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ADDIS ABABA UNIVERSITY
COLLEGE OF BUSINESS AND ECONOMICS
DEPARTMENT OF MANAGEMENT
MASTERS OF INTERNATIONAL BUSINESS

***ASSESSMENT OF THE CHALLENGES OF THE ETHIOPIAN
LIVESTOCK EXPORT PERFORMANCE***

BY

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A thesis submitted to the College of Business and Economics, Addis Ababa University in partial fulfilment of the requirements for the degree of Masters of International Business (Import and Export).

JANUARY, 2024
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Addis Ababa University
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This is to certify that the thesis prepared by Ms. Mekdem Kassaye, “Assessment of the Challenges of Ethiopian Livestock Export Performance”: a thesis submitted to Addis Ababa University, College of Business and Economics, department of management in partial fulfilment of the requirements for the Degree of Master of science in international business (Import and Export), fulfils the regulation of the university and meets the accepted standards with respect to originality and quality.

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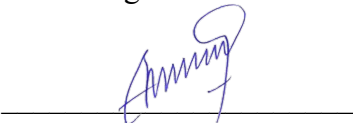
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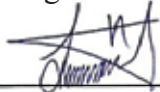
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List of Acronyms and Abbreviations

CBLT	Cross-border livestock trading
CR	Country Reports
CSA	Central Statics Agency
EAA	Ethiopian Agricultural Authority
EBR	Ethiopian Business Review
ECA	Economic Commission for Africa
ECRA	Ethiopian Customs and Revenue Authority
FOB	Free on Board
FSNAU	Food Security & Nutrition Analysis Unit
GDP	Gross Domestic Product
HoA	Horn of Africa
ILRI	International Livestock Research Institute
ISS	Institute for Security Studies
LSIL	The Feed the Future Innovation Lab for Livestock Systems
MoT	Ministry of trade
NBE	New Business Ethiopia
OECD	The Organization for Economic Cooperation and Development
OEC	The Observatory of Economic Complexity
OIE	World Organisation for Animal Health
PBS	Public Broadcasting Service
PSI	Policy Research Institute
TPLF	Tigray's people liberation front
USD	US Dollars
WDI	World Development Indicator
WTO	World trade Organization

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Abstract

The purpose of this research is to describe the challenges the Ethiopian livestock export performance face in the context of the exporting companies. The study employed a mixed methodological approach that included both quantitative and qualitative methods. Primary data was collected and cross-checked with secondary data from 2011 to 2021. Four challenges were assessed in this study: government policy, political stability, infrastructure, and market accessibility. According to the Ministry of Trade, there are over 110 registered live animal exporters, but only 13 operating in the export. To analyse the export market of the operating companies, a descriptive analytic method was utilized, and 5 of each company's top leaders were chosen. To further investigate and comprehend, a qualitative approach thematic analysis method was used for the former companies' owners. The long procedure to get certification and finance, low amount of loans, lack of protocol policy, lack of enforcement of contractual agreement are the main government policy problems. Inconsistent supply, unable to make on time delivery's, possibility of losing 100% export are main political stability problems. Increasing death rate because of quality of roads, lack of coordination, administration and capability quarantine station are main problems of infrastructure. Export market being dependant on holiday bases requirement of importing countries, unable to make competitive and uniform pricing strategies, unpredictable and continuous changes of requirement from importing countries and high competition from illegal export are the barriers from market accessibility. Ethiopian companies' livestock export has been gradually dropping. The sector is becoming no longer profitable for them.

Key Words- Livestock Export

CHAPTER ONE

INTRODUCTION

This chapter provides background information about the study and statement of the problem that emphasise the study's specific concerns. To successfully direct the investigation, research questions are developed along with the objectives. The chapter also defines the study's scope and constraints. Furthermore, the study's significance was discussed underlining its prospective contributions and ramifications. Finally, the chapter finishes with a quick overview of the paper's organisation, providing readers an idea of the structure and substance of the remaining chapters.

1.1 Background of the Study

The livestock industry is important to Ethiopia's economic benefits, contributing substantially to agricultural GDP and providing an essential means of revenue and employment for rural families (B. Abbas, 2015). However, the market of livestock exports in the country has been affected by various factors. This study aims to describe the key factors and challenges that impact the export market of Ethiopian livestock from the perspective of the exporting companies. Policymakers and stakeholders can gain valuable insights by examining these factors in order to develop targeted interventions and strategies to improve the competitiveness and long-term viability of Ethiopia's livestock export industry. Furthermore, the study's findings add to the current research on animal export results in countries that are developing.

Ethiopia is strategically important due to its proximity to markets in Asia, the Middle East, and Europe. Nevertheless, Ethiopia is landlocked. This situation had a negative impact on livestock export market. Because of its lack of immediate sea access, it has lost substantial advantages from live animal exports, according to a study conducted by the World Bank, World Development Indicators, (2017). The country's reliance on livestock exports as a major source of revenue is hindered by the constraints imposed by its landlocked geography. Without direct access to international markets and relying solely on neighbouring countries for trade routes, Ethiopia is faced with higher transportation costs and logistical challenges, severely impacting its competitive advantage in livestock exports. The absence of ports and a maritime network limits the country's capacity to efficiently transport and export its livestock products, thereby negatively affecting its export volume and potential income.

A number of important variables that affect the industry's overall market and obstacles are related to Ethiopian livestock exports. The accessibility and Caliber of infrastructure, such as transportation routes and facilities for quarantine, are important factors that might impact the convenience and security of exporting livestock. The business is greatly influenced by laws and regulations from the government, including export bans and agreements pertaining to international trade.

Another important factor that affects the profitability and viability of exporting livestock is importing countries' demand and competition, both domestically and internationally. Besides, climate change, disease control, and animal welfare practices all have an impact on Ethiopian livestock exports. To gain a comprehensive understanding of Ethiopia's livestock export industry, it is necessary to consider these factors, as well as their potential interactions and implications.

The other key factor in influencing the export market is the political instability of the country. Ethiopia, like many other nations, relies significantly on its agricultural sector, and livestock plays a crucial role in its economy. Livestock exports contribute to foreign exchange earnings, employment, and the livelihoods of many Ethiopians (Yibrah and Gebriel, 2020). According to Yibrah's study political instability often leads to disruptions in transportation, logistics, and infrastructure. Political instability creates an environment of uncertainty that can deter both domestic and foreign investments in the livestock sector.

In light of the above-mentioned constraints, the purpose of this paper is to describe what are the main factors influence the livestock export market growth in the case of Ethiopian companies.

1.2 Statement of the Problem

The livestock export market of Ethiopia has been declining over the years. Ethiopia is the largest livestock-producing country in Africa, with a significant portion of its livestock production intended for export. While Ethiopia controls the numbers, neighbouring countries control the market (Ibrahim, 2015). Efforts have been made by the Ethiopian government and industry stakeholders to address these challenges and improve the livestock export sector. This includes initiatives to enhance veterinary services, improve market access, and strengthen the value chain for livestock products (Policy Studies Institute, 2021).

There are several studies and research have been done on the topic. Despite the surplus of studies, very little is understood about the forces influencing the livestock business (Mekonnen, 2022). According to the Policy Studies Institute, 2021, the majority of existing government programs are broad and fail to distinguish between crop farming and livestock industry objectives. There are restrictions on livestock-specific policies such as health and marketing. Even having low efficacy and execution levels to improve livestock development by addressing significant issues, several Policies are in the planning (draft) stages.

Several obstacles affect Ethiopian companies' market in exporting livestock. Disease epidemics, livestock health care, and vulnerability to climate change. In order to address these complex issues and foster sustainable practices, improved facilities, and a climate that is favourable for companies, government agencies, stakeholders in the industry, and foreign partners must work together. This will help Ethiopia's livestock export industry thrive (Jirata & Wesenu,2020).

One of the major challenges Ethiopian exporting companies' faces is that all countries that import Livestock, demand an effectively-managed exporting quarantine facility as well as a Global Medical Certificate for all shipments of animals and their products (Abdurehman,2014). Live animal exports were also channelled through the Djibouti quarantine system, which produced international health certificates. These animals, nevertheless, are recognized as being from Djibouti, which is detrimental to Ethiopia's competitiveness in the long run and export figures. Lack of sufficient infrastructure, such as roadways, networks for communication, sewage, and water, particularly in rural areas with an abundance of livestock, has a significant impact on the sector (Ahmed, 2020).

Another obstacle to the companies' export performance is there is an illegal trade. Pastorals prefer to sell their animals to illegal traders rather than going through the legal system. There is little data on how much Ethiopia loses as a result of the illegal livestock trade (Ibrahim,2015). Many Ethiopian Livestock are illegally exported. According to Ibrahim's (2015) research, the weak connection is a barrier to the efficient movement of proper feed for livestock from the central highlands to the peripheral lowlands. Other issues, such as government trade laws, had also vulnerable trading along recognized lines. According to Yibrah's (2020) research unofficial cross-border trade has generated markets for border region items and supplied things that were inaccessible through formal routes to fill these gaps. As such, the border area in eastern Ethiopia has strengthened links with Djibouti and Somalia.

Market dynamics also play a huge role in the export sector. Fluctuations in global demand and market preferences for livestock products impact the competitiveness of Ethiopian companies in the international market, influencing export volumes and revenue (Ayele,2003).

Livestock availability for the global export marketplace are limited. The discrepancy between market supply and exporters' demand is a serious concern. There are a number of challenges with the design and operation of the livestock marketing system due to reliance on supply provided by non-market-oriented livestock systems of production lack of an effectively-organized livestock supply chain that links multiple farmers and purchasers, as well as challenges with slaughterhouse acquisition procedures, is an interrelated issue.

Furthermore, a lack of procedures for animal husbandry facilities to constantly evaluate their procurement processes, access challenges to unexplored areas characterized by instability, and frequent clan clashes in rural regions exacerbate the situation (Yibrah & Gebriel, 2020).

Identifying the important challenges that have a big impact on the nation's livestock exports could enhance the subsector's export revenues and accelerate the nation's overall economic growth.

1.3 Research Questions

1. What are the challenges of Ethiopian Livestock Export performance?
2. What remedial measures need to be taken to improve the Livestock export performance?

1.4 Objective of the study

The study's main objective was to describe the challenges the Ethiopian Livestock exporting companies face while exporting. It anticipated that stakeholders and government representatives would learn from this investigation just how much Ethiopia is losing out on from the export. There was a lot of untapped potential in this industry. To address these complex issues and foster sustainable practices, better infrastructure, and an environment that is favourable for the companies, government agencies, industry stakeholders, and foreign partners must work together. This research paper would help develop the livestock export sector in Ethiopia.

