A Qualitative Study of the Ethiopian Meat and Meat Product Export Industry: Challenges, Opportunities, Strategies, Impacts, and Competitiveness

A Thesis Submitted to Addis Ababa University Faculty of Business and Economics, Graduate Studies in Partial Fulfillment of the Requirements for the Degree of Master of Science in Management Specialization in International Business (Import/Export)

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Declaration

I, Meron Aregay Belachew, hereby declare that the thesis entitled **"A Qualitative Study of the Ethiopian Meat and Meat Product Export Industry: Challenges, Opportunities, Strategies, Impacts, and Competitiveness"** is my own original work and has not been submitted for any degree in any other University. It is offered for the award of the degree of Master in Management from Addis Ababa University.

Name: Meron Aregay

Signature: ____________

Advisor Name: Dr. Ethiopia Legesse

Signature: ____________

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Abstract

Despite having Africa's largest cattle population, Ethiopia struggles to export meat due to various challenges in the livestock value chain. This qualitative study examines the challenges and opportunities faced by Ethiopian meat and meat product exporters in the global market, focusing on three aspects: government policies and macroeconomic factors, product quality and marketing strategies, and competitive advantages of Ethiopian meat exporters based interview. Interviews were used to collect data by asking different stakeholders in the industry, such as meat and meat byproduct exporters, livestock animal exporters, licensing bodies, banks, research institutes, quality controllers, logistic experts and associations. The interviews were coded and themed in NVivo 14. Based on the analysis, the main challenges for Ethiopian meat exporters that are currently affecting their business majorly are supply shortage and high production cost. The distribution strategy analysis shows that air transportation is preferred for chilled meat exports to the Middle East site has to reach to destination site freshly without spoilage, while sea transportation is used for meat by-products and some regions with high air costs. Ethiopian meat exporters mostly sell chilled meat to the Middle East, where Dubai takes the lead, meat by-products to Far East Asia, and live cattle and camels to Egypt and Somalia, according to the analysis of meat export destination. Analysis of business strategy showed that pricing was the most important factor for the respondents. The export market analysis shows that a distinctive and appealing flavor makes Ethiopian meat and meat products competitive in the Middle East, despite higher pricing, with target market selection remaining crucial. Based on the analysis on factors to meat export success, respondent's response were peace and stability, effective livestock regulations, ranch ownership, export standard compliance, illegal trade prevention, system modernization, market expansion, and value chain expansion as crucial success factors for meat and animal exports, with peace and stability ranked highest. Respondents emphasized that Ethiopian government policies and the overall Ethiopian economy significantly affect the meat export sector. Meat export brings foreign currency for Ethiopia, which has the largest livestock population in Africa and can take advantage of its geographic closeness to reduce expenses and time. The Ethiopian meat export sector can expand its markets and products by finding new customers and opportunities in the Middle East, Asia, US and Europe, and by creating more value-added products such as processed meat by obtaining the required certificate for quality assurance.

Keywords: Meat, live animals, export, Strategy, challenges, opportunities, competitiveness

CHAPTER ONE

1. Introduction

1.1. Background of the study

Ethiopia's livestock sector is a significant component of the country's agricultural economy, boasting a vast and diversified array of animal populations.

As of 2023, the estimated livestock populations in Ethiopia are as follows: 70 million cattle, 42.9 million sheep, 52.5 million goats, 8.1 million camels, and 57 million poultry (Mohamed, Legesse and Abdimahad, 2023). Livestock production plays a pivotal role in the Ethiopian economy, serving as a primary source of food, income, and employment for millions of Ethiopians. However, the livestock value chain in Ethiopia faces many challenges that limit its growth and export potential. Some of these challenges are: lack of commercial production systems, gaps in policy implementation and skills, scarcity of animal feed, and insufficient access to veterinary services and infrastructure. These factors affect the productivity and quality of the livestock sector in Ethiopia. (Barry et.al, 2015).

Ethiopia has the largest cattle population in Africa and a great potential to export meat. However, it has not been able to tap into this potential and expand its exports (International Livestock Research Institute, 2020). In 2022, Ethiopia exported around 933,124 tonnes of meat (Ethiopian Livestock Development Data, 2022) . However, Ethiopia's international market share is less than 1 per cent of the global meat trade. The country's meat production has been steadily increasing in recent years, driven by rising demand from a growing population and a growing middle class.

Ethiopia's main export markets for meat are the Middle East countries, especially the United Arab Emirates, Saudi Arabia, Qatar, Oman and Kuwait. These countries have a high demand for halal meat, which Ethiopia can supply with its large population of sheep and goats. Ethiopia also has a comparative advantage in terms of low production costs, proximity to the markets and preferential trade agreements.

In this thesis, a detailed qualitative study of the meat and meat export industry was perfomed by examining its challenges, opportunities, strategies, impacts, and competitiveness through thematic analysis with NVivo software. This approach will enable in-depth exploration of the experiences, perspectives, and challenges faced by various stakeholders involved in the meat export industry.

Data will be collected through in-depth interviews with a select group of exporters, including Ethiopian meat and meat products exporters, livestock exporters, and representatives from associations, government ministries, trade offices, and quality assurance organizations. These interviews will see the meat export value chain, from the farmer's field to the final destination.

Thematic analysis will be employed to identify and analyze recurring themes, patterns, and connections within the interview data. This rigorous approach will provide a nuanced understanding of the factors that hinder Ethiopia's meat export growth and reveal potential strategies to unlock its untapped potential.

NVivo, a qualitative data analysis software, will be utilized to organize, manage, and code the interview data. NVivo's advanced features will facilitate the identification of themes, subthemes, and connections, enabling a comprehensive understanding of the complex dynamics of the meat export industry.

This thesis aims to provide a holistic understanding of the challenges and opportunities that define Ethiopia's meat export industry. The findings will serve as the foundation for formulating actionable strategies to unlock Ethiopia's untapped export potential and propel the nation to the forefront of the global meat trade

1.2. Problem statement

The Ethiopian meat and meat products industry has seen significant growth in recent years (Ethiopian Livestock Development Data, 2022).This growth is due in part to the country's favorable climate and abundant livestock resources, as well as to the increasing demand for Ethiopian meat and meat products in global markets (International Livestock Research Institute, 2020). Despite the potential and opportunities of the Ethiopian meat and meat product export industry, there is a gap in the literature on the factors that affect its export performance. This thesis aims to fill this gap by conducting a qualitative study of the industry, examining its challenges, opportunities, strategies, impacts, and competitiveness.

Despite having the largest cattle population in Africa and a great potential to export meat, Ethiopia has not been able to tap into this potential and expand its exports (International Livestock Research

Institute, 2020; Ethiopian Livestock Development Data, 2022). The country faces many challenges in the livestock value chain that affect its productivity and quality. While existing research acknowledges the importance of business strategy in Ethiopian meat exports, several key research gaps remain. These include a lack of comprehensive analysis of specific constraints and opportunities within the meat export value chain, the influence of specific government policies on exporters, and the impact of international market access and quality standards. Additionally, the direct impact of international business market knowledge and the effectiveness of current marketing strategies need further exploration. By addressing these research gaps, this MSc thesis can contribute significant knowledge to improve the export performance of Ethiopian meat and meat product exporters and strengthen the industry's position in the global market.

Besides, this thesis aims to analyze the meat and meat export industry in Ethiopia, using a qualitative approach, and identify the main factors that hinder or facilitate its growth and competitiveness. The thesis will also propose recommendations for improving the performance and profitability of the sector, as well as enhancing its contribution to the national economy and food security. This thesis aims to provide a holistic understanding of the challenges and opportunities that define Ethiopia's meat export industry. The findings will serve as the foundation for formulating actionable strategies to unlock Ethiopia's untapped export potential and propel the nation to the forefront of the global meat trade.

1.3. Research Questions

The research questions are as follows:

1. How can we identify key challenges encountered by Ethiopian meat and meat product exporter's face in the global market, and what are the impacts of these challenges on their export performance?
2. How do Ethiopian government policies affect the meat and meat products export industry, and what are the outcomes of these policies on the export performance of Ethiopian exporters?
3. How have the level of export of Ethiopian meat and meat product exporters been affected by macroeconomic factors, such as GDP growth, inflation, and exchange rates?

4. Why do Ethiopian meat and meat product exporters use certain marketing strategies, and how do these strategies help them to attract and retain customers in international markets?
5. Do Ethiopian Meat Exporters have a distinctive competitive advantage over their global competitors?

1.4. Objectives

1.4.1. Main Objective

The main objective of this study is to explore the challenges and opportunities faced by Ethiopian meat and meat product exporters by assessing government policies and macroeconomic factors, the role of product quality and marketing strategies, and the competitive advantages of Ethiopian Meat Exporters..

1.4.2. Specific Objectives

- To explore the main challenges faced by Ethiopian meat and meat product exporters in the global market.
- To assess Ethiopian government policies on the meat and meat products export industry.
- To assess the role of macroeconomic factors on the export performance of Ethiopian meat and meat product exporters.
- To explore the marketing and distribution strategies employed by Ethiopian meat and meat product exporter.
- To identify the competitive advantages of Ethiopian Meat Exporters and distinguish them from their competitors in the global market.

1.5. Scope of the thesis

- The study will explore the experiences and challenges of Ethiopian exporters of meat and meat products to the global markets.
- The study will adopt a qualitative thematic analysis method, which will involve collecting and analyzing data from various sources.

- The sources include Ethiopian exporters of meat and meat products, livestock exporters, government and non-government organizations that have relevant expertise and knowledge of the sector, and experts who have conducted in-depth interviews on the topic.

1.6. Limitation of the study

While the study provides valuable insights into the factors influencing the export performance of Ethiopian meat and meat product exporters, it is important to consider the following limitations: Qualitative data reliance and sample size limitations: The study focuses on operational meat exporters, which represent a small fraction of licensed exporters (12 out of 700). This limited sample may not be representative of the entire industry, potentially impacting the generalizability of the findings. Besides, Interview responses and information gathered from stakeholders might be subject to bias, either due to participants' desire to portray themselves favorably or limitations in their recall of past events. This could affect the accuracy and reliability of the data collected. These limitations should be considered when interpreting the findings of the study and formulating recommendations for future research and interventions in the meat export industry.

1.7. Organization of the study

The thesis is organized into six chapters. Chapter One introduces the research topic, objectives, questions, and significance of the study. Chapter Two reviews the relevant literature and theoretical frameworks that inform the study. Chapter Three describes the research methodology, including the research design, data collection methods, data analysis methods, and ethical considerations. Chapter Four presents the data analysis, results, and discussion of the findings. Chapter Five summarizes the main conclusions and recommendations of the study. The last part consists of appendices that provide additional information and evidence to support the study.

CHAPTER TWO

2. Review of Related Literature

Ethiopia has a large number of livestock animals, which makes it one of the leading countries in Africa and the world in terms of livestock population. However, this potential is not fully exploited, as the amount of meat exports is relatively low. This literature review examines the export of meat, meat products, and live animals from Ethiopia. Despite this potential, the volume of meat exported from Ethiopia is very low compared to other countries. This literature review will examine the current situation of the export sector, the main challenges and barriers that hinder its development, the policy-related issues that affect its performance, the impact of the export sector on the Ethiopian economy, the supply chain-related issues that affect its efficiency and quality, and the main opportunities related to the export market. The literature review will also critically assess the previous studies on this topic, highlight the research gap that needs to be addressed, and recommend the way forward for future research and practice.

The Ethiopian livestock population has significantly increased over the past two decades, with cattle, sheep, and goat numbers more than doubling (Zemedu, 2015). This growth is particularly pronounced in the central highland regions, which are also more accessible to markets (Zemedu, 2015). Despite this growth, the livestock sector is heavily dependent on climate change and variability, making it vulnerable to climate risks (Gashaw, Asresie and Haylom, 2014). Livestock plays a crucial role in the Ethiopian economy, providing food, income, and power, and contributing to export earnings (Endalew and Ayalew, 2016). However, the sector's economic contribution is still relatively low, indicating the need for continuous commitment to reduce constraints and boost its potential (Zemedu, 2015).

Ethiopia's large livestock population presents significant opportunities for meat and live animal export, with the latter contributing a substantial portion of the earnings (Alemayehu and Ayalew, 2013; Mamo, 2019). However, challenges such as lack of export routes, illegal trade, and breeding programs hinder the sector's potential (Alemayehu and Ayalew, 2013; Mamo, 2019; Tolera and Eik, 2020). The country's proximity to the Middle East and high demand for meat and live animals provide further opportunities (Gidey, 2021). The role of development projects in improving export performance is also highlighted (Tolera and Eik, 2020).

Eshetu (Eshetu and Abraham, 2016) and (Eshetie, 2018) highlights the challenges and opportunities in the live animal and meat export marketing system. These include low productivity, absence of market-oriented production systems, and various internal and external factors such as disease prevalence and inadequate infrastructure. The studies also emphasize the need for government involvement in controlling illegal trade and improving market infrastructure. However, there is a lack of focus on the specific constraints and opportunities in the meat export value chains, which is addressed by (Legese *et al.*, 2008). The study identifies supply shortage and inferior quality of animals as major issues, calling for further research to determine the factors contributing to these problems. (Nega and Eshete, 2018) also underscores the need for technical support, policy incentives, and improved business communication in the honey and bee products industry, which could be relevant to the meat export sector. *Therefore, the research gap in the existing literature is the lack of a comprehensive analysis of the specific constraints and opportunities in the meat export value chains, as well as the potential for cross-sectoral learning from other agricultural export industries.*

The Ethiopian government's policies have had a significant impact on the meat and meat products export industry. The export of live animals has been a major factor influencing the export performance of meat and meat products, with the volume of live animal export affecting the supply of animals to export abattoirs (Girmay and Yeserah, 2019). Despite the challenges of illegal live animal trade and shortage of live animals, the sector has seen significant growth in both meat and live animal exports (Mamo, 2019). The relationship between export resources, exporting capability, and exporter-foreign distributor relationship has also been found to positively influence export performance (Imiru, 2022). However, the potential of the meat production, processing, and marketing industry in Ethiopia has not been fully realized due to various challenges, including limited compliance with international standards and poor market promotion (Eshetie *et al.*, 2018). *A research gap exists in understanding the specific government policies that have influenced the export performance of Ethiopian exporters in the meat and meat products industry.*

The export performance of Ethiopian meat and meat product exporters is influenced by a range of macroeconomic factors. *While some research exists on other sectors, further studies and interviews with meat exporters are needed to understand the specific effects on meat export industry*. (Kassa, 2012) and (Kamma, 2020) both found that real GDP growth has a positive impact on export performance, while (Kassa, 2012) also highlighted the importance of a stable exchange rate. However, (Kamma, 2020) noted that inflation can have a negative effect on export supply. These findings suggest that maintaining a stable exchange rate and focusing on real GDP growth are crucial for improving the export performance of Ethiopian meat and meat product exporters.

The quality of Ethiopian meat and meat products significantly impacts their export competitiveness, with key challenges including knowledge gaps, limited compliance with international standards, and poor marketing (Eshetie *et al.*, 2018). Specific quality standards and requirements for international market access include ISO and HACCP food safety standards (Eshetie *et al.*, 2018). However, high domestic input costs and low animal productivity are identified as the primary constraints to market access (Rich, Perry and Kaitibie, 2009). The livestock production system in Ethiopia is also hindered by low productivity and a lack of market-oriented production (Eshetu and Abraham, 2016). Despite these challenges, the sector has seen significant growth in meat and live animal exports, with opportunities including a large livestock population and proximity to Middle Eastern markets (Alemayehu and Ayalew, 2013). *A research gap exists in the specific quality standards and requirements for international market access, as well as the potential impact of addressing these challenges on export competitiveness.*

The literature on the level of international business market knowledge among Ethiopian meat and meat product exporters reveals several key findings. (Eshetu and Abraham, 2016) and (Legese *et al.*, 2008) both highlight the challenges faced by these exporters, including low productivity, absence of market information, and poor market infrastructure. (Gadisa Muleta, 2022) further emphasizes the lack of communication and understanding among value chain actors, leading to a focus on individual benefit rather than product quality. (Sisay, 2018) underscores the impact of these challenges on the consistency of export volume and sales, particularly due to macro environmental barriers. However, a research gap exists in the specific assessment of international business market knowledge among these exporters and its direct impact on their ability to identify and penetrate export markets. Further research is needed to address this gap and provide a more comprehensive understanding of the factors influencing the success of Ethiopian meat and meat product exporters in international markets.

The literature on the marketing strategies employed by Ethiopian meat and meat product exporters reveals several key findings. (Eshetie *et al.*, 2018) and (Gidey, 2021) both highlight the challenges faced by the industry, including limited compliance with international standards, poor market infrastructure, and illegal cross-border trade. These challenges are further compounded by the low productivity of livestock and the absence of market-oriented production systems (Eshetu and Abraham, 2016). Despite these obstacles, the country's comparative advantages in livestock and livestock product trading, such as its geographic proximity to the Middle East and government support, provide opportunities for growth (Gidey, 2021). However, the effectiveness of the marketing strategies employed by these exporters in promoting their products and services in international markets remains unclear. This gap in the literature calls for further research to evaluate the impact of these strategies on the industry's performance.

The literature on the distinctive competitive advantage of Ethiopian meat exporters highlights several key factors. (Ahmed, 2019) emphasize the potential of the country's strategic location, climatic conditions, and large livestock population. However, they also identify challenges such as knowledge gaps, compliance with international standards, and limited promotion and market outlets. (Alemayehu and Ayalew, 2013) underscores the opportunities presented by the large livestock population and high demand for meat and live animals, but also points to challenges like lack of exporting routes and ports. (Tsega et al., 2022) provides a broader perspective, discussing the role of the leather and textile industries in Ethiopia's industrialization and their potential to enhance the country's global market competitiveness. However, there is a gap in the literature regarding the specific strategies and practices that have enabled Ethiopian meat exporters to gain a competitive advantage in the global market. Further research is needed to explore this aspect and provide a more comprehensive understanding of the factors contributing to their success.

The role of business strategy in the export performance of meat and meat products in Ethiopia is a critical area of study, with several key findings and research gaps identified. (Tolossa and Pandya, 2023) found that managerial attitude significantly affects export performance in the fresh fruits and vegetable sector, suggesting a potential similar impact in the meat industry. (Eshetie et al., 2018)highlighted the need for strategic interventions to address knowledge gaps, compliance with international standards, and promotion in marketing, which are likely to be relevant to the meat and meat products sector. (Imiru, 2022) further emphasized the importance of managing the exporter-foreign distributor relationship and the positive impact of export resources on performance, indicating potential areas for improvement in the meat industry. However, the specific role of business strategy in these factors and its direct impact on export performance in the meat and meat products sector remains a research gap. Further studies are needed to explore the relationship between business strategy and export performance in this specific industry, potentially building on the findings of these studies.

Table 1 : Summary of Literature review

Author(s)	Summary of the research	Key findings	Research gap
Zemedu (2015)	Ethiopian livestock population has significantly increased	Increase in cattle, sheep, and goat numbers	Need for continuous commitment to reduce constraints and boost sector potential
Gashaw et al. (2014)	Livestock sector heavily dependent on climate change and variability	Vulnerable to climate risks	Need to address vulnerability to climate risks
Endalew and Ayalew (2016)	Livestock plays a crucial role in the Ethiopian economy	Provides food, income, and power	Need for continuous efforts to improve sector's economic contribution
Alemayehu and Ayalew (2013); Mamo (2019)	Large livestock population presents opportunities for meat and live animal export	Live animal export contributes a substantial portion of the earnings	Need to address challenges like lack of export routes, illegal trade, and breeding programs
Gidey (2021)	Country's proximity to the Middle East and high demand for meat present further opportunities	Potential for growth due to comparative advantages	Need for research on specific challenges and opportunities in the meat export value chain
Eshetu and Abraham (2016); Eshetie (2018)	Highlights challenges and opportunities in the live animal and meat export marketing system	Challenges include low productivity, poor infrastructure, and illegal trade	Lack of focus on specific constraints and opportunities in the meat export value chains
Legese et al. (2008)	Supply shortage and inferior quality of animals are major issues	Need for research to determine factors contributing to these problems	Potential for cross-sectoral learning from other agricultural export industries

Nega and Eshete (2018)	Underscores the need for technical support, policy incentives, and improved business communication	Relevance to the meat export sector	Need for a comprehensive analysis of the specific constraints and opportunities in the meat export value chains
Girmay and Yeserah (2019)	Export of live animals significantly impacts export performance of meat and meat products	Volume of live animal export affects supply of animals to export abattoirs	Lack of understanding of the specific government policies that have influenced the export performance of Ethiopian exporters
Imiru (2022)	Relationship between export resources, exporting capability, and exporter-foreign distributor relationship positively influences export performance	Potential for improvement in the meat industry	Need for studies and interviews with meat exporters to understand the specific effects on meat export industry
Eshetie et al. (2018)	Limited compliance with international standards and poor market promotion hinder export competitiveness	Key challenges include knowledge gaps	Need for research on specific quality standards and requirements for international market access
Kassa (2012); Kamma (2020)	Real GDP growth and stable exchange rate are crucial for improving export performance	Macroeconomic factors influence export performance	Need for further research on the specific effects on meat export industry
Rich et al. (2009)	High domestic input costs and low animal productivity are primary constraints to market access	Quality of Ethiopian meat and meat products significantly impacts their export competitiveness	Need for research on specific quality standards and requirements for international market access
Eshetu and Abraham (2016); Legese et al. (2008); Gadisa Muleta (2022); Sisay (2018)	Highlights challenges faced by meat and meat product exporters, including low productivity, absence of market information, and poor market infrastructure	Level of international business market knowledge among Ethiopian meat and meat product exporters	Need for specific assessment of international business market knowledge among exporters and its impact on their ability to penetrate export markets

Eshetie et al. (2018); Gidey (2021)	Challenges faced by the industry include limited compliance with international standards, poor market infrastructure, and illegal cross-border trade	Marketing strategies employed by Ethiopian meat and meat product exporters	Need for research to evaluate the impact of these strategies on the industry's performance
Ahmed (2019); Alemayehu and Ayalew (2013); Tsega et al. (2022)	Country's strategic location, climatic conditions, and large livestock population provide opportunities	Distinctive competitive advantage of Ethiopian meat exporters	Need for research on specific strategies and practices that have enabled Ethiopian meat exporters to gain a competitive advantage in the global market
Tolossa and Pandya (2023); Eshetie et al. (2018); Imiru (2022)	Managerial attitude significantly affects export performance	Role of business strategy in the export performance of	Specific role of business strategy in the meat and meat products sector needs research.

