry of Industry</i>	
<b>13:00</b>	<i>Arrival at Elily International Hotel (9<sup>th</sup> Day)</i>	
<b>Thursday, 27 April</b>		
<b>Addis Ababa, Departure to Beijing</b>		
<b>Time</b>	<b>Activity/place</b>	<b>Contact person</b>
<b>00:30</b>	<i>Arrival at Bole International Airport and check in</i>	
<b>02:30</b>	<i>Departure from Bole international Airport, Addis Ababa to Beijing</i>	



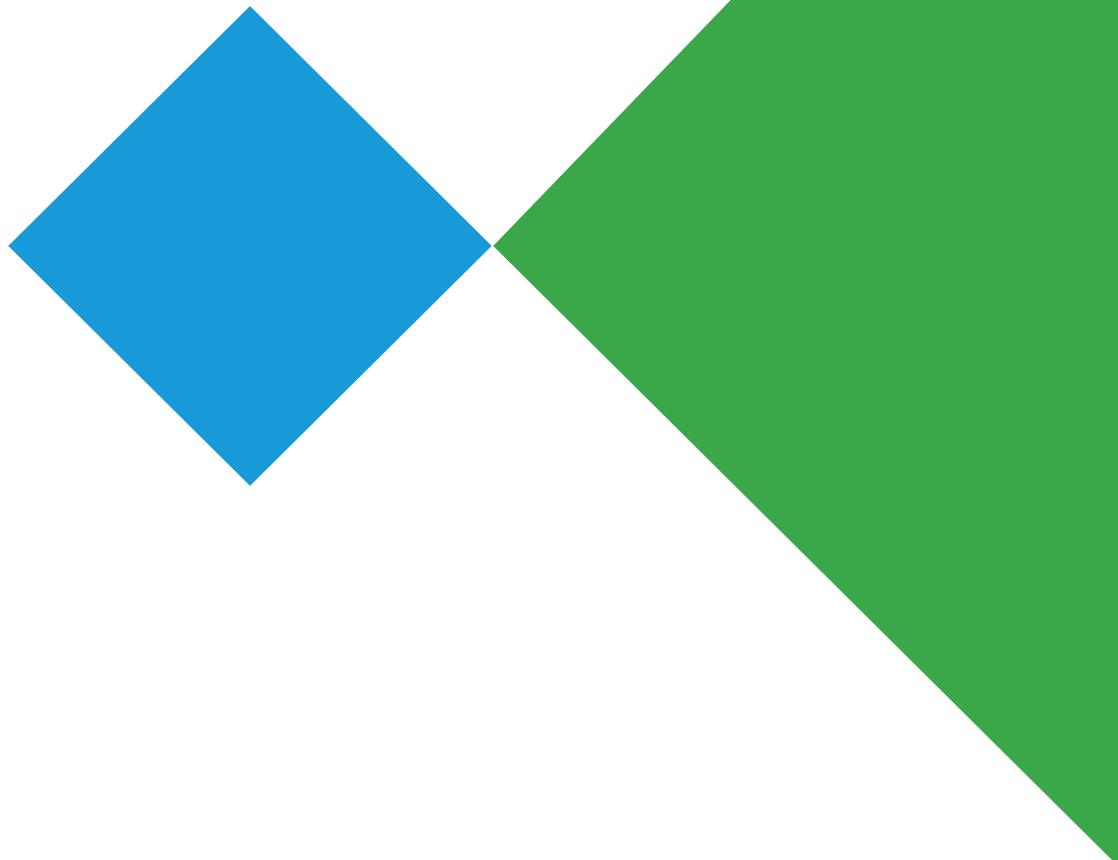
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