1.4.1 Specific Objectives of the Study

The specific objectives of this study are:

- To describe the extent to which government policy influences Ethiopian export enterprises' livestock export market.
- To find out the degree to which Ethiopia's political stability impacts the success of the livestock export business.
- To describe in what ways the presence of sufficient infrastructure affects the market of livestock exports
- To describe how much the performance of livestock exports is affected by market accessibility

1.5 Scope and Limitation of the Study

1.5.1 Scope of the Study

The study's scope is limited to only live animal exporting companies found in Ethiopia. The study's scope is limited only to describe the factors influencing the livestock export market. The study used secondary data ranging from 2011 to 2021. The market of the exporting companies in this time period was assessed.

1.5.2 Limitation of the Study

Several limitations were encountered throughout this investigation. The primary one was the lack of a trustworthy database that included information on each company's cargo from 2011 to 2021. Information regarding the entrance and exit of companies from the sector in the 2011-2021 time period was not discovered. The livestock industry is further broken down into a number of subcategories. A vast topic could be researched in a relatively short amount of time. The livestock export market may vary in terms of outcome and factor.

1.6 Significance of the Study

A number of studies attribute that Ethiopia is the leading country in the population of livestock. But the export performance is low compared to other African countries. This research aims to be significant in identifying the factors that significantly influence Ethiopia's livestock export. The study further investigates the factors influencing the livestock export market from the

company's side. The study will assist decision-makers of government bodies in identifying the downsides of exports. The research will benefit investors in their decision to become more involved in the sector by benefiting to overcome the export challenges of the selected livestock Animals. The findings can be used to improve the industry's shortcomings, establish the best feasible governmental interventions, and raise the export of live animals' foreign exchange income. Furthermore, Livestock Export has the potential to attract a large number of investors. It has the potential to become one of Ethiopia's most important export goods.

1.7 Organization of the paper

The research will be divided into five chapters, each with its own goal. The first chapter offers an introduction to the research, covering various important topics such as background of the study, statement of the problem, the research questions and objectives of the study. The second chapter is the literature review. It includes a critical review of existing academic publications, ideas. Chapter three is the methodology of the research. As well as Chapter four is about results and discussion. The last chapter is about the conclusion of the research and recommendation of the findings.

CHAPTER TWO

LITERATURE REVIEW

This chapter provides the relevant literature on the research subject. It includes a background of livestock export with critical review of existing academic publications, ideas and models. This chapter attempts to create a solid foundation for the research by reviewing the supply chain of the livestock trade, highlight existing gaps or inconsistencies which are major challenges faced in the livestock export business, and position the study within the broader academic discourse by examining the current body of knowledge.

2.1 Background of Livestock Trade in Ethiopia

Livestock is a vital commodity for Ethiopia's economy, contributing to both export revenue and domestic consumption. This category includes cattle, sheep, goats, horses, donkeys, and poultry. Overall, even though Ethiopia has a lot of potential for exporting livestock, the sector's current state presents a mix of opportunities and difficulties that call for calculated interventions to maximize the industry's economic impact (ILRI, 2021). Ongoing developments and policy measures are aimed at improving the status of livestock exports in Ethiopia. Ethiopia's livestock sector is susceptible to climate-related factors, such as recurrent droughts, affecting the health and productivity of livestock and consequently impacting export potential (Yibrah & Gebriel, 2020).

According to the World Bank of all the African nations, Ethiopia maintains the highest number of Live animals. Nevertheless, the live animal sector contributes 12–16% of the overall economy and 33%–35% of farming-related GDP (World Development Indicators, 2017). Animals are crucial for families in the entire Ethiopia for both economic and social reasons, alongside to making a significant contribution to global trade revenue. Due to its enormous and diverse animal population, the nation retains a competitive advantage over other African nations when it comes to manufacturing and management of a variety of livestock product goods (Abebe,2016).

According to the Observatory of Economic Complexity (OEC,2021), livestock and livestock products such as skins, hides, meat, and related goods, leather and goods made from leather are Ethiopia's fifth most important export commodities, after coffee, oil seeds, gold, and chat. Despite Ethiopia's live animal exports have undergone considerable recent fluctuations, they

were projected to rise between 2002 and 2021, according to OEC data. Ethiopian live animals are in great demand on both the domestic and global market places. Ethiopia's livestock export performance is influenced by several factors, including demand from importing countries, government policies, infrastructure development, and environmental conditions. The Middle East and neighbouring African countries have traditionally been key markets for Ethiopian livestock (Belete,2022). There is an overall increase in Ethiopia's livestock exports between 2016 and 2019 in terms of trade value, from 8 million to 59 million dollars. but decreased in trade value from 2019 to 2021, from 59 million to 33 million dollars. Yemen is first in terms of imports with 75%, followed by Saudi Arabia with 21%, and neighbouring countries Djibouti and Somalia with the remaining portion (OEC,2021).

Ethiopia, Somaliland and Djibouti are connected to marketplaces in the Arabian Peninsula and the Gulf through the live animal exports from the northern Horn of Africa (Brass and Jennifer 2007). For the administrations of Djibouti, Somaliland, and Ethiopia, respectively, the three ports of Djibouti, Bossaso, and Berbera are vital centres of power and important sources of income. Over the past 20 years, the relative fortunes of the port cities have fluctuated rapidly, a reflection of both their connections with Ethiopia and their internal power struggles and shifting relationships. Ethiopia is impacted in one way or another by the power battle between the ports (Nisar, 2016).

Ethiopia plays a significant role in this trade since it is the known origin of over 50% of the small stock (goats and sheep) shipped through Berbera and probably a comparable percentage of the animals exported from Bosasso (Holleman, 2002). Ethiopia is the primary source of all exports, and most of Djibouti's animal exports come from Ethiopia, per Holleman's study on livestock. The Ogaden region of Ethiopia is home to a sizable fraction of the animals, particularly small stock, that inhabit Ethiopia's Somali Region. Cattle made up the majority of the traded livestock (62%), with the majority of those transactions (4%), occurring at the Togwajalle market, a crucial border crossing between Somaliland and the Somali Region of Ethiopia. Remarkably, 82.73% of the 293,815 head of livestock were reported to have been traded informally (Abdushekur, 2019).

Exporting livestock is less profitable than exporting products from animals. Even with products of Live animals there are a number of anchoring factors for the industry to grow. Feed and water shortages, diseases, a lack of veterinary care, periods of drought, a lack of market access and facilities illegal animal trades, and poor genetic abilities of indigenous cattle are among

the constraints impeding efficient beef production in the country (Belete ,2022). Live animals must be extensively processed in order to produce animal products. A country's government has to regulate an industry in order for it to participate in the worldwide Import-Export market. The term "processing" refers to all of the stages required to convert a living animal into meat for sale: Slaughter includes, bleeding, skinning, eviscerating, and scrubbing the corpse, which is then chopped in half or quickly chilled quarters in a chiller (Matawork, 2017).

2.2 Livestock Supply Chain

In order to record the relationships of developing nation marketplaces that are growing more dynamic, supply chain techniques have been adopted by developmental professionals and academics. Examine the interactions between the different players who are involved at each stage of the channel of marketing. They are all very focused on their supply chain strategies (Karl,2010).

Remote marketplaces and scattered markets both lack data on prices. Since there are a greater number of livestock available than are required in the community's marketplace, there is frequently an overabundance of supply. The more flexible the trader, the better informed they are about prices on the market, and superior knowledge combined with extra inventory puts the buyer or seller in a better negotiating position, which successfully lowers the price paid by producers (Kefyalew & Tarekegn,2011). In the livestock trade, weighing livestock is not routinely done; rather, charges are typically decided "eye-ball" manner. Prices are frequently negotiated individually and are mostly based on demand and supply factors, which are significantly influenced by the season, the existence of religious holidays, and other variables. The availability of livestock in Ethiopia is significantly impacted by the duration and severity of the drought season (LSIL,2021).

Ethiopia has a variety of levels in both legitimate and unlicensed livestock trading. Unofficial cross-border trading occurs in Ethiopia's, western, eastern, southern, and north-western frontiers. In addition to the massive livestock exports within Ethiopia and Sudan, there are vital abroad livestock trade activities between Somalia, Djibouti and Kenya. The trade in animals across the border within eastern Somaliland and Ethiopia makes up the majority of the all four borders in regard to the value and quantity of Ethiopian exports. Berbera is the main channel for livestock exports (Kefyalew & Tarekegn, 2011).

According to Alelign's (2014) research, the four phases of the livestock selling framework utilised in pastoralist regions are bush, primary, secondary, and terminal marketplaces, which depend on the quantity of livestock and buyers or sellers each day. This region's traders move livestock that they bought over extended periods despite enough sleep, watering, or nutrition facilities. These animals produce low-quality products, the majority of which are rejected during pre-mortem and post-mortem examination checks because they are frequently ill, underweight, and dehydrated (Alelign, 2014).

In the supply chain, according to Abebe's (2016) research, weekly animal exchanges take place at bush markets between pastoralists and small-scale vendors, usually for the purpose of breeding (Abebe,2016). The volume of animals bought and sold distinguishes primary markets from secondary markets. Primary markets are those in district towns where barely more, as opposed to 500 animals, are sold each week. Large city markets are secondary markets where 501 to 1,000 animals are offered on a weekly basis. Large merchants who are the main consumers and medium-sized buyers serving as vendors are the two main market contributors. Terminal Marketplaces include those in the country's major cities that supply over 1,000 animals on a weekly basis while slaughterhouses and consumers make up the majority of purchasers; large traders make up the majority of sellers (Ahmed, 2020).

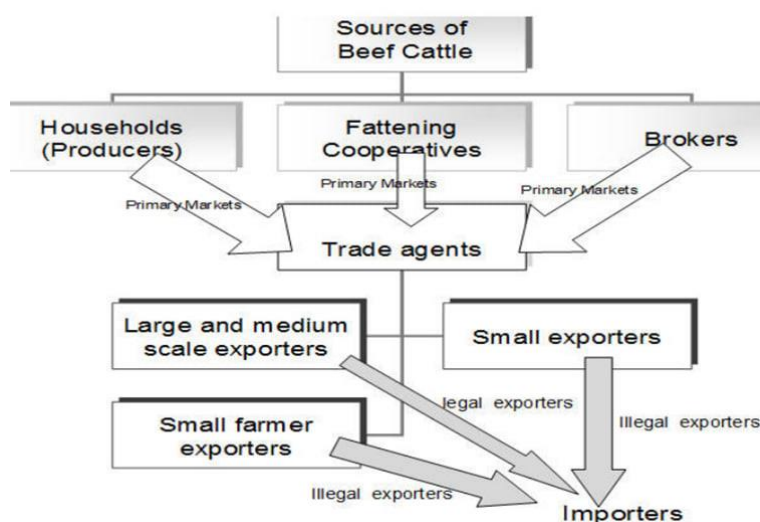


Figure 1 Existing Live animal sources and market channel of livestock trade in Ethiopia

Source: P. Reddy and N. Kanna, "Market and value chain analysis of cattle and beef in Ethiopia-a review (2015)

There is a weak connection between the individuals involved in the production link, which is one of the main problems in the chain of supply and commercialization. Some marketplaces

are monopolised by influential people and unlawful exporters (Belete,2022). Access to market-related information, such as expenses, value chains, competitors, and customer tastes is restricted. Additionally, there aren't enough finances to buy equipment, supplies, and components that would improve quality (Mekonnen,2022).