CHAPTER THREE

3. METHODOLOGY OF THE STUDY

This study's main objective is to investigate the different elements that influence Ethiopian meat and meat product exporters' export performance. The research will additionally ascertain the principal obstacles, the consequences of policies, the macroeconomic factors, the significance of product quality and promotional tactics, and the competitive benefits that Ethiopian exporters have in the international market. Interviews will be used in the study's qualitative research approach in order to meet this goal. These techniques are appropriate for this study because they can: Offer more profound understandings of the opinions, backgrounds, and driving forces of significant players in the Ethiopian meat export market; Examine intricate and subtle matters that are difficult to quantify using quantitative techniques; Gather extensive and rich data that can provide a deeper understanding of the subject of the study.

3.1 Justifications for using a qualitative study instead of a quantitative study for this research

The following are the justifications for using Qualitative study instead of quantitative study for this research (Cohen, 2008; Marlo, 2015; Nygren and Pramberg, 2023):

1. Research Question of the Study: While qualitative research can go further into understanding the "why" and "How" behind occurrences, quantitative methods are better at finding correlations. A thorough investigation of the meat export business can be conducted through observations and interviews. Since the responder has worked in this industry for a number of years, they are able to share their practical experience, which can be thoroughly documented through qualitative research.

2. Exploring complex phenomena: Understanding the Ethiopian export requires knowledge of a number of topics, including market-related concerns, governmental laws and policies, and logistics. Qualitative methods provide a better understanding of the experiences, viewpoints, and motives underlying these complex events, whereas quantitative methods typically concentrate on observable variables and interactions. In light of our main objective of this research as it to thoroughly explore how and why the meat sector is not exporting as expected, to understand the major challenges, the influence of governmental regulations and macroeconomic variables, the significance of product quality and marketing tactics, and the role of qualitative research in capturing all relevant aspects of the study is the main reason in selecting qualitative study.

3. In-depth understanding of the phenomenon: There are more than 700 exports of meat, meat byproducts, and livestock, according to information gathered from the Minister of Trade. But only 12 of them are consistently exporting for a variety of reasons. Some only work when it's convenient for their business. Some of them had their reasons for quitting work explored as part of the study. The results will be discussed along with the difficulties. Because there aren't many meat exporters. It's challenging to get a sample size big enough to produce conclusions that can be applied broadly. The study makes use of qualitative approaches since they can yield detailed information from a more manageable and intimate population, such as focused interviews.

Qualitative research facilitates comprehensive data collecting and open-ended questioning. Important details regarding meat exporters can be obtained, including insights into their decision-making procedures, difficulties, marketing plans, and prospects. Status quo analyses can also be used to comprehend the current circumstances of meat exporters and their opportunities. With the help of this comprehensive data, the study can better grasp the context and gather additional information for my thesis. Thus, qualitative research has been used for the study for the rationale.

3.2 Participants and Sampling

An initial comprehensive list of meat and live animal exporters was obtained, along with detailed contact information. Despite the existence of over 700 licenses, the investigation revealed that only a select group of 12 exporters consistently engaged in export activities. The remaining exporters participated based on available opportunities.

To gain deeper insights into the industry, 15 comprehensive interviews were conducted with key stakeholders. This included representatives from diverse sectors, encompassing:

- Meat exporters: Understanding the challenges and successes of companies directly involved in meat export.

- Meat byproducts exporters: Exploring the potential and limitations of diversifying exports to include byproducts.
- Live animal exporters: Examining the relationship between live animal export and meat export performance.
- Quality control experts: Assessing the role of quality control in enhancing competitiveness and meeting international standards.
- Logistics experts: Investigating logistical challenges and opportunities in exporting meat and live animals.
- Veterinary doctors: Analyzing the impact of animal health regulations on export performance.
- Trade offices: Exploring government support and initiatives for export promotion.
- Ministers: Gaining insights into governmental policies and their impact on the industry.
- Banks: Understanding financing options and challenges faced by exporters.
- Research institutes: Obtaining research findings and data relevant to the meat and live animal export sector.
- Associations: Analyzing the role of industry associations in supporting exporters.

- Each interviewee contributed unique insights relevant to the study's objectives:
    - Exporters and experts: Identified key factors impacting export performance, including product quality, market access, competition, and logistics.
    - Policymakers and financial institutions: Revealed the impact of government policies and access to finance on export competitiveness.
    - Research and industry representatives: Provided data and context for analyzing the broader trends and challenges within the Ethiopian meat export industry.

By combining data from diverse sources and perspectives, this comprehensive approach allowed for a thorough investigation of the complex factors impacting Ethiopian meat and meat product exporters' performance.

3.3 Data Collection

The detailed interview questionnaires are provided in the appendices for your reference. These questionnaires were specifically designed to address the research questions and objectives of the study. By focusing on semi-structured questions, the interview process allowed for flexibility and in-depth exploration. While providing a clear focus for each question, the semi-structured format encouraged interviewees to share their unique perspectives, experiences, and opinions in their own words, resulting in richer and more insightful data.

Prior to each interview, the interviewer obtained a signed consent form from each participant, ensuring their informed understanding and voluntary participation in the research. Additionally, the interviewer sought explicit permission from each individual to record the conversation. This recording served as a valuable tool for ensuring accurate data collection and facilitated a more comprehensive review of responses after each interview.

To protect the privacy and identities of the participants and their companies, all names were anonymized throughout the data collection and analysis process. This anonymization strategy encouraged open and honest responses from the interviewees, knowing their confidentiality would be maintained.

3.4 Data Analysis

NVivo qualitative data analysis software will be utilized to examine the information obtained through these techniques. This program will facilitate effective data management and organization. To identify themes and patterns, code and classify the data; Determine connections between various data elements; To convey the results, use reports and visuals. The researcher will be able to extract insightful information from the gathered qualitative data by using NVivo to ensure a methodical and rigorous approach to data analysis.

3.4.1 Qualitative data analysis

Qualitative data analysis is an intricate process of extracting meaning and patterns from non-numerical data, such as interview transcripts, observations, and written documents. It delves into the depths of human experiences, uncovering underlying themes, narratives, and social constructs.

Interviews, as a primary source of qualitative data, offer a rich tapestry of insights into individuals' perspectives, emotions, and lived experiences.

There are various justifications for using interviews as the basis for qualitative analysis. Interviews offer detailed information about the experiences and opinions of participants regarding a specific subject (Guenna Holmgren et al., 2023). Due to their exclusive access to the companies under study, the participants are able to provide firsthand accounts of their thoughts, experiences, and activities of their company (Næss, 2020). In addition to quantitative assessments, qualitative interviews can offer a deeper knowledge of factors including trust, driver attitude, and self-confidence (Mann, 2016). Additionally, interviews enable researchers to investigate the behaviors and representations of players in sensitive and secretive regions (Jane, 2011). Interviews are very widely employed in qualitative research since they are regarded as a natural and socially acceptable means of gathering data. To sum up, one effective way to address the research problems raised in this study is through qualitative data analysis based on interviews. Through interviewing exporters of meat and meat products from Ethiopia as well as government representatives and specialists, it is possible to learn more about the obstacles, regulations, macroeconomic variables, marketing strategies, and competitive advantages that impact this industry's export performance. The perceptions, beliefs, experiences, and motives of the participants may also be revealed through the interviews, which can aid in understanding the dynamic and complex nature of the export environment. Thematic analysis is a method for analyzing qualitative data that entails finding, classifying, and interpreting patterns or themes in the data. This can produce new knowledge and suggestions for enhancing the export performance of Ethiopian meat and meat product exporters, as well as aid in providing a thorough and methodical response to the research questions. This research adopted thematic analysis as a framework for analyzing the qualitative data.

The selection of the appropriate qualitative data analysis method depends on the specific research question, the nature of the data, and the researcher's theoretical framework. Thematic analysis proves to be a versatile method, applicable to a wide range of research questions and data types.

Thematic analysis emerges as a prominent approach to qualitative data analysis, particularly when dealing with interview transcripts. It involves systematically identifying and analyzing recurring themes or patterns within the data. This process involves several steps:

1. **Data Familiarization**: Immerse yourself in the data by carefully reading and re-reading the interview transcripts, paying attention to the nuances and subtleties of the participants' expressions.
2. **Generating Initial Codes**: As you delve deeper into the data, identify meaningful segments of text and assign codes to them. These codes represent emerging themes or concepts.
3. **Searching for Themes**: Scrutinize the coded data to identify connections between codes, refining them and consolidating them into broader themes.
4. **Defining and Naming Themes**: Articulate the core meaning of each theme, providing clear and concise descriptions that capture the essence of the data.
5. **Organizing and Presenting Themes**: Construct a framework or hierarchy to organize the identified themes, showcasing their relationships and interconnections.

3.4.2 Thematic Analysis

Thematic analysis is a popular method for qualitative data analysis, particularly in the context of interviews. It allows researchers to identify patterns and themes within the data, providing a systematic approach to understanding the research findings. Thematic analysis is useful for researchers who want to explore the meanings that participants attach to their experiences and how these meanings are constructed within social contexts (Evans and Lewis, 2018). It is also valuable for sorting knowledge based on themes, which can be particularly helpful in troubleshooting complex systems or processes (Braun and Clarke, 2006) . Thematic analysis can be a time-efficient alternative to transcription and analysis of audio-recordings, making it suitable for large-scale research projects or those with limited resources (Hutchinson, 2005) . Additionally, combining traditional manual thematic analysis with software tools like NVivo can enhance the identification and validation of significant themes (Auld et al., 2007). Overall, thematic analysis provides a flexible and adaptable approach to qualitative data analysis, allowing researchers to explore research questions and make sense of their findings (Virginia, Victoria and Nicola, 2014).

3.4.3 Qualitative Data Analysis with NVivo

NVivo has been found to be a valuable tool for thematic analysis of interview data in qualitative research. (Auld *et al.*, 2007) highlights its ability to enhance the research process, expand analytical avenues, and quickly process queries, but also notes the importance of considering factors such as training time and coding structure. (Buchanan and Jones, 2010) underscores the software's efficacy in reducing the complexity of research, particularly in sensitive industries, and its role in the emergence of concepts and themes. (Zapata-Sepúlveda, López-Sánchez and Sánchez-Gómez, 2012) further supports the software's usefulness in simplifying the coding, analysis, and display of data, particularly when working with large quantities of information. (Welsh, 2002) suggests that a combination of manual and computer-assisted methods may be most effective, emphasizing the need for a rigorous approach to ensure the reliability and validity of the analysis.

NVivo is a qualitative data analysis (QDA) software program developed by QSR International. It is a powerful tool for organizing, analyzing, and interpreting qualitative data from a variety of sources, including interviews, focus groups, field notes, documents, and images. NVivo is used by a wide range of researchers, including social scientists, health researchers, business researchers, and educators.

Key features of NVivo include:

- **Code and manage your data**: NVivo allows you to easily create and apply codes to your data. You can also use the software to organize your data into nodes and subnodes, and to create links between different pieces of data.
- **Analyze your data**: NVivo provides a variety of tools for analyzing your data, such as thematic analysis, cross-case analysis, and network analysis. You can also use the software to create charts, graphs, and tables to visualize your data.
- **Visualize your data**: NVivo allows you to create maps, diagrams, and other visual representations of your data. This can help you to identify patterns and relationships in your data that might not be apparent from looking at the data in a table or chart.

- Write and report your findings: NVivo provides tools for writing and reporting your research findings. You can use the software to create documents, presentations, and multimedia presentations.

NVivo is a versatile and powerful QDA tool that can be used to analyze a wide variety of qualitative data. It is a valuable tool for researchers who want to make sense of their data and gain insights into their research questions. The following procedure has been used to perform the analysis

Step 1: Transcription: The interview recordings should be accurately transcribed and verified, ensuring all details and nuances are captured. The transcripts should then be securely saved in an organized manner for easy access.

Step 2: Familiarization: The transcripts should be read and re-read multiple times to allow for thorough immersion in the data and gain a comprehensive understanding of the participants' perspectives and experiences. Notes should be taken and annotations should be made during the reading process to capture key ideas, emerging themes, and potential connections between different segments of the transcripts. Open coding should be employed to assign preliminary labels or categories to segments of text that represent recurring ideas, concepts, or themes.

Step 3: Coding: The initial codes should be generated and refined by carefully reviewing and refining them to ensure consistency and accuracy. A coding scheme or framework should be developed to organize the codes into broader categories or themes. The coding scheme should be systematically applied to the entire data set, with appropriate codes assigned to each relevant segment of text. NVivo is used to facilitate the coding and organization of the data.

Step 4: Theme Identification: The coded data should be reviewed to identify recurring patterns, connections, and overarching themes. Similar codes should be grouped together, and descriptive labels should be developed for each theme. The themes should be defined and refined to ensure that each theme represents a distinct and meaningful pattern in the data.

Step 5: Theme Exploration: Thematic connections, contrasts, and underlying patterns should be identified by analyzing the relationships between themes. The nuances, variations, and implications of the research question should be explored in-depth for each theme. Relevant evidence from the data, including concrete examples of participants' statements and experiences, should be used to support each theme.

Step 6: Interpretation and Reporting: The identified themes should be interpreted in relation to the research question and the broader context of the study. The implications of the findings should be discussed for theory, practice, and future research directions. A clear and concise report should be written, presenting the research methodology, findings, interpretations, and implications.

3.5 Ethical Considerations

Recognizing the importance of ethical research conduct, this study prioritized informed consent and confidentiality throughout the process. Prior to each interview, participants were provided with a detailed consent form outlining their rights and responsibilities, and their voluntary participation was ensured through their signature. Additionally, the researcher and interviewer also signed the forms, demonstrating their commitment to ethical research principles. To further protect participant privacy, both company and participant names were anonymized throughout the research, allowing participants to freely share their insights and experiences without fear of personal identification. By implementing these measures, the study ensured respect for participant autonomy and privacy, fostering an environment conducive to open dialogue and honest responses.

3.6 Limitations

The study includes operational meat exporters, who are a small subset of the licensed exporters (12 out of 700). Therefore, the findings may not reflect the whole industry and their generalizability may be limited. Moreover, the data collected from interviews and stakeholders may be biased, as participants may have distorted or incomplete memories of past events or may want to present themselves in a positive light. This could compromise the data's accuracy and reliability. These limitations should be taken into account when discussing the study's results and suggesting directions for future research and interventions in the meat export industry.

3.7 Summary of the methodology

This study employed a qualitative research approach to investigate the factors influencing Ethiopian meat and meat product exporters' performance. Fifteen in-depth interviews were conducted with representatives from various sectors, including meat exporters, quality control experts, and government officials. Data was collected through semi-structured interviews, with participant consent and anonymity ensured. A thematic analysis approach, facilitated by NVivo software, were used to analyze the data and identify key themes. While acknowledging limitations in sample size and potential bias, this study aims to contribute valuable insights to understanding the challenges and opportunities facing Ethiopian meat exporters in the global market.

CHAPTER FOUR

4. DATA ANALYSIS, DISCUSSION AND INTERPRETATIONS

Data Analysis

While conducting interviews various stakeholders in the meat and meat export industry were considered. The interview participants included nine exporters of meat and meat products, as well as livestock exporters. Additionally, representatives from the Ethiopian Meat and Meat Exporters Association, the Ministry of Agriculture, the Ministry of Trade, and experts from the export logistics office were interviewed. Interview were collected from nine meat and meat exporters, the Ethiopian Meat and Meat Exporters Association, veterinary practitioners, the Ministry of Agriculture, the Ministry of Trade, Banks, Quality assurance experts, and experts from the export logistics office. The interviewees also included livestock exporters as Livestock exporters are an important part of the meat and meat export industry, as they supply live animals to countries that prefer to slaughter them according to their own cultural or religious practices.

NVivo 14 is a software tool that helps researchers to organize and analyze qualitative data. By using NVivo 14, the data was coded into categories and themes that reflect the research objectives and questions. The following themes and codes were identified from the data and are presented in the next section. The analysis also provides insights into the patterns, relationships, and trends among the data. The results are discussed below.

Barriers and challenges: themes and codes have already been generated using NVivo 14 has been generated as shown in figure below. The thematic areas codes for NVivo were created based on the barriers and challenges faced by the participants. The codes are: Animal issues, Certificates, finding skilled worker, high production cost, Inadequate government support, unstable currency exchange, animal insurance, competition, finding working place, illegal smuggling and slaughter houses, infrastructure constraints, supply shortage.

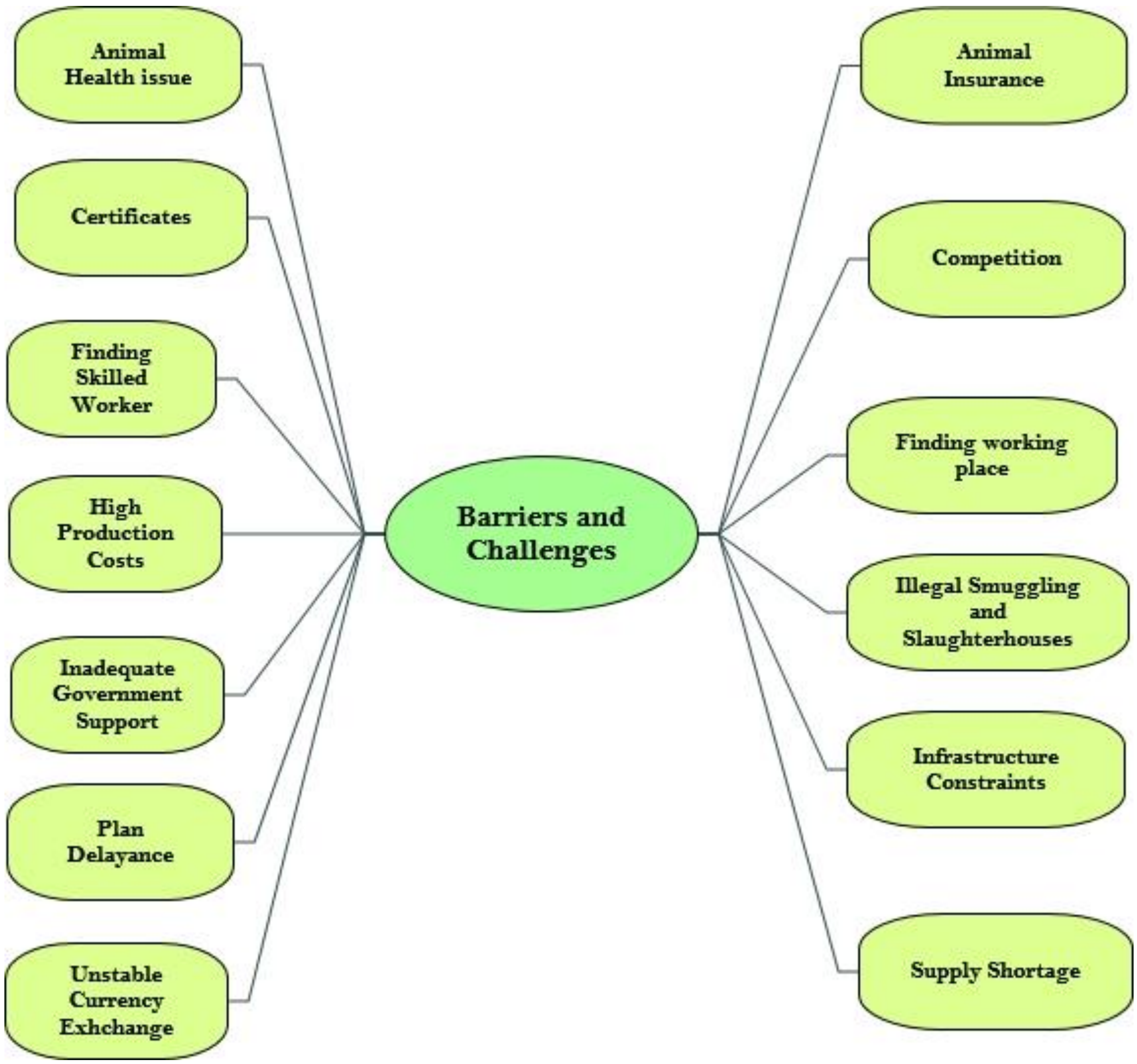

Figure 1 : Barriers and Challenges map

Figure 2 illustrates the result of the thematic analysis. The main challenges faced by the meat exporters in Ethiopia are supply shortage and high production costs, as indicated by most of the respondents in Figure 2. This result is consistent with the existing body of research on this topic. The literature review reveals that previous studies have also reported similar findings and supported the same hypothesis. Therefore, this study contributes to the validation and generalization of the theoretical framework that underlies this field of inquiry. (Ahmed, 2019).

