



ECOWAS COMMISSION
COMMISSION DE LA CEDEAO
COMISSÃO DA CEDEAO



LA BANQUE MONDIALE
BIRD • IDA | GROUPE DE LA BANQUE MONDIALE



Terms of reference

Recruitment of a consultancy firm to map stakeholders and set up a task force and a multi-stakeholder platform for the development of poultry value chains in West Africa and the Sahel.

September 2023

I. INTRODUCTION

I.1. General context

In January 2005, the Economic Community of West African States adopted a regional agricultural policy: ECOWAP, as a reference framework for interventions in the agro-sylvo- pastoral and fisheries sectors within the Community. ECOWAP is the regional version of the Comprehensive Africa Agriculture Development Programme (CAADP), the agricultural component of NEPAD. It aims to "contribute in a sustainable manner to meeting the food needs of the population, to economic and social development and to reducing poverty in Member States, as well as inequalities between territories, zones and countries".

ECOWAP is being implemented through national agricultural, food security and nutrition investment plans, on the one hand, and a regional agricultural, food security and nutrition investment plan supported by major initiatives to promote strategic products, on the other. The first generation of investment plans adopted in 2010 identified five strategic products to be promoted to ensure food security and sovereignty in the region: rice, maize, manioc, meat, milk and dairy products.

The second generation of agricultural, food security and nutrition investment plans adopted in 2016 as part of the new guidelines for ECOWAP up to 2025 extended the list of strategic products to ten: rice, maize, pulses, cotton, palm oil, meat, milk and dairy products, poultry, fishery products, cassava, sorghum and millet.

As part of the operationalisation of ECOWAP, ECOWAS has already launched major initiatives to promote the development of two strategic value chains: rice and milk.

- The offensive to promote the rice-growing economy was adopted in 2015. Through it, the region aims to produce 25 million tonnes of milled rice by 2025. It is currently being implemented through the REGIONAL RICE OBSERVATORY and national CHAPITRES, which aim to coordinate interventions in the sub-sector, on the one hand, and to ensure strong involvement of the private sector in the various links of the value chain, on the other.
- The offensive to promote local milk value chains, which was adopted in 2019. It aims to make West Africa and the Sahel a major milk production basin, with a projected volume of 10 billion litres compared with 6 billion at present, and a collection capacity for industrial processing of 25% of fresh milk compared with 5% at present, by 2030. To this end, a priority investment plan has been drawn up. Countries are translating it into national investment plans. With financial support from a number of partners, ECOWAS has launched around thirty pilot projects covering the main links in the local milk value chain.

All these initiatives are aimed at strengthening the food and nutritional systems of populations, as well as their resilience, and providing jobs by reducing the region's dependence on imports from outside Africa.

I.2. *Justification for the choice of the poultry value chain.*

The poultry value chain (VVC) occupies an important place in West Africa's agricultural economy. FAOSTAT (2022) has estimated the West African poultry stock at around 863 million head in 2021, or 27% of the continental stock. Poultry farming is driven by the private sector, either by small family farms or by genuine entrepreneurs, some with considerable financial resources, and is concentrated in the region's four largest economies: Nigeria, Ghana, Côte d'Ivoire and Senegal. These countries account for more than 73%

of the region's livestock, thanks to efforts to industrialise the sub-sector and the very strong involvement of the private sector.

Beyond this general picture, the poultry sub-sector is dominated by two major systems: (i) the traditional system and (ii) the so-called commercial industrial system. The traditional system is dominated by semi-extensive family and village rearing. Most rural and peri-urban households in West Africa and Chad have a small flock of poultry, consisting mainly of chickens, guinea fowl, pigeons, etc. Although of low productivity, this flock plays an important role in the production of poultry. Although their productivity is low, they play an important role in improving people's living conditions.