Other than a few sales intended for local Ethiopian celebrations, there was not much purposeful livestock production for export. Marketplace and pricing data are inaccessible in remote locations. Both legal and illegal systems for trading livestock are operational to varied degrees. Local producer exporters and middlemen are the principal participants in the unlawful livestock exporting system, whilst medium to large size authorised exporters operate mostly in the legal system (Kefyalew & Tarkegn,2011).

2.3 Major Challenges Facing Livestock Sector in Ethiopia

Export animal husbandry facilities in Ethiopia encounter a variety of obstacles that have a bearing on their efficiency. The actual value of the segments to the overall economy is much lower than the potential, as indicated by the country's present share of the international Livestock marketplace for export (Mekonnen, 2022).

Natural grasses and farm waste are the principal feed sources for rural livestock ranchers in Ethiopia, however, they have very little nutrition and are not regularly available due to seasonal variations and famine (Belete, 2022). The supplies of feed may differ between Ethiopia's diverse livestock systems of production. During the period of drought, many areas of Ethiopia have significant shortages of water, even the available water is poor quality. The situation is exacerbated in rural regions, where livestock farmers have few water sources, resulting in a variety of waterborne infections in the animals (Matawork,2017).

Animal health is critical for the animal production industry. Mortality and disease can result from financial losses by reducing export volume. For example, a substantial number of imported medications are of poor quality, and their application is not effectively controlled because of the Ethiopian Veterinary Code's ineffective implementation (Ibrahim,2015). More than 60% of live animals have not had vaccines in the last ten years (2011-2021), and just 15% have received the essential care (CSA,2021).

Ethiopians consume an adequate number of livestock annually ,8.4 kg per person both in terms of quantity and quality (B. Abbas & M. Nur, 2015), Ethiopian farmers saw prospects for

demographic expansion, growth, literacy, and income for families, as well as rising demand for livestock in both internal and global markets. The country's beef production is inefficient. One of the primary reasons is issues with ineffective breeding methods. Ethiopia continues to practise backward breeding method (Belete ,2022).

The livestock markets in many Ethiopian villages and cities are in disarray. Water service, road networks, fencing, livestock operations, vehicle transportation, keeping areas, resting points, ramps for loading animals onto ships, and veterinarian monitoring stations are still challenges that must be addressed (Jirata & Wesenu,2020). A few donors have begun to improve some marketplaces by providing necessary infrastructure such as loading and unloading platforms. Because animals at local markets usually require waiting a few days before being offered for sale or transported, better animal holding spaces may need to be a major priority for the improvement of infrastructure (Ibrahim ,2015).

Live animal exports rely heavily on the ability to isolate animals and decrease the danger that diseases will spread to other states. In fact, all countries that import demand an effectively-managed exporting quarantine facilities as well as a Global Health Certificate for every one of livestock and livestock products consignments (Jirata & Wesenu,2020). Livestock exports were also channelled through the Djibouti inspection system, which produced global medical certificates. These livestock, however, have been recognised as being from Djibouti, which is damaging to Ethiopia's competitiveness over time and export figures (Yibrah & Gabriel, 2020).

Almost all of the livestock animals (85%) are illegally transported into nearby nations such as Djibouti, Kenya, Sudan and Somalia and then re-exported to the Middle East for further consumption. As a result, the Ethiopian government has lost substantial shares of the market and foreign exchange (Nardos,2023).Some of the key obstacles that impede Ethiopia's smooth livestock trade include a lack of exporting channels and harbours, illegal live animal trafficking and scarcity of live animals (Abebe ,2016).Cross-border livestock trading (CBLT) is a key means of revenue for many rural and agro-pastoral people in the Horn of Africa (HoA). The trade has evolved into an informal portion of economic activity, offering services to multiple parties that make up the value chain, among them Livestock Traders, transporters, nomad traders, property owners, and feed suppliers (Nardos,2023). The Ethiopian authorities, on the other hand, has long regarded cross-border livestock transactions to be illegal. Due to the lengthy border between Somali Area and around Somali regions, the Ethiopian Customs and Revenue Authority (ECRA) has found it impossible to properly monitor and manage this

traffic. In addition, the Customs Authority has traditionally prioritised imported goods over livestock or other things exported unofficially from Ethiopia District to bordering areas. Ethiopia is bound to fail when it comes to livestock export performance unless proper regulations that assist the business are implemented (Abdurehman, 2014).

To maintain high bio-security, it is a challenging work to properly regulate, as well as having the capacity to make rapid judgements at various stages when animals are transferred from marketplaces, through the premises, and onto awaiting areas at terminals. This involves the application of an excellent, cohesive, effective, and efficient quarantine control system from origin through the final markets. This is impossible to achieve with the government's present staffing and service arrangements (Yibrah & Gabriel, 2020). There is a monopolistic quarantine station even after enough quarantine spaces were created. A small group of firms and people who also have a stake in providing and restricting market opportunities for Gulf nations dominate the region's quarantined activities in an oligopoly. They forbid the export of animals from sites other than their very own because it is such a lucrative business for them. Due to this, the task at hand is made more difficult and calls for a large investment of energy and time on behalf of the governing body (Ethiopian Business Review, 2023).

2.4 Determinants of Livestock Export Performance in Ethiopia by fellow researchers

Nations like Ethiopia gain from global trade in a number of different ways. The unquestionable advantage of trade is that by concentrating on goods and services where they have a competitive advantage, it enables countries to grow their output and demand (Yibrah & Gebriel, 2020). According to their research, the analysis' findings show that real GDP, real GDP per capita, distance from market, population density, and real exchange rate were the main gravitational factors affecting Ethiopian livestock exports (Yibrah & Gebriel, 2020).

Abdushekur (2019), looked into the factors that affected the export of live livestock from Ethiopia between 2000 and 2017. The calculation findings showed that the GDP, physical distance, the population density of importing nations, and overall infrastructure were the primary factors of Ethiopian livestock export. Contrarily, the export of livestock from Ethiopia was unaffected by FDI, the real exchange rate, having a shared border, advantageous trade, or agreements on regional trade.

According to Ibrahim's (2015) research, determinants of livestock export are the overall requirement for growth in the economy. This include increase in facilities and the number of livestock traded, which is the key challenge faced by traders in the Somali region. As a result of the more stringent rules, livestock farmers are less able to take advantage of marketplaces and make profit from the sale of their animals. As a consequence of trade limitations, the herd loses more than 60% of its assets. The value of transported animals is found to be highly influenced by livestock volume, local price, and import limitations put in place by the main consumer nations (Ibrahim,2015).

According to Abebe (2016)'s research, the primary predictors of livestock export performance are a lack of proper diets, a poorly organised live animal, and the marketing of its products structure. He also mentioned determinants like the absence of suitable stable animal routes and amenities, an inadequate grasp of the marketplace and livestock strategy. The widespread nature of illnesses and illegal animal traffic were two additional significant hindrances and influences on the effectiveness of the livestock export.

A gravity model of commerce was used by Aleign, (2014) to analyse the variables affecting Ethiopia's export patterns over a 16-year period (1995-2010). The estimation outcomes showed that Ethiopia's export flows were significantly influenced positively by demographic sizes, the importing nations and Ethiopia's GDP and GDP per capital. Contrarily, the distance between the nation's economic centres and the real exchange rate had a detrimental but statistically important effect on the nation's trade patterns.

According to Mekonnen (2022), in their research "Determinants of Ethiopian Meat Export", the determinants were classified as internal and external factors. The study shows constraints in getting qualified and trained labour from domestic, limited technology transferred from support institution, managers educational readiness and shortage of working capital were the internal factors. For external factors involvement and act of intermediary live animal marketing, the entrant of new investment in the sector, presence of illegal cross-border trade of live animal and coordination among export abattoirs were mentioned (Mekonnen,2022).

According to Kefyalew & Tarekegn's (2011) study, shortage of live animals because of illegal export, shortage of animal feeds and lack of well-established reproduction programs tied the sector to remain variable, government policies and lack of marketing system were determinants of the export.

2.5 Theoretical Literature Review

The challenges which influence the livestock export market can be divided into external and internal. Market accessibility, entry requirements, and a nation's geographic position all fall under the category of external factors (Mengistu,2018). According to Mengistu's research the supply-side environment is related to internal elements. There are many factors that affect demand abroad. Country's internal limitations on exports such as infrastructure and strict government policies are essential to the exporting companies. Countries political stability plays a huge role in determining export performance of developing countries (Amelia, 2000).

Although there are many elements that influence livestock export performance and have been researched by various scholars, this paper seeks to describe current sector factors from the perspective of exporting companies. The following challenges are selected for further research which influence Livestock export market.

2.5.1 Challenges of Livestock Export

1. Government Policy:

The term "government policy" refers to a set of rules, guidelines, financial goals, and plans to take action pertaining to a certain topic that were created developed by an official body or its representatives. A crucial element of democratic rule is the law. The word "law" is commonly used when referring to both particular laws and more broadly acknowledged basic or universal principles (Lucie, 2013).

According to New Business Ethiopia (NBE) in their 2023 article, the trade of Live animals out of Ethiopia is handled by the Ethiopian Ministry of Agriculture. The authorities put regulations and laws in place to ensure the welfare of animals while travelling and prevent disease spread. The World Organisation for Animal Health (OIE) and other international organisations have created standards that these laws follow. The process of exchanging live animals from Ethiopia involves several procedures. Companies that export must first obtain permission from the Ministry of Agriculture. These permits specify the type and quantity of animals being shipped abroad and ensure that the necessary legal requirements are met. The live animals are examined by doctors to ensure they are free of sickness after receiving the necessary permits. Animal health records are provided for animals by agronomic and veterinarians. In order to ship animals, their health certificates must be procured. Live Animals are moved based on their

point of arrival. While close-by countries are moved by road, trade over long distances are often moved by aircraft. To ensure the livestock's welfare while travelling, safety measures have been put in place, such as providing ample space, the flow of air, as well as access to food and water.