The respondents also ranked the other issues affecting their business, such as inadequate government support, infrastructure constraints, illegal smuggling competition, animal health, finding skilled workers and space, lack of market access, unstable currency, certificates, plan delayance and animal insurance. The most urgent problem to be addressed is the supply shortage, followed by the high production cost.

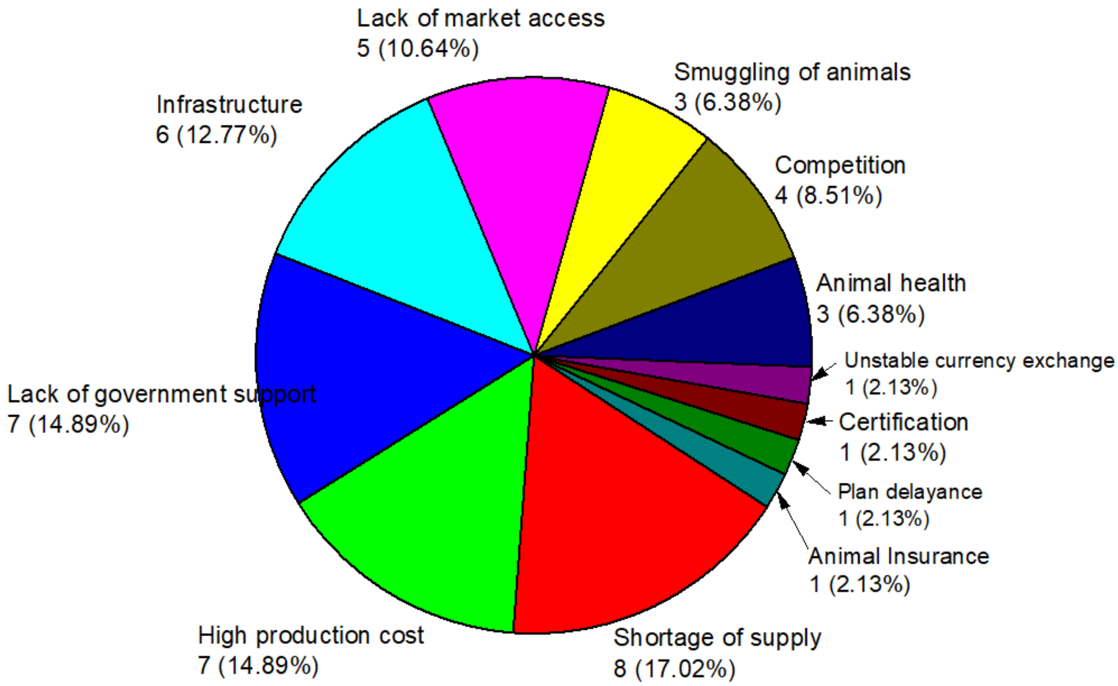

Figure 2 : Results of Barriers and Challenges map

The data structure for the barriers and challenges are here below. For the other thematic analysis the data structure is attached to Appendices 3.

Table 2 : Data Structure for Barriers and Challenges

Quotations	Constructs	
What are the barriers in the meat and meat products export market? *"I think Shortage of supply creating a big challenges for our meat export business"* ***(Company 1)*** *What are the challenges in the meat and meat products export market?* *"Resource supply is the main challenge for our business"* ***(Company 1)*** *"Getting reliable supply is creating a problem for our business ..."* ***(Company 2)*** *What are the challenges in the meat and meat products export market? "We believe the following challenges that are highly affecting the meat export business in ethiopa,are Lack of certificates, Animal health issues, Lack of*	*Supply Shortage*	*Barriers and Challenges*

refrigerated containers to transport meat products, Unstable foreign currency exchange, Illegal cattle contraband to neighboring countries, and ***Shortage of supply" (Company 3)*** ***"****Ethiopia has a large cattle population, with 70 % being female. However, the country does not allow the slaughter of female cattle, which means that we are only exporting 30% of our potential. If we were to slaughter female cattle after they stop giving birth, we could significantly increase our meat export volume. Additionally, if veterinarians were to check the health of these female cattle before slaughter, it would ensure that only healthy meat is exported, bringing additional benefits. This will decrease the* ***supply shortage****.* ***(Company 3)*** *"Our main challenge is* ***getting enough supply*** *to meet the demand. We are currently working on increasing our supply chain capacity."* ***(Company 4)*** *"The meat export market only needs male slaughtered meat. We do not have our own cattle, so we buy them from the open market at a high price and* ***there is also shortage problem****. If our export market was coffee, we could grow coffee. However, in the meat market, it is very challenging to have our own ranch. Because of this, our market is focused only on the Middle East"* ***(Company 4)*** *"Our company is facing Shortage of supply of live animals"* ***(Company 5)*** *"Illegal smuggling of live animals across borders creates shortage in the country"* ***(Company 6)*** ***"There is lack of supply for livestock animals due to several reasons.." (Company 7)*** *"There is shortage of supply "* ***(Company 8)***		
*"High transportation cost bring a cumulative effect in increasing the production cost " (****Company 1)*** *"High production cost for export businesses due to double taxation during transportation of live animals..." (****Company 2)*** ***"****It is challenging that our Ethiopian meat products are being sold at three times the price of Kenyan and Tanzanian meat products at the international market. However, it is important to remember that Ethiopian meat is known for its unique and delicious taste. This is a significant advantage that can leverage to market our products." (****Company 3)*** ***"****Cost: The cost of producing meat in Ethiopia is higher than in other countries, such as Kenya. This makes it difficult to compete in the global market." (****Company 4)*** *"We are buying the live animals with higher price and we are exporting with less price just to get foreign currency"* ***(Company 6)*** ***"****The high cost of living and doing business has made it difficult for us to source and produce livestock at a competitive price" (****Company 7)*** *"If the current meat production cost in Ethiopia keeps at the current level, we believe Ethiopian meat will be too expensive compared to other meat producing countries such as Somalia, Sudan and others we will be out of business."* ***(Company 9)***	*High Production Cost*	*Barriers and Challenges*
"There is Inadequate government support" ***(Company 1)*** *"Complex and challenging business registration requirements in Ethiopia"* ***(Company 2)***	*In adequate government support*	

"Less government support for meat exporters…" ***(Company 4)*** ***"****Inadequate government support"* ***(Company 5)*** ***"****Government must support exporters "* ***(Company 7)*** ***"****We wish the government could work on traceability of animals and also on the health of animals so as we could get certified to export to the European market which is much more attractive than the middle Eastern market."* ***(Company 9)***		
"Lack of infrastructure…." ***(Company 1)*** *"Transportation challenges due to poor road infrastructure"* ***(Company 2)*** *"Lack of road infrastructure"* ***(Company 3)*** *"Infrastructure must me be improved"* ***(Company 4)*** *"Transportation difficulties during transportation of live* animals due to poor *road infrastructure"* ***(Company 5)***	*Infrastructure*	
"Lack of market access is hindering our expansion as we only focus on Middle East and they pay less compared European or USA meat market" ***"(Company 1)*** *"There is lack of market access…" (* ***Company 5)*** *"The government must promote to find market across the global" (Company 6)\"There is lack of Lack of market access for Ethiopian meat exporters…)* ***Company 7*** *"There must be market research to penetrate into new country and create market access..)* ***(Company 8)***	*Lack of Market access*	
"There is a high number of illegal slaughterhouses and illegal live animal smuggling in Ethiopia to the neighbouring countries or our competitors " ***(Company 2)*** ***"There is*** *Illegal cattle contraband to neighboring countries"* ***(Company 3)*** ***"The government must preven****t cattle smuggling to neighboring countries."* ***(Company 3)*** *"Illegal smuggling of live animals across borders…"(* ***Company 7)***	*Illegal smuggling of live animals*	
"The competition from other countries is very high" ***(Company 1)*** *"The initial cost of buying animals is very high, and so are the logistics costs, international prices, and fuel costs. This makes it difficult to compete with other countries, such as Kenya and Australia, which have lower animal costs and logistics costs. Additionally, the international market price for meat is relatively low."* ***(Company 4)*** *"Competition from other countries…"(****(Company 5)*** *"Competition from other countries…"(****(Company 7)***	*Competition*	
"Animal health issues especially mouth and feet disease *excluding Ethiopia from penetrating European and USA market"* ***(Company 3)*** *"There is animal health issue…"* ***(Company 4)*** *"The animal health issue is affecting our export business"* ***(Company 9)***	*Animal Health*	*Barriers and Challenges*
"Finding working place is limiting out export business" ***(Company 2)*** *"Land acquisition for livestock production is very challenging and very costly "* ***(Company 8)***	*Finding working place*	
"Finding skilled workers starting from slaughtering, marketing, export businesses. is very challenging" ***(Company 2)***	*Finding skilled worker*	

“Getting Effective Human resource in workplace and for our business is difficult” ***(Company 4)***		
“There is unstable foreign currency exchange” ***(Company 3)***	*Unstable currency exchange*	
“One time our company burned meat due to plan deleyance“ ***(Company 6)***	*Plane deleyance*	
“Difficulties obtaining certificates for exporting Ethiopian meat products” ***(Company 2)***	*Certification*	
“There is no animal insurance during transportation. We lost more than 20 animals due to transportation accident. There were no insurance that covers the loss of animals during transportation” ***(Company 7)***	*Animal Insurance*	*Barriers and Challenges*

The key findings are:

- **Shortage of supply**: majority of the respondents highlighted the challenge of a shortage of supply. This is due to a number of factors, including drought, instability in major producing areas, and illegal cattle contraband to neighboring countries. As depicted in the data structure (Table 2) based on the interview of exporters, the key findings is as follows related to shortage of supply :

  A number of obstacles hinder the Ethiopian meat export industry, with the most prominent being the insufficient supply. Several companies, such as Company 1, 4, 5, and 7 share this problem. The scarcity of resources also aggravates the situation, as Company 1 and 3 mention. Moreover, some companies, like Company 2, struggle to find reliable sources of livestock animals. Apart from these main challenges, Company 3 identifies other factors that affect the industry negatively, such as the lack of certifications, animal health issues, refrigerated container shortages, unstable currency exchange, illegal cattle smuggling, and low utilization of female cattle. Ethiopia has a large cattle population, with females making up 70 % of it, which offers a great opportunity for the industry, according to Company 3. However, the cultural taboo on slaughtering female cattle limits the exports to only 30 % of the potential volume. This also creates a mismatch between the market's preference for male meat, as Company 4 states, and the availability of meat for companies that do not have their own ranches. Additionally, Company 6 highlights the negative effect of illegal cross-border *live animal smuggling, which worsens the domestic shortage. Therefore, the Ethiopian meat export industry requires resilience and creativity to overcome a complex set of difficulties.*

- **High Production cost**: The respondents highlighted that the initial cost of buying animals is very high, sometimes animal are double taxed during transportation from region to region and so are the logistics costs, international prices, and fuel costs. This makes it difficult to compete with other countries, such as Kenya, Sudan and Australia, which have lower animal costs and logistics costs. Additionally, the international market price for meat is relatively low. Based on table 2 of the data structure based on the interview response, the findings related to high production cost is summarized as follows :

  Ethiopian meat exporters struggle to compete internationally due to high production costs. This concern mentioned by multiple companies, with Company 1, 4, 6, and 7 all highlighting the issue. Transportation costs are a major issue that is making the overall production cost to be higher, as Company 1 points out, adding a significant layer to the overall price tag. Double taxation during livestock transport further increases the problem, as Company 2 mentions. This cost burden makes Ethiopian meat significantly pricier than competitors, as Company 3 and 4 mentioned. Company 3 even highlights the visible contrast with Kenyan and Tanzanian products, which are cheaper in the international market. However, quality remains a potential advantage. Company 3 emphasizes the unique and delicious taste of Ethiopian meat, which could be leveraged for effective marketing. Beyond transportation, the high cost of living and doing business in Ethiopia hinders livestock sourcing and production, as Company 7 emphasizes. This challenge further reduces the competitiveness of Ethiopian meat. The situation is further complicated by limited supply and reliance on male cattle. As Company 6 explains, buying live animals at high prices and exporting at lower prices just to acquire foreign currency is a precarious balancing act. If current production costs remain high, as Company 9 warns, Ethiopian meat risks losing out to competitors. Therefore, addressing the high production cost issue is very crucial for the industry's survival. This requires tackling transportation *costs, support from the government to avoid double taxation during transport of livestock animals from region to region, and the overall high cost of living and doing business. Additionally, market the unique taste of Ethiopian meat could offer valuable avenues for growth. In conclusion, while Ethiopian meat market potential is increasing due to its quality. However, limited supply threatens its competitiveness. Overcoming these challenges requires a multi-pronged approach to reduce costs, improve efficiency, and leverage unique strengths to secure a sustainable and reliable supply future for the industry.*

- **Lack of government support**: Based on the data structure depicted on Table 2, the response from the neat exported related to the lack of government support is summarized as follows

> *The major challenge facing the Ethiopian meat export industry based on the interview is the insufficient government support. This problem reflects in various ways, such as: High transportation costs, which Company 1 points out, and which are aggravated by the lack of government measures to lower them. Complicated and bureaucratic business registration processes, which Company 2 identifies, hinder new entrants and impede industry growth. Limited access to the profitable European market, which Company 9 desires, due to the lack of government actions to enhance animal traceability and health standards to comply with European regulations. This insufficient support not only undermines industry competitiveness but also limits potential. Company 4 highlighted that the limited government support for meat exporters, hampering their ability to be competitive in the international market. While the industry recognizes other barriers, such as high production costs and inadequate supply, they regard government support as a key factor for overcoming them. Company 7 emphasizes for the government to actively support exporters, while Company 5 simply reiterates the need for better government assistance. For the Ethiopian meat export industry to achieve its full potential, it requires a strong and supportive hand from the government. This support can take various forms, from cutting transportation costs and streamlining business registration to investing in animal traceability and health standards. This helps the industry compete on the global stage and get economic benefits .Addressing this crucial need are essential for unlocking the industry's true potential and ensuring its long-term success.*

- **Infrastructure:** Companies (1, 2, 3, 4 and 5) emphasized based on the data structure presented on Table 2, the significant impact of inadequate road infrastructure on animal transportation, leading to extended transit times beyond expectations. This is particularly challenging as the majority of livestock originates from remote regions of Ethiopia, including Borena, the Somali region, and the Southern region. The majority of meat exporters rely on air freight to ensure the timely delivery of fresh meat products. However, this mode of transportation incurs significantly higher costs compared to shipping. Utilizing shipping methods for chilled meat poses substantial challenges due to extended transit times and limited availability of cold chain containers. Moreover, shipping companies generally prioritize high-volume cargo, making it difficult for Ethiopian exporters to secure the necessary cold chain containers. This preference for large shipments also prolongs delivery times as the cargo may need to be consolidated for multiple destinations. Therefore, establishing a state-of-the-art shipping infrastructure with adequate cold chain facilities is crucial for Ethiopian meat exporters to gain control over their supply chain and ensure timely delivery of their products. This finding is in line with the literatures (Eshetu and Abraham, 2016). In summary based on the response on Infrastructure , the finding are summarized as follows :

  Poor road conditions pose a serious threat to the meat export industry in Ethiopia, according to companies 1, 2, 3, 4, and 5. They say that the poor infrastructure makes it hard to transport livestock efficiently and competitively, both within the country and abroad. Companies like Company 4 demand urgent action to improve the roads and transportation networks. They say that this is a key factor affecting their profitability and performance. Other challenges, such as low supply and resource scarcity (mentioned by companies 1 and 3), are also important, but the infrastructure gap is a major obstacle for the industry as livestock animals are moving from place to place till they reach the abattoirs which very far from the livestock locations . It not only causes higher costs, delays, and losses, but also prevents them from fully utilizing Ethiopia's large cattle population (as Company 3 points out). It has been highlighted that the infrastructure gap needs to be addressed it will benefit the meat export industry, but also the whole economy of Ethiopia. By investing in infrastructure and working with exporters to solve these logistical problems, Ethiopia can become a global leader in the meat export sector.

- **Lack of market access**: *Company 1,2,3,4 and 5 highlighted that a significant portion of the meat export businesses in Ethiopia emerged from personal connections and prior commercial ventures in other field. Over 90 % of Ethiopia's meat and meat products are exported to the Middle East, with some reaching as far as the Far East. However, penetrating markets like Europe and the United States proves challenging due to stringent certification requirements and traceability standards for livestock. As a result, Ethiopian meat exporters primarily focus on the Middle East and Far East Asian markets, leading to intense competition. To diversify export destinations and expand market reach, the Ethiopian government must actively engage in market access initiatives.*
- **Illegal smuggling of animals:** *Companies (3, 5 and 7) highlighted the issue of animal smuggling across borders to neighboring African countries. Smugglers are able to command higher prices for their contraband, often transacting in US dollars and profiting from favorable black-market exchange rates. This illegal trade directly undermines Ethiopian meat exporters, as smuggled animals flood local markets and disrupt the supply chain for legitimate export businesses. The price of livestock for domestic consumption is also affected, making it increasingly challenging for Ethiopian meat producers to compete with smuggled products. To curb this illicit activity, regional governments must implement stricter border controls, enhance enforcement measures, and collaborate with neighboring countries to dismantle smuggling networks.*
- **Competition from other countries**: *Based on the Companies response (1, 4, 5 and 7) it has been highlighted that other meat exporting countries enjoy a competitive advantage due to lower production costs, government subsidies for the meat and meat products industry, and well-developed infrastructure. As a result, Ethiopia's meat export competition primarily comes from external sources rather than domestic ones. This is because most meat exporters face similar challenges. Notably, preventing illegal animal smuggling will not only help maintain domestic supply but also prevent smuggled animals from reaching competitors.*
- **Animal health:** *Companies (3, 4 and 9) mentioned "Animal health issues" that foot-and-mouth disease is affecting their export business, as Ethiopian livestock is*

perceived to have this health problem. They also told us that the ministry of agriculture is making efforts to eliminate the disease, despite its prevalence.

- **Unstable currency exchange:** According to the respondent, the meat export sector is facing challenges due to unstable currency exchange rates. The fluctuations in the value of the local currency against the foreign currencies make it difficult for the exporters to predict their revenues and costs. This affects their competitiveness and profitability in the global market.
- **Certificates:** *according to company 2 "One of the main obstacles that hinder Ethiopia's meat industry from accessing the markets of the European Union (EU) and the United States (US) is the poor animal health situation in the country. Ethiopia suffers from a high incidence of animal diseases, such as bovine tuberculosis, foot-and-mouth disease, and Rift Valley fever. These diseases pose a serious threat to human health and food safety, as well as to the productivity and profitability of the livestock sector. Another challenge that Ethiopia's meat industry faces is the lack of a reliable traceability system for livestock. This means that it is hard to monitor the movement of animals from farms to slaughterhouses and processing facilities. This makes it hard to guarantee that meat is safe and that it has not come from animals that have been exposed to disease. Once these challenges have been addressed, meat exports get certified, and Ethiopia will be able to export meat to the EU and the US."*
- **Plan delayance:** *Airlines have earned the trust of many meat exporters for their reliable cargo service. Only company 6 in one incident was reported where their shipment meat shipment was spoiled due to a flight delay. Apart from that, Airlines has a good track record in delivering the cargo on time. Only company 6 said that "The whole meat to be exported burned due to a plane delaying one time".*
- **Animal Insurance:** *Company 7 highlighted that the absence of animal insurance in Ethiopia poses a significant challenge for livestock transporters, exposing them to substantial financial losses in the event of animal deaths during transportation. This lack of insurance coverage can hinder business operations and hinder the growth of the livestock industry. To address this issue, the government or insurance companies must establish an animal insurance program specifically tailored for animal*

transportation. One of the firms mentioned that "Around 20 animals died during transportation and the loss of money was immense since there is no animal insurance during transportation. The insurance is for the cars not for the animals"

Distribution strategy: The main distribution strategy for meat export involves three modes of transportation: air, sea and land as shown in Figure 3.