The modern system has expanded rapidly in recent years, accounting for over 50% of livestock in countries such as Côte d'Ivoire and Senegal. This system is developing both in peri-urban areas and on real farms integrating production and the primary processing industry. Benefiting from incentives, including appropriate policy measures in some countries, the modern sector represents an estimated turnover of 350 billion CFA francs in Côte d'Ivoire (IPRAVI, 2023). Although the poultry sub-sector is growing strongly, it is still far from satisfying the growing demand in the region. According to the FAO, West Africa produced some 905,733 tonnes of poultry meat in 2021, or 55% of total consumption. Demand therefore outstrips domestic supply, leading to imports of more than 747,500 tonnes of chicken in 2021. Poultry consumption per capita was estimated at almost 4 kg in 2021, far below the world average of 14 kg per capita.

The poultry sub-sector faces a number of structural problems that prevent it from fully functioning as a true cross-border value chain.

- Feed, which accounts for 70% of the poultry industry's production budget, is still far from optimal. Farmers face many difficulties in securing a regular supply of feed and other poultry feed products. They have to resort to imports from outside West Africa, constantly exposing themselves to the imperfections of the international market. The industry is also faced with recurring health crises, particularly avian flu, which is causing major losses to flocks.
- The low level of professionalisation and structuring of poultry sector stakeholders, for whom very little information is available, not only on the level of their structuring but above all on their organisation. There are at least three aspects to this problem: the level of integration of stakeholders from the various links in the chain at the level of functional inter-professional platforms, both at national and regional level; the level of integration of stakeholders from traditional and modern sectors; and finally the linguistic compartmentalisation that characterises the network at regional level. Indeed, while the social and economic foundations of the Union of Poultry Sector Organisations in WAEMU countries are not well known, the level of organisation of stakeholders in Nigeria, Ghana and elsewhere is poorly documented. One of the major challenges of this value chain is to have a complete map of the regional poultry sectors, their scope and the possibility of structuring them around a regional platform for exchanging data and best practices to boost production and create a favourable environment for the development of the value chain.
- Weak intra-regional trade in poultry products. According to Comtrade, intra-Community trade in poultry products represents around 1.45% of the volume of regional production. It is made up of three categories of products: (i) the marketing of live products, in particular day-old chicks and traditionally reared poultry; (ii) transactions in offal, which essentially involve the re-export of products imported from the international market; and finally (iii) the marketing of eggs for consumption. Very little is known about the scale of these transactions, the marketing channels, the players involved, and the factors and other obstacles to regional poultry trade, over and above health issues. The challenge for the region is to promote intra-community trade in poultry products in order to strengthen regional integration and the resilience of populations.

- The absence of a strategy defining very clearly the direction of regional public choices for the development of poultry value chains. The policies and strategies adopted and implemented by the Member States diverge, both in terms of their orientation and the strategic objectives assigned to them. The result is a lack of harmonisation and coordination of investment and commercial policy instruments for the regional poultry sectors. This concern is all the more crucial given that the upward trend in poultry consumption driven by population growth and changing dietary habits must be judiciously exploited to boost this value chain.

These various challenges require ECOWAS to effectively address the bottlenecks in this value chain in order to support the changes underway in the region's agri-food systems and strengthen the resilience of its populations in the long term.

II. STRATEGIC OBJECTIVE OF THE STUDY

II.1. GENERAL objective

The overall aim of the study is to contribute to a better understanding of the dynamics and structural changes taking place in poultry value chains, with a view to defining appropriate public policy measures to boost their development.

II.2. Specific objectives

The study has four specific objectives:

1. Mapping the players in the poultry value chains of the fifteen ECOWAS countries plus Mauritania and Chad, together with the creation of a database on good practice and the need for credible information accessible to private operators.
2. To analyse the functioning of the regional poultry market and the implications of the resulting policy measures for improving the fluidity of trade,
3. Support the structuring of stakeholders into a regional interprofession or consultation platform including the fifteen Member States, women and young entrepreneurs;
4. Set up a regional *task force* to steer initiatives affecting the poultry industry.

III. Methodological approach

III.1. The overall approach

An integrated value chain approach is recommended. In this context, the triangulation method or the active participatory research and planning (MARP) method will be used. These methods are known to be powerful research tools in rural development. Their techniques require the team to dialogue extensively and informally with local people and to take account of local conditions and rules at the same time as using second-hand information such as existing maps and administrative reports. They are all the more appropriate for this mission as the aim is to listen to the CVA stakeholders before classifying them by link. These methods make it possible to understand the interactions involved, the power and game strategies, the techniques for formulating decisions and negotiating, etc. The results of this work carried out at country level will be consolidated and transferred to regional level for use in the analysis. They will be used to build a platform or database of data and information based on the needs expressed by economic operators and accessible to them.