2. Political Stability:

Any decision made by an individual in the society that alters how authority is allocated in a community is referred to as political conduct. It is a catastrophic condition in the country that can be attributed to a variety of things, such as subpar administration, economic hardships, high rates of crime, etc. Instabilities in politics can lead to disputes, and vice versa, hostilities can lead to unpredictability in politics (Claude,1975).

After Mengistu Haile Mariam's dictatorship was overthrown in 1991 by the Tigrayan People's Liberation Front (TPLF), Ethiopia's modern democratic system was established. After a general vote in June 1994, the country has continued to have multiple parties of government (John, 2009). Writers randomly use terminology like fragility of state, collapse and failure, to describe the scenario because the country has been involved in a number of complex issues, including displacement, conflict, and a humanitarian predicament. If the state is unable to exert a dominant grip on brutality, defend its citizens, deliver sufficient services to its citizens, and uphold its constitutionality, state fragility will occur (Endalcachew,2022).

Government disintegration as described by Endalcachew in his article from 2022, takes place when these problems deteriorate and endanger the state's existence. Government fall apart occurs when a state completely disintegrates, creating an authority void. The Horn of Africa is perhaps the most volatile and risky region of the African continent. It includes Somalia and South Sudan the two nations with the highest levels of instability on earth. Despite its dictatorial form and ongoing issues, the Ethiopian government prior to 2018 had an advantageous hold over its geographic areas and a lower tolerance for cruelty. Whenever Abiy Ahmed, the country's prime minister, assumed office in 2018, long-suppressed difficulties in the country reemerged, which currently seemed out of hand. Among the serious governance issues the nation has faced are inter-ethnic disputes, extensive relocation, countless assassinations catastrophic disasters, and the formation of terrorist organisations. It has been asserted that as a result, the federal government of Ethiopia is currently crumbling (Endalcachew,2022).

3. Infrastructure:

The essential structures and systems that service an entire nation, geographical area, or society are referred to as infrastructure. Transportation infrastructure and networks for communication are examples of infrastructure. Large-scale infrastructure is often developed and financed by the government. Although the degree and pattern of connection are contested, there is universal agreement that fundamental infrastructural amenities are significant factors connected with financial development. A unique characteristic of these investigations is that various experimental and conceptual components are collectively referred to as infrastructure (Gianpiero ,2009).

Ethiopian roadways are inadequately illuminated, barely signed, and neglected. Outside of Addis Abeba and other cities, driving at night is unsafe and is not recommended due to the risks posed by abandoned disintegrated vehicles, pedestrians, abandoned animals, and the potential for armed robberies (Country Reports,2021).According to the ministry of agriculture, Ethiopia runs five animal quarantine facilities in the exit points for the export of livestock to the Middle East and North Africa—Jigijiga in somali region, Mile in afar Region, Metema in Amhara region, Humera in Tigray region and Almehal in Benishangul Gumuz region.

4. Market Accessibility

The ability of a corporation or nation to trade products and services outside boundaries is referred to as access to the market. Access to markets can relate to trade on a global scale, although that preceding scenario is the most dominant setting. Foreign trade necessitates intricate talks among more than one nation. Participants in these negotiations often seek for access to markets that benefits their specific export businesses while also aiming to limit marketplace access to import goods that could possibly conflict with delicate or strategically important local industries (Trend Economy ,2023).

Although public dissatisfaction with commerce abroad, it continues to be the primary engine of overall global prosperity, even if wealth cannot be distributed evenly. Trade agreements are currently referred to in conditions for access to markets instead of free trade in order to prevent associations that are adverse. Because small-scale farmers rely heavily on money earned from animals and animal products, removing barriers to the market for export and local trade and sales framework, enhance knowledge of the market, and improving advertising

facilities, including medical and sanitation. This will benefit small-scale manufacturers, consumers in cities, and the national currency for repayments (Ayele, 2003).

2.6 Empirical Literature Review

The export of animal products brought in less revenue than the export of live animals, according to Asoko's Insight Report's 2017 document. The majority of researchers, particularly (Belete,2022), (Mekonnen, 2022), and (Ibrahim, 2015), disagree with this report. These researchers came to the firm conclusion that Ethiopia is not benefiting as much from the export of livestock as it should. Exports of live animals have consistently lagged behind those of animal products.

According to Ethiopian Business Review's article on 2023, between 2016 and 2018, there was a decrease in the live animal's resource, an increase in the price of by products from animals, and a decrease in the amount of trade value that this sector generated. This finding conflicts with those of the CSA (2011–2021), which found that Ethiopia has Africa's biggest number of livestock. Over the past ten years, the number of livestock has gradually increased. The OEC report states that animal products, with an average trade value of about 134 million US dollars, contributed less than 2.5% of the nation's total export earnings from 2011 to 2021. Ethiopia's trade value for livestock is lower than that of animal products, but it has been gradually rising from 2011 to 2021.

Ibrahim's research from 2015 indicates that Ethiopia is losing 50 to 250 million ETB in foreign currency as a result of illegal trading, which keeps going to be the nation's greatest obstruction to the sector's financial success. The research results from the article of Ethiopian Business Review's, 2023 are in conflict with this conclusion. According to the article, it was concluded that the illegal transnational trade in live animals is not an issue in Ethiopia. This is merely because of fundamental factors that decision-makers rarely take into account. The absence of foreseeable marketplaces in the Middle East, which has compelled investors and farmers into illegal trade across borders, is a basic issue that needs to be solved. On the contrary, accredited quarantine stations helped traders from Djibouti, Sudan, and Somalia build a trustworthy marketplace in the Middle East. For locale-specific traders who buy live animals from Ethiopia and export them to the Middle East, trading across borders becomes beneficial.

According to a WTO article from 2018, the liberalisation of trade has improved the ability to export of emerging economies like Tanzania, Rwanda, and Burundi. A number of

investigations have looked into the impact of international trade liberalization on export earnings in nations that are developing. The extending effects of free trade upon these nations export revenues have been the subject of many research investigations (WTO,2018). Ethiopia and other nations are still in the WTO application process. As a result, nations like Ethiopia will pass up chances to improve their export performance. This runs counter to the research's findings (Amelia, 2000). Very little to no proof of a positive impact from trade liberalization on export outcomes was found by Amelia in her study from 2000. It was noted that typical tariff rates for a large number of developing nations are not directly correlated with exports, which may account for the lack of proof regarding the impact of international trade liberalization on the performance of exports.

CHAPTER THREE

RESEARCH METHODOLOGY

This chapter provides the research techniques used to properly address the study topics. It covers the approach adopted, as well as the justification for its choosing. The research design and data gathering procedures are developed in order to ensure validity and reliability. This chapter also addresses any ethical concerns about the research.

A research methodology is a process for logically and methodically addressing a research issue. In order to get trustworthy, valid results which tackle the goals and objectives of the research, a researcher must employ a methodology. It is a technique for obtaining data and information in order to make business decisions.

3.1 Research Design

The objective of this study is to describe the factors that exporting companies believe have an impact on livestock export success. There are other elements that may have been taken into account for the export. However, four vital challenges were selected to be investigated as it was thought by the researcher that they successfully emphasised the difficulties that exporting companies frequently encounter.

To obtain data for the study, a mixed methodology approach was taken. The mixed method approach included both quantitative and qualitative methodologies. The quantitative approach was chosen because it emphasises the statistical, mathematical, or numerical analysis of the obtained data. The qualitative approach was taken in order to further examine and investigate the variables and possibly obtain new information from the exporting companies. The research used a quantitative approach to get a view of the bigger picture the "What?" then used a qualitative approach to find out the underlying reasons.

3.2 Research Approach

The study design used descriptive and thematic analysis method. The descriptive research technique was chosen because it tries to precisely and completely describe a population, event, or occurrence. It is best analysed what, when and how inquiries of the research questions. A thematic analysis uses sets of information, which are frequently rather vast, and categories them based on commonalities, or themes. The researcher could better understand the situation

and extract meaning from it with the aid of these topics. Thematic analysis is an excellent tool for learning about people's perspectives, circumstances, and views. A data set's patterns and interpretations are examined using thematic analysis.

3.2.1 Target Population

The study's target population is Ethiopian livestock exporter companies found in Ethiopia. According to the Ministry of trade, there are over 110 Ethiopian companies registered as livestock exporters. Almost all of companies have their headquarters in Addis Ababa. There are just two companies that are not in Addis Ababa, one in Dilla, SNNPR, and Sululta, Oromia region.

3.2.2 Sampling Technique

From the Probability sampling technique, simple random sampling was chosen. A subset of participants is randomly selected from a population in simple random sampling. There is an equal chance for everyone in the population to be chosen. Therefore, it is thought of as a fair method of selecting a sample from a particular population.

3.2.3 Sample Size

Out of a total of 110 Ethiopian livestock exporting companies, 32 companies were selected based on Carvalho's (1984) sampling technique. There are 97 companies exited the export business. 20 exited companies were selected as a sample size. The rest 12 companies were selected from the operating companies. Although there are alternative ways to determine sample size, the study used Carvalho's (1984) easy technique because it is the most straight forward. Due to the limited population, the researcher was drawn to utilise a large-scale sampling strategy.

Population Size	Sample Size		
	Low	Medium	High
51-90	5	13	20
91-150	8	20	32
151-280	13	32	50
281-500	20	50	80
501-1,200	32	80	125
1,201-3,200	50	125	200
3,201-10,000	80	200	315

10,001-35,000	125	215	500
35,001-50,000	200	500	800

Table 1. Carvalho's Sample Size Determination Table

Source: Carvalho (1984) table

3.2.3 Method of Data collections procedures

The study used primary and secondary data collection methods. For the purpose of gathering primary data, standardised questionnaires for the descriptive analysis method and open-ended interview survey questions were used. The questionnaire was initially tested and then adjusted based on the results before beginning the actual data collecting. Despite the fact that using questionnaires to gather data has some disadvantages, it also has some benefits, like being inexpensive, bias-free, giving respondents enough time to think about their responses and easily reaching respondents. For this study, the popular Likert system of rating was implemented. Respondents are required to express their level of disagreement or agreement with a number of items pertaining to the study topic on a Likert scale (Lietz, 2010). The scale used by Likert has many advantages. Because participants easily grasp the way to utilise the size, it is simple to create and manage, which makes it appropriate for questionnaires. Assessment options include: (1) Strongly disagree, (2) Disagree, (3) Neutral, (4) Agree, and (5) Strongly agree.

The qualitative method employed in-depth interviews for the former company owners. These interview questions were specifically designed based on the factors chosen in order to obtain a deeper knowledge of the issue from the viewpoint of the companies. Two interviewing techniques were used in the study: in-person and phone interviews.