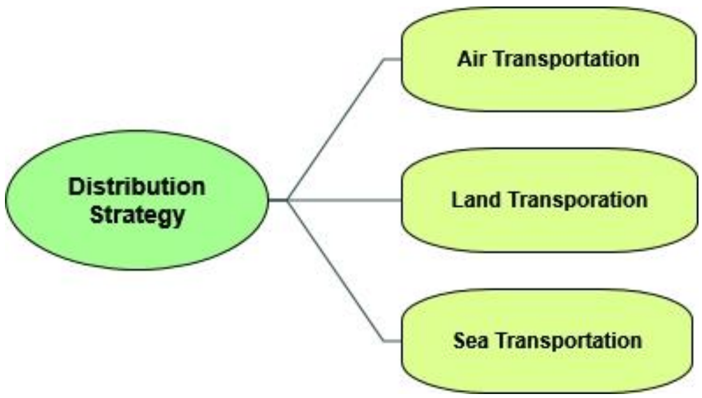

Figure 3 : Distribution Strategy Map

According to the survey results, 63.65 % of the meat is exported by *air*, especially chilled meat that is destined for the Middle East as shown in Figure 4 and data structure (Appendices A). Meat by-products are exported in deep freezers that are suitable for sea transportation. Sea transportation is also used for some areas where the cost of air transportation is too high. Land transportation is mainly used for transporting animals from farms to slaughterhouses.

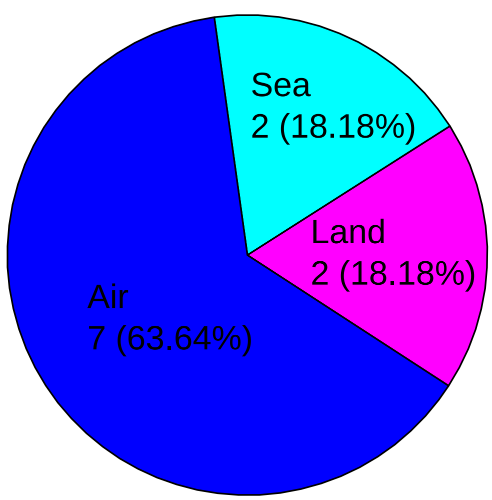

Figure 4 : Results of Distribution Strategy

Meat export destinations: Based on the data collected from the interviews as shown data structure (Appendices A), the main markets for Ethiopian meat exporters are in the *"Middle East and Asia"*. The exporters supply chilled meat, such as beef and lamb, to Dubai, Saudi Arabia, Qatar, Kuwait, Oman and Bahrain. They also export meat by-products, such as offal, to China, Vietnam, Cambodia, Thailand, Sicily, Seychelles and Hong Kong. Companies (1-9) highlighted that Meat byproducts are considered to be delicious foods in many parts of Far East Asia. They are often used in traditional dishes in Far East Asia. Thus, they started our business considering this need. In addition, they transport live animals, mainly cattle and camels, to Egypt and Somalia (Company 7 and 8). Figure 4 illustrates the destinations of Ethiopian meat exports.

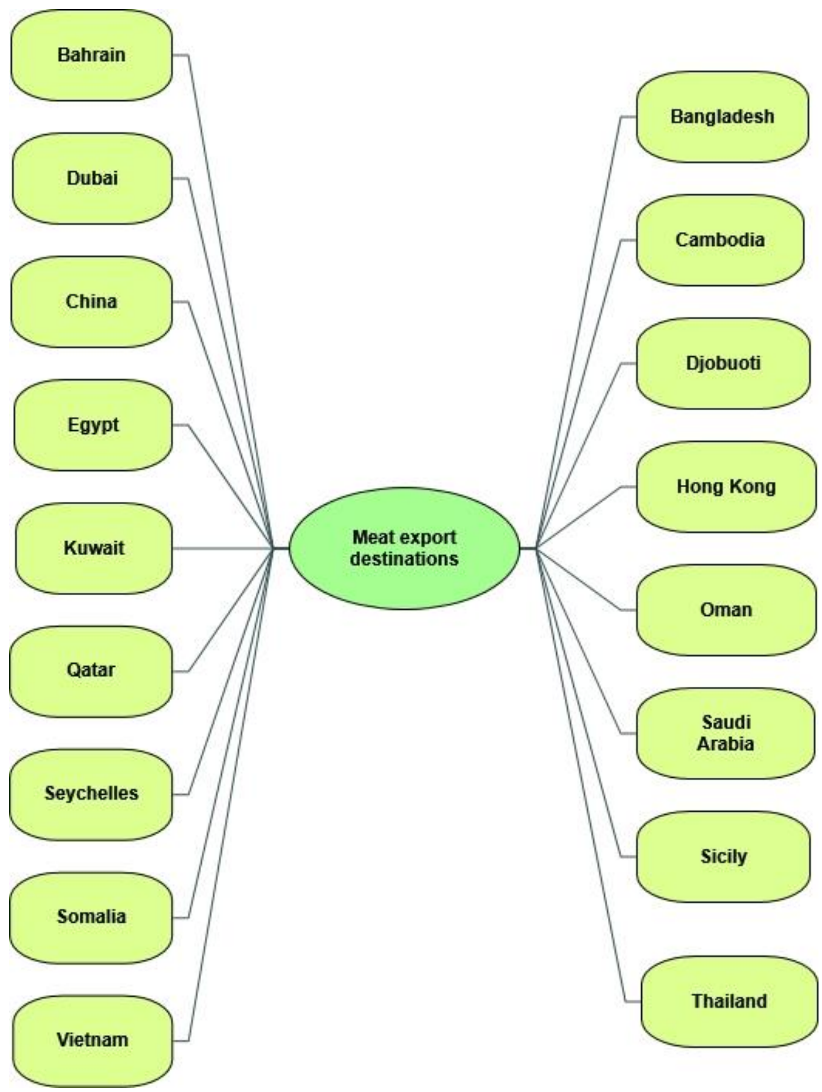

Figure 5 : Meat export destinations map

Based on the analysis and data structure (Appendices A), among the destinations mentioned by respondents, *"Dubai"* emerged as the most popular choice, followed by Saudi Arabia, Qatar, and Bahrain as shown in Figure 6.

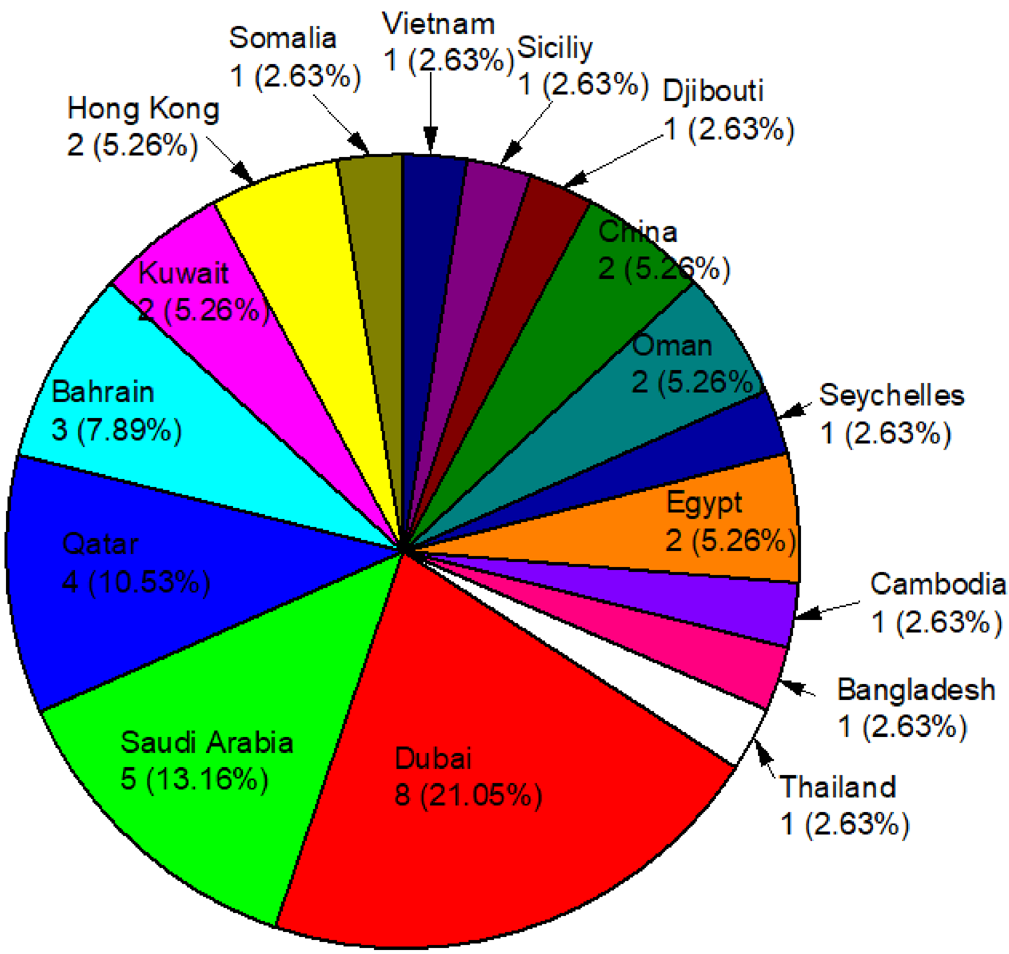

Figure 6 : Results of Meat export destinations

Based on the companies (1-9) response and analysis result, as a nation, Ethiopia has limited market access for meat and meat products due to regulatory requirements. As a result, the meat export market destinations have been limited to the Gulf Arab countries. Among these countries, the United Arab Emirates (UAE) has been the highest buyer of Ethiopian meat and meat products, with a market share of approximately 80 %. There are several reasons why the majority of meat exporters from Ethiopia send their meat to the Middle East. These reasons include:

- **Proximity**: The Middle East is geographically close to Ethiopia, making it a relatively inexpensive and efficient destination for Ethiopian meat exports. Most respondents cited *"the proximity of the Gulf countries as the primary reason for exporting meat products, as it allows for fresh delivery without issue."*
- **High demand**: The Middle East has a high demand for meat, particularly for halal meat, which is meat that has been prepared according to Islamic law. *According to the some of the respondents "The Middle East is predominantly Muslim, and as a result, there is a high demand for meat in the region. Meat exports are well-suited for this market."*
- **Strong trade relationships**: Some of the respondents and trade office mentioned *"Ethiopia has strong trade relationships with many Middle Eastern countries, which makes it easier for Ethiopian meat exporters to access these markets."*
- **Government support**: The Ethiopian government has been actively promoting the export of meat to the Middle East, and has provided financial and logistical support to Ethiopian meat exporters. However, Companies (2,3 and 5) highlighted that "*The meat export sector is vital for the country's foreign exchange earnings, especially in the face of increasing competition from neighboring countries that have invested heavily in this sector. For instance, Kenya has developed a strong meat export industry with the help of government policies and incentives. Therefore, the government should provide adequate support to the meat export sector to ensure its sustainability and growth."*

As a result of these factors, the Middle East has become the most important destination for Ethiopian meat exports. In 2020, for example, the Middle East accounted for 80% of Ethiopia's total meat exports. The most popular types of meat exported from Ethiopia to the Middle East are beef, mutton, and goat meat. The main Middle Eastern markets for Ethiopian meat are the United Arab Emirates, Saudi Arabia, Qatar, Kuwait, Bahrain and Oman. Based on the data obtained from Ethiopia livestock development institute, the Ethiopian government has set a goal of increasing meat exports to the Middle East to $1 billion by 2025.

Company Strategy: In this report, we present the comprehensive insights from the respondents on their company strategy. They shared their approaches to product quality, marketing strategies, service consistency, economies of scale, pricing strategy and future plans as shown in Figure 7.

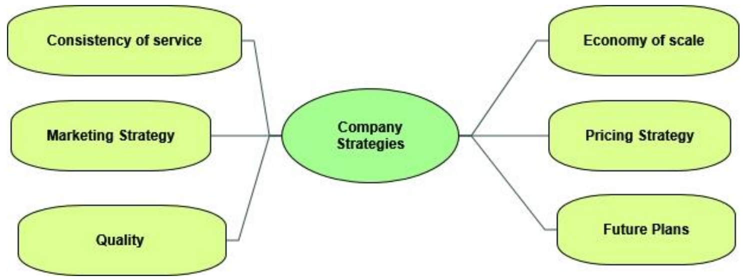

Figure 7 : Company Strategy Map

The interview results indicate that the pricing strategy has a significant impact on the business, as illustrated in the Figure 8 followed by delivering quality product, marketing strategy, and consistence for service, future plans and economics of scale.

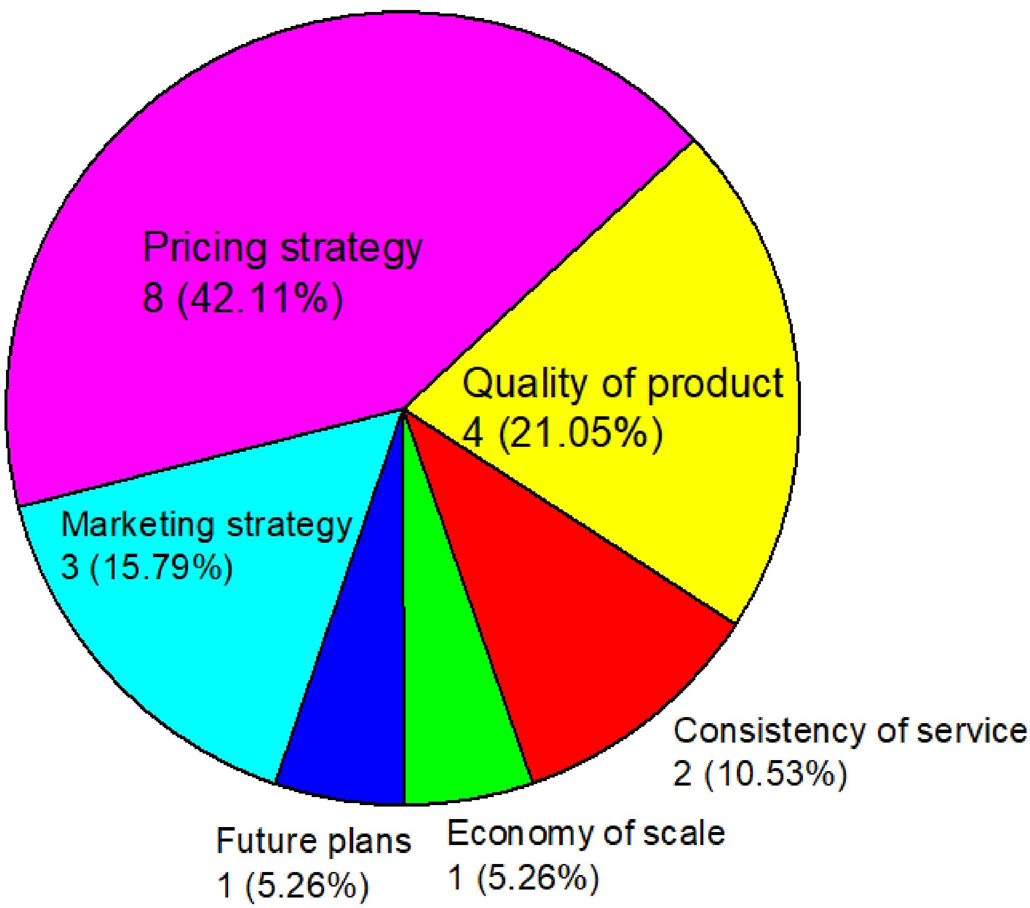

Figure 8 : Results of Company Strategy

Pricing strategy: The government regulates the meat prices, setting them at 6.3 Dollars per kg for goat meat and 6.6 Dollars per kg for other meat exported to Dubai in 2023. According to the responses, *"The Ethiopian Livestock Institute consults with the meat exporter and the National Bank of Ethiopia to determine the price per kilogram of meat for export. The price is based on various factors, such as the current market prices and the competition from other countries. The National Bank of Ethiopia approves the final price."* However, the respondent highlighted that "*the Kenyan competitors are selling their meat for less than 5 Dollars per kg, making it difficult to compete in the same market"*. Moreover, the illegal smuggling reduces the local livestock supply and increases the livestock prices. Additionally, the livestock are subject to multiple taxes when they travel across different regions at the checkpoints. The summary of the findings based on the data structure presented in Appendices A is as follows:

> *Ethiopian meat exporters deal with various challenges in pricing their products. They have to consider the global market, the government rules, and their own quality standards. Some companies, like Company 2, try to lower their costs to be more competitive. Others, like Company 3, charge higher prices based on their quality and certifications. The Ethiopian government set a price for export market and it has a fixed pricing system for all meat exports (Companies 5 and 6). This can create problems for some companies, like Company 9, who have to sell at lower prices to keep up with the competition, but then face difficulties in meeting foreign currency requirements. Company 4 highlighted in offering high-quality products from selected locations, with proper handling and certification, and timely delivery and customer feedback. They aim to build trust and value with their customers, which may help them cope with the fixed pricing system. Company 7; show the tension between exporting prices and securing foreign currency for other projects. This shows the wider economic situation that exporters face, where currency issues sometimes matter more than market competitiveness. Ethiopian meat exporters need to find innovative ways to overcome these pricing challenges. They need to balance cost reduction and quality differentiation, follow government rules, and create trust through value-added services.*

Quality product: *According to the companies (2, 3, 4 and 6), the exported meat has to meet high standards of quality and safety. The meat exporters are subject to regular and random inspections by the quality controllers of their buyer, who visit the slaughterhouses without prior notice. The meat exporters also need to obtain a certificate from the Minister of agriculture, who assigns several veterinary doctors to examine the livestock before, during and after slaughtering. The meat exporter highlighted that every piece of meat that is exported to other countries undergoes a rigorous quality check. The meat exporters also stated that they source their animals from the same market, except for three companies that have their own ranches.*

However, even those companies buy some animals from the same locations as others. The meat exporters also comply with the strict requirements from the Middle East countries, which oblige them to deliver high quality products. To support their claims, they pointed out that the veterinary doctors assigned by the ministry verify the quality control process and issue a certificate before shipping the meat. If those veterinary doctors found quality problems they follow the law that requires them to burn the meat.

Marketing strategy: Based on the findings of the respondents (Company 1-9) the following marketing strategy is adopted by Ethiopian meat exporter based on the interview extracts is:

- *Focus on building and maintaining personal relationships with customers and partners in the target markets, as this is the main business strategy of the exporters.*
- *Highlight the long-term commitment and high-quality standards of the exporters, as these are their competitive advantages in the export market.*
- *Use a mix of online and offline channels to promote the products and the brand, such as website, social media, brochures, print materials, international media, and exhibitions.*
- *Participate in relevant international exhibitions and events to showcase the products, network with potential customers, and generate leads.*
- *Use Ethiopian embassies as intermediaries to facilitate connections and trust with potential customers in different countries.*
- *Monitor and evaluate the effectiveness of the marketing activities and adjust them accordingly to achieve the desired outcomes.*

Consistence of service: Maintaining consistent service delivery is crucial for enhancing export opportunities in the meat and livestock sector. Data from the Ministry of Trade indicates *that the number of licenses granted to meat and meat product exporters and livestock exporters is approximately 706 as of 2023. However, only 12 of these exporters consistently export their products without interruption.* This highlights the importance of maintaining consistent service delivery to attract more opportunities. Some companies operate for a year and then cease operations, lacking the consistency necessary for sustainable growth.

Future plans: Company 1 mentioned that *"their company's future plan is to own a ranch and export their products to the European, US, and Chinese markets. They explained that the prices in* *those markets are higher than in the Middle Eastern countries. However, they also need to meet the requirements of animal traceability before slaughtering and comply with the regulations for exporting meat and meat products from Europe, US, and China. These requirements are additional challenges that they have to overcome.”*

Economics of scale: The small volume of meat exports currently limits the use of shipping containers for chilled meat transportation. Company 2 indicated *that “meat exporters require large volumes to justify the cost of cold chain containers”.* Consequently, chilled meat is currently exported via airlines, while frozen meat products are exported via shipping. Due to the high cost of air freight compared to shipping, achieving economies of scale through increased export volumes could lead to significant cost reductions. This would enable exporters to lower their prices and gain a competitive edge in the market.

Export Market: To succeed in exporting meat and meat products and livestock’s to foreign markets, it is essential to consider several factors that affect the competitiveness and sustainability of the business. These factors include:

- **Competitive strategy**: how to differentiate the products from other suppliers in terms of quality, price, safety, and customer service.
- **Target market:** The primary target markets for Ethiopian meat exporters are the Gulf countries, namely the United Arab Emirates (UAE), Saudi Arabia, Kuwait, Qatar, Bahrain, and Oman. These countries have a large and growing demand for meat due to their expatriate populations and increasing disposable incomes. In addition, the Gulf countries are geographically close to Ethiopia, which makes it easier and more cost-effective to export meat to these markets.
- **Export destinations**: which countries or regions have the highest demand and potential for the products, and what are the legal, cultural, and logistical barriers to enter those markets.
- **Market segmentation**: how to identify and target the most profitable and loyal customers within each market, and what are their preferences, needs, and expectations
- **Competitors**: who are the main rivals in each market, and what are their strengths, weaknesses, opportunities, and threats.

- **Long term strategy**: how to plan and execute a long-term vision for the business that ensures growth, innovation, and customer satisfaction.

Figure 9 : Export market map

According to the findings from the respondents' answers as shown in Figure 10, *''competitive strategy''* is a crucial factor. The respondents emphasized *''the Middle East country prefers Ethiopian meat and meat products because they have a distinctive and appealing flavor compared to other countries. Even though our price is higher than other countries, they still purchase our products for the reasons mentioned above.''* Next to the competitive advantages, target market also plays a significant role.