Specifically, the aim is to :

- An inventory of poultry value chain stakeholders in the 15 ECOWAS countries plus Mauritania and Chad, as well as their level of organisation and operations. This inventory also includes an inventory of their information needs in order to improve the performance of their businesses.

- To analyse the functioning of the market for poultry value chain products, with particular emphasis on the level and importance of regional trade, the structuring of supply and demand, and the level of imports from outside Africa. The analysis will also triangulate data from national statistical and technical services and external sources.
- For both the mapping of value chain actors and the study of market functioning, the consultant will carry out an in-depth analysis of the strengths, assets, weaknesses, opportunities and threats of the value chains. It will endeavour to identify the public policy gaps that need to be filled in order to improve the development environment for poultry value chains. These elements will subsequently feed into the orientations of policies or strategies targeting the development of this value chain.

III.2. Consultant tasks.

In addition to producing a methodology note at the start of the assignment, setting out the approach adopted, the planning of the assignment and the forms that the various products will take, the consultants will pay particular attention to the following tasks:

- Mapping of players and creation of a database accessible to the private sector,
 - Recruit and train national consultants in data collection and analysis and in producing the information needed for analysis
 - Identify the dominant players in the various links of the two categories of value chain players (traditional and industrial)
 - Identify the forms of functional organisation at each link level
 - Analyse the functionality of national umbrella organisations and the forms of organisation they take (inter-professions, commodity chain tables, consultation platforms, etc.).
 - Identify the information needs expressed by the various categories of stakeholder
 - Building a database and specifying how it is to be fed and accessed
 - Consult the different categories of stakeholders on their needs, challenges, visions for the future, opinions on intra-regional trade, priorities for a regional strategy and urgent activities.
- The functioning of the regional market for poultry value chain products
 - Carry out an in-depth review of existing documentation and an analysis of data from the main sites dealing with trade
 - In-depth analysis of national and regional statistics (WAEMU, ECOWAS),
 - Draw up data collection forms for the various categories of stakeholder, in particular producers and distributors of poultry feed, production equipment, hatching eggs, distributors of inputs and day-old chicks, live poultry, cut-up poultry products, imported poultry, table eggs, egg meal and other poultry products and inputs.
 - To recruit and train national consultants in the process of collecting and analysing data and producing the information needed for analysis,
 - Conduct interviews with the main players in the poultry value chain trade
 - Identify the main bottlenecks to regional trade,
 - To take stock of imports of poultry products and inputs and the border regulations in force and specific to poultry farming,
 - Identify and analyse poultry-specific policy measures in force in the countries concerned
 - Identify the specific regulations in force for poultry farming
 - Analyse the direction of policies, strategies and other major programmes affecting the poultry sector in each country

- To make suggestions for policy measures to be brought to the attention of ECOWAS and the Member States.

Support for the structuring of a regional umbrella organisation for stakeholder organisations involved in poultry value chains

- To analyse in greater depth the national structure of poultry umbrella organisations, highlighting the duality that characterises them in some countries;
 - To analyse in greater depth the organisational situation and representativeness of poultry umbrella organisations and their constituent organisations
 - To consult UOFA officials and analyse the obstacles to the expansion/emergence of a single umbrella organisation in West Africa.
 - Conduct interviews with the heads of the umbrella organisations in non-WAEMU countries, in particular Nigeria, Ghana, Guinea, Liberia, Sierra Leone, Gambia, Cape Verde, Chad and Mauritania;
 - Develop a set of arguments to convince all organisations to support the idea of a single regional umbrella organisation
 - Propose a draft statute and internal regulations for the future inter-professional organisation of poultry value chain stakeholders.
 - Propose the ToR and modalities for a regional meeting constituting the unified organisation of poultry value chain stakeholders
 - Prepare and moderate the meeting and report on the main conclusions.
- **Setting up a regional task force to support the revitalisation of poultry value chains**

The Task Force is designed as a consultative body responsible for advising players in the public, private and voluntary sectors on the direction to be taken by strategies and policies addressing the problems of poultry value chains. It is an ad hoc body, which meets only at the request of stakeholders to decide on an issue to be entrusted to it: facilitating the development of instruments and measurement of public policies, projects and programmes of regional scope.

