MARKET ASSESSMENT

Final Report

Livestock and Apiculture value chains for Women, Youth and PLWD in Garissa County

3 December 2021

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ABBREVIATIONS

CIDP	County Integrated Development Plan
DRC	Danish Refugee Council
FFS	Farmer Field Schools
FMS	Farmer Market Schools
IDTC	Institute of Development and Training Consultants
NRC	Norwegian Refugee Council
SOLO	Somali Lifeline Organization
FGD	Focus Group Discussion
ILO	International Labour Organization
KII	Key Informant Interview
PWLD	Persons Living With Disabilities
SDGs	Sustainable Development Goals
TOR	Terms of Reference
WFP	World Food Programme

ACKNOWLEDGMENT

The completion of this report was made possible by the roles played by different individuals and groups. They either provided information and data required or facilitated the engagement with the different stakeholders. The report has been enriched by the insights and contribution of different technical people who did a thorough review and critique of the inception report which firmed up the foundation upon which respondents were identified, data was collected, analyzed, and reported. We especially recognize the valuable inputs of Kulmiye Hassan, Executive Director, SOLO; Joel Asago, Program Advisor, SOLO and; John Wanjohi, Program Manager for their technical support and guidance. ILO staff in Nairobi, Lilyanne Ndinda, Paul and Caroline Njoki, reviewed and provided valuable inputs and feedback on the report, especially on the study design and the outcome of the market assessment. We are greatly indebted to the enumerators who travelled across sample villages in the three sub-counties of Garissa Township, Fafi and Dadaab to interview a wide cross-section of respondents. The County Government leadership in Garissa, community leaders in the Garissa Township and Dadaab refugee complex, livestock, fodder and honey traders, women and the youth were important source of data during the assessment, focus group discussions and the Key informant interviews. The report also benefited from the work of other actors in Garissa County who include, WFP, DRC, K-DR DIP, NRC, DRC, Mercy Corps, and many others for willingly sharing experiences on lessons picked in implementing similar initiatives.

The participants who included County government staff, representatives of cooperatives and NGOs who participated and gave their feedback during the report dissemination workshop, on 23rd November in Garissa.

Most importantly, the consultant would like to acknowledge the hospitality and enthusiasm extended by the communities in all the locations visited in Garissa County. The in-depth interviews, Focus Group Discussions, Key Informant interviews and Participatory observation of fodder production, beekeeping, feedlot production and marketing infrastructure took time off from the respondents, which they willingly gave; they provided insightful data and information that was very helpful to the market assessment; to them I say thank you.

Lastly, my appreciation goes out to the SOLO team in Garissa, especially Mohamud Abdi and those who accompanied the researchers to the field playing an important role of introducing the assessment/survey team to the local communities.

It is hoped that this market assessment findings will assist SOLO to better plan implementation and monitoring of Livestock and apiculture value chains project ultimately benefiting the youth, women and persons living with disabilities and the larger community of Garissa County.

As is clear from the above, many individuals and institutions participated and contributed to the outcome of the market assessment process, while it may be difficult to mention each individually, IDTC is very appreciative of their contributions.

Institute of Development and Training Consultants (IDTC) Limited
Nairobi
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1 EXECUTIVE SUMMARY

This Market Assessment report is produced to help SOLO better orient market systems development assistance to livestock and apiculture value chains in the most impactful manner for the targeted women, youth, and Persons Living with Disabilities (PWDs) who derive their livelihoods from activities linked to livestock and apiculture value chains.

This assessment employed a combination of tools to collect primary data while literature review provided an overview of the market situation in the County primarily in marketing of livestock, fodder, feedlot, and honey. This was used together with key informant interviews (KIIs) and focus group discussions (FGDs) tools which provided qualitative data on women, youth and persons living with disabilities (PWD) employment situation, factors facilitating or hindering their gainful and profitable participation in the market systems. Improved business performance of livestock, fodder and beekeeping value chains have potential of growing incomes for both the individuals and the county, but also importantly, birth new value addition small industries that will in turn transform the local economy from purely a service-based to value addition-based economy.

As per the findings of the assessment, marketing efforts are largely individualised, disjointed, and lacking in comprehensive understanding of how to profitably grow the market. However, the assessment identified the existence of women and youth groups who work together to produce and sell fodder but fail to reach their optimum as their market is hinged on existence of an institutional buyer inform of county government or NGO, which unfortunately are not regular. They nevertheless do not own common land, instead, land is owned by individuals. Key informants from non-state actors allude to market distortion by humanitarian actors through the services and inputs they provide to the target group. The national and county government institutions established to support improvement in the livestock, fodder and honey production lack sufficient extension capacity in market-based production improvement support.

The women, youth and persons living with disabilities lack capital and skills to improve their income generation activities in livestock, fodder, and honey production. Commercial fodder production is not widespread but small groups of farmers grow and sell their fodder to traders who eventually take it to the terminal market targeting livestock traders and small ruminant producers. Trading in small ruminants and honey is primarily done by women while youth trade in livestock or participate in the different livestock value chains, like trekking the animals from point of sale to the intermediary or terminal markets. Honey and fodder have been produced traditionally and marketed for health imperative – 'the medicinal value'. Current production of fodder and honey are anchored on traditional production methods as the target market was mainly convenient buyers-those who buy for being close to the sale outlet. To realistically empower women, youth and PWDs economically in these value chains, current production methods need

to be fused with modern farming and production skills that will add value and expand the market. These include better management of the apiary, honey harvesting, packaging, and marketing.

The women and youth cooperatives and groups should build on the common benefits the individual members stand to gain from participating in the groups. It may be better to structure the cooperative as an institution through which individual women and youth traders can get support from among themselves (in-ward looking) unlike the current motivation where individuals primarily join groups to satisfy support conditions by government or other non-state actors. These groups are external-driven and fail to function as economic groups as soon as the support from outside is no longer forthcoming. This first strategy does infuse the foundational requirements for sustainable economic groups. It is pertinent that inward-looking drivers merge more effectively with market systems development, which is driven by a need to succeed in the value chain and not a desire to be compliant to the needs of another entity whose support objectives may not be supportive of an effective market system.
The market assessment identified high demand for technical skills in feedlot, livestock, honey and fodder production and marketing. Conversely, the supply of technical capacity in these skills either by the county government or other private sector providers was low. The County Government has attempted to address this gap by organising cross-county learning visits where groups of farmers from Garissa visit other Counties to learn from their experiences. While this is an important way to train farmers, it must be appreciated that it has limitations in reaching many farmers but more crucially, exchange visits should only compliment functional skills training programs. There is thus a need to focus on skills training through institutions that organise the groups together.

The imperatives of partnership between SOLO and partners/groups working in the target value chains has been identified as a necessary part of support strategy to enrich market systems development for the different producer groups. This collaboration will partly address the gaps in technical support to these value chains that arise from minimalist approach adopted by different partners in supporting the value chains.
Farmer Field Schools (FFS) and Farmer Market Schools (FMS) have succeeded in other contexts to build technical and marketing capacity among farmers and can work well in Garissa too. They would be useful platforms to promote aggregation and joint marketing and avenues through which innovations are shared. To compliment FFS and FMS, the project could partner with the County Government and Mobile Service providers to provide service messaging and remote training for smallholder fodder and beekeeping farmers to include women, youth and PWD in e-extension advice services and marketing using digital platforms.

2 INTRODUCTION

This report provides the outcome of the market assessment that was conducted in Garissa County (Garissa Township, Fafi and Dadaab Sub-counties) between 23rd October and 7th November 2021. The market assessment was conducted by Institute of Development and Training Consultants (IDTC) limited in coordination and collaboration with the SOLO and Garissa County Government. It was designed to cover four outputs: Livelihoods of 150 vulnerable youths is enhanced through commercial fodder production; Increased income of 150 women and youth undertaking feedlot rearing of livestock for sale to abattoirs; Livelihoods of 120 women engaged in small ruminant production and marketing is improved; and 80 Bee keeping targeting women and people with disabilities.