Figure 10 : Results of Export Market

Based on the data structure presented I Appendices B: the following is the summery of the findings:

Competitive strategy*: The quality, experience, and affordability of the meat products vary among the companies. Companies 1, 5, 7, 8, and 9 have high standards of livestock and meat production, as well as international certifications. Company 3 has a long history in the industry, while Company 2 builds strong relationships with its customers and tailors its marketing plans. Company 1 and Company 9 aim to reduce their costs and offer competitive prices, with Company 9 planning to use its own ranch. Company 4 uses both online and offline media to promote its products and increase its brand awareness.*

Target Markets: *The export destinations of the meat byproduct companies vary, but most of them concentrate on the Middle East market, especially Saudi Arabia and Dubai, where there is high demand for their products. These include companies 1, 4, 5, 7, and 8. However, some companies also have a strong presence in East Asia, such as companies 2 and 3, which mainly ship to China. A few companies, like 6 and 9, aim* *to diversify their market reach by exporting to both the Middle East and East Asia regions.*

***Competition**: Some Ethiopian meat exporters face competition from both domestic and foreign sources. For example, Companies 1 and 9 consider other Ethiopian exporters as their main rivals, especially the large-scale abattoirs that have more capacity and resources. Company 8 also faces the challenge of competing with cheaper meat from other countries that may undercut its prices.*

***Export Destinations**: Company 1 caters to the needs of middle-income expatriates in the Middle East, providing them with affordable and high-quality products and services. On the other hand, Companies 3 and 9 have adopted segmentation strategies that allow them to target specific groups of customers within their chosen regions, based on their preferences, behaviors, or demographics.*

***Long-Term Strategy**: Companies 2 and 3 highlight their focus on long-term strategies, involving participation in international exhibitions, market research, and customer engagement.*

Factors for success : The respondents' views (Company 1- 9) on the success factors for the meat and meat export and livestock animal exports business are as follows: peace and stability, effective livestock regulations, having their own ranch, compliance with export standard, preventing illegal livestock trade, modernization of the traditional system, market expansion and expanding value chains. They consider peace and stability as the most important factor followed effective livestock regulation, having their own ranch, compliance with export standard, preventing illegal livestock trade, modernization of the traditional system, market expansion and expanding value chains as shown in Figure 12.

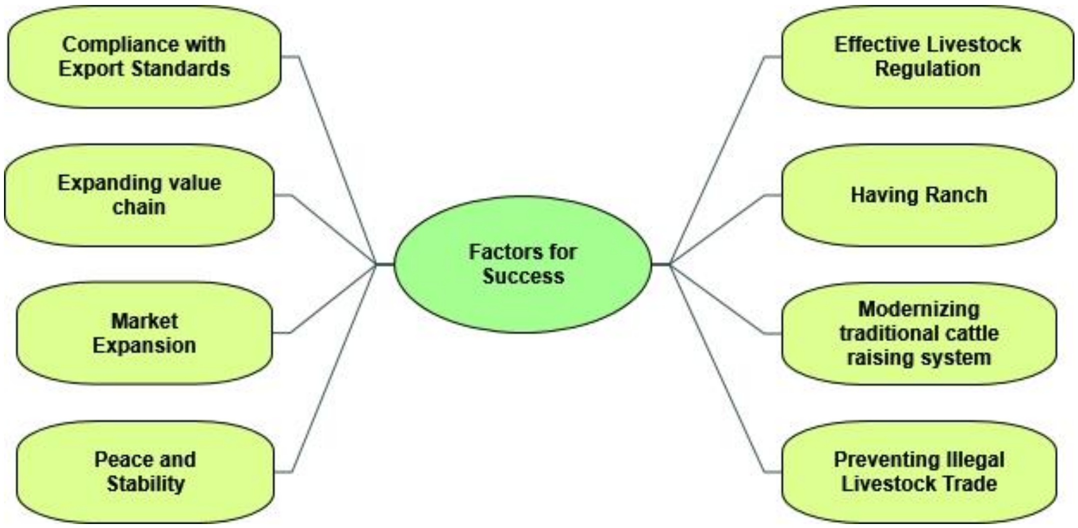

Figure 11 : Factors for success map

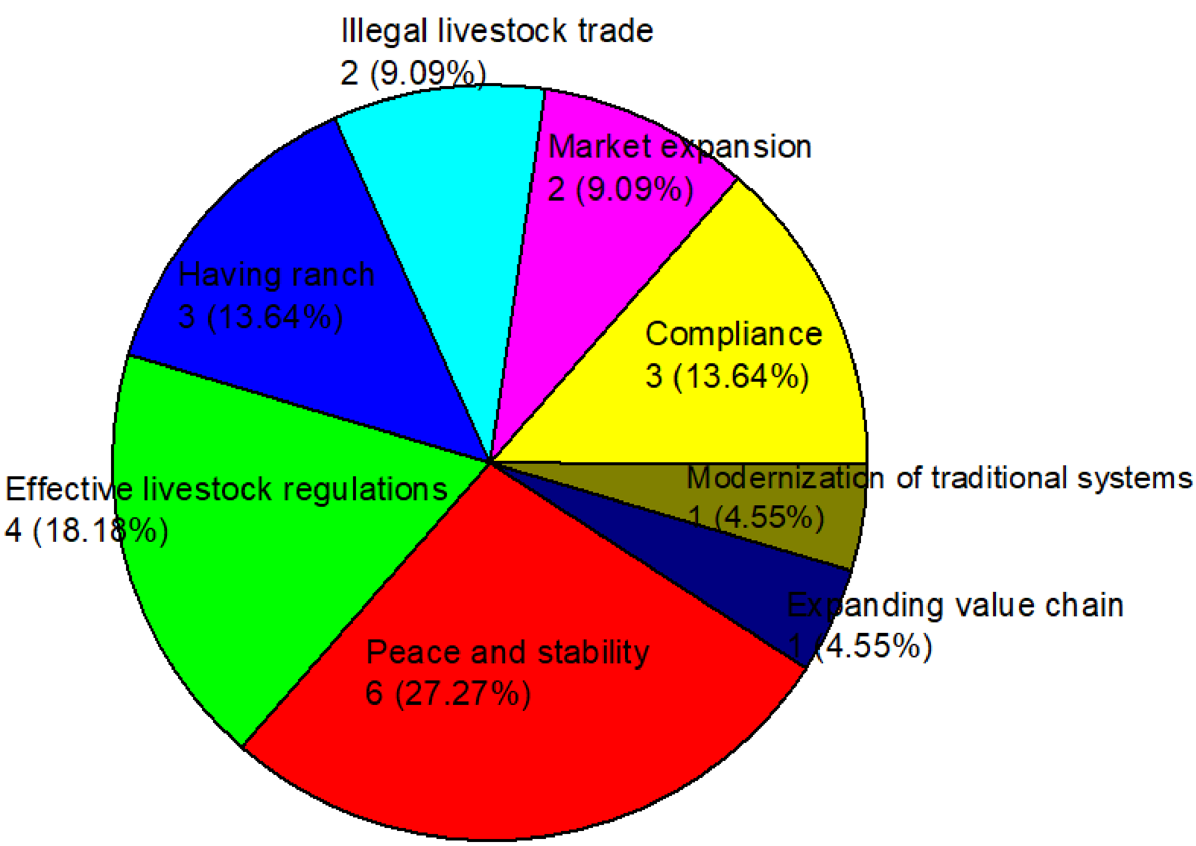

Figure 12 : Results on Factors for success

Based on the analysis and the data structure presented in Appendixes A, the findings are as follows:

- **Peace and Stability:** One of the main themes that emerged from the respondents' feedback (Company 1, 3, 5 8 and 9) was "the *importance of having a stable and peaceful political environment for the development of the meat export industry".* They mentioned that *"political stability builds confidence among investors and encourages them to invest in long-term projects that can enhance the quality and quantity of meat exports."* They also stressed that *"peaceful conditions facilitate the smooth transportation of livestock and meat products across the country and abroad, minimizing disruptions and losses due to violence or conflict".* Furthermore, they pointed out that *"a secure environment attracts international buyers and creates opportunities for trade partnerships that can boost the competitiveness and profitability of the meat export industry"*.
- **Effective Livestock Regulations:** According to the respondents (Company 1, 2 and 4), "*One of the key factors for the success of the livestock sector in Ethiopia is the existence of clear and well-defined regulations that ensure compliance with international standards and consumer expectations. These regulations cover aspects such as animal health, welfare, traceability, quality and safety of meat products*". The respondents also *emphasized "the importance of having efficient regulatory processes that streamline export procedures and minimize bureaucratic hurdles for exporters. This reduces the time and cost of exporting meat products and enhances the competitiveness of Ethiopian exporters in the global market"*. Furthermore, the respondents stressed *"the need for robust enforcement of regulations to prevent the spread of animal diseases and maintain the reputation of Ethiopian meat products"*. They argued that *"effective enforcement requires adequate resources, capacity and coordination among relevant stakeholders"*.
- **Owning Ranches**: Only two of the respondent has their ranches (Company 4 and 5). One of the main advantages of owning ranches directly is that exporters can have more control over the quality and consistency of the livestock they sell. By owning the ranches, they can also implement sustainable livestock management practices that improve animal welfare and environmental stewardship. Furthermore, owning ranches reduces the need to rely on external suppliers and increases the profit margins for exporters.
- **Compliance with Export Standards**: The respondent (Company 1, 4 and 9) highlighted that *"Ethiopian meat products meet the highest quality and safety requirements by*

adhering strictly to international export standards. This adherence builds trust and reputation among international buyers, who are more likely to explore new market opportunities with Ethiopian exporters. Moreover, Ethiopian exporters demonstrate their commitment to quality and safety by undergoing regular audits and certifications."

- **Preventing Illegal Livestock Trade**: *Company 1 and 2 are concerned about "the illegal smuggling of livestock to their competitors in Kenya and Sudan. This has resulted in a shortage of livestock animals for Ethiopian meat exporters, causing an increase in prices for the resource and benefiting the competitors of the Kenyan and Sudanese meat exporter who are able to export meat and live animals at a lower cost."*
- **Modernization of Traditional Systems**: Company 2 emphasized *"the importance of several factors for improving the livestock sector. First, they suggested that embracing modern technologies and practices in livestock production and processing can enhance efficiency and productivity. Second, they recommended investing in cold chain infrastructure and transportation to minimize post-harvest losses and maintain product quality. Third, they advocated for adopting digital solutions for record-keeping, tracking, and traceability to ensure transparency and accountability throughout the supply chain.*
- **Market Expansion and Value Chain Expansion**: *Company 4 highlighted that Ethiopian meat exporters could benefit from diversifying their export markets beyond the traditional destinations. This would reduce their reliance on a single market and mitigate the risks of demand fluctuations, trade barriers, and political instability. The study also suggested that the exporters could explore new market segments, such as niche products and value-added products, which could expand the reach of Ethiopian meat exports and increase their competitiveness. Furthermore, they recommended that the exporters could collaborate with international partners and distributors to expand their distribution networks and increase their market reach. These strategies could help the Ethiopian meat sector to overcome the challenges and seize the opportunities in the global market.*

In conclusion, these factors play a critical role in determining the success of Ethiopian meat and meat product export, livestock, and animal exports businesses. By addressing these factors effectively, Ethiopian exporters can enhance their competitiveness, expand their market reach, and contribute to the growth of the Ethiopian economy.

Impact of Ethiopian Economy: The Ethiopian economy is intricately linked to the meat and meat product export industry, as well as the broader livestock sector. However, the sector's growth and export potential are being hampered by a range of challenges, particularly resource-related issues and a lack of modernization in livestock development practices. A critical factor hindering the livestock sector's progress is the scarcity of essential resources. Land availability, water accessibility, feed procurement, and labor shortages are among the key resource-related issues identified by industry experts (Figure 14). These limitations pose significant obstacles to expanding livestock production and meeting the demands of the export market. In addition to resource constraints, the lack of modernization in livestock development practices is impeding the sector's ability to reach its full potential. Traditional rearing methods, outdated technologies, and inadequate infrastructure are hindering productivity and quality control, making it difficult for Ethiopian meat and meat products to compete effectively in the global market.

Figure 13 : Impact of Ethiopian Economy map

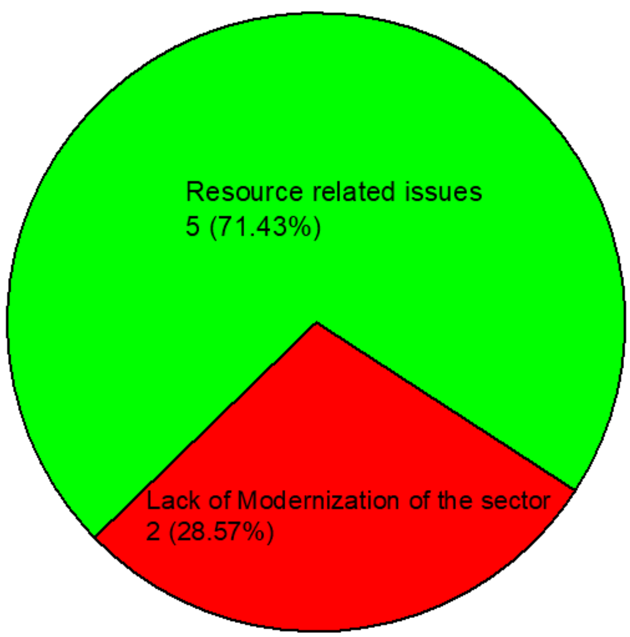

Figure 14 : Result of Impact of Ethiopian Economy

Impact of government policy: Ethiopia's meat and meat product export industry, along with the broader livestock sector, is profoundly influenced by government policies. Financial policies, tax policies, and trade policies play a pivotal role in shaping the sector's trajectory and export competitiveness. Financial policies, as identified by respondents, hold the highest priority in influencing meat and livestock exports (Figure 16). Access to affordable credit, favorable exchange rates, and government subsidies can significantly impact the sector's growth potential. By implementing supportive financial policies, the government can incentivize investment in livestock production, processing, and marketing infrastructure, thereby enhancing the sector's overall competitiveness.

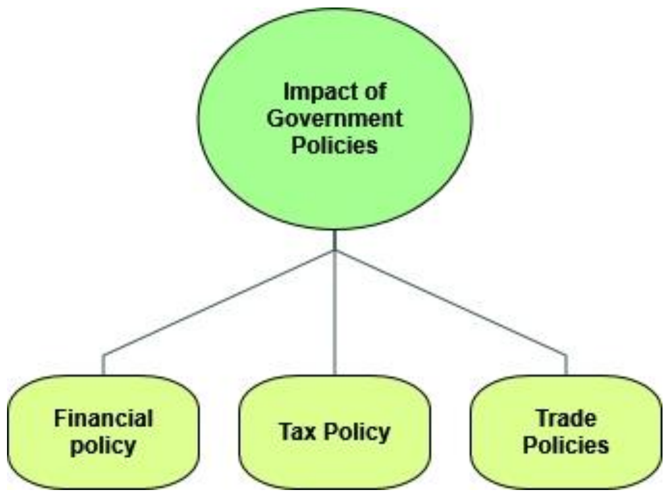

Figure 15 : Impact of government policy map

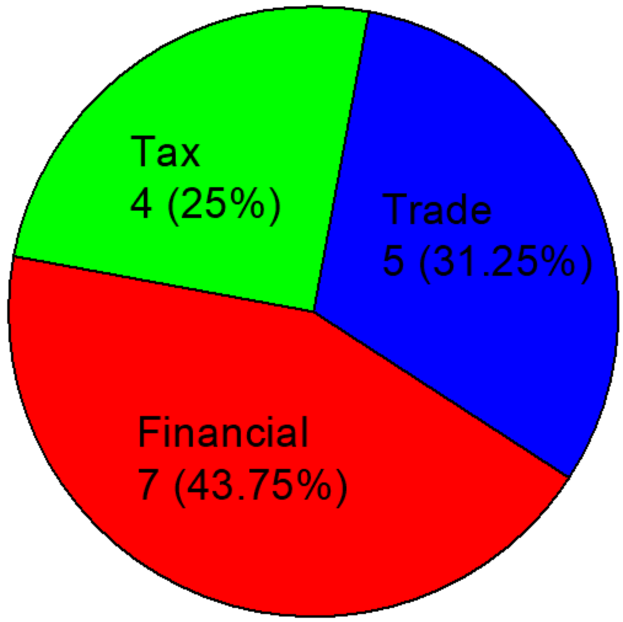

Figure 16 : Results of Impact of government policy

Based on the analysis and data structure presented in Appendices A, the findings are presented as follows :

Ethiopian meat exporters are struggling to survive in a hostile environment created by government policies that undermine their competitive edge and profitability. The complaints are loud and clear:

***Financial Policies and Taxation**: Companies 2 and 5 feel oppressed by tax policies that don't distinguish between meat and other export items, leading to a disadvantageous cost structure. Company 1 adds another layer of frustration, highlighting the double taxation of livestock during transportation, adding to the financial burden.*

***Trade Policy**: Minimum selling price: Companies 7 and 9 point to the government-set minimum selling price as a major hurdle, forcing them to operate below market value and struggle with customer acceptance.*
***Inefficient enforcement**: Company 1 highlights the lack of control over illegal livestock trade and weak law enforcement, disrupting the supply chain and creating unfair competition.*

Key challenges: The result of the analysis shows that the main obstacles faced by exporters of meat, meat products and live animals are related to animal health, livestock prices, supply chain disruptions, certifications, production costs and unregulated livestock trade as shown in figure 17. Among these, the most significant challenge is the supply chain disruption, which affects the availability and quality of the products. The next major challenge is the certification process, which requires compliance with various standards and regulations. The high prices of livestock also pose a problem for exporters, as they reduce their competitiveness and profitability. Furthermore, the unregulated livestock trade creates uncertainty and risks for the exporters, as they may face legal or ethical issues. The animal health issues and the production costs are also important challenges, as they affect the welfare and productivity of the animals. All these challenges are linked to the supply chain and resource management of the exporters

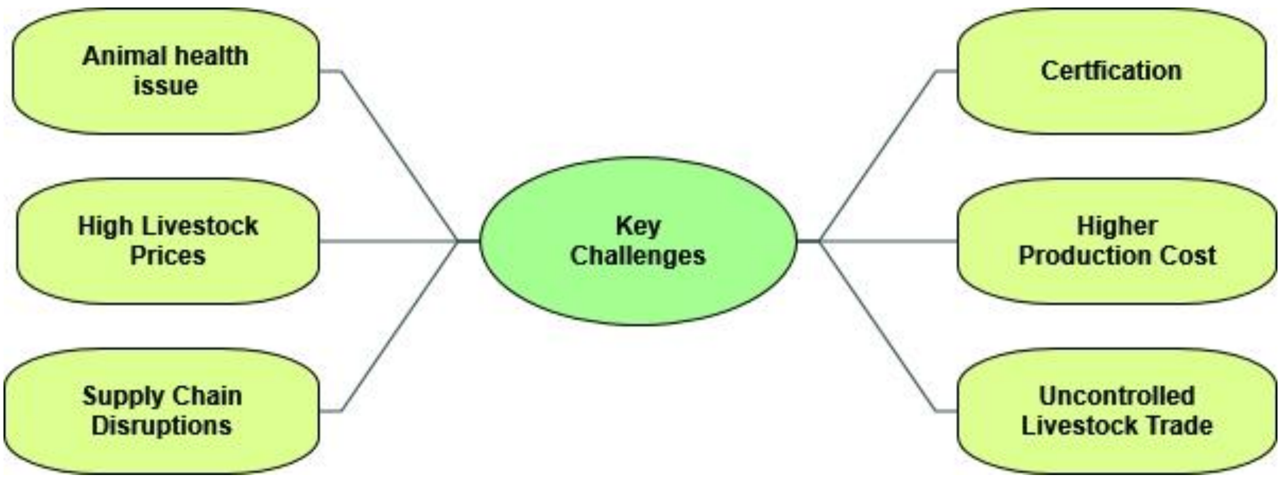

Figure 17 : Key challenges map

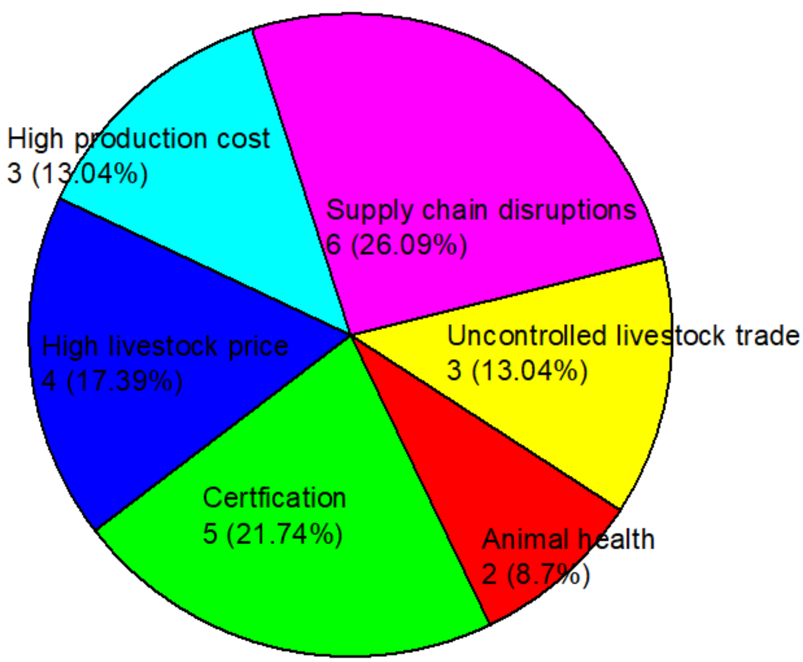

Figure 18 : Results of Key challenges

Motivation to start exporting meat and meat products: The analysis from the respondents (Company 1 – 9) revealed that the main motivation factor for starting the meat export business was to earn foreign currency. According to the current policy, 100 % of the foreign currency earned by the meat exporters is divided as follows: 50 % for the exporters, 10 % for the bank and 40 % for the government. The exporters can use their share of foreign currency to import various items from abroad. Most of the respondents indicated that they were doing this business to obtain foreign currency and use it to import goods. Some of the meat exporters had previous experience in other export businesses before entering the meat export sector. Their previous business activities helped them to develop the motivation and skills to start exporting meat, meat products and live animals, as shown in Figure 19 and 20.