Additional secondary data sources were employed to gather and cross check the respondent's information, including reports from governmental, non-governmental, and international organisations, scholarly works (journal articles, dissertations, and theses), the internet, and computerised data bases. For the secondary data in a 10-year period, from 2011 to 2021 G.C data was gathered from the Observatory of Economic Complexity (OEC), the Ministry of Agriculture, Ethiopian Agriculture Authority (EAA), Ministry of Trade, and the Ethiopian Central Statistics Agency (CSA).

3.2.4 Data Analysis Technique

The study analysed the quantitative data using the standard descriptive statistics method. The researcher could assess sample data, generalise them to the population, and describe the factors that affect the success of live animal exports. Thematic analysis was the method used in the study to analyse the qualitative data. This approach emphasizes themes and patterns. These themes were useful in helping to understand the background and extract significant meaning from it.

Additionally, Microsoft excel and the Statistical Package for Social Sciences (SPSS) software were used to manage and interpret the data collected.

3.2.5 Validity and Reliability

Validity - relates to the accuracy of an assessment. The testing tools were produced by the researcher in confidential collaboration with many research professionals, and the expert evaluation enhanced the content's validity. Before the current study, the researcher distributed a questionnaire to ten respondents, enabling to look for any unresolved or ambiguous issues.

Reliability - By contrasting several responses from the respondents to the same measurement, the reliability of the research was determined. The study used Cronbach alpha reliability test to measure internal consistency of the statements Cronbach's alpha is most commonly used to check the internal consistency of a questionnaire based on Likert scale type.

S.no	Description	Cronbach's Alpha	No of Items	Comment
1	Government Policy	0.787	7	Reliable
2	Political Stability	0.898	7	Reliable
3	Infrastructure	0.839	6	Reliable
4	Market Accessibility	0.844	6	Reliable

Table 2 Reliability test result

Source: Survey, SPSS output

CHAPTER FOUR

RESULTS DISCUSSION AND INTERPRETATION

This chapter provides analysing and interpreting the research results. It employs proper analytical techniques and tools to conduct a systematic assessment of the obtained data. Following that, the findings are analysed in light of the research aims and research topics. The chapter's goal is to find relevant patterns, insights and relationships, gained from the data, allowing for a more in-depth understanding of the research issue.

This chapter included discussions on the study's collected data and an interpretation of the data. Based on prior investigation by the researcher, The Ministry of Trade (MOT) reports that more than 113 companies are registered and have licenses to export live animals as of 2023. However, the Ethiopian Agricultural Authority (EAA) reports that just 13 or more companies are actively exporting live animals. Over time, even their export performance numbers fluctuate.

4.1 Response Rate

Out of the 110 companies, 32 companies were selected as a sample size based on Carvalho's sample size determination table. From this, 13 active companies were selected and 5 of their top managers to distribute the questionnaire. From the total of 65 questionnaires distributed, 43 was returned. From 97 of the companies who stopped the export 19 of them were selected to get further investigation and deep understanding why they ended the export. From 19 companies 17 agreed for an interview. Therefore from 32 companies selected, 28 gave response. An analysis was drawn with a very good response rate of 87.5%.

4.2 Respondents Profile

The following part provides an overview of the demographic background of the individuals who responded and the exporters of livestock companies. In accordance with survey answers, data pertaining to participants' age, gender, level of education, and employment history was analysed.

S.no	Description	Category	Frequency	Percentage
1.1	Gender	Male	31	72%
		Female	12	28%
		Total	43	100%

1.2	Age	25 years or less	1	2%
		26-35 years	11	26%
		36-45 years	12	28%
		46-55 years	13	30%
		55 years above	6	14%
		Total	43	100%
1.3	Educational Level	Diploma	1	2%
		Degree	20	47%
		Masters	18	42%
		Ph.D.	1	2%
		Other	3	7%
		Total	43	100%
1.4	Job Position	Owner / Founder	9	21%
		Manager	15	35%
		Director	4	9%
		Section Head	10	23%
		Officer	5	12%
		Total	43	100%
1.5	Experience	0-2 years	0	0%
		2-5 years	9	21%
		6-10 years	16	37%
		More than 10 years	18	42%
		Total	43	100%

Table 3 Respondents data

Source: survey data

According to the gender breakdown, of the 43 responders, 72% are male and the remaining 28% are female. The age distribution of the respondents is as follows: 54% are between the ages of 26-45, while 14% are above 55 and 30% are between the ages of 46-55. Of these, 28% are between the ages of 26-35. This demonstrates that youthful, energetic persons make up the bulk of the workforce. Merely 2% of the participants have an age below 25.

As seen in Table 3 above, the respondents who took part in this study have a variety of educational backgrounds. 88% of them possess both an undergraduate and graduate degree. First-degree holders make about 47% of the overall population. This demonstrates that the study's participants were knowledgeable experts who were well-versed in the problems relating to livestock export performance. Just under 2% of the study's respondents had a diploma, while the remaining 7% had alternative responses.

According to the frequency of employment positions held by the respondents, 21% were Owners or Partners of the firm, 35% were in managerial positions, 9% were Directors, 23% were Section Heads, and 12% were Officers. This data indicates that the intended audience—

top executives of export firms with in-depth knowledge of the main challenges and possibilities facing the livestock export industry—was reached.

The majority of respondents (42%) have more than ten years of experience in the field, based on the frequency of their experience. The remaining 58% have between two and ten years of experience, with three-quarters having between six and ten years of work experience. This demonstrates that most senior executives have sufficient background in the export of livestock.

4.3 Export Company's Profile

4.3.1 Operating Companies' Profile

An outline of the company's profile can be found in the section as follows. The relevance of exporting live animals to the company is ranked according to staff count, experience exporting live animals, and other products the company exports and imports.

S.no	Description	Category	Frequency	Percentage
2.1	Number of Employees	1-10	6	55%
		11-20	3	27%
		21-30	1	9%
		31-40	1	9%
		More than 40	0	0%
		Total	11	100%
2.2	Company Experience in Exporting Live Animals	0-2 years	0	0
		2-5 years	4	36%
		6-10 years	5	45%
		more than 10 years	2	18%
		Total	11	100%
2.3	Company Export other products	Yes	8	73%
		No	3	27%
		Total	11	100%
2.4	Company Import products	Yes	6	55%
		No	5	45%
		Total	11	100%
2.5	Order of importance of exporting live animals for the company	1st Priority	0	0
		2nd priority	6	55%
		3rd priority	4	36%
		Not priority at all	1	9%
		Total	11	100%

Table 4 Export Companies' Profile

Source: survey data

According to the number of employees break down majority which is 82% of the companies have 1-20 employees which is a total of 9 companies, from this 1-10 employees account for 55% that is 6 companies. The rest 21- 40 employees account for 18% which are 2 companies. 31–40 employees account for 9% which is only 1 company. This shows the companies operate in small-scale enterprises. According to Yared H. (2012), small companies are defined as those that utilize 10–99 people, while medium-sized businesses are defined as those that employ 100–less than 500 people.

The majority of companies, or 81%, had between 2-10 years of experience exporting live animals, as shown in table 4. The percentage of 6–10 years is 45%. The remaining 18% have worked for more than ten years. This demonstrates that the bulk of the companies have substantial experience exporting live animals.

In a survey question, the companies were asked if they have any other export products than live animals. 73% which is 8 companies have additional export goods. Additionally, 55% which is 6 companies acknowledged their involvement in the importation of goods.

When asked how important they would rate the livestock export for their company, the majority of companies 45% which is 5 companies said it was either their third priority or not a priority at all. In this 36% which is 4 companies said that this was their third priority. According to the remaining 55% which is 6 companies, they responded the export is considered second priority. Not a single company responded stating that their top goal is exporting live animals. This indicates that companies are not prioritizing the export of livestock above anything else.

4.3.2 Exited Companies' Profile

The data of Exited companies and the period during which they stopped exporting Live animal are displayed below.

S.no	Time	Frequency	Percentage
1.1	3 Years ago,	3	18%
	4 Years ago,	6	35%
	5 Years ago,	4	24%
	6 Years ago,	3	18%
	7 Years ago,	1	6%
	Total		17

Table 5 Time period where exited companies stopped exporting?

Source: own survey data

Table 5 indicates that 77% of the companies, or 13 in total, have discontinued exporting in the last less than five years. 24 % of the remaining 4 companies have stopped exporting more than 6 years ago.

S.no	Other import export items	Frequency	Percentage
1.2	Yes	8	47%
	No	5	29%
	Other businesses	1	6%
	No response	2	12%
	Completely out of business	1	6%
	Total	17	100%

Table 6 Companies Import Export status and Involvement in other Businesses

Source: own survey data

Table 6 indicates the majority of the companies which is 76% (13) companies have other import and export items. Only 6% (1) company is involved in other form of business. 12% (2) companies gave no response about their business status. Only 6% (1) company is completely out of business.

4.4 Export Items of Operating companies and Destination Countries

The data of the companies exporting live animals together with the top countries of destination are displayed in the following table.

S.no	Description	Category	Percentage
2.6	Type of live animal's export	Cattle	55%
		Sheep & Goat	100%
		Camels	45%
		Donkeys & Horses	-
		Poultry	-
		Fish	-
		Other	27%
2.7	Top Export Destination	Neighbouring Countries	91%
		The Middle East	82%
		East Africa	18%
		North Africa	27%
		West Africa	-
		The Far East	-
		Other	9%

Table 7 Export items and destination countries

Source: survey data

According to Table 7, all companies export sheep and goats, whereas 55% export cattle and 45% export camels. 27% chose "other." The OEC data (2011-2021) shows Ethiopia's Livestock Export Items Total Trade Value in US dollars. Sheep, goats, and cattle account for the majority of Ethiopia's exports. Poultry exports are variable and poor in quantity.