The market assessment was undertaken to identify barriers to business start-ups and scale-ups for youth, women and PLWD in target areas of Garissa County within the following broad value chain focus, while employing the lens of market systems development.

a) Commercial fodder production along the Tana Riverbanks targeting the youth.
b) Feedlot rearing of livestock for sale to abattoirs for women and youth
c) Small ruminant production and marketing for women and people with disabilities
d) Bee keeping targeting women and people living with disabilities (PLWD)

Based on the findings, the report articulates strategies for enhancing youth, women and PLWD competitive participation in business start-up and scale-up within the selected value chains, while ensuring profitability, sustainability, and innovation to improve livelihoods and alleviate poverty among the target group. Recommendations from the market assessment provided in this report will hopefully help SOLO to strengthen business and employment promotion services along the selected value chains.

The market assessment gathered and assessed quantitative and qualitative data from a diverse sample selected from six target locations (*Ifo, Dadaab, Hagardera, Dagahaley, Garissa Township and Mbalambale*) within Garissa County. Its findings provide concrete data on areas to promote business and employment opportunities for women, youth and PWDs, in fodder, feedlot rearing, small ruminant production and bee keeping value chains. The market assessment confirms the existence of potential for the development of targeted value chains to create gainful employment in Garissa County. It also helps identify barriers to the participation of women, youth and PWDs in small and micro enterprises. The report highlights the institutional capacity development needs to facilitate participation of more women and youth in these value chains. The market assessment clarifies the actors and the marketing nodes for livestock, fodder, and honey in the County.

As well as providing valuable insights into the situation in the locations covered by this market assessment, the process of conducting this assessment provided SOLO staff and enumerators selected from local community institutions with experience in conducting data collection. It also highlighted several issues related to assessing women, youth and PWDs employment potential for host and refugee populations contexts in Garissa. This will certainly help shape the implementation strategy of **Strengthening the Livestock Market Systems in Garissa County through Value Chain Approach Project** by SOLO but largely address steps that lead to greater success in small and micro enterprises development.

Four data collection techniques were employed: Participatory observation, Group Discussions and Key Informant Interviews (these three techniques focusing mainly, but not exclusively, on qualitative data);

and a Survey Questionnaire was administered on 15 key Stakeholders from County Government, UN, NGOs and Business, and Livestock Marketing Associations and focusing both on quantitative and qualitative data. The data derived from the Focus Group Discussions and Key Informant Interviews was analyzed by the team to ground quantitative data extracted from secondary data and from survey questionnaire administered on key stakeholders. This provides additional information to this report's contents.

A dissemination workshop, was organized in Garissa on 23rd November 2021. It was attended by ILO,

picture 1: Lilyanne, ILO making her remarks

picture 2: Director of Livestock Development, opening remarks

Garissa County senior staff representing various departments key among them being Livestock Development, representatives from NGOs and producer cooperatives working in the target value chains. Feedback from the participants has been incorporated in this report.

Though the sub-counties had some variations, the only distinct factor was River Tana which transverses Garissa Township and where fodder production was more prominent. Fafi and Dadaab Sub-Counties and much of the villages of Garissa Township sub-county had similar attributes in terms of accessibility, prevailing agro-economic conditions, food security and livelihood status. Fafi and Dadaab sub-counties are refugee hosting sub-counties and had both camp and non-camp populations. The engagement of camp populations in beekeeping and fodder production was nevertheless constrained by their residence patterns. So, although the sample (65 respondents among women, youth and PWDs and 15 KII from major stakeholders) is small the consultant feels that it does provide an adequate overview of the types of villages in which the projects are being implemented and the prevailing conditions/opportunities for women, youth and PWD employment and participation in Small and Micro Enterprises within the selected value chains (Feedlot, Small ruminants, Fodder and Beekeeping). That said, caution should of course be exercised in drawing definitive conclusions from such a sample.

2.1 OPERATIONAL CONTEXT

Garissa as a refugee hosting County creates a unique socio-economic set-up where host communities co-exist with refugees. The total population of Garissa County is estimated by Kenya National Bureau of

Statistics (KNBS) to be 841,353[1] people (55 percent male and 45 percent female). The highest proportion of this population, 75 percent, reside in the rural areas and 25 percent in urban areas. On the other hand, Refugees Affairs Secretariat (RAS) give the total population of refugees in Dadaab to be approximately 230,137[2] people. The refugee population in Dadaab area is approximately 26 percent of the total population of Garissa County. Garissa has a population density of 19 (persons per square kilometer) which is one of the lowest in the country when compared with the national average of 82 persons per square kilometer. The county is saddled by extraneous environmental challenges that drain resources as it strives to serve the dispersed population.

The population of persons living with disabilities in the County is one percent of the total population, approximately 8,414 persons. The demographic composition of Garissa County is eminently young, urban settlement is being driven by rural poverty and limited livelihood options. The youth population (15-29 years) constitute 28.5% of the total population of the County. There is a growth of educated but unemployed youth in the County, notably because of two factors: increase in public education financing, and slow growth in the employment creation by both the public and private sectors.

Sectors driving growth in economic activity in Garissa County are Manufacturing (3.0%), Agriculture (43.0%) and services (44.0%). Agriculture (livestock based) has the second largest share of economic activity in Garissa County. Livestock trade contributed significantly to better performance in Agriculture Gross Value Added for Garissa County. Much of this is coming from Dadaab sub-county where there is a thriving market trade. Despite huge contribution of the livestock sector to the local economy, there is limited investment in livestock value addition. Production, processing, packaging, and marketing of animal products has not been developed adequately. Dagahaley is the largest livestock market among the three refugee camps. The refugee population both male and female are active participants in local marketing of livestock. They participate in the different value chains either directly or through their local counterparts.

The impact of global warming on desertification and depletion on rangelands has resulted to high losses of livestock during droughts. Beekeeping has been promoted as an additional livelihood to supplement household incomes. The County Government of Garissa estimates that if fully exploited, beekeeping industry can generate revenues in the upwards of 30 million Kenya shillings annually. Beekeeping in Garissa County was previously done to produce honey for local consumption and only limited surplus was offered in the market for sale. Currently, there is an increasing realization among the local population of the importance of honey for health and nutrition. This demand spiked during the Covid-19 situation in the country when honey was used as a major ingredient in 'dawa'[3] consumed to mitigate the impact of Covid-19 virus on the body.

The dense vegetation along the plains of River Tana and all year availability of water provides favorable conditions for beekeeping. Bees like locations that are close to water and nectar sources.

[1] Kenya National Bureau of Statistics (KNBS), Kenya Population and Housing Census Report, 2019

[2] Refugee Affairs Secretariat (RAS), September 2021

[3] Dawa – medicine (served in upscale restaurants and homes)

There is emergence of strong economic networks both within Dadaab urban center and the refugee camp complex, greater Garissa County and neighboring counties with these ties extending to neighboring countries such as Somalia. Livestock value chains have the participation of host and refugee populations, at different levels of the value chains. Increased trading and growth of business opportunities have transformed the areas into a vibrant trading hub with thriving and booming businesses, widened access to employment, services and education and improved markets and infrastructure. The provision of both infrastructural and social amenities for the refugee communities has had both social and economic impact to the refugees and host communities with linkages emerging between them and surrounding urban areas. The intra-county trade routes facilitate the movement of livestock, honey products, goods, and commodities from Dadaab to Garissa town which constitute the main trading hub in the entire northeastern region as well as other neighboring counties in northern Kenya. Direct benefits of trade flows in and out of Dadaab continues to be experienced beyond the immediate catchment area- and extends to other major towns in Kenya including Garissa, Thika, Nairobi and Mombasa; as well as across Kenya border in Somalia. The proportion of livestock traded in Garissa that originate from Somalia has considerably increased after the market share of livestock from other regions of Kenya increased. An opportunity for local pastoralists to expand their market has been created.