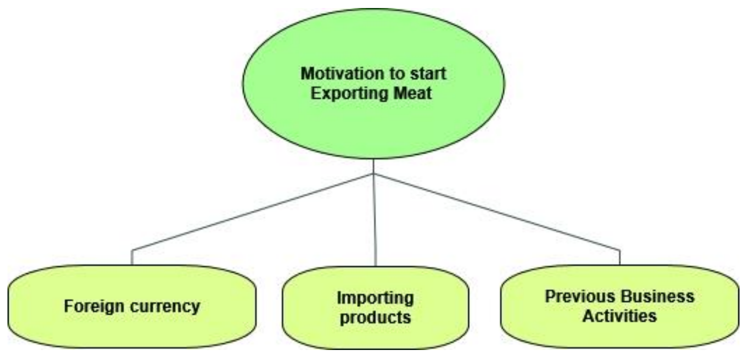

Figure 19 : Motivation to start meat export map

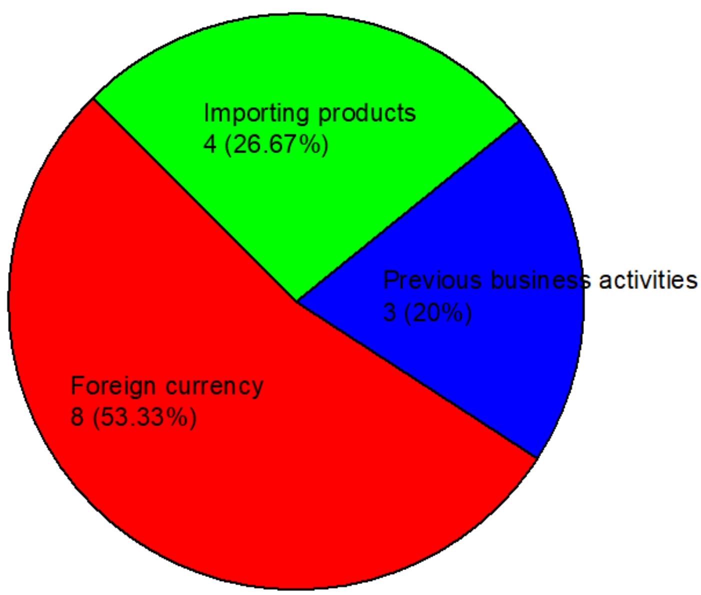

Figure 20 : Result of Motivation to start meat export

Opportunities. According to the analysis of the respondents' responses (Company 1-9), *"the meat and meat products and livestock exports sector in Ethiopia has several opportunities that can enhance its performance and competitiveness"*. Some of these opportunities are: generating foreign currency by exporting high-quality meat products to international markets, offering a unique taste of the Ethiopian meat that reflects the diversity and richness of the country's culture and cuisine, having a proximity to key markets such as the Middle East and Africa that have a high demand for meat and meat products, tapping into the growing demand of meat and meat products both domestically and globally due to population growth, income growth, urbanization and changing consumption patterns, leveraging the large livestock population in Ethiopia that is one of the largest in Africa and the world, and increasing the awareness of the benefits of meat products among consumers in terms of nutrition, health and food security as shown in Figure 21.

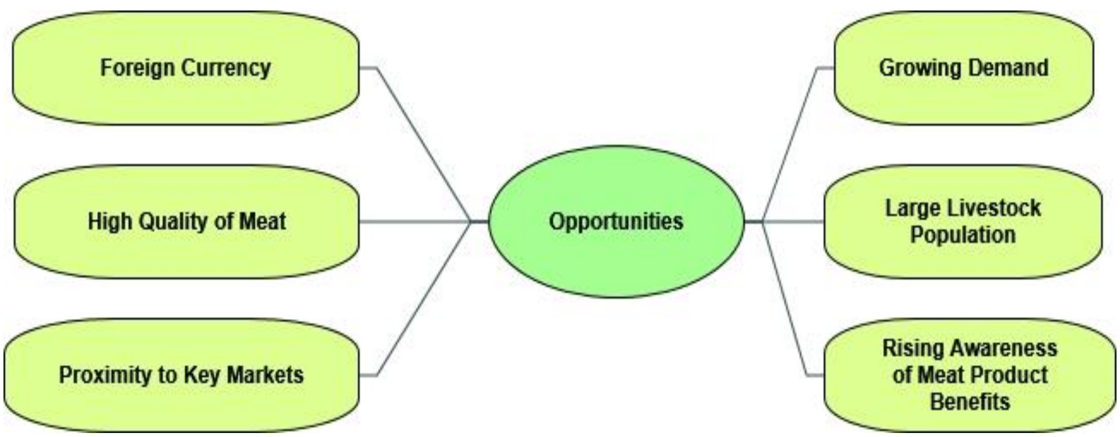

Figure 21 : Opportunity map

The respondents emphasized *"the uniqueness and popularity of Ethiopian meat in several countries. Despite its high price, customers are willing to pay more for the special taste of Ethiopian meat"*, as shown in Figure 2. Exporting meat also benefits the exporters, banks and government by generating foreign currency. There is a very high demand for Ethiopian meat, especially in the Middle East. This is a great opportunity for Ethiopian meat exporters, because the Middle East is geographically close to Ethiopia, which reduces the transportation costs and time. Ethiopia has the largest livestock population in Africa, which gives it a competitive advantage in the meat export business, if it can utilize its resources effectively. Moreover, the awareness of the benefits of meat and meat products for human health is increasing, and many countries are incorporating them in their daily food menu. Therefore, the opportunities for working in the meat export business are immense for the Ethiopian economy.

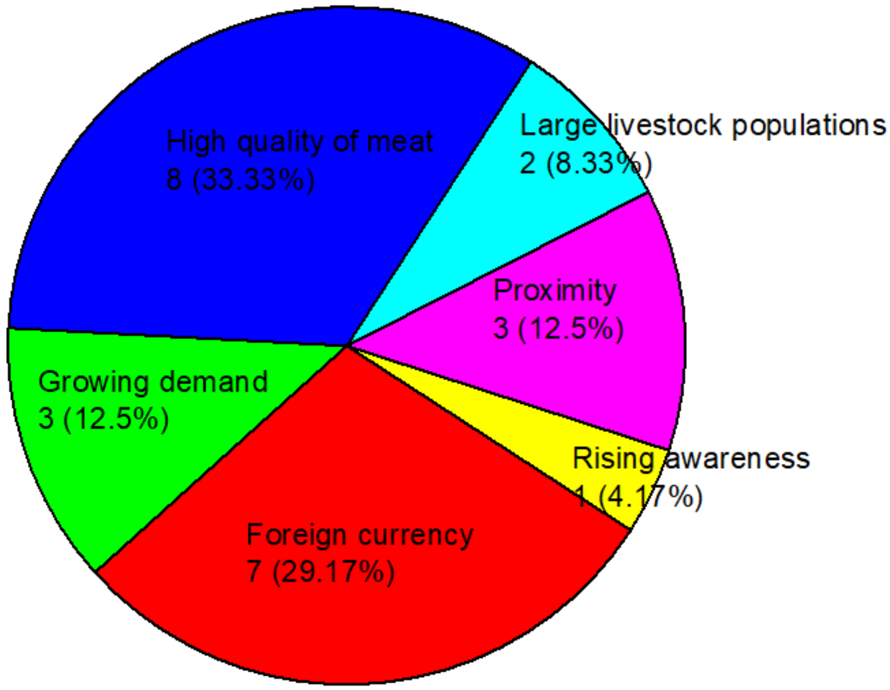

Figure 22 : Results of Opportunity

According to the analysis shown in Figure 22, 33.33% of the respondents emphasized the high quality of Ethiopian meat that is unique opportunity for Ethiopian meat exporter. They stated that even though the price of Ethiopian meat is high, customers are willing to buy Ethiopian meat because of its uniqueness and taste. 29.17% of the respondents mentioned that they do the business to earn foreign currency and use that money to import goods from abroad. This is considered a great opportunity for Ethiopian meat exporters. There are also other opportunities such as proximity to key markets, especially in the Middle East, growing demand for Ethiopian meat, large population of livestock in Ethiopia and increasing awareness about the health benefits of meat products.

CHAPTER FIVE

5. CONCLUSIONS AND RECOMMENDATIONS

5.1. Summary

In this thesis, the Role of Business Strategy on the Export Performance of Meat and Meat Products investigated considering selected Ethiopian meat exporters. Data were from various actors in the meat and meat export sector. The data collection methods included interviews with nine meat and meat product exporters, as well as some livestock exporters. Moreover, the thesis also interviewed representatives from the Ethiopian Meat and Meat Exporters Association, the Ministry of Agriculture, the Ministry of Trade, and experts from the export logistics office. The interview participants consisted of nine meat and meat product exporters, the Ethiopian Meat and Meat Exporters Association, the Ministry of Agriculture, the Ministry of Trade, and experts from the export logistics office. Some livestock exporters were also part of the interviewees.

Based on the major findings a number of obstacles hinder the Ethiopian meat export industry, with the most prominent being the insufficient supply. Several companies, such as Company 1, 4, 5, and 7 share this problem. The scarcity of resources also aggravates the situation, as Company 1 and 3 mention. Moreover, some companies, like Company 2, struggle to find reliable sources of livestock animals. Apart from these main challenges, Company 3 identifies other factors that affect the industry negatively, such as the lack of certifications, animal health issues, refrigerated container shortages, unstable currency exchange, illegal cattle smuggling, and low utilization of female cattle.

Ethiopian meat exporters struggle to compete internationally due to high production costs. This concern mentioned by multiple companies, with Company 1, 4, 6, and 7 all highlighting the issue. Transportation costs are a major issue that is making the overall production cost to be higher, as Company 1 points out, adding a significant layer to the overall price tag. The major challenge facing the Ethiopian meat export industry based on the interview is the insufficient government support. This problem reflects in various ways, such as high transportation costs, which Company 1 points out, and which are aggravated by the lack of government measures to lower them.

Poor road conditions pose a serious threat to the meat export industry in Ethiopia, according to companies 1, 2, 3, 4, and 5. Company 1,2,3,4 and 5 highlighted that a significant portion of the meat export businesses in Ethiopia emerged from personal connections and prior commercial ventures in other field. Over 90 % of Ethiopia's meat and meat products are exported to the Middle East, with some reaching as far as the Far East. However, penetrating markets like Europe and the United States proves challenging due to stringent certification requirements and traceability standards for livestock.

Companies (3, 5 and 7) highlighted the issue of animal smuggling across borders to neighboring African countries. Smugglers are able to command higher prices for their contraband, often transacting in US dollars and profiting from favorable black-market exchange rates.

Companies (3, 4 and 9) mentioned “Animal health issues” that foot-and-mouth disease is affecting their export business, as Ethiopian livestock is perceived to have this health problem.

Company 7 highlighted that the absence of animal insurance in Ethiopia poses a significant challenge for livestock transporters, exposing them to substantial financial losses in the event of animal deaths during transportation. According to the survey results, 63.65 % of the meat is exported by air, especially chilled meat that is destined for the Middle East.

Based on the data collected from the interviews, the main markets for Ethiopian meat exporters are in the “Middle East and Asia”. The Middle East is geographically close to Ethiopia, making it a relatively inexpensive and efficient destination for Ethiopian meat exports. Most respondents cited “the proximity of the Gulf countries as the primary reason for exporting meat products, as it allows for fresh delivery without issue.

Ethiopian meat exporters deal with various challenges in pricing their products. They have to consider the global market, the government rules, and their own quality standards. Some companies, like Company 2, try to lower their costs to be more competitive. Others, like Company 3, charge higher prices based on their quality and certifications. The Ethiopian government set a price for export market and it has a fixed pricing system for all meat exports (Companies 5 and 6). This can create problems for some companies, like Company 9, who have to sell at lower prices to keep up with the competition, but then face difficulties in meeting foreign currency requirements. Company 4 highlighted in offering high-quality products from selected locations, with proper handling and certification, and timely delivery and customer feedback. They aim to build trust and value with their customers, which may help them cope with the fixed pricing system. Company 7; show the tension between exporting prices and securing foreign currency for other projects. This shows the wider economic situation that exporters face, where currency issues sometimes matter more than market competitiveness. Ethiopian meat exporters need to find innovative ways to overcome these pricing challenges. They need to balance cost reduction and quality differentiation, follow government rules, and create trust through value-added services.

Another main themes that emerged from the respondents' feedback (Company 1, 3, 5 8 and 9) was “the importance of having a stable and peaceful political environment for the development of the meat export industry”. They mentioned that “political stability builds confidence among investors and encourages them to invest in long-term projects that can enhance the quality and quantity of meat exports.” They also stressed that “peaceful conditions facilitate the smooth transportation of livestock and meat products across the country and abroad, minimizing disruptions and losses due to violence or conflict”. Furthermore, they pointed out that “a secure environment attracts international buyers and creates opportunities for trade partnerships that can boost the competitiveness and profitability of the meat export industry.

According to the analysis shown in Figure 22, 33.33% of the respondents emphasized the high quality of Ethiopian meat that is unique opportunity for Ethiopian meat exporter. They stated that even though the price of Ethiopian meat is high, customers are willing to buy Ethiopian meat because of its uniqueness and taste. 29.17% of the respondents mentioned that they do the business to earn foreign currency and use that money to import goods from abroad. This is considered a great opportunity for Ethiopian meat exporters. There are also other opportunities such as proximity to key markets, especially in the Middle East, growing demand for Ethiopian meat, large population of livestock in Ethiopia and increasing awareness about the health benefits of meat products.

5.2. Conclusion

This MSc thesis has investigated the role of business strategy on the export performance of meat and meat products Ethiopia using thematic analysis with NVivo 14. The study used qualitative data collection methods through interviews. This thesis investigated the role of business strategy on the export performance of meat and meat products in Ethiopia. The research employed a qualitative approach and thematic analysis, drawing on interviews with diverse stakeholders in the industry. This analysis revealed several key findings:

- **Challenges**: Ethiopian meat exporters face significant challenges, including supply shortages, high production costs, limited government support, inadequate infrastructure, smuggling, animal health issues, skilled labor shortages, market access hurdles, currency fluctuations, certificate delays, and lack of animal insurance.
- **Distribution**: Air transportation is preferred for exporting chilled meat to the Middle East, while sea transportation is used for meat by-products and specific regions. Land transportation primarily serves animal movement to slaughterhouses.
- **Destinations**: Ethiopian exporters primarily target the Middle East (particularly Dubai) with chilled meat, Far East Asia with meat by-products, and Egypt and Somalia with live cattle and camels.
- **Business Strategies**: Respondents identified pricing as the most crucial factor, followed by product quality, marketing, service consistency, future plans, and economies of scale.
- **Competitive Advantage**: Ethiopian meat and meat products possess a distinctive and appealing flavor that makes them competitive in the Middle East, even at higher prices. However, strategic target market selection remains crucial.
- **Success Factors**: Respondents highlighted peace and stability, effective livestock regulations, ranch ownership, compliance with export standards, illegal trade prevention, system modernization, market expansion, and value chain expansion as essential factors for meat and animal export success, with peace and stability ranking highest.
- **Government Policy**: Ethiopian government policies and the overall economy significantly influence the meat export sector.

Importance and Limitations

These findings offer valuable insights for stakeholders in the Ethiopian meat export industry. They highlight the sector's potential and challenges, informing future strategies and interventions. However, the study limitations should be considered:

- **Qualitative data reliance**: The research primarily relied on qualitative data from a limited sample of operational meat exporters. This may not fully represent the entire industry, potentially impacting the generalizability of the findings.
- **Potential bias**: Interview responses and stakeholder information might be subject to bias, either intentional or unintentional, affecting the accuracy and reliability of the data.

Future research should:

- **Expand the sample size and include non-operational exporters**: This will enhance the generalizability of the findings and provide a more comprehensive understanding of the industry.
- **Conduct quantitative research**: Employing quantitative methods could further validate the findings and identify the relationships between specific variables.
- **Investigate specific challenges in detail**: In-depth studies of critical challenges like supply shortages, high production costs, and infrastructure issues could provide valuable insights for targeted interventions.
- **Explore the impact of interventions**: Evaluating the effectiveness of existing and potential interventions aimed at improving the meat export industry is crucial for optimizing strategies and policies.

By addressing these limitations and pursuing further research, stakeholders can gain a deeper understanding of the Ethiopian meat export industry and develop effective strategies to enhance its performance and competitiveness in the global market.

Overall, this MSc thesis plays a significant contribution to our understanding of the role of business strategy on the export performance of meat and meat products from Ethiopia. The findings of the study provide valuable insights for Ethiopian meat exporters, policymakers, and researchers.

5.3. Recommendations

One of the potential sources of Foreign currency for Ethiopia is the export of meat and meat products. However, the industry is not without its challenges, such as high production costs, low foreign investment, poor animal health, and cultural restrictions on slaughtering female cattle. To overcome these challenges, the government of Ethiopia can play a key role by implementing policies that lower the cost of production, attract foreign investors, improve animal health, and allow the slaughter of female cattle. Moreover, the exporters themselves can increase their competitiveness by ensuring the quality of their products, investing in marketing and distribution, and collaborating to address industry issues.

Besides one of the challenges faced by meat exporters in Ethiopia is to comply with the standards and regulations of the international markets, especially the USA and the European Union. These markets offer higher prices and more opportunities for Ethiopian meat products, but they also require strict quality control, animal health, and food safety measures. To overcome these barriers, some meat exporters must invest in their own ranches, where they can raise livestock under controlled condition. The illegal smuggling must be stopped by working with the regional government offices and through strict border checks with neighboring countries. The meat exporters must work closely with the government and other stakeholders to obtain the necessary certificates and licenses to export their meat products efficiently and with high price. By doing so, the meat exporter can gain a competitive edge over other countries.

In general, based on the key findings, we recommend the following actions for the government of Ethiopia and the meat and meat products exporters:

For the government of Ethiopia

- Reduce the cost of production by lowering taxes, tariffs, and fees on inputs such as feed, water, electricity, and transportation.
- Provide financial incentives to foreign investors who are willing to invest in the industry, such as tax holidays, duty-free imports, and land lease subsidies.
- Invest in animal health by improving veterinary services, vaccination programs, disease surveillance, and quarantine measures.
- Allow the slaughter of female cattle for export purposes, as they have higher meat yield and quality than male cattle.

For the meat and meat products exporters

- Focus on exporting high-quality products that meet the standards and preferences of the target markets, such as halal certification, organic certification, and traceability systems.
- Invest in marketing and distribution by creating strong brands, developing effective promotional strategies, and establishing reliable distribution channels.
- Work together to address industry challenges by forming associations, cooperatives, or clusters that can facilitate information sharing, collective bargaining, quality control, and market access.