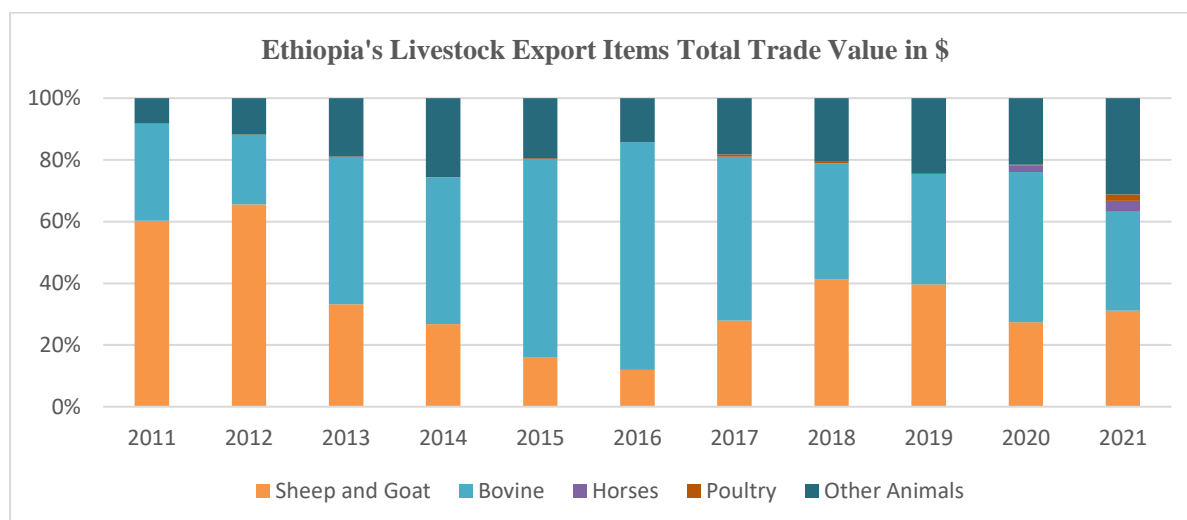


Figure 2 Ethiopia's Livestock Export Items total trade value in \$

Source: OEC (2011- 2021)

Ethiopia's Livestock Export Items Total Trade Value in \$				
Year/Item	Sheep and Goat	Bovine	Poultry	Other Animals
2011	75,000,000	39,200,000	-	10,200,000
2012	71,500,000	24,800,000	225	12,800,000
2013	12,400,000	17,900,000	4,570	7,060,000
2014	10,400,000	18,500,000	-	9,970,000
2015	4,850,000	19,400,000	88,700	5,870,000
2016	2,180,000	13,500,000	10,700	2,590,000
2017	4,080,000	7,770,000	113,000	2,660,000
2018	5,320,000	4,830,000	66,700	2,660,000
2019	23,500,000	21,300,000	15,000	14,500,000
2020	11,900,000	21,100,000	121,000	9,360,000
2021	10,500,000	10,800,000	701,000	10,500,000

Table 8 Ethiopia's Livestock Export Items total trade value in \$

Source: OEC Export Data of Ethiopia from (2011-2021)

In response to a survey question concerning the company's top export destination, 91% stated that it exports to neighbouring countries such as Djibouti, Kenya, Somalia, and Sudan. The UAE, Saudi Arabia, Yemen, Kuwait, Qatar, and Oman get 82% of all livestock exports to the Middle East. East and North African countries receive 45%, with North African countries such as Egypt and Libya receiving 27%. According to OEC data, the majority of Ethiopia's exports

travel to neighbouring countries Djibouti and Somalia, with the Middle East, particularly Yemen, Saudi Arabia, UAE and Kuwait. As a result, the statistics from the respondents align with the secondary data from the OEC.

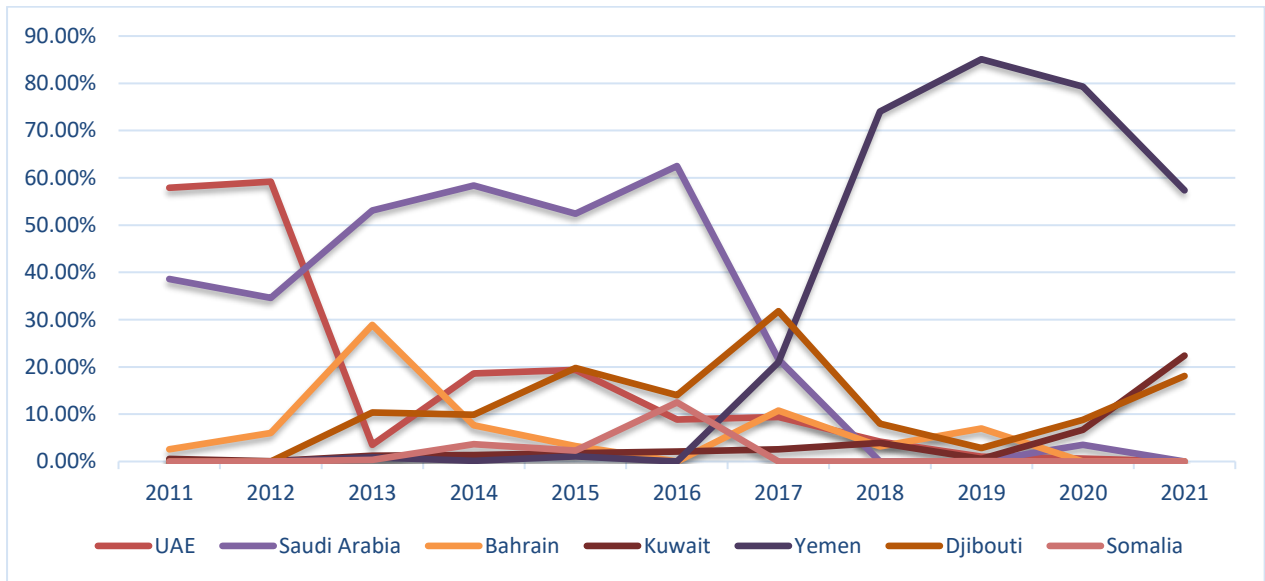


Figure 3 Ethiopia's Sheep and Goat Export Destination Countries

Source: OEC (2011- 2021)



Figure 4 Ethiopia's Bovine (Cattle) Export Destination Countries

Source: OEC (2011- 2021)

Figures 6 and 7 demonstrate that from 2016 to 2021, Yemen was the biggest importer of Ethiopian livestock. Previously, Saudi Arabia was the largest importer. According to statistics acquired by the Ethiopia Agriculture Authority (EAA), Ethiopian animals traveling to Yemen are for re-export to Saudi Arabia. As a result, Ethiopia is losing a significant amount of revenue.

4.5 Export Performance

This section analyses the responses of respondents regarding the export performance of their companies. The results of the responders are represented in the table below.

S.no	Description	Category	Frequency	Percentage
2.8	Livestock Export Goal	Yes	1	9%
		No	9	82%
		Missing	1	9%
		Total	11	100%
2.9	Range of Export Volume in a year	Less than 1,000	0	0%
		1,000- 5,000	4	36%
		5,000 - 10,000	2	18%
		10,000 - 50,000	4	36%
		50,000 - 100,000	1	9%
		More than 100,000	0	0%
		Total	11	100%
2.1	Livestock Export Profitability	Yes	4	36%
		No	7	64%
		Total	11	100%

Table 9 Export Performance

Source: survey data

The majority of respondents, 82% (9) companies stated that they do not meet their livestock export goal, while the remaining 9% (1) stated that they do. This means that the majority of companies fail to succeed in livestock export.

In terms of export range, 36% (4) companies said their livestock exports are in the 10,000-50,000 range, 9% only 1 company is in the 50,000–100,000 range. 18% (2) companies are in 5,000-10,000 range, the rest 36% (4) companies are in the low range 1,000-5,000. This shows that the companies are engaged in a small-scale livestock export industry, which, in comparison to the country's resources, is quite little to spare. According to statistics acquired from the Ethiopian Agricultural Authority (EAA), even if the number of animals brought to the quarantine facilities is greater, there are a variety of reasons why the animals would be rejected. Each importing country has its own set of health-check regulations. Furthermore, their requirements are variable with uncertain intervals. Because of rising international competition, local companies are struggling to compete.

Ethiopia's Livestock Export Items			
Year/ Item	Camel	Sheep & Goats	Cattle
2016/2017	9,361	163,774	74,961
2017/2018	12,000	288,000	60,000

2018/2019	19,000	515,000	27,000
2019/2020	19,000	346,000	41,000
2020/2021	18,000	278,000	28,000
2021/2022	14,000	63,000	16,000

Table 10 Ethiopia's Livestock Export Items

Source: Ethiopia Agriculture Authority (EAA)

Table 10 displays secondary data acquired from the Ethiopian Agriculture Authority (EAA) between 2016 and 2022 G.C. This data was utilized to cross-check the response of the export range of numbers. The data was important for double-checking the accuracy of the numbers. As a result, the data from the respondents matches with the secondary data. In a survey question about profitability, 64% (7) companies said the industry is not profitable. Only 36% (4) of those surveyed companies exports are profitable.

4.6 Assessment on Challenges

4.6.1 Assessment of Operating in and Exited companies on Government Policy

The table below analyses data of respondents from operating companies on the variable Government policy. The responses of the respondents are shown below.

S. No	Description	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	Total
3.1.1	Frequency	7	20	7	6	3	43
	Percentage	16%	47%	16%	14%	7%	100%
3.1.2	Frequency	14	21	6	1	1	43
	Percentage	32.6%	48.8%	14.0%	2.3%	2.3%	100%
3.1.3	Frequency	9	23	8	2	1	43
	Percentage	20.9%	53.5%	18.6%	4.7%	2.3%	100%
3.1.4	Frequency	10	21	9	2	1	43
	Percentage	23.3%	48.8%	20.9%	4.7%	2.3%	100%
3.1.5	Frequency	13	24	2	3	1	43
	Percentage	30.2%	55.8%	4.7%	7%	2.3%	100%
3.1.6	Frequency	11	19	6	5	2	43
	Percentage	25.6%	44.2%	14%	11.6%	4.7%	100%
3.1.7	Frequency	12	27	3	0	1	43
	Percentage	27.9%	62.8%	7%	0%	2.3%	100%

Table 11 Assessment of Operating Companies on Government Policy

Source: Survey data

When respondents were asked the level of their agreement to the statement that states "The government encourages the export of live animals," under the variable "Government's policy." 63% of respondents disagreed, with 16% strongly disagreeing. 21% of respondents agreed with the statement, while 16% had no opinion. Only 7% of those surveyed strongly agreeing. Melaku K. (2023) claims that the Ethiopian government has put regulations in place to encourage and endorse the livestock industry's expansion because it recognizes the industry's significance. To increase the potential for live animal exports, many initiatives have been implemented, including building the ability of livestock farmers, developing infrastructure to improve market accessibility, and upgrading animal medical care services. Never the less, the secondary data obtained from CSA (2011-2022) about vaccination and treatment given to live animals. As shown on fig 4.61a and b more than half of live animals do not get proper vaccination and treatment. This is the leading cause for Live animals' rejection from export in quarantine facilities and Ethiopia's continuous ban on export.

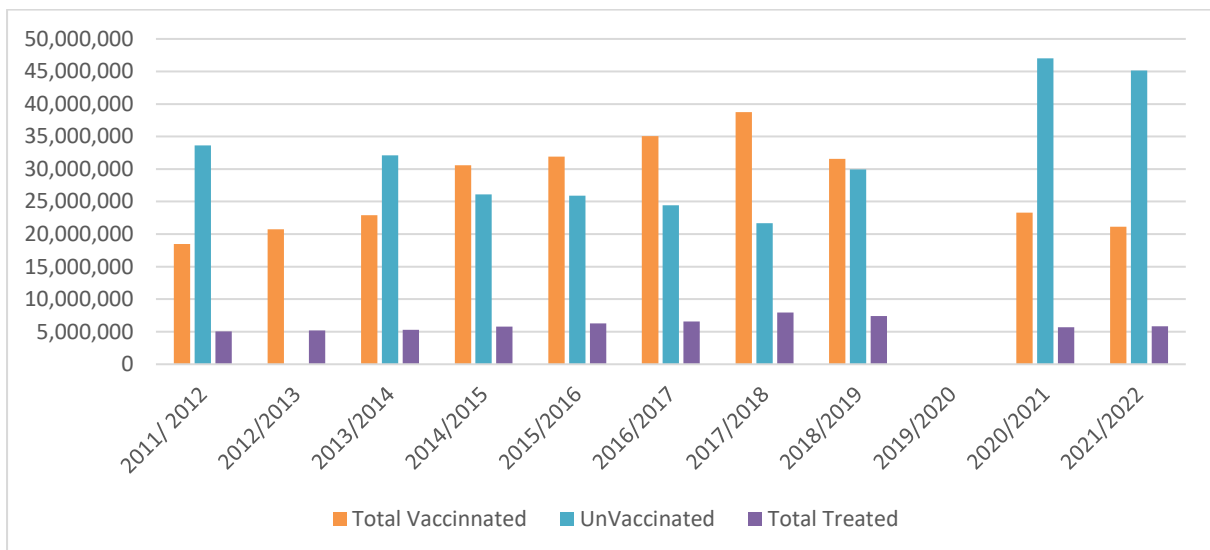


Figure 5 Number of Cattle Total Vaccinated, Unvaccinated and Treated

Source: FEDERAL DEMOCRATIC REPUBLIC OF ETHIOPIA ETHIOPIAN STATISTICS SERVICE CSA (2011-2022)

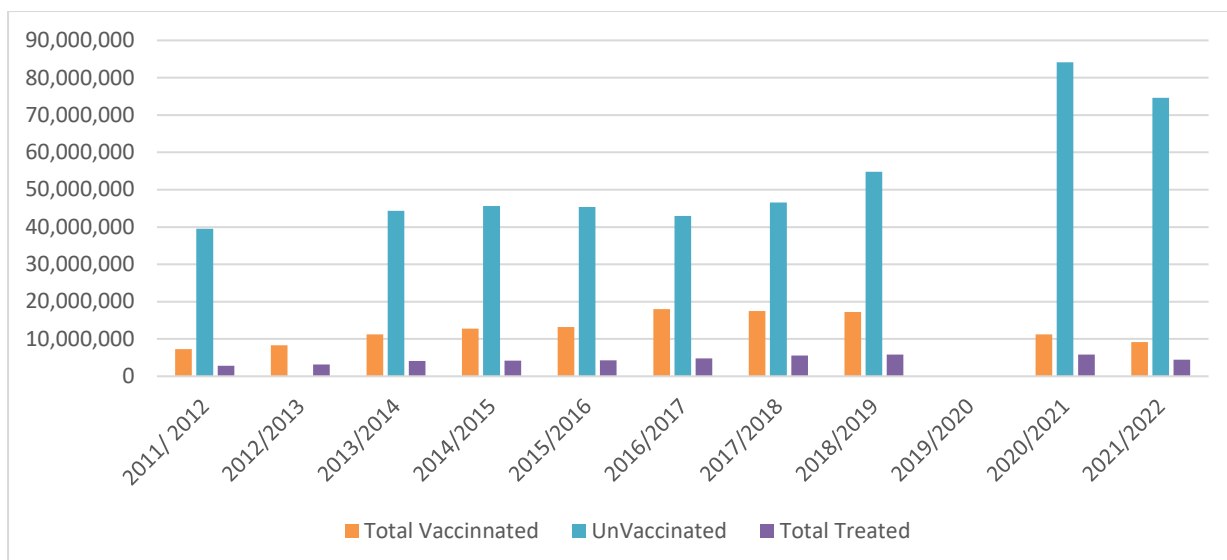


Figure 6 Number of Sheep and Goat Total Vaccinated, Unvaccinated and Treated

Source: FEDERAL DEMOCRATIC REPUBLIC OF ETHIOPIA ETHIOPIAN STATISTICS SERVICE CSA (2011-2022)

On the statement of “Obtaining a license for the export of livestock is an easy process.” 81.4% of respondents disagreed with the statement. From this 32.6% strongly disagreed. 14% had no point of view. 4.6% agreed which half of this percentage strongly agreed. In reference to the statement, “The procedure for exporting Live animals is easy.” the majority 53.5% of respondents said they disagreed. 20.9% strongly disagreed as well. 18.6% of people are undecided about the issue. The remaining 7% accepted the statement. 2.3% of respondents strongly agreed. From this it can be concluded that government assistance is weak than broadcasted.

Regarding the statement “Ethiopia's government has a well-designed framework for its export strategy for Livestock.” Of these, 23.3% strongly disagreed with the statement, making up the majority of 72.1% who disagree 20.9% are indifferent. 2.3% and 4.7% of respondents, respectively, said they strongly agreed and agreed. Following the statement “Performing well in the livestock export market is simple due to extensive government assistance.” 30.2% strongly disagreed, with the majority, 55.8%, disagreeing. 4.7% are oblivious(neutral), whilst 2.3% and 7% replied respectively, strongly agreed and agreed. In addressing the statement “There are enough government policies to protect the livestock export from Ethiopia.” 44.2% of respondents said they disagreed. 25.6% disagreed strongly. 14% are indifferent. 11.6% agree, 4.7% strongly agree with the assertion. In addressing the statement, “Ethiopia has a simplified quality assurance method that helps to improve livestock export performance.” Once more, the

majority, or 90.7%, disagreed, with 27.9% strongly disagreeing. 7% are neutral. 2.3% of the others strongly agreed.

The interview responses from exited companies regarding the variable government policy are analysed as follows. Their response was categorized in accordance with the companies' overall similar responses. After then, it was examined using communalities, which helped to reveal trends and themes.

Interview Question	Major Theme	Minor Theme
What are the problems that occur during the initial stage production of the livestock?	Supply number decreasing	No proper feed and water supply
	Lack of modern breeding system	Drought and Famine
	No Medication	
Can you describe the main government procedure problems for your company?	Very Long and Hectic	Corruption - Nepotism
	Corruption - Bribery	

Table 12 Problems that occur during the initial stage of production and government procedure problems

Source: Survey data

When asked about the problems that occur during the initial stage production of the livestock, the interviewed company owners brought up the number of suppliers has been declining over time. Sometimes there are occasions when the farmers won't provide any number of live animals. The lack a contemporary breeding system, which lowers the amount that can be exported and remains incapable to be competitive internationally. The majority of pastorals employ outdated methods. Ethiopian live animals are abundant; however, their quality is really poor. The participants also stated about the drought and famine in Ethiopia. Ethiopia experiences famine and dry seasons throughout certain time of year, particularly in Ethiopia's rural areas, where a large number of pastoralists reside. The animals do not get the proper medication requests made by the importing country. The available drug supplied is not determined by the requirements of the importing nation. 100% of medication is under government control.

The following are some direct quotations from the participants:

- [1]. "After long travels to the quarantine's facilities lacked a sufficient supply of water and food. The animals They must be nourished while they are in the facility."
- [2]. "The cost of animal feed is in fact expensive. On occasion, it may even exceed the terms of the sale agreements the companies negotiated with the importers."

[3.] “The animals are incapable to be competitive on a worldwide scale.”

[4]. “Majority of animals are not vaccinated against Brucella and RVD, 70% of them are rejected.”

When asked about the problems of the main government procedure for your company, the participants replied the very long and hectic government procedure. The companies have to be certified from Ethiopian Customs Commission, Ministry of Trade (MoT) and Ministry of agriculture. The process to get this certification is very disordered. Some of the government officials request for bribery.

The following are some direct quotations from the participants:

[1]. “The amount of bribery money requested is unrealistic. If you don’t pay them, you are going to have to wait for the never-ending process.”

[2]. “The government officials are all connected. There is visible nepotism in the offices.”

Interview Question	Major Theme	Minor Theme
What are the problems from the government side?	Not Country Level Agenda	Changing Government Officials and Structure
What are the main reasons for the animals to be rejected from export?	Contagious Diseases	Political Sabotage from middle east countries
	Underweight	
	Dehydration and No Proper Nutrition	

Table 13 Main reasons companies get rejected from export Source: Survey data

When asked about the problems from the government side, the respondents replied the government failed to see the industry as a country-level agenda. The companies experienced issues with ongoing government authorities and unexpected structural changes. The issues brought forth by the companies went unheard and completely ignored.

When asked about the main reasons for the animals to be rejected from export, all companies replied by saying, the animals are subjected to contagious diseases and have no proper medication. When the animals move from one place to another, they will be sleep deprived as. Sometimes the companies are given vague reason why the animals are declined from export.

The following are some direct quotations from the participants:

[1]. “The middle east countries tend to favour Djibouti and Somalia because they are a member of the Arab league.”

[2]. “There is a potential political sabotage on Ethiopia.”

Interview Question	Major Theme	Minor Theme
What are the issues your company faced when it comes to finance?	Banks do not have the capacity for loans	Payment not guaranteed
	Not enough Loans	Banks are hesitant for loans
	The amount for collateral requested is too much	
	Very Long Process to give loans.	Long terms of condition from banks
	Loans have more than 18% - 20% interest rate	

Table 14 The issues the exited companies faced when it comes to finance

Source: Survey data

When asked about the main issues the exited companies face when it comes to finance is the lack of appropriate contractual agreements hadn't been reached and protocol agreements were not upheld by the government. Because of these advance payments are not possible. Therefore, the companies have to get loans from banks. The issue is interconnected. The banks are hesitant to give loans especially for this livestock export sector, because they consider the business is too potentially dangerous. The number of collateral banks seek is double the rate. They have no guarantee that the payment will be refunded.

The following are direct quotes from the respondents.

[1]. "Payment is not assured after a Letter of Credit (LC) is opened, there are several reasons why this occurs. Even with LC, there are numerous terms and conditions, which can result in losses of 60% to 100%."

[2]. "We have initial costs to pay until the day of payment while exporting."

[3]. "Even if a loan is approved, the amount would not be sufficient to meet the cost of export."

[4]. "Approved loans have interest rate of 18% - 20%."

[5]. "The banks' prolonged loan approval process made export unfeasible."

With the exception of cattle, which are necessary for the cultivation of grain crops, live animals have not gotten a lot of focus in government policy or development initiatives, according to Michael H. (2022). The goal of an ongoing research program by ILRI and affiliated organizations is to influence central and regional government policies concerning the development of agriculture in Ethiopia. The program focuses primarily on livestock and proper issues and involves scientific, economic, social, and organizational factors. Due in significant part to the burden of excessive regulations, taxes, and other transaction costs (which

disproportionately affect exporters), the government-supported regulatory structures have not fared well. The responses from each of the operating and Exited companies have similarities and complementary. The majority of businesses rely on other import and export revenue. Livestock exports is not profitable on its own. The level of government assistance for facilitating the process, as well as the lack of supportive policies, are the key barriers to export. As a result, Ethiopia is losing between \$200 and \$300 million in trade value.

4.6.2 Assessment of Operating and Exited companies on Political Stability

The table below analyses data from operating company employees on the variable Political stability. The responses of the respondents are shown below.

S. No	Description	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	Missing	Total
3.2.1	Frequency	1	3	11	23	4	1	43
	Percentage	2%	7%	26%	53%	9%	2%	100%
3.2.2	Frequency	2	7	17	12	4	1	43
	Percentage	5%	16%	40%	28%	9%	2%	100%
3.2.3	Frequency	3	5	9	21	5		43
	Percentage	7%	12%	21%	49%	12%		100%
3.2.4	Frequency	3	5	11	20	4		43
	Percentage	7%	12%	26%	47%	9%		100%
3.2.5	Frequency	3	2	14	20	4		43
	Percentage	7%	5%	33%	47%	9%		100%
3.2.6	Frequency	3	11	8	18	3		43
	Percentage	7%	26%	19%	42%	7%		100%
3.2.7	Frequency	3	7	12	16	5		43
	Percentage	7%	16%	28%	37%	12%		100%

Table 15 Assessment of operating Companies on Political Stability

Source: Survey data

Regarding the statement “The livestock export has been impacted by political instability in the last 5 years.” Under the variable Political stability. 62% of respondents agreed, with 9% strongly agreeing. 26% are indifferent. Out of these 2% that strongly disagreed, 7% disagreed with the statement. In addressing the statement which is “The Tigray war, which raged in Ethiopia from 2020 to 2022, had an impact on livestock export.” 37% of the respondents agreed with the statement with 9% strongly agreeing and 21% disagreed. The majority 40% were neutral. In reference to statement “Ethiopian regional conflict has an impact on the performance of the livestock export industry.” The majority 61% agreed with the statement while 12%

strongly agreed a total of 19% dissent from the sentence. 21% were neutral. In regarding the statement, which reads, “Displacement of people from different clans' conflicts highly affects the livestock export performance,” 56% of respondents agreed with it, with 9% strongly agreeing. 19% disagreed, and 26% were neutral. In Addressing the statement “The Ethiopian government's inability to enforce the rule of law, which has resulted in economic struggles and high crime rates, is directly related to the decline of the livestock export sector.” Of them, 9% strongly agreed, with the majority, 56%, agreeing. 33% were neutral.12% disagreed from this 7% strongly disagreed. The plurality of respondents (49%), out of which 7% strongly agreed, approved with the statement, which reads, " Ethiopia’s political governance issues like inter-ethnic disputes, extensive relocations, etc., highly affected the livestock export performance of your company." Out of this, 33% disagreed and from this 7% strongly disagreed.19% had neutral opinion. On the statement “Border conflict in Ethiopia and with neighbouring countries has had an impact on the performance of the livestock exporting sector.” Majority of the respondents responded by agreeing with the statement that is 37% agreed where as 12% of them strongly agreed. 28% were neutral. 16% disagreed where the remaining 7% strongly disagreed.

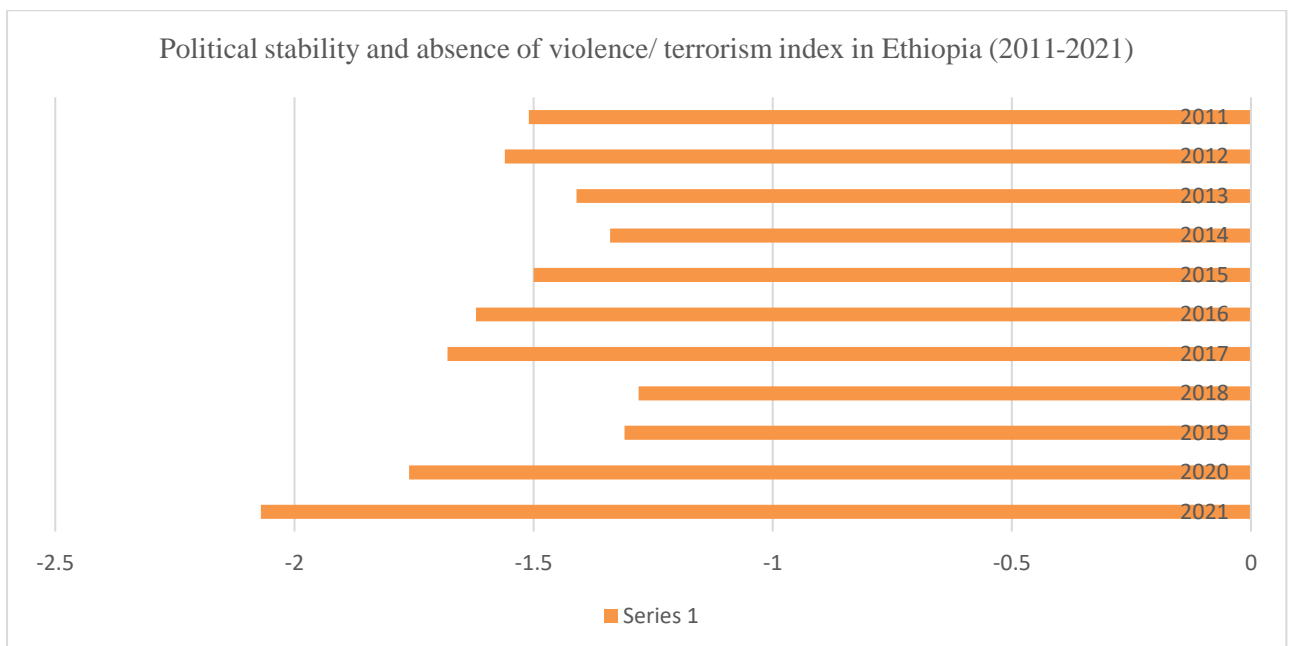


Figure 7 Political stability and absence of violence/ terrorism index in Ethiopia (2011-2021)

Source: “Statista” global data and business intelligence platform

Based on secondary data collected from SaifaddinG. (2023)'s article, Ethiopia's 2020 political stability and lack of violence/terrorism index was -2.07. Furthermore, Ethiopia's political stability index was negative for the whole ten years under review; the lowest number was -1.28

in 2018, and the highest score was likewise in 2021. Ethiopia saw multiple instances of tension between its various ethnic groups during the assessment period. The Political Stability Index (PSI) for Ethiopia from 2011 to 2021 is depicted in the figure 10, with 2.5 denoting "strong" and -2.5 denoting "weak.". Ethiopia has experienced momentous peaceful time when Abiy Ahmed (Ph.D.) came to power in 2018. From 2018 to 2019, livestock exports showed a significant increase from 12.8 M\$ to 59.6 M\$. Never the less, the Tigray war, which lasted from 2020 to 2022, reduced the index to less than -2. Ethiopia had been in the negative index for the past decade, but the Tigray war and its aftermath exacerbated the situation even worse. Similarly, the export declined as well.

The interview responses from exited companies regarding the variable political stability are analysed as follows. Their response was categorized in accordance with the companies’ overall similar responses. After then, it was examined using communalities, which helped to reveal trends and themes.

Interview Question	Major Theme	Minor Theme
what issues have you encountered related to conflicts and disputes in Ethiopia?	Not Safe Roads	Reoccurring Conflicts
	Inconsistent Supply	Displaced Pastorals
How did the Tigray war from 2020-2022 impacted the livestock export?	Contract termination	Destroyed Infrastructure
		Disconnected Communication

Table 16 Issues encountered related to conflicts and disputes in Ethiopia

Source: Survey data

When asked what issues have your company encountered related to conflicts and disputes in Ethiopia, the respondents verified that there is inconsistency in supply because of recurring disputes between tribes, and traveling to those areas is becoming more dangerous as days go by. The pastoralists who supplied the live animals are displaced. While transporting live animals, there are multiple politically risky roadways. Because of the political tension, companies must incur additional transportation costs.

The following are direct quotes from the respondents.

[1]. “The road from the mille quarantine station to Djibouti, for example, is quite dangerous. Conflicts between the Afar and Somali tribes are common. We could lose 60% to 100% of their livestock.”

[2]. “Because of conflicts across the road from mille to Djibouti, many companies must return to the Diredawa quarantine facility and subsequently to Djibouti. This adds 374 km from Mille to Diredawa and 317 km from Diredawa to Djibouti.”

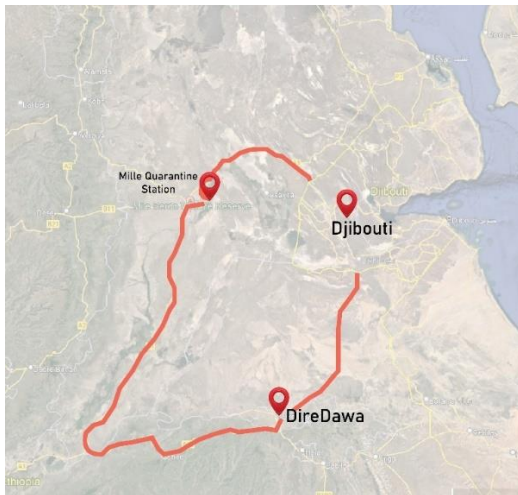


Figure 8 Road from mille quarantine station to Djibouti

Source: Google Earth

When asked about how did the Tigray war from 2020-2022 impacted the livestock export, the respondents replied as follows. The Tigray war contributed to infrastructures being destroyed. There was also communication disconnection not to just Tigray but to Northern Amhara regions and afar, which resulted the company’s contact termination of the export with the importing countries.

The following are direct quotes from the respondents.

[1]. “The Humera quarantine facility was ready for use and on the verge to be internationally accepted. But because of the war, 100% of the facility was completely destroyed.”

The secondary data on political