2.2 MARKET ASSESSMENT

The market assessment aimed at gathering appropriate data on market systems in livestock and beekeeping value chains to ground SOLO's, Technical Support and Capacity Development that builds competitiveness and value among stake holders within the livestock and bee keeping value chains; Farmer institutional development to ensure inclusion and improved production and market linkages; and Production development and Market linkages driven by innovation and competitiveness of products from the four value chains and other by products emanating from the livestock and beekeeping value chains. The assessment also carefully subjected the variables to the market systems framework as shown below;

a. ***Analyzing the market system***: Market systems was analyzed alongside the intervention of the County Government, Development actors as well as the private sector. This captured issues such as demographic trends, the multiplier effects of agricultural development, and the impact of safety nets or social protection interventions including the disruptions of drought and Covid19.
b. ***Defining the intervention space***: We then proceeded to define the intervention space through KII with systems actors to get a good understanding of the target groups within the four selected value chains and their context. The assessment extended the boundaries wide enough to i) see beyond individual transactions to the patterns of behavior that emerge; ii) find points of leverage to address constraints in a scalable, cost-efficient or effective way; and iii) include actors key to sustainable impact, including decision-makers, influencers and those with the potential to lose out as a result of changes in the market system.
c. ***Designing interventions in a complex system:*** This market system analysis will be used to identify changes that appear to be key to increasing the competitiveness, inclusiveness and/or resilience of the system with reference to the four selected value chains. As project interventions stimulate change in the system, ongoing analysis and learning will identify new entry or leverage points (and obstacles) that will require adjustments to plans and the introduction of supporting interventions.
d. ***Increasing the competitiveness of markets***: At the time of the assessment Garissa County was recovering from the impact of Covid19 while in the eye of a severe drought; a lethal combination

of livelihood shocks. The assessment recommends a facilitation approach that creates the conditions under which market actors can innovate and adapt to changes in market trends or in the enabling environment without project support, through a focus on building capacities, strengthening relationships, and aligning incentives in pursuit of shared objectives.

e. ***Increasing the inclusiveness of the market system***: Garissa county host a large community of refugees hence the assessment intentioned a focus on pathways of interventions that will catalyze change processes resulting in a more inclusive market system, analysis needs to include a specific focus on i) who is traditionally excluded, and why; ii) which excluded actors—if included—would have the most catalytic impact on poverty reduction, women's empowerment, or other inclusion goal; and iii) where there are opportunities to align competitiveness and inclusion objectives.
f. ***Strengthening the resilience of the market system***: The focus on building resilience in the system as well as the individual actors looked at some of the issues, ability to learn, mechanisms for stakeholder coordination, and the promotion of diversity. It is important to note that there is often a tradeoff between resilience and efficiency (which affects competitiveness) as shock preparedness requires addressing a wide variety of shocks that may or may not occur, but which incur a cost.

The analysis of capacity of groups that are active in fodder, feedlot, small ruminants, and honey production has been presented in this report. It emphasises on the need for SOLO to build on already developed or existing groups instead of forming new 'project' groups. The assessment findings confirm that some groups only require information on how to activity participate in market systems. Due to constrain of time, the market assessment did not undertake a detailed capacity assessment of individual groups. The report instead recommends that SOLO technical staff proceeds to conduct a more detailed capacity of assessment of potential groups. This information will help map out groups with potential to in the different value chains and plan a tailor-made market development support for each group.

2.3 OBJECTIVES OF THE MARKET ASSESSMENT

The main objective of the market assessment was to identify barriers to business start-ups and scale-ups for youth, women and PLWD in target areas of Garissa County within the following broad value chain focus:

a) Commercial fodder production along the Tana Riverbank targeting the youth.
b) Feedlot rearing of livestock for sale to abattoirs for women and youth
c) Small ruminant production and marketing for women and people with disabilities
d) Bee keeping targeting women and people living with disabilities (PLWD)

Based on the findings, the market assessment report was to elaborate on strategies for enhancing youth, women and PLWD competitive participation in business start-up and scale-up within the selected value chains, while ensuring profitability, sustainability, and innovation to improve livelihoods and alleviate poverty among the target group.

The market assessment was to make recommendations to strengthen business and employment promotion services along the selected value chains.

2.4 METHODOLOGY

The market assessment mainly focused on; Commercial fodder production; Feedlot rearing of livestock; small ruminant production and marketing, and Bee keeping. The study focus area was Garissa Township, Dadaab and Fafi sub-counties mainly Tana riverbank, Mbalambala, the three refugee camps of Hagardera, Ifo and Dagahaley and camp markets. The market assessment began with an inception phase in October 2021 during which preliminary literature review was conducted which informed the preparation of the Inception Report, detailed work plans as well as data collection tools and instruments.

Various inception level meetings were also conducted between the consultant, SOLO, County Government, and ILO technical team. Several virtual meetings were held with fodder producer groups and the County Department of livestock development to agree on study process and coordination. Technical staff in County Department of Livestock also participated in providing feedback though in-depth interviews.

After approval of the inception report and study methodology (including tools and work plan), our team commenced detailed review of existing literature in tandem with conducting high level introductory meetings with key stakeholders. Subsequently, the team commenced field-based interviews with various targeted respondents at county and sub county levels including field visits to Dadaab and Fafi sub-counties and Garissa County offices.

Field visit and field-based interviews were conducted in villages along Tana River, within Garissa Township as well as livestock and beekeeping markets in Dadaab and surrounding areas spanning the period October 23 – November 7, 2021, by a team led by the consultant and SOLO's Technical Advisor assisted by the local research assistants. Data collection process largely utilized qualitative research method and approaches. These can be summarized as follows:

Desk study and review of relevant information which included conducting a detailed context analysis of existing secondary data on various production and marketing processes within the different value chains, aimed at establishing status, identifying gaps, opportunities, and potential. The desk study mainly referenced reports, documents, and other materials from, national and county level perspectives.

Virtual consultative meetings were conducted online with key stakeholders which included the technical teams from NGOs working in Garissa.

The field data collection in Garissa township, Dadaab and Fafi sub-counties level comprised of a mix of face to face and virtual qualitative data interviews with staff from county department of livestock and selected Garissa based livestock and beekeeping SMEs and value chains. At Dadaab and Fafi sub-counties level, face to face interviews were conducted with group leaders, as well as sampled respondents from fodder, livestock, and honey SMEs in Dadaab Town and the 3 camp markets (Ifo, Dagahaley and Hagadera). Virtual interviews were also conducted with sampled key respondents from humanitarian aid and relief agencies supporting both refugees and local (host) community.

The draft report was presented during a dissemination workshop in Garissa, attended by ILO, Garissa County Government, NGOs and Producer groups participating in the target value chains.

2.5 MARKET ASSESSMENT GAPS AND CHALLENGES

Limited availability of primary data on the targeted value chains was a major gap in aggregation of data. The County Government does not have a depository of information on acreage under fodder production, number of beehives with bee colonies, capacity of honey production and number of traders or businesses in each of the value chains. Data available was only from reported activities by humanitarian actors some of which was inaccurate as the activities were no longer active. Where primary data could not be accessed during the time of the market assessment, the assessment depended largely on secondary data at county and national government levels.

There was no data on number and operations of SMEs (both formal and informal) in the livestock and beekeeping value chains which necessitated using of primary estimations as provided by partners. Fodder production and beekeeping are not very prominent economic activities compared to livestock trade and thus attract limited attention in terms of documentation. The dynamics of trade in these value chains was not understood by most people and thus sourcing of information was constrained. Though livestock traders in Dagahaley livestock market gave clear information of sizeable livestock emanating downstream from Somalia, data this trade could not be accessed since border operations remains illegal with the Liboi crossing border point officially closed. This necessitated referencing of generalized information as obtained from key informants. There were few challenges encountered during the process of data collection.

Another challenge was inability to get approval from a commercial feedlot producer to access the farm. As such information on feedlot rearing was not comprehensive and much of what was collected on this value chain was more on zero grazing.

3 SOCIAL, ECONOMIC AND POLITICAL OVERVIEW

Addressing youth unemployment has become increasingly urgent in the face of the growing numbers of unemployed youth. 75% of the 47.6 million population in Kenya is of the age 35 and below. The youth population (15-29 years) in Garissa County constitute 28.5% of the total population of the County. Men make up 49.5% of the population while 50.5% of the population are women. About half of the total female population comprised women of child-bearing age (15-49 years). Of particular significance is the fact that Kenya has a youthful population with a mean age of 20 (male 19.9 years and female 20.1 years) years and with 45 per cent below 15 years of age. The youthful population poses a fundamental challenge to future workforce development and employment creation in Kenya in general and Garissa in particular.

Nationally, 918,270 people aged 5 years and above had a disability. More females (523,883) than males (394,330) had disabilities. An additional demographic feature that adds to employment challenge is the high level of urbanization estimated at 27.51%.

The County continues to rely on resources allocated by the national government and bilateral donors to complement its employment creation and economic development agenda. Various development partners have established programs, that seek to ensure economic and social services that are responsive to the priority requirements of the Kenya population, are efficiently and equitably delivered. There is also an inherent need to promote integration between different population groups both from hosting communities and those in displaced status like the refugees.

Table 1: Organizations' interventions in target value chains

Sector	Partners
Livelihoods	NRC, DRC, FAO, SOLO, LWF
Food Security	DRC, NRC, KRCS
Livestock production	KRCS, KDR-DIP, SOLO, Mercy Corps, ACDI-VOCA, LMS, KLMC
Beekeeping	WFP, Mercy Corps, KRCS
Fodder production	ACDI-VOCA
Skills/Business training/Grants	NRC, DRC, Humanity and Inclusion, SOLO

Among the target value chains, persons living with disabilities mainly operate businesses which include milk vending and selling honey. They are not involved in the other value chains. High number of women (both refugees and host communities) are largely involved in small scale businesses. However, the number of disabled women involved in business remains very low. For women engaging in enterprises, the operations were on retailing of meat mainly fried pieces of meat in oil (nyirinyiri), vegetables, hotels, milk business, artifacts, household utensils, fabric dyeing, tailoring, saloon, cosmetics, cereals, charcoal, firewood and Miraa (Catha edulis). Women owned and managed businesses accounted for 30% with funding for 60% of these businesses having been financed by spouse.

4 MARKET ANALYSIS

This market assessment reports discusses the different strategies that need to be put in place to achieve a market system that works for livestock, honey and fodder value chains targeting refugee and host communities. The market assessment observes the complexity of the livestock market and the different actors involved in the different value chains. There is emergence of strong economic networks both within Dadaab urban center and the refugee camp complex, greater Garissa County and neighboring counties with these ties extending to neighboring countries such as Somalia. This has led to increased trading and business opportunities, transforming the areas into a vibrant trading hub with thriving and booming businesses, widened access to employment, services and education and improved markets and infrastructure. The provision of both infrastructural and social amenities for the refugee communities has had both social and economic impact to the refugees and host communities with linkages emerging between them and surrounding urban areas. Direct benefits of trade flows in and out of Dadaab continues to be experienced beyond the immediate catchment area- and extends to other major towns in Kenya including Garissa, Thika, Nairobi and Mombasa; as well as across Kenya border in Somalia. Refugees participate in keeping small ruminants in the camps. They lack land to grow their own fodder and must negotiate with the local host communities to access grazing land.

The refugee population have an opportunity to advance their livelihoods by participating in small ruminant value chains. They also have opportunity to engage at the tail end of the fodder value chain as the final sellers to the livestock keepers. They have actively been engaged in the marketing of processed or packaged honey within the camp markets. Since they have access to grazing land, and can move between markets, host communities have opportunities in trading with life animals and animal products like meat and milk.

4.1 COPING WITH DISRUPTIONS IN LIVESTOCK AND HONEY VALUE CHAIN BUSINESSES

Drought and the aftermath of covid-19 has resulted to businesses taking long to recover. Different livelihood activities were affected by poor revenues from a low customer base. For example, on the supply side, sales were low due to reduced animal weight, high costs of keeping the animals alive and high costs of fodder to supplement the depleting rangelands. On the demand, side, most consumers suffered loss of income considering that 80% of the population drive their income directly from livestock and livestock related businesses. On the demand side, the customers lacked adequate purchasing power. The refugees who largely sell their products out of the Dadaab areas found themselves holding their stock for a longer duration. Women rearing small ruminants spent more to save their livestock, and when they took them to the market, the sales were poor. Access to informal credit was reduced too and those who required short-term financing to bridge the cash gap suffered financial stress.

Droughts also affect the beekeepers. With the lack of flowering plants, trees and water honey production is low. However low production was compensated by high price of honey which shot up from Ksh 500 per litre to Ksh.1000 per litre, 100% increase in price. Because of high demand for honey, there were increased cases of theft especially for those beehives that were placed away for the homestead. Fodder producers had lower production capacity but also sold for a higher price. The price of Sudan grass seeds that normally sell for 550/- per kilogram was sold at 700/-per kilogram.

The market for livestock, fodder, honey, and meat have been reasonably transformed by the lessons picked from the impact of convid-19. Fodder producers have diversified into other types of fodder. Some producers reported that there are more on-line sales and transactions than was the case previously. This has boosted sales and transaction costs. Farmers who were already producing fodder have increased production by diversifying to other varieties of fodder apart from maize. They have started growing Sudan grass in addition to maize.

The following summary outlines some of the responses from the group as to the coping and impact of drought and Covid19 on their livelihoods.

Impact of COVID-19 & Drought on Groups Activities (%)

Figure 1: Impact of Covid-19 and drought

Respondents stated that COVID-19 pandemic and drought resulted in other changes in their lives especially women who have had to spend longer hours taking care of the children during school closures leading to neglect of their businesses. Some group activities were affected by restriction of movements and closure of business as shown above. On a positive note, drought occasioned the demand for fodder whose demand could not be met within the County.

% Distribution of how the group responded and adapted to the challenges due to COVID-19 and the drought?

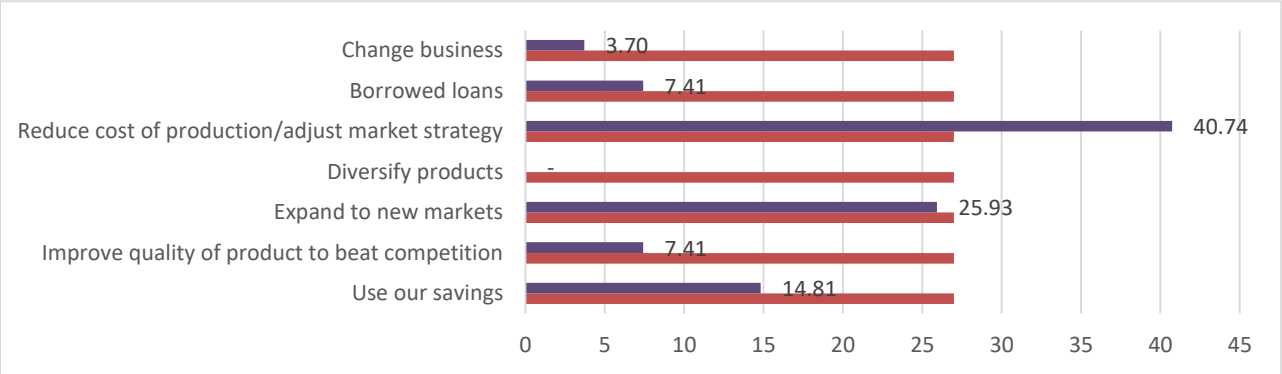

Figure 2: Adaptation to covid-19 and drought

% Distribution of internal factors enabled the group to survive

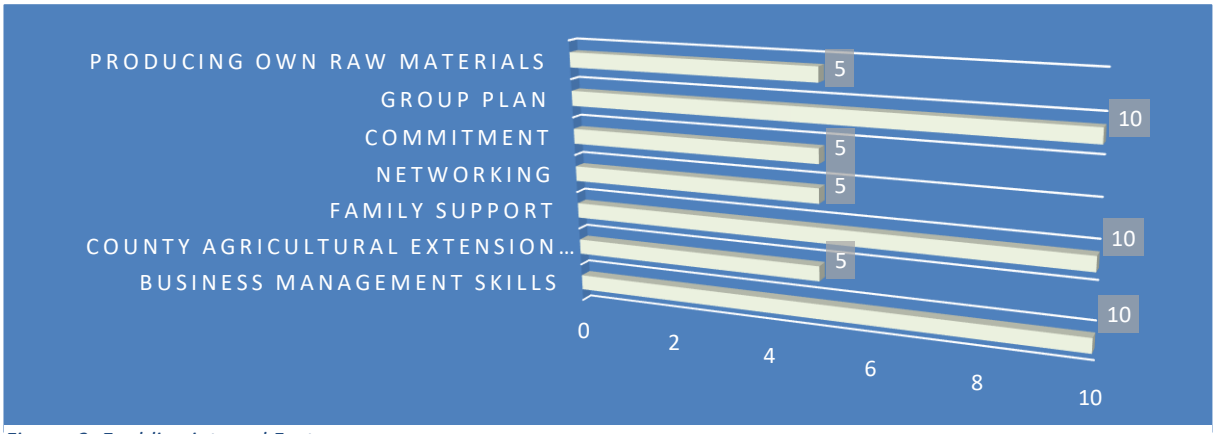

Figure 3: Enabling internal Factors

Asked about the external factors/support (i.e., business environment, government, other businesses/organizations) that enabled their groups to adapt to the challenges of drought and Covid19, they prioritized them as follows.

Table 2: Enabling external factors

External Support that enabled the group to adapt to the challenges	%
Training and Technical Support	40
Business institutional networks	5
Extension services	20
The financial crisis from similar businesses	10
Networking	5
Support from other organizations	15
Current technology	5
Training and Technical Support	8
Business institutional networks	1
Extension services	4
The financial crisis from similar businesses	2
Networking	1
Support from other organizations	3
Current technology	1

The groups also identified the following as the most important support they need for recovery of their enterprises;

- Finance
- Raw materials and fam input
- Equipment
- Advice/training/extension services

What other Support does your group need to better adapt to the crises?

Table 3: Needed support to adapt better

Capital/Start-up kits/loan	32%
Training/ Technical skills	44%
Equipment and Energy	8%
Creating market links	4%
Business plan development	4%
Leadership skills	4%
Management skills	4%

How do you feel about the ability of your group to recover after COVID-19 and the drought in the short term?

Table 4: Groups recovery from covid-19 and drought

Feeling	%	Reason
Slow	40%	Decreased production Capital is not available Drought, locust and covid 19 Government support
Moderate	30%	Has savings, group work collaboration
High	20%	I have capital Group is flexible
Won't recover	10%	I made major loses

How do you anticipate your group will adapt or change after COVID-19 and the drought over the medium to long term?

Table 5: Adaptation to change after covid 19 and drought

Seek training and skills		36%
Adopt technology and modern approaches		9%
Product branding/strategizing/identifying market gaps		23%
Identify new businesses opportunities		23%
External Support		4.5%
Collaboration		4.5%

Thinking about the future and potential future pandemic or other crises: What Support would help your group be better prepared, better able to adapt, and become more resilient?

Table 6: Strategies to be adopted

Strategies the group will use to Adapt	%
Build gabions to prevent soil erosion	3.57
Business plan review/development	14.29
Training and capacity building	28.57
Business administration and accounting	3.57
Networking	3.57
Management and planning	14.29
Financial Support	10.71
Adopt technology	10.71
Diversify business and material sources and markets	10.71

Financial literacy was inculcated to the beneficiaries after they could no longer access traditional credits to cover their cash flow gaps during the prolonged covid-19 situation. Respondents affirm that they have

increased their savings. Upon further probing, it was estimated that 30% of the target groups are saving 5% more than they were doing before.

As discerned from the respondent's articulation of how best to survive after the disruptions to business, technical support, creating linkages with other groups and training were crucial. Further the groups and individuals expressed a need for tailored technical advice (e.g., Business resilience planning, marketing strategies, Digitalization, product labelling, changes in product range), setting livestock treatment centers, fodder production.

4.2 LIVESTOCK VALUE CHAINS

The vast majority of local (host) community in Garissa Township, Dadaab and Fafi Sub-counties are predominantly engaged in pastoral production while refugee community are in trade and enterprises. In addition to pastoralism, host community members are also involved in other livelihood activities including trading with refugee community through sale of milk, live animals for slaughtering, firewood as well as provision of donkey cart transport services.

picture 3: Camel trade, Dagahaley, Dadaab

The trade business in live animals for slaughter is well established and booming within Garissa County (mainly Dadaab and Garissa town) and remains the dominant engagement which support over 80% of the population in the county. Livestock markets in both Garissa Town and Dadaab areas constitute the largest livestock market in East and Central Africa- which provided live animals for slaughterhouses. Live animals sold in the markets are sourced locally (with approximately 25% of the cattle sold at Garissa Livestock Market sourced from Dadaab area) with most of these animals purchased during market days on Friday and Saturday from bi-weekly Dagahaley Livestock Market. From Dagahaley market, the branded animals are trekked by hired local herders to weekly Garissa Livestock Market which takes place every Wednesday.

Additionally, live animals sourced from neighboring counties of Wajir, Isiolo and Mandera are sold directly in livestock markets such as Dagahaley, Ifo, Hagadera and Garissa Town mainly to refugees, butcheries and traders who further sell to other Kenyan markets mainly in Nairobi, Thika, Mwingi, Kitui and Mombasa. Some of the animals are also relocated to ranches in other parts of Kenya- mainly coast and southeast parts- for fattening and later resale in local markets as well as export to other countries including United Arab Emirates and Mauritius. The business in livestock is segmented in approach whereby some traders specialize in cattle, others in camels while others trade in goats and sheep. Other major livestock products that generate income is cooled or uncooled fresh camel milk for sale.

Apart from sale of live animals and milk, communities (both refugee and locals) also trade in livestock products which include meat sold in butcheries; camel meat pieces fried in oil locally known as "Nyirinyiri";

camel milk processed to yoghurt or fermented milk (mala), ghee, animal hides and skins, as well as camel bone marrow extracted from slaughtered camel bones. These

Sale of Livestock, slaughtering to sell as meat as well sale of milk products constitutes the main value addition activities by the refugee populations in Dagahaley, Ifo and Dadaab camps. Women keep small ruminants for fattening and later sell in the local markets for slaughter or herd multiplication. Production of small ruminants predominantly undertaken by women is facilitated by the fact that the small ruminants are easily confined within the camp and fed on fodder collected from neighboring farms or pastures. Women are able to fatten them and market them in goat markets that take place daily.

Livestock value chain in Garissa has many players all who play an important role in value addition by moving the product closer to and in the form the customer wants it. Pastoralists who tend the livestock, farmers who grow the fodder for sale to livestock owners, business owners and workers who buy and transport the livestock to terminal markets, distributors who facilitate movement of livestock and livestock products to different markets, middle men sellers(locally known as brokers) who buy from the pastoralist and bring to the market or buy in the market on behalf of specific businessmen, transporters who move the livestock or its products to the terminal market, government licensing and regulatory officers who verify quality and approve for sale in the market, development partners supporting livelihood programs and consumers who constitutes the terminal market for livestock products (milk, meat, hides, hooves, bones etc.). Livestock value chains in Garissa town, Fafi and Dadaab areas interconnected due to the important role that Garissa town plays as a connector to other towns in Kenya. Garissa is major marketing hub for livestock and promotes a lot of the livestock value chains.

picture 4: Livestock trade, small ruminants, Dagahaley, Dadaab sub-county

The Ministry of Livestock supports livestock marketing through County Livestock Marketing Council (CLMC) formerly the District Livestock Marketing Council (DLMC), which is an umbrella of all livestock marketing association (LMA) at each livestock market facility throughout the county. Livestock traders elect the Council and the associations for smooth running of the market services. The most vibrant of the LMA in the county is Garissa Livestock Marketing Association that has an office at the facility.

Marketing of meat is one value chain that accommodates both the host and the refugee populations. It can be further developed to appeal to different market segments. Animals are slaughtered daily, and their meat sold to consumers through different outlets like butcheries, hotels and other eateries serving meat. Meat is also supplied in raw form to the Kenya Defense forces, schools and hospitals. The local

communities consume a lot of meat. This supports different value chains. Triangulated data from livestock traders, county government reports and members of livestock marketing association estimate that, in Garissa Town alone, an estimated 35-40 camels and 110-150 goats and sheep (shoats) are slaughtered daily while in Dadaab, 30-50 sheep and goats and 10-15 camels are slaughtered daily. The traders in meat products reported facing numerous challenges which include inadequate finance for expansion, bad debts from some creditors, lack of adequate equipment and technology to preserve meat, lack of appropriate tools and refrigerated meat transportation vans; lack of proper product packaging; limited market penetration especially national and international markets and delayed payments by Kenya Meat Commission which affects their working capital.

WFP is supporting the Garissa County Government to develop a Food Safety and Quality Strategy protocol to ensure quality of animal products especially milk that is marketed by many vendors. Quality standards should be promoted across the whole milk marketing chain from the source, transportation, intermediaries, and the final market.

The existing camel milk aggregators should be targeted for support to improve the quality and supply of milk in order to benefit all in the chain.

4.3 APICULTURE VALUE CHAINS

Beekeeping has attracted a lot of support in Garissa County primarily because it is easy to manage and can provide an alternative source of livelihoods for the host population and refugees alike. A total of 15 beekeepers' groups were identified in the County. Key organizations supporting beekeeping are WFP, KDR DIP, Kenya Red Cross Society (KRCS) It is estimated by many experts that Garissa has a capacity to produce honey worth 30 million Kenya shillings annually. One beehive is estimated to produce approximately 10kg of honey per harvest. Honey harvesting is done three times in a year, which would then translate to 30 Kg per year from one beehive. The market price of one kg of honey is approximately Ksh 1,000. It is estimated that for economic production, 300 hives are required. Honey production and harvesting is the preserve of men. Women participate in the processing, packaging, and marketing of honey to the end users. It is packaged in recycled containers. Much of the honey produced in Garissa is undertaken by farmers living along Tana River.

picture 5: Honey production, Korakora farm, Garissa township

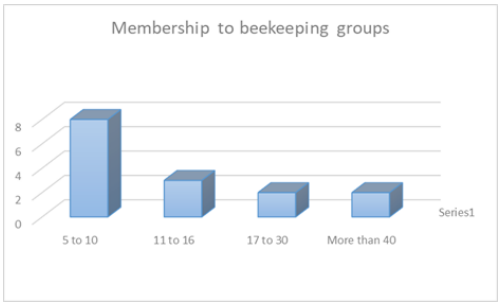

Figure 1: Size of producer groups

Past efforts in beekeeping value chains have focused largely on increasing production. Beekeepers have been organized into groups through which support is provided. The support provided include beehives and other accessories that support management of the bees and eventual harvesting of the honey. Beneficiary identification and selection is expected to follow pre-defined selection criteria which primarily should favour those who demonstrate commitment and readiness to contribute to their own development. Respondents from humanitarian organizations acknowledge that proper selection of beneficiaries is essential for the success of beekeeping enterprises.

picture 6: Honey marketing, Dagahaley market, Dadaab

Use of chemicals in farming and shortage of flowers are increasingly leading to the migration of bees.

Demand for honey is higher than supply. In addition to the other uses, honey is considered a good treatment against corona. Honey marketing is facing some key marketing gaps that need to be addressed to improve the supply and demand flow of the commodity. Processing of honey is still largely traditional. Though some organizations have provided equipment to improve in honey processing, the extension services are weak, and the farmers are sometimes not able to effectively make use of the equipment due to this capacity gap. Packaging is a major barrier to extensive marketing of the honey. Much of the honey produced in the tana river banks or in the deep rangelands of Dadaab is packaged in recycled containers. A cup of half-litre volume is used as standard measure of honey which sells for Ksh 300. Using this measure, different sizes of bottle would be used to put the half-litre volume. From the visual assessment it is difficult for a customer to tell of the bottles contain the same volume of honey whey the same measure is put in different sizes of containers.

Individual farmers work independently in marketing their small quantities of honey. They are not able to achieve market identify through this fragmented approach. It has been proposed that identifying one lead farmer to serve as an aggregator of small amounts of honey from different producers can assist in joint marketing of groups' honey through a common channel. This would facilitate appropriate packaging, brand identity and quality control of honey offered in the market. The project should support in strengthening farmers groups to act jointly in marketing their honey.

It is further proposed that a private entity or a lead farmer could come into agreement with the beekeepers to provide extension services to the beekeepers. The County government should facilitate legislation of appropriate policies to guide honey production and marketing.

4.4 FODDER PRODUCTION

The market assessment determined the existence of demand for fodder production within the county to meet the gap in pasture especially during the drought situations when most livestock die because of lack of pasture. There are 28 producer groups identified in the target sub-counties. Their membership includes both male and female with the total membership ranging from 8 for small groups to 82 members. Majority (57%) have a membership of between 10 and 20 members. Only 29% of these groups have a membership of more than 35 members. These groups do not primarily produce fodder only but also produce Mango, Lemon, watermelon, tomatoes, guavas and mangoes. Sudan grass is the common fodder produced. None of the groups had accessed any form of credit to expand their production activities. They produce in small scale and sell in the local market.

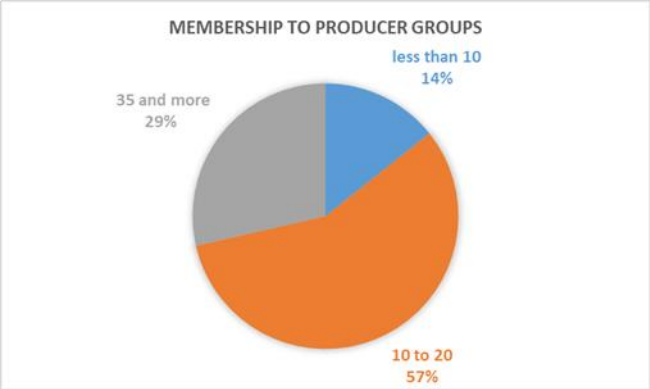

Figure 2: Size of producer groups

Different assistance provided to fodder producers included seeds to regenerate the pasture and heavy irrigation infrastructure to water the fodder producing farms. There are about six farms in Garissa County that are undertaking fodder production. The farms are along the Tana River. All these farms have had support from humanitarian actors in form of farming technology and the irrigation infrastructure. However, the production capacity of the farms producing is still low when assessed with the level of investment that has gone into the farm.

picture 7: Fodder, Dasheeq ADC farm, Garissa township sub-county

For a viable fodder production project, the right targeting of farmers and farming groups need to be undertaken. Second the feasibility of the project should be established before investments are made.

Small holder farmers are producing fodder to feed their own livestock and have done it successfully for many years. Occasionally, they sell a small amount of this fodder in the market to generate some income. These farmers have the technical know-how and are growing their own fodder by themselves. Technical support that should be directed at building on what they have started can help increase production and link with the market to sell the surplus that will not be consumed by his/her livestock.

The market assessment established that fodder production is a good intervention, but unfortunately, farmers have not seen the economic sense of growing fodder for commercial purposes. The motivation

to produce for the market is low mainly because the return on investment is also low and not immediate. The market assessment visited youth group owned farms that grow fodder. There has been a heavy investment in youth groups to undertake fodder production within Garissa Township. A further analysis of these huge fodder farms would need to be undertaken to learn from them.

A lot of fodder that is brought into the market is subsistence based and not fully commercialized. Some women freely weed other people's farms and package the grass for sale in the market as fodder. Among the bigger farmers growing fodder, buyers collect it from the farm. They don't deliver it to the market.

picture 8: Fodder (sudan grass), Korakora village, Garissa township sub-county

Fodder value chain has been studied by types of soil, but it terms of agronomical conditions it is not well researched. There have been some experiments undertaken to compare the different varieties. Many barns have been constructed to store hay, but they have largely remained empty because there is no hay that is produced.

One of the reasons why commercial fodder production has not succeeded is because there are no incentives for the farmers to produce during the times when there is plenty of pasture.

It is estimated that Garissa County has a shortage of 2 million bales of hay annually, yet the farmers have not adequately linked with the market to meet this shortfall. There is need to think more strategically on how the county government and the private sector can partner to meet this shortfall. There are discussions and actions planned towards range management (restoration, protection, reseeding) in Garissa. A livestock policy is in draft form and issues about fodder have been incorporated in the policy.

Fodder commercialization will require policy guidelines and support especially on how to store fodder to be sold during the drought situations. The fact that stores have been constructed and no hay is stored for use during the drought season is indicative of a market system that is not functioning effectively. There will be need for the County government to develop strategies on how to absorb production from small holder farmers who play a key role in meeting needs of livestock keepers.

SOLO should focus on supporting small holder farmers with marketing and production skills. The target should be those who are already producing but lack proper organization to penetrate the market.

4.5 SMALL RUMINANTS

Gala goats and Persian sheep are the varieties of small ruminants produced by women both in the refugee camps and in host communities. The market demand for goats is well developed and farmers are not able to meet the demand. Garissa livestock market is the primary market where these small ruminants are

sold. The small ruminants are sourced from the feeder markets and brought to Garissa for sale. There are other projects like Kenya Smart Project that is supporting value chain of small ruminants. Stock density of small ruminants is high. More livestock places more pressure on offtake and marketing of the stock.

Challenges encountered with small ruminants include disease control, inbreeding which affects health of the animals and poor marketing. To address these challenges, it is

picture 9: Women small ruminant traders, Dagahaley market, Dadaab sub-county

recommended that producer groups are promoted alongside higher level traders to help in aggregation and sale of these livestock. The small ruminants are sold daily unlike the camel market which is restricted to specific days of the week.

To improve the value chains, it is pertinent that health, marketing, inbreeding, capacity of producer groups and aggregation are all addressed comprehensively. New breed of higher production genetic would need to be introduced to improve production. Better veterinary services need to be availed while capacity of groups or linkage with private sector aggregators will need to be strengthened.

4.6 FEEDLOT PRODUCTION

Feedlot production is not common in Garissa. There four (Green orchard, Liib farm, Qahira farm and Wathajir farm) feedlot production farms in Garissa County, all located within Garissa Township sub-county. There is only one prominent commercial feedlot farm in the County, owned by a local politician. Feedlot production is not common in Garissa. There is one commercial feedlot farm in the County that is owned by one prominent family. The team was not able to visit the farm. Other similar feedlot production activities involve traders who buy weak animals during drought and feed them within an enclosed environment with high concentrates and sell them after four months. Communities living

picture 10: Zero grazing, Korakora village, Garissa township

along the river and grow their own fodder enclose their animals and fatten the animals by feeding them with the fodder they produce. These animals are later sold when the families need cash. It is not largely commercialized because feeding an animal on fodder alone is expensive and one would require huge acreage to grow enough fodder.

Recognizing the economic significance of feedlot production, the national government in partnership with the World Bank is planning to establish a feedlot in Garissa. Fodder will be produced, and infrastructure will be developed to accommodate the feedlot project. A Public Private Partnership (PPP) model is envisaged. land is communally owned which is a bottleneck to the PPP model. Engagements are going on with the local community who want compensation for their land, this has delayed the take-off of the project. It is nevertheless an encouraging initiative which should be encouraged. It is capital intensive, and the private sector will certainly do it right to recoup his investment. Ordinary farmers can be encouraged to practice enclosed livestock rearing and get out of the mentality of subsistence livestock rearing.

5 CONCLUSIONS AND RECOMMENDATIONS

5.1 CONCLUSIONS

The twin impact of drought and Covid-19 has had a devastating impact on the livelihoods of groups and individuals in the County. This has resulted to challenges in sustaining some of the commercializing activities of fodder, beekeeping, feedlot and small ruminants production. The policy environment has gaps in guiding development of the emerging value chains and the producer groups and cooperatives being formed. There is value employing market systems development in Garissa to transform livelihood activities into economic and business entities that are purely driven by marketing dynamics. This will change the current mentality of subsistence and external driven assistance to income generation activities. The change in assistance modality where needs and self-drive informed by the understanding of personal change among the target value chains will help anchor the project on a firm foundation that is pathed on sustainability. Fodder Production and Feedlot production would need to be reflected upon as there is need for strategic reorientation of the implementation of these value chains. The market assessment has not established adequate data on feedlot production and bases the recommendation on traditional enclosed grazing of livestock. Similarly, fodder production need presents a challenge if assistance is provided to the same groups who are recipients of other forms of assistance.

It may be difficult to infuse marketing systems imperatives in the groups if they had or have been oriented towards sustained assistance.

5.2 RECOMMENDATIONS

a. The honey producers, fodder producers and small ruminant livestock keepers operate their livelihoods activities independently and thus fail to benefit from the economies of scale. It is recommended that to optimize on their production capacities the farmers would need to be trained on the economic value of aggregation and joint marketing. This will trigger interest for the farmers to try to work together to achieve higher sales and incomes. The training should induct

the farmers and livestock keeper on the different forms institutional formation they can put into place to assist them achieve the individual and group goals. They should be left to brainstorm and agree among themselves on the kind of organization to establish or strengthen to lead them to their goals.