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Appendixes

A. Data Structure

Quotations	*Constructs*	
What are the barriers in the meat and meat products export market? *"I think Shortage of supply creating a big challenges for our meat export business"* ***(Company 1)*** *What are the challenges in the meat and meat products export market?* *"Resource supply is the main challenge for our business" (****Company 1)*** *"Getting reliable supply is creating a problem for our business …"* ***(Company 2)*** *What are the challenges in the meat and meat products export market? "We believe the following challenges that are highly affecting the meat export business in ethiopa,are Lack of certificates, Animal health issues, Lack of refrigerated containers to transport meat products, Unstable foreign currency exchange, Illegal cattle contraband to neighboring countries, and* ***Shortage of supply" (Company 3)*** ***"****Ethiopia has a large cattle population, with 70% being female. However, the country does not allow the slaughter of female cattle, which means that we are only exporting 30% of our potential. If we were to slaughter female cattle after they stop giving birth, we could significantly increase our meat export volume. Additionally, if veterinarians were to check the health of these female cattle before slaughter, it would ensure that only healthy meat is exported, bringing additional benefits. This will decrease the* ***supply shortage****.* ***(Company 3)*** *"Our main challenge is* ***getting enough supply*** *to meet the demand. We are currently working on increasing our supply chain capacity."* ***(Company 4)*** *"The meat export market only needs male slaughtered meat. We do not have our own cattle, so we buy them from the open market at a high price and* ***there is also shortage problem****. If our export market was coffee, we could grow coffee. However, in the meat market, it is very challenging to have our own ranch. Because of this, our market is focused only on the Middle East"* ***(Company 4)*** *"Our company is facing Shortage of supply of live animals"* ***(Company 5)*** *"Illegal smuggling of live animals across borders creates shortage in the country"* ***(Company 6)*** ***"There is lack of supply for livestock animals due to several reasons.." (Company 7)*** *"There is shortage of supply "* ***(Company 8)***	*Supply Shortage*	***Barriers and Challenges***
*"High transportation cost bring a cumulative effect in increasing the production cost " (****Company 1)*** *"High production cost for export businesses due to double taxation during transportation of live animals..." (****Company 2)*** ***"****It is challenging that our Ethiopian meat products are being sold at three times the price of Kenyan and Tanzanian meat products at the international market. However, it is important to remember that Ethiopian meat is known for its unique and delicious taste. This is a significant advantage that can leverage to market our products." (****Company 3)***	*High Production Cost*	

"**Cost: The cost of producing meat in Ethiopia is higher than in other countries, such as Kenya. This makes it difficult to compete in the global market." (**Company 4) *"We are buying the live animals with higher price and we are exporting with less price just to get foreign currency"* ***(Company 6)*** ***"**The high cost of living and doing business has made it difficult for us to source and produce livestock at a competitive price" (**Company 7)*** *"If the current meat production cost in Ethiopia keeps at the current level, we believe Ethiopian meat will be too expensive compared to other meat producing countries such as Somalia, Sudan and others we will be out of business."* ***(Company 9)***		
"There is Inadequate government support" ***(Company 1)*** *"Complex and challenging business registration requirements in Ethiopia"* ***(Company 2)*** *"Less government support for meat exporters…"* ***(Company 4)*** ***"**Inadequate government support"* ***(Company 5)*** ***"**Government must support exporters "* ***(Company 7)*** ***"**We wish the government could work on traceability of animals and also on the health of animals so as we could get certified to export to the European market which is much more attractive than the middle Eastern market."* ***(Company 9)***	*In adequate government support*	
"Lack of infrastructure…." ***(Company 1)*** *"Transportation challenges due to poor road infrastructure"* ***(Company 2)*** *"Lack of road infrastructure"* ***(Company 3)*** *"Infrastructure must me be improved"* ***(Company 4)*** *"Transportation difficulties during transportation of live animals due to poor road infrastructure"* ***(Company 5)***	*Infrastructure*	
"Lack of market access is hindering our expansion as we only focus on Middle East and they pay less compared European or USA meat market" ***"(Company 1)*** *"There is lack of market access…)* ***Company 5*** *"The government must promote to find market across the global" (Company 6)\"There is lack of Lack of market access for Ethiopian meat exporters…)* ***Company 7*** *"There must be market research to penetrate into new country and create market access..)* ***(Company 8)***	*Lack of Market access*	
"There is a high number of illegal slaughterhouses and illegal live animal smuggling in Ethiopia to the neighbouring countries or our competitors " ***(Company 2)*** ***"There is** Illegal cattle contraband to neighboring countries" (Company 3)* ***"The government must preven**t cattle smuggling to neighboring countries."* ***(Company 3)*** *"Illegal smuggling of live animals across borders…"**(Company 7)***	*Illegal smuggling of live animals*	

"The competition from other countries is very high" ***(Company 1)*** *"The initial cost of buying animals is very high, and so are the logistics costs, international prices, and fuel costs. This makes it difficult to compete with other countries, such as Kenya and Australia, which have lower animal costs and logistics costs. Additionally, the international market price for meat is relatively low."* ***(Company 4)*** *"Competition from other countries…"(****(Company 5)*** *"Competition from other countries…"(****(Company 7)***	*Competition*	
"Animal health issues especially mouth and feet disease excluding Ethiopia from penetrating European and USA market" ***(Company 3)*** *"There is animal health issue…"* ***(Company 4)*** *"The animal health issue is affecting our export business"* ***(Company 9)***	*Animal Health*	
"Finding working place is limiting out export business" ***(Company 2)*** *"Land acquisition for livestock production is very challenging and very costly "* ***(Company 8)***	*Finding working place*	
"Finding skilled workers starting from slaughtering, marketing, export businesses. is very challenging" ***(Company 2)*** *"Getting Effective Human resource in workplace and for our business is difficult"* ***(Company 4)***	*Finding skilled worker*	
"There is unstable foreign currency exchange" ***(Company 3)***	*Unstable currency exchange*	
"One time our company burned the meat due to plan deleyance " ***(Company 6)***	*Plane deleyance*	
"Difficulties obtaining certificates for exporting Ethiopian meat products" ***(Company 2)***	*Certification*	
"There is no animal insurance during transportation. We lost more than 20 animals due to transportation accident. There were no insurance that covers the loss of animals during transportation" ***(Company 7)***	*Animal Insurance*	
" We use Airlines to export our product to Middle East it has to delivered in fresh" ***(Company 1)*** *"We export goat and sheep meat to Dubai using Air transportation"* ***(Company 2)*** *"We use Air Transportation to export our meat products"* ***(Company 3)*** *"Fresh chilled meat must arrive within 24 hours, so we use Air Transportation, depending on availability we use different Airlines"* ***(Company 4)*** *"We use Air Transportation…)* ***(Company 5)*** *"We use Air Transportation…)* ***(Company 6)*** *"We use Air Transportation…)* ***(Company 9)***	*Air*	***Distribution Strategy***
"We use cold chain cargo shipping to transport our meat byproduct to far east Asia." ***(Company 2)*** *"We use refrigerated cold chain transportation to ship meat byproducts from Addis Ababa to Djibouti and from Djibouti to Far East Asia"* ***(Company 3)***	*Sea*	
" We are using Truck to transport live animals" ***(Company 7)*** *" We also use truck to transport the livestock locally and to Somalia"*	*Land*	

(Company 8)		
"We are exporting our Meat products to ***Dubai****...."* ***(Company 1,2,3,4,5,6,8 and 9)*** *"We are exporting our Meat products to* ***Saudi Arabia****...."* ***(Company 1,3,5,6,7 and 9)*** *"We are exporting our Meat products to* ***Qatar****...."* ***(Company 1,3,4 and 5)*** *"We are exporting our Meat products to* ***Bahrain****...."* ***(Company 1,3 and 5)*** *"We are exporting our Meat products to* ***Vietnam****...."* ***(Company 2 and 3)*** *"We are exporting our Meat products to* ***Hong Hong****."* ***(Company 2 and 3)*** *"We are exporting our Meat products to* ***Kuwait****."* ***(Company 1 and 4)*** *"We are exporting our Meat products to* ***Oman****."* ***(Company 1 and 3)*** *"We are exporting our Meat products to* ***Bangladesh****"* ***(Company 3)*** *"We are exporting our Meat products to* ***Cambodia****"* ***(Company 3)*** *"We are exporting our Meat products to* ***China****"* ***(Company 2)*** *"We are exporting our Meat products to* ***Djibouti****"* ***(Company 7)*** *"We are exporting our Meat products to* ***Egypt****"* ***(Company 7)*** *"We are exporting our Meat products to* ***Thailand****"* ***(Company 2)***	*Dubai* *Saudi Arabia* *Qatar* *Bahrain* *Vietnam* *Hong Hong* *Kuwait* *Oman* *Bangladesh* *Cambodia* *China* *Djibouti* *Egypt* *Thailand*	***Meat Export destinations***
We are focusing on cost reduction to be competitive " ***(Company 2)*** *"Ethiopian meat exporters are at a disadvantage compared to Kenyan and Sudanese meat exporters because of our high production costs. We have to sell our meat at whatever price buyers are willing to pay because we don't have the necessary certificates. Additionally, the government sets the price of meat in Ethiopia."* ***(Company 2)*** *"We price our meat exports based on their quality."* ***(Company 3)*** *"We have already sourced our animals from well-known areas in Ethiopia, including Borena, Somali, Afar, Omo, Bale, etc. have agents and animal storage facilities in these areas, and we consistently collect animals and slaughter them when the market demands. We have ISO certification for all of our processes, including proper slaughter, chilling, and veterinary inspection. We work with the airlines to ensure timely delivery of our meat to our customers. We collect daily feedback from our customers to ensure that we are meeting their needs"* ***(Company 4)*** *"Pricing is fixed for all meat and meat product exporter."* ***(Company 5)*** *"The price of every meat exported is equal. It is the association who set the cost"* ***(Company 6)***	*Pricing Strategy*	*Company Strategy*

"We are exporting at low price just to get the foreign currency for other importing businesses" ***(Company 7)*** *"We have not encountered any pricing issues as we operate multiple businesses simultaneously"* ***(Company 8)*** *"We are often forced to sell meat below the government set minimum sales price and this hassled us to inter the list of exporters who didn't full fill the National Bank of Ethiopia's standard and we are often in trouble to export more meat since we didn't remit the foreign currency as per the minimum selling price set by the government."* ***(Company 9)***		
We are exporting high quality of meat" ***(Company 2)*** *Our top priority is to export high-quality meat and meat byproducts.* ***(Company 3)*** *"Our company's competitive advantage is that we have implemented Total Quality Management (TQM) and consistently deliver high-quality meat products"* ***(Company 4)*** *"Quality is first priority"* ***(Company 6)***	*Quality of Product*	
"Through our international market connections, we build relationships with our customers. We also hold various symposia to promote our products" ***(Company 3)*** *"Exhibition as they usually send invitation, Magazines, we promote our product in every occasion"* ***(Company 6)*** *"We leverage Ethiopian embassies to establish connections with potential customers."* ***(Company 8)***	*Marketing Strategy*	
"We are delivering our service consistently. Even we were exporting during COVID " ***(Company 2)*** *"Through our international market connections, we build relationships with our customers and delivered our product consistently."* ***(Company 3)***	*Consistency of Service*	
" Our company follows economics of scale " ***(Company 2)***	*Economics of scale*	
" We plan for a long term business strategy " ***(Company 1)***	*Future plans*	
"We have high-quality livestock supply value chain as it helping our company to be competitive" ***(Company 1)*** *"We export high quality meat"* ***(Company 1)*** *"We focus one personal relation is our own many business strategy so as to be competitive "* ***(Company 2)*** *"Our company has more than decades of experience in the business as we are competitive "* ***(Company 3)*** *"We increase our visibility through our website and promote its products in its target markets twice a year through brochures, print materials, social media, and international media. This is bringing a competitive advantage for us"* ***(Company 4)*** *" We deliver standardized and quality meat and meat products and Internationally certified to be competitive "* ***(Company 5)*** *"We focus on Quality to be competitive "* ***(Company 7)*** *"To be competitive we are exporting high quality products" (Company 8)* *"We are currently resetting our competitive strategy to be based on the quality of meat we are going to supply since we own a ranch and an export standard abattoir where our production cost is expected to be marginally higher than*	*Competitive Strategy*	

those who export meat based on live animals bought from the open market." ***(Company 9)***		*Export Market*
"Our target market is Middle east" ***(Company1, 4 ,5 7 and 8)*** *Our market target is : Far East Asia, China and Middle East"* ***(Company 2)*** *" We currently export to Saudi Arabia and Dubai in the Middle East, but we send most of our meat byproducts to East Asia, especially China"* ***(Company 3)*** *"Our target market is Far east Asia and middle east" (****Company 6)*** *"The owner of the company has long establishment in the country and Saudi was also our major destination for our coffee export. That is our target market"* ***(Company 9)***	*Target Market*	
"As a nation Ethiopia has currently 12 large scale active abattoirs and out of this 7 meat exporters are our main competitors" ***(Company 1)*** *"Although foreigners are not allowed to own businesses in Ethiopia, many Ethiopian companies have foreign shareholders."* ***(Company 2)*** *"The price from other countries is cheap and their making our product pricy "* ***(Company 8)*** *" Some local companies but Sudan meat exporters at large"* ***(Company 9)***	*Competitors*	
"We export our products to many Middle Eastern Arab countries, including the United Arab Emirates (UAE), Saudi Arabia (KSA), Qatar, Oman, Kuwait, and Bahrain. Currently we are exporting to 6 countries" ***(Company 1)*** *"We export meat byproducts (offal) (Pizzles, Tendon, tripe, etc.) to Vietnam, Hong Kong, and Thailand. The final destination of these byproducts is China, where they are sent by agents at the destination. The byproducts are transported in cold chain cargo by boat. "* ***(Company 2)*** *" We currently export to Saudi Arabia and Dubai in the Middle East, but we send most of our meat byproducts to East Asia, especially China"* ***(Company 3)***	*Export Destinations*	
"Our main focus in the market segmentation is the middle income expatriates who are working in the Middle East countries. We think they have a high demand for our products and services, and we can offer those competitive prices and quality." ***(Company 1)*** *We focus on the market segment on Far east Asia and middle east"* ***(Company 3)*** *We focus one Goat meat export "* ***(Company 9)***	*Market Segmentation*	
"We focus on long-term strategy" ***(Company 2)*** *"We do not advertise in Ethiopia, but we participate in several international exhibitions, visit several countries to find new markets, and sponsor several events to attract customers. This is our trend and long term strategy"* ***(Company 3)***	*Long Term Strategy*	

"Peace and stability across the country create a favorable environment for business operations." (Company 1) *"The meat export industry is highly dependent on overall macroeconomic stability and peace and security. Therefore, the government and regional governments have a major role to play in sustaining the potential growth of the meat sector."* ***(Company 1)*** *"If there is no peace in the country, the company will be indirectly affected to a great extent."* ***(Company 3)*** *"Peace and stability is very crucial for livestock movement form place to place "* ***(Company 5)*** *"Lack of Peace and security is hammering our business"* ***(Company 8)*** *" Instability of a given region is very important for the meat export business as the animals must move from place to place"* ***(Company 9)***	*Peace and stability*	*Factor for Success*
"Ethiopia has not yet achieved complete control over the illegal trade in livestock." ***(Company 1)*** *"Regional administrations have poor law enforcement of legal procedures."* ***(Company 1)*** *"Effective regulation of livestock flow to ensure the availability of high-quality animals for export."* ***(Company 2)*** *"It is very important to address resource constraints through strict regulations)* ***(Company 4)***	*Effective livestock regulation*	
"Lack of government support for commercial sourcing or ranching: The Ethiopian government needs to provide more support to meat exporters to help them develop their own commercial sources of animals or ranches. This would reduce their reliance on the open market and give them more control over the quality of their products." ***(Company 4)*** *"We are Involved in new product development and develop our own ranch"* ***(Company 5)*** *"We have our own ranch"* ***(Company 7)***	*Having ranch*	
"Compliance with export standard is very crucial to export meat to any countries where they do have strict regulations) ***(Company 1)*** *"Obtaining certification is main criteria to export meat"* ***(Company 4)*** *"We are limited to middle east market for quality standard reason and this has affected us since we couldn't inter the European market where a better profit margin could have been achieved which in turn could have helped us to navigate any short term and long term price hike of live animals at the local market."* ***(Company 9)***	*Compliance with Export standard*	
"Proper law enforcement to protect the rights of exporters and deter illegal activities must be in place" ***(Company 1)*** *"Even the abattoirs that receive cattle legally are small as most of they are not coming to those places legally"* ***(Company 2)***	*Preventing illegal livestock trade*	
"Developing relationships with potential buyers in Europe and Asia to expand market access is very important" ***(Company 1)*** *" As our company has several braches all over the world, we want to expand our market further"* ***(Company 3)***	*Market Expansion*	

"Expanding value chain is top priority" ***(Company 4)***	*Expanding value chain*	
"It is very important to work modernization of the traditional cattle raising system to compete with others " ***(Company 2)***	*Modernization traditional cattle raising system*	
"Lack of modernization in the meat export industry" ***(Company 2)*** *"There Unlimited purchase price increment due to traditional way of doing business"* ***(Company 5)***	*Lack of modernization of the sector*	*Impact of Ethiopian Economy*
"Inability to fully utilize domestic resources…" ***(Company 2)*** *"Ethiopia needs to use its own resources to support the meat export sector."* ***(Company 4)*** *"Land policy challenges..)* ***(Company 4)*** *"The high cost of living and doing business has made it difficult for us to source and produce livestock at a competitive price"* ***(Company 7)*** *"Overall, the high inflation seen on the food sector has created a major problem to our company the cost of live animals is also soaring compared to the acceptable meat price from our Middle East customers."* ***(Company 9)***	*Resource related Issues*	
Unfavorable financial policies and foreign currency exchange rates make it difficult to compete in the export market." ***(Company 2)*** *"Access to debt financing is limited."* ***(Company 2)*** *"The financial policy is affecting us a lot"* ***(Company 3 and 5)*** *"The government's financial policies do not provide equal priority to all exporters. For example, those involved in agricultural exports receive higher priority than those exporting meat and meat products. This can make it more difficult for meat exporters to compete in the global market."* ***(Company 7)*** *"Sharing the foreign currency equally with the government is creating a problem for us"* ***(Company 8)*** *"Among the major government policy know to affect our company are: the foreign currency retention policy which was 20 % to the exporter until recently was a major factor which disappointed most exporters and also the minimum selling price set by government is also a major obstacle since most of our customers are unwilling to pay that much amount for each KG of meat we ship."* ***(Company 9)***	*Financial policy*	*Impact of government policy*
"The government's tax policies for meat and meat products are similar to those for other export items, which can be disadvantageous." ***(Company 2)*** *"The tax policy is has been affecting us a lot."* ***(Company 5)*** *"The government's trade policies do not provide equal priority to all exporters. For example, those involved in agricultural exports receive higher priority than those exporting meat and meat products. This can make it more difficult for meat exporters to compete in the global market."* ***(Company 7)*** *"Among the major government policy know to affect our company are : the foreign currency retention policy which was 20 % to the exporter until recently was a major factor which disappointed most exporters and also the minimum selling price set by government is also a major obstacle since most of our customers are unwilling to pay that much amount for each KG of meat we ship."* ***(Company 9)***	*Tax policy*	

"Ethiopia has not yet achieved complete control over the illegal trade in livestock. Brokers interfere in the supply chain without adding value. Regional administrations have poor law enforcement of legal procedures. Livestock suppliers are double taxed during transportation. Inflation, trade imbalances, fluctuating government monetary policy, and unjustified increases in livestock purchasing prices have created challenges in sustainable livestock supply, affecting the overall export performance of meat and meat products. ***(Company 1)*** *"The government policy has been affecting us a lot"* ***(Company 5)*** *"The government's trade policies do not provide equal priority to all exporters. For example, those involved in agricultural exports receive higher priority than those exporting meat and meat products. This can make it more difficult for meat exporters to compete in the global market."* ***(Company 7)*** *" Among the major government policy know to affect our company are : the foreign currency retention policy which was 20 % to the exporter until recently was a major factor which disappointed most exporters and also the minimum selling price set by government is also a major obstacle since most of our customers are unwilling to pay that much amount for each KG of meat we ship."* ***(Company 9)***	*Trade policy*	
"There is supply chain disruption due peace and instability " ***(Company 1)*** *"Finding reliable supply is the main priority for our market"* ***(Company 2)*** *"Our main challenge is getting enough supply to meet the demand. We are currently working on increasing our supply chain capacity."* ***(Company 4)*** *" There is Animal shortage challenge"* ***(Company 6)*** *"There is Lack of supply of livestock animals"* ***(Company 8)***	*Supply Chain distribution*	
"Our goal is to export our products to other countries, but we need to resolve our certification issues first. Once we have our certifications, we will be able to reach a wider customer base." ***(Company 2)*** *" We Lack of certificate to export our product to many countries"* ***(Company 3 and 8)*** *"There is certification problem to export our meat product to European and USA market"* ***(Company 9)***	*Certifications*	*Key challenges*
"Brokers interfere in the supply chain without adding value." ***(Company 1)*** *"Livestock suppliers are double taxed during transportation."* ***(Company 1)*** *"Unjustifiably high livestock purchasing prices"* ***(Company 1)*** *"Uncontrolled purchase price"* ***(Company 8)***	*High livestock price*	
" Animal health issues is affecting Ethiopian meat export as the issue of mouth and feet disease must be eradicate " ***(Company 3)*** *"Medication of the livestock's is very crucial ..."* ***(Company 5)*** *" safety and traceability of animals is the major criteria to export our meat at higher price"* ***(Company 9)***	*Animal health issue*	
"All of the issues have been raised, but the logistic and value chain issues must be given higher priority. Kenyan meat is priced at $3 per kilogram, while Ethiopian meat is priced at $7 per kilogram. The logistic issues, traditional systems, and illegal abattoirs are making it difficult for Ethiopian meat exporters to compete. Additionally, Ethiopia's meat export volume is very low,	*High production cost*	

and most giant shipping companies are not willing to accept small volumes, so Ethiopian meat exporters typically have to pay whatever price the shipping companies ask. The lack of cold chains in Ethiopia's shipping service is also a major challenge." **(Company 2)** *"The high cost of living and doing business has made it difficult for us to source and produce livestock at a competitive price"* **(Company 7)**		
"Ethiopia has not yet achieved complete control over the illegal trade in livestock." **(Company 1)** *"Uncontrolled cross-border livestock trade"* **(Company 1)** *"Uncontrolled purchase price due illegal smuggling…"* **(Company 8)**	*Uncontrolled livestock trade*	
" We start this business to get foreign currency " **(Company 2,3, 4, 5, 6,7, 8 and 8)**	*Foreign Currency*	*Motivation to export meat and meat by products export*
"We are using the foreign currency to import different products" **(Company 4, 5, 6 and 9)**	*Importing products*	
"Our main motivation for starting this business was our previous business activities. We were interested in creating export opportunities, and we also had a business partner in another business from one of our destination areas. This created a good opportunity for us to start this business together." **(Company 2)** *"With that mindset, we launched the business. As we have expanded our export business, we have also begun exporting strawberries."* **(Company 7)** *"We have been engaged in the same business in South Africa prior to establishing our operations here."* **(Company 8)**	*Previous business activities*	
"Ethiopian meat products have a unique taste that is preferred by many buyers abroad, even though they are more expensive than Kenyan and Sudanese meat products. This is because Ethiopian meat products are produced on a smaller scale, which allows for more attention to quality. As a result, Ethiopian meat product exporters are able to charge higher prices for their products. **(Company 1,2, 3, 4, 5,7 and 9)**	*High Quality of meat*	*Opportunities*
"Meat export is helping us to get foreign currency and use that money to import products " **(Company 3,4,5, 7 and 8)**	*Foreign Currency*	
"There is also a meat demand abroad for Ethiopian meat taste" **(Company 1 and 2)** *"It is challenging that our Ethiopian meat products are being sold at three times the price of Kenyan and Tanzanian meat products at the international market. However, it is important to remember that Ethiopian meat is known for its unique and delicious taste. This is a significant advantage that can leverage to market our products."* **(Company 3)**	*Growing demand*	
"Ethiopian proximity to key market especially to the middle is a great opportunity"" **(Company 1, 2 and 3)**	*Proximity to key markets*	
"There is large livestock population in Ethiopia" **(Company 1)** *"If we use our resource wisely we have resources"* **(Company 2)**	*Large livestock populations*	
"There is rising awareness of meat product benefits" (Company 1)	*Rising Awareness of meat product benefits*	