The consultant will be responsible for :

- Document the missions of existing task forces in the region,
- Consult with national and regional stakeholders (UEMOA, CRSA, inter-professional organisations, etc.)
- Propose the composition and mission of the Task Force
- Propose ways of launching it,
- Organising and moderating the Task Force launch meeting
- Report to ECOWAS on the conclusions and recommendations of the Task Force launch meeting,

5. Study products

- A mission start-up note
- A report providing an exhaustive knowledge of the players in the poultry value chain, their organisation and the operation of national and regional umbrella organisations
- Outline of the database and information accessible to private sector players
- A report on the state of regional trade in poultry value chain products
- A document setting out the statutes and internal regulations of the regional inter-branch organisation
- A summary of the conclusions and recommendations of the constitution of the regional umbrella organisation
- A statement of conclusions and recommendations from the meeting to set up the Regional Task Force.

6. Consultant profile

The mission will be led by a firm with a **team of four experts and seventeen national resource persons**. It will be supervised by the regional coordination of the FSRP with the support of the team from the Directorate of Agriculture and Rural Development of the ECOWAS Commission. The team will be composed of :

- A socio- or agro-economist or livestock specialist with a sound knowledge of agricultural economics. He/she must have a degree equivalent to at least BAC + 5 and at least 10 years' experience. They must have a good knowledge of major livestock development policies and strategies in general and the poultry sector in particular. They must also have a good knowledge of the players in the poultry value chains in West Africa.
- An economist or livestock specialist with solid experience in analysing cross-border value chains in general and agri-food markets in particular. They must have at least a 5-year higher education qualification and ten years' experience in analysing trade in livestock products. They must also have a good knowledge of regional agricultural policy and regional trade policy instruments, in particular the operation of the trade liberalisation scheme and the ECOWAS Customs Union.
- A sociologist or anthropologist or equivalent qualification with sound knowledge of support for professional agricultural organisations, particularly in terms of structuring. They must have a level of qualification equal to or higher than BAC +5 and at least 10 years' practical experience in similar assignments. They must also have a good knowledge of the players in the value chains of the agroforestry and fisheries sector in West Africa.
- A veterinary or agronomist resource person or communication specialist with solid experience in facilitating the processes of constructing regional public choices in the agroforestry and fisheries sector. They must have at least 10 years' experience in moderating and communicating on regional policy and strategy formulation processes.

Seventeen (17) local experts, i.e. 1 per country, veterinarians or zootechnicians or agro-economists will be recruited. They must be poultry specialists with recognised experience in poultry sector development and support. They must have a level of qualification equal to or higher than BAC +5 and at least 10 years' practical experience in a similar role. They must also have a good knowledge of the livestock systems and sectors in the countries where they will be carrying out field surveys.

All consultants must combine the following skills:

- Knowledge of agri-food commodity chains and value chains in West Africa
- Experience of industry and social analyses,
- Experience of regional integration issues and public policy at regional and national level, including regional trade and health issues.
- Good ability to analyse the West African and Sahel context,
- Proven experience of regional public policy formulation processes,
- Good knowledge of the players and institutions in the region.

7. Length of consultation

The duration of the consultation is 320 working days to be invoiced, broken down as follows:

Market name	Regional consultants	National consultants
Lot 1: Mapping of value chain players and creation of a database, a directory of communities of practice accessible to the private sector	21 days	10 days x 17
Lot 2 analysis of the state of intra-regional trade in poultry value chain products in West Africa	21 Days	5 days X 17
Lot 3: Support for the extension and strengthening of the West African regional poultry interprofessional network	13 Days	PM
Lot 4: Setting up a regional poultry policy support task force	10 days	PM