b. Learning from the livelihood shocks of drought and Covid19, the project needs to look at the possibility of a digital platform to bridge the communication gap between demand and supply. This will ensure that the producers are able to reach markets outside Garissa County.
c. Most groups identified training/ capacity development in business planning as well us management and product development as some of the areas that their enterprises need to be more resilient to shocks in the future. SOLO should ensure that training and capacity development are guided and targeted to specific needs of the enterprises along the selected value chains.
d. Existing groups and cooperatives should be strengthening on the new and innovative production and marketing methods. The institutional capacity of these groups or cooperatives should be strengthening by implementing a needs driven tailor made capacity development support that place a lot of decision-making responsibilities on the groups. This capacity development plan should be anchored on detailed capacity assessment for each of the groups so that training is only specific to the areas that gaps have been identified.
e. The project should provide technical advice on market linkages and where needed strengthen linkages between the producers and consumers/buyers of the small ruminants, fodder, honey, and livestock products. Inward-looking strategies for financial mobilization among groups for a joint business investment should be promoted so that the groups do only perceive external funding as the only source of business finance. It is pertinent that groups are encouraged and sensitized to raise their own equity to fund their enterprises.
f. The Village Savings and Loans (VSLAs) have been promoted as an initial strategy in raising own savings. This is a good initial step. But experience has shown that this 'merry-go-round' funding method has inherent limitation in boosting growth. Groups must inject additional capital outside of their regular savings to be able to expand. Thus, the project should train groups in savings but also link the groups with financial services providers to guarantee their business undertakings or finance their business plans purely based on the bankability of the business plan. For example, small ruminant producers can aggregate their livestock and export to a bigger market outside of Garissa. The financial service provider can guarantee working capital to the producers between the date when the sale is completed and the date when payment is made, if for example one is supplying to an institutional buyer.
g. Small ruminant producers are unable to achieve optimum production of their livestock due to in-breading, diseases, and weak marketing approaches. Animal health and advice on breed variation need to be transmitted experientially to the target beneficiaries. Private sector or lead/anchor farmer led technical assistance could be explored to improve on extension services.
h. For a successful market system, appropriate selection of market actors is as important as the product and services being offered in the market. Success in market systems hinges on the type and motivation of selecting project beneficiaries. SOLO should hedge beneficiary targeting against non-primary considerations that bring in beneficiaries that are not in committed to the project

strategy. Success among the beneficiaries and by extension the project will be largely determined by the self-drive of the value chain beneficiaries.

i. The Lamu port has been completed and is already receiving international vessels. The port has a provision for loading livestock for export. It is linked to Garissa through LAPSET (South Sudan, Ethiopia Transport Corridor). The port proximity to Garissa can be tapped for expanding export of livestock to other countries and this will boost the incomes of farmers. Export of live animals has not been very big, and this can be promoted as it would certainly add value to the livestock trade. Small farmers can be trained in aggregation and exporting through institutions like livestock marketing cooperatives. They should also link both strategically and operationally with Kenya National Chamber of Commerce and Industry (KNCCI) and Kenya Manufacturers Association (KMA) to organize trade missions to countries that have potential to import animals and meat from Kenya.

6 APPENDICES: TOR AND DATA COLLECTION TOOLS

6.1 TOR AND DATA COLLECTION TOOLS


Case studies and Producer Organizatio


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KII Private Sector 251021.docx


FGD guide.docx


Revised Draft ToR Market Assessment S


Revised SOLO Market Assessment In

6.2 RESPONDENTS

Respondents who willingly provided their names and were recorded in the questionnaire

	Name	Group/Organisation	Location	Designation/Contacts.
		Target Groups		
1	Ali Hassan	Livestock Trader	Garissa	0715284296
2	Siyat Dubow	Dasheeg Farm	Garissa	0722506466
3	Ahmed Hussien	Self-Business	Dadaab	Owner
4	Nimco Iraad Ahmed	Iftin Youth	Dadaab	Member
5	Moalim Osman Ali	Self-Business	Dadaab	Owner
6	Kasim Abukar Ali	Dai,Dai Group	Dadaab	Chairman
7	Canab Hassan Ali	Fafi Youth	Hagardera	Chairman
8	Sugal Osmail	Self-Business	Hagardera	Owner

	Name	Group/Organisation	Location	Designation/Contacts.
9	Mohamed Ismail	Madina Group	Hagadera	Secretary
10	Muno Ahmed Ali	Yusra Group	Hagadera	Member
11	Ahmed Hussien	Self-Business	Ifo	Owner
12	Mahad Ali	Self-Business	Ifo	Owner
13	Asma Ahmed Yussuf	Self-Business	Ifo	Owner
14	Shamis Ali Ismail	Yusra Youth	Ifo	Member
15	Amina Osman	Self-Business	Dagahale	Owner
16	Asad Ahmed	Self-Business	Dagahaley	Secretary
17	Fatuma Abdi	Self-Business	Dagahaley	Secretary
18	Abdi Muhumed Bare	Al-Bushra Honey Trader	Ifo Camp	Member
19	Hassan Mohamed Ali	Individual Business	Ifo Camp	Individual Owned Business
20	Ahmed Yasin	Kalkal Youth Group,	Ifo Camp	Secretary
21	Maryan Ahmed Osman	Huda Youth Group,	Ifo Camp	Chairlady
22	Weli Bunow	Warfa Group	Hagadera	Member
23	Amino Mohamed	Horyal Youth Group	Hagadera	Member
24	Kadar Abdi Ahmed	Hormud Youth Group	Hagadera	Secretary
25	Said Abdi Ahmed	Iskashato Honey Traders,	Hagadera	Member
26	Fatuma Abdullahi	Wadajir Group	Dagahaley	Member
27	Abukar Hassan	Sky Youth Group	Dagahaley	Member
28	Abdifatah Mohamed	Midnimo Group,	Dagahaley	Chairman
29	Mohamud Awil	Individual Owned Business-	Dagahaley	Individual Owned Business
30	Habibo Ahmed Osman	Star Youth Group	Dadaab	Chairman
31	Ahmed Ali	Individual Owned Business-	Dadaab	Member
32	Sahra Jibril	Qamar Group	Dadaab	Member
33	Fartun Abdi Ahmed	Kulmis Honey Trader,	Dadaab	Member
34	Maalim Nuh Abdi	Bura Fodder Production Cooperation	Garissa	Chairman
35	Siyat Dubow	Dasheeg Farm	Garissa	Chairman 0722506466
36	Ali Hassan	Livestock Trader	Garissa	Market Committee Member 0715284296
37	Abdullahi Mohamed	Honey Trader Male	Garissa	0722389363/ Owner

	Name	Group/Organisation	Location	Designation/Contacts.
38	Ali Abdi Hassan	Honey Trader	Garissa	0721379154
39	Hassan Bulle Kheir	Aloley Farm	Garissa	0710957153
40	Muumin Gedi (Male)	Gabobey Farm Beekeeping and Fodder Production	Garissa	Secretary Contact: 0712148850
41	Ismail Sanweyne Ibrahim	Laheley Farm Group	Garissa	0701505017-Chairman
42	Michael Ogola	Maendeleo Farm	Garissa	Farm Manager Contact: 0736176642
43	Bare Ali Hillow	Nasra Self Help Group	Garissa	Chairman Contact: 072589361
44	Garane Abdullahi Sheikh	Qahira Farmers Association	Garissa	Chairman Contact: 0726308543 Address 393-70100
45	Dek Madey Mohamed	Talex Farm	Garissa	Contact: 0711955169
46	Abdullahi Aden Ali	Tasbih Farm Group (32 Members)	Garissa	Contact: 0727161847
47	Mohamed Ali Bilal	Wadhajir Farm	Garissa	Chairman For Wadhajir Farm Contact: 0723444308
Humanitarian organizations/County Government				
48	Daudi Ahmed Shile	KRCS	Garissa	Project Officer
49	Abdullahi Dahir	Mercy Corps (LMS-Consortium)	Garissa	Project Manager
50	Dubal Ali Amay	Kenya Livestock Marketing Council	Garissa	Chairman
51	Geofrey	KDR-DIP	Dadaab	Project Manager
52	Yusuf Ali	WFP	Garissa	Head of Office
53	Abdirahi Dahir	ACDI-VOCA	Garissa	Business Development
54	Dr. Hared Ahmed	County Department of Livestock	Garissa	Director
55	Thariki Karanja	ASTRADS	Nairobi	Consultant, Honey Processing
56	Anisa Abdirahman	HA	Dadaab	Institutional Development