B. Codebook - Nodes – Extracts from NVivo 14

Themes and Codes	Description
Barriers and Challenges (theme)	
Animal Health issue (Code)	Any condition that affects the health and well-being of an animal. This can include diseases, parasites, injuries, and nutritional deficiencies. Animal health issues can have a significant impact on the productivity and profitability of animal agriculture.
Animal Insurance (Code)	A type of insurance that provides financial protection against losses due to animal deaths, injuries, and illnesses. Animal insurance can help farmers and ranchers manage the risk of these events and ensure the financial stability of their operations.
Certificates (Code)	Official documents that attest to a specific fact or accomplishment. In the context of animal agriculture, certificates may be required for activities such as importing and exporting animals, transporting animals, and selling animal products.
Competition (Code)	The rivalry among businesses that sell similar products or services. In the animal agriculture sector, competition can come from both domestic and international producers.
Finding skilled worker (Code)	The process of identifying and hiring qualified workers who have the skills and experience necessary to perform their jobs effectively. In the animal agriculture industry, skilled workers may be needed for tasks such as animal care, veterinary care, and food processing.
Finding working place (Code)	The process of securing a suitable location for an animal agriculture operation. This may involve finding land, building facilities, and obtaining necessary permits and approvals.
High Production Costs (Code)	The expenses associated with producing animal products. These costs can include feed, labor, veterinary care, and transportation. High production costs can make it difficult for animal agriculture businesses to compete in the marketplace.
Illegal smuggling and slaughterhouses (Code)	The illegal trade in animals and animal products. This can include the smuggling of live animals, the sale of illegally slaughtered animals, and the counterfeiting of animal products. Illegal smuggling and slaughterhouses can pose a serious threat to animal health and food safety.
Inadequate Government Support (Code)	The lack of government funding, programs, and policies that support animal agriculture. Inadequate government support can make it difficult for animal agriculture businesses to thrive.

Themes and Codes	Description
Infrastructure Constraints (Code)	The limitations in physical infrastructure, such as roads, bridges, and utilities that can hinder the development and operation of animal agriculture businesses.
Lack of Market Access (Code)	The inability of animal agriculture businesses to sell their products to buyers at profitable prices. This can be due to factors such as trade barriers, competition from imported products, and consumer preferences.
Plan delayance (Code)	The postponement of a planned animal agriculture project. Plan delayance can be caused by a variety of factors, such as financial constraints, regulatory hurdles, and environmental concerns.
Supply Shortage (Code)	The situation in which there is not enough of a particular animal product to meet demand. Supply shortages can lead to higher prices and may also cause disruptions in the food supply chain.
Unstable Currency Exchange (Code)	Fluctuations in the exchange rate between the local currency and the currencies of major export markets. Unstable currency exchange can make it difficult for animal agriculture businesses to plan for the future and can erode their profits
Company Strategies (theme)	
Consistency of service (Code)	Delivering products and services consistently in a way that meets or exceeds customer expectations. This includes providing reliable service, maintaining high quality standards, and handling customer complaints effectively.
Economy of scale (Code)	The cost advantage that a company has when it produces a large volume of goods or services. This is because the company can spread its fixed costs over a larger number of units, which lowers the cost per unit.
Future Plans (Code)	The goals and objectives that a company has for the future. These plans may include expanding into new markets, developing new products, or becoming more efficient.
Marketing Strategy (Code)	A plan for communicating the value of a company's products or services to potential customers. This may include advertising, public relations, and social media marketing.
Pricing Strategy (Code)	The method that a company uses to set prices for its products or services. This may involve considering factors such as cost of production, competition, and market demand.
Quality Product (Code)	A product that is free of defects and meets or exceeds customer expectations. This includes using high-quality materials, employing skilled workers, and implementing rigorous quality control procedures.
Distribution Strategy (theme)	Means of transportation

Themes and Codes	Description
Air Transportation (Code)	The movement of goods or people by airplane. This is the fastest mode of transportation, but it is also the most expensive.
Land (Code)	The movement of goods or people by truck, train, or car. This is a more affordable option than air transportation, but it is also slower.
Sea Transportation (Code)	The movement of goods or people by ship. This is the slowest mode of transportation, but it is also the most cost-effective for large shipments.
Export Market (theme)	The market for goods or services that are sold to other countries. Export markets can offer companies opportunities to expand their reach and increase their profits.
Competitive Strategy (Code)	A plan for how a company will compete in the marketplace. This may involve differentiation, low-cost leadership, or focus.
Competitors (Code)	Other companies that sell similar products or services. Companies need to understand their competitors' strengths and weaknesses in order to develop effective competitive strategies.
Export Destinations (Code)	The countries to which a company exports its goods or services. Companies need to carefully select their export destinations based on factors such as market demand, trade regulations, and economic stability.
Long-term strategy (Code)	A plan for a company's future growth and development. This may involve setting ambitious goals, investing in research and development, and building strong customer relationships.
Market Segmentation (Code)	The process of dividing a market into smaller groups of customers with similar needs or characteristics. This allows companies to tailor their marketing and sales efforts to specific segments of the market.
Target Market (Code)	The specific segment of the market that a company wants to reach with its products or services. Companies need to carefully define their target market in order to develop effective marketing and sales campaigns.
Factors for Success (theme)	
Compliance with Export Standards (Code)	Meeting the requirements set by importing countries for the quality, safety, and labeling of products. This is essential for companies to gain access to export markets.
Effective Livestock Regulation (Code)	Government policies and regulations that ensure the health and safety of livestock. This is important for maintaining the quality of animal products and protecting consumers from diseases.

Themes and Codes	Description
Expanding value chain (Code)	Increasing the number of steps in the production and distribution process that a company controls. This can help companies improve efficiency, reduce costs, and increase profits.
Having Ranch (Code)	Owning and operating a ranch where livestock is raised. This can give a company more control over the quality of its products and reduce its reliance on external suppliers.
Market Expansion (Code)	Entering new markets with its products or services. This can help companies increase their sales and profits.
Modernizing traditional cattle raising system (Code)	Implementing new technologies and practices to improve the efficiency and sustainability of livestock production. This can help companies reduce their environmental impact and increase their profitability.
Peace and Stability (Code)	A stable political and economic environment that is conducive to business investment and growth. This is essential for companies to operate successfully in the long term.
Preventing Illegal Livestock Trade (Code)	Combating the smuggling of livestock and animal products. This is important for protecting the health of livestock, ensuring food safety, and upholding the rule of law.
Impact of Ethiopian Economy (theme)	The overall health and performance of the Ethiopian economy. A strong economy can provide opportunities for businesses to grow and prosper.
Lack of modernization of the sector (Code)	The outdated and inefficient practices that are still used in many parts of the livestock sector. This can hinder productivity, reduce quality, and increase costs.
Resource related issues (Code)	The scarcity of resources such as land, water, and feed that can constrain the growth of the livestock sector. This requires careful management
Impact of Government Policies (theme)	
Financial policy (Code)	The government's use of monetary and fiscal tools to influence the economy. These tools can affect the cost of capital, the level of investment, and the overall economic growth.
Tax Policy (Code)	The government's system of taxation, which can affect the profitability of businesses and the disposable income of consumers.
Trade Policies (Code)	The government's regulations and agreements that govern the import and export of goods and services. These policies can affect the competitiveness of domestic businesses in international markets.

Themes and Codes	Description
Key Challenges (theme)	
Animal health issue (Code)	The presence of diseases and parasites in livestock can reduce productivity, increase costs, and hinder exports.
Certification (Code)	The process of obtaining government approval to export meat and meat products. This can be a complex and time-consuming process.
High Livestock Prices (Code)	The rising cost of livestock can make it difficult for meat exporters to compete in international markets.
Higher Production cost (Code)	The increasing cost of feed, labor, and transportation can make it difficult for meat exporters to be profitable.
Supply Chain Disruptions (Code)	Events such as natural disasters, political unrest, and infrastructure problems can disrupt the flow of goods, leading to shortages and price fluctuations.
Uncontrolled Livestock Trade (Code)	The illegal smuggling of livestock and animal products can undermine efforts to control animal diseases and ensure food safety.
Meat Export Destination (theme)	
Bahrain (Code)	Meat export destination
Bangladesh (Code)	Meat export destination
Cambodia (Code)	Meat export destination
China (Code)	Meat export destination
Djibouti (Code)	Meat export destination
Dubai (Code)	Meat export destination
Egypt (Code)	Meat export destination
Hong Kong (Code)	Meat export destination
Kuwait (Code)	Meat export destination
Oman (Code)	Meat export destination
Qatar (Code)	Meat export destination
Saudi Arabia (Code)	Meat export destination

Themes and Codes	Description
Seychelles (Code)	Meat export destination
Sicily (Code)	Meat export destination
Somalia (Code)	Meat export destination
Thailand (Code)	Meat export destination
Vietnam (Code)	Meat export destination
Motivation to start exporting meat and meat products (theme)	
Foreign currency (Code)	Exporting meat and meat products can generate foreign currency, which can be used to purchase imports, invest in business expansion, and repay debts.
Importing products (Code)	Export earnings can be used to import goods and services that are not available or are more expensive domestically.
Previous Business Activities (Code)	Companies with experience in the meat industry may have the expertise and resources to successfully export meat and meat products.
Opportunities (theme)	
Foreign Currency (Code)	The global demand for meat provides opportunities for Ethiopian companies to generate foreign currency through exports.
Growing Demand (Code)	The rising demand for meat in many countries, particularly in the Middle East and Asia, presents opportunities for Ethiopian meat exporters.
High Quality of Meat (Code)	Ethiopia has a reputation for producing high-quality meat, which can be attractive to international buyers.
Large Livestock Population (Code)	Ethiopia has the largest livestock population in Africa, providing a strong foundation for the meat export industry.
Proximity to Key Markets (Code)	Ethiopia's proximity to key export markets in the Middle East and Asia can reduce transportation costs and increase competitiveness.
Rising Awareness of Meat Product Benefits (Code)	The growing awareness of the health benefits of meat products can increase demand for Ethiopian meat exports.

C. Questionnaires

Questionnaires for Ethiopian meat and meat product exporter and livestock exporters

A Qualitative Study of the Ethiopian Meat and Meat Product Export Industry: Challenges, Opportunities, Strategies, Impacts, and Competitiveness

My Name is Meron Aregay. I am a Master of Science student in Import Export at Addis Ababa University. I am conducting a research study on "A Qualitative Study of the Ethiopian Meat and Meat Product Export Industry: Challenges, Opportunities, Strategies, Impacts, and Competitiveness". I would like to invite you to participate in this study. Your responses are used for research purposes only. Thank you in advance for your time and consideration. I would be happy to share our research findings with you once the study is complete.

1. Company Name :
2. Year of Establishment:
3. What year did you begin exporting your meat and meat products?
4. What was the first country that you exported your meat and meat products to?
5. Why you selected that specific country?
6. What was your motivation to start exporting your meat and meat products?
7. How did you reach out to your first export customer?
8. What were the challenges you faced in finding your first export customer?
9. How many countries do you export your products to?
10. What is the legal form of your business? Is it a private limited company, sole proprietorship, partnership, or corporation?
11. What are the main types of meat products that your company exports?
12. What is your company's target market?
13. What are your company's main competitors?
14. What is your company's competitive strategy that you use to achieve your targeted Export performance? Why you also use that competitive strategy?

15. How do you differentiate your meat products or services from those of your competitors?

16. What segments of the market do you focus on?

17. What are the barriers in the meat and meat products export market?

18. What are the challenges in the meat and meat products export market?

19. What are the opportunities in the meat and meat products export market?

20. How has the Ethiopian government's trade policies affected your company's export performance?

21. How has the Ethiopian economy affected your company's export performance?

22. How has the quality of your products or services affected your company's export performance?

23. What is the level of your firm's International Business market knowledge?

24. How has your marketing strategy affected your company's export performance?

25. How has your distribution strategy affected your company's export performance?

26. How has your pricing strategy affected your company's export performance?

27. What were your planned export volume and revenue targets for the past five years?

28. What are your company's plans for the future of its export business?

29. What are the most important factors that will determine the future success of meat and meat products exporters in Ethiopia?

30. What are the most important challenges that meat and meat products exporters in Ethiopia will face in the future?

31. Is there anything that you would like to add?

Questionnaires for National Bank of Ethiopia

A Qualitative Study of the Ethiopian Meat and Meat Product Export Industry: Challenges, Opportunities, Strategies, Impacts, and Competitiveness

My Name is Meron Aregay. I am a Master of Science student in Import Export at Addis Ababa University. I am conducting a research study on “A Qualitative Study of the Ethiopian Meat and Meat Product Export Industry: Challenges, Opportunities, Strategies, Impacts, and Competitiveness”. I would like to invite you to participate in this study. Your responses are used for research purposes only. Thank you in advance for your time and consideration. I would be happy to share our research findings with you once the study is complete.

1. What are the NBE's current foreign currency policies and regulations for exporters?
2. What are the main objectives of the NBE's foreign currency policy?
3. How do the NBE's foreign currency policies and regulations affect the export diversification and value addition of Ethiopian products?
4. What are the criteria and procedures for the NBE to allocate foreign currency to different sectors and exporters?
5. How can Ethiopian exporters cope with the high inflation and the depreciation of the birr in terms of their production costs and profitability?
6. What are the main sources of foreign currency supply and demand in Ethiopia and how do they influence the exchange rate?
7. How can the NBE collaborate with other institutions such as commercial banks, export promotion agencies, and trade associations to facilitate the access and utilization of foreign currency by Ethiopian exporters?
8. How does the NBE monitor and evaluate the impact of its foreign currency policies and regulations on the export performance and competitiveness of Ethiopia?
9. What is the NBE's role in formulating and implementing foreign currency policy in Ethiopia?
10. What are the main challenges faced by the NBE in managing Ethiopia's foreign reserves?

11. How can the NBE promote the use of the Ethiopian Birr in international trade and settlements?
12. What are the implications of the global economic outlook for Ethiopia's foreign exchange management?
13. What are the key opportunities and challenges for Ethiopian exporters in the global marketplace?
14. How can the NBE and other stakeholders support Ethiopian exporters to succeed in the global marketplace?

Questionnaires for Minster of Agriculture

A Qualitative Study of the Ethiopian Meat and Meat Product Export Industry: Challenges, Opportunities, Strategies, Impacts, and Competitiveness

My Name is Meron Aregay. I am a Master of Science student in Import Export at Addis Ababa University. I am conducting a research study on "A Qualitative Study of the Ethiopian Meat and Meat Product Export Industry: Challenges, Opportunities, Strategies, Impacts, and Competitiveness". I would like to invite you to participate in this study. Your responses are used for research purposes only. Thank you in advance for your time and consideration. I would be happy to share our research findings with you once the study is complete.

Contact information: ___________________________

Company: _____________________________________

1. What are the responsibilities and functions of the Ministry of Agriculture in facilitating and regulating the export and trade of meat and livestock products from Ethiopia?

2. How does the Ministry of Agriculture facilitate meat and meat product exports, livestock production, and livestock exports in Ethiopia?

3. What steps is the Ministry of Agriculture taking to ensure the quality and safety of meat products exported from Ethiopia?

4. What measures are being implemented to enhance the quality and safety of meat products exported from Ethiopia, ensuring they meet international standards and consumer expectations?

5. How is the Ministry of Agriculture collaborating with Ethiopian meat exporters to identify and expand into new markets, fostering export growth and market diversification?

6. What specific challenges are Ethiopian meat exporters encountering in the global market, and what strategies are being employed to address these challenges and enhance competitiveness?

7. What is the Ministry of Agriculture's long-term vision for the Ethiopian meat export industry, and what key initiatives are being undertaken to achieve this vision?

8. What steps are being taken to improve livestock productivity in Ethiopia, particularly in terms of increasing milk and meat yields per animal?

9. How is the Ministry of Agriculture supporting Ethiopian livestock producers in enhancing their access to quality feed, water resources, and essential veterinary services?

10. What role does the Ministry of Agriculture play in promoting sustainable livestock practices in Ethiopia, ensuring environmental stewardship and resource conservation?

11. How is the Ministry of Agriculture addressing the impacts of climate change and drought on livestock production in Ethiopia, mitigating the risks and building resilience?

12. What is the Ministry of Agriculture's vision for the future of livestock production in Ethiopia, and how does it align with the country's overall agricultural transformation agenda?

13. What measures are being implemented to regulate and monitor livestock animal exports from Ethiopia, ensuring adherence to animal welfare standards and preventing illegal trade?

14. How is the Ministry of Agriculture supporting Ethiopian livestock animal exporters in accessing international markets, identifying export opportunities, and complying with export requirements?

15. What challenges are Ethiopian livestock animal exporters facing, and what strategies are being employed to address these challenges and enhance their competitiveness in the global market?

16. What is the Ministry of Agriculture's long-term vision for the Ethiopian livestock animal export industry, and what key initiatives are being undertaken to achieve this vision?

17. How is the Ministry of Agriculture ensuring that livestock animal exports contribute to the economic development of Ethiopia, particularly in terms of job creation, revenue generation, and foreign exchange earnings?

Questionnaires for Ethiopian Livestock development Institute

A Qualitative Study of the Ethiopian Meat and Meat Product Export Industry: Challenges, Opportunities, Strategies, Impacts, and Competitiveness

My Name is Meron Aregay. I am a Master of Science student in Import Export at Addis Ababa University. I am conducting a research study on "A Qualitative Study of the Ethiopian Meat and Meat Product Export Industry: Challenges, Opportunities, Strategies, Impacts, and Competitiveness". I would like to invite you to participate in this study. Your responses are used for research purposes only. Thank you in advance for your time and consideration. I would be happy to share our research findings with you once the study is complete.

Contact information: ___________________________

Institute: ______________________________________

1. What are the roles of your institute in related meat and meat products exporting and exporters?
2. What is the organizational structure of Your Institute, and to whom does it report?
3. What are the primary sources of funding for your Institute?"
4. Who oversees the work of Your Institute and provides it with guidance and support?"
5. Who is responsible for setting the prices of meat for export? What criteria are used to make these pricing decisions
6. What are the specific areas of collaboration between the National Bank of Ethiopia and your institute in relation to the export of meat and meat products?
7. What are the specific areas of collaboration between the Meat Exporters and your institute in relation to the export of meat and meat products? Also with Meat Exporters association?

8. What are the major challenges and opportunities for Ethiopian meat and meat products exporters in the current global market?
9. What specific strategies can Ethiopian meat and meat products exporters adopt to enhance their competitiveness and increase their share of international markets?
10. How can your Institute effectively support Ethiopian meat and meat products exporters in complying with international standards and regulations?
11. What role your institute plays in promoting Ethiopian meat and meat products in key export markets, such as the Middle East and other region?
12. How your institutes collaborate with other government agencies, industry associations, and private sector partners to strengthen the Ethiopian meat and meat products export value chain?

Questionnaires for Minster of Trade

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1. What are the Minister of Trade's roles and responsibilities for the meat export sector?
2. What are the criteria and requirements for obtaining a meat exporter license in Ethiopia?
3. How many meat exporter licenses have been issued to date?
4. How many of these licenses are currently active?
5. How many meat exporters have stopped exporting meat and meat products? Why did they stop?
6. What are the main challenges that meat exporters face in meeting the licensing criteria and requirements?
7. Do you also issue export licenses to foreign companies? If not, why not?
8. Do you have a mechanism for monitoring meat exporters?
9. Have you revoked any meat exporter licenses?
10. Is there anything else you would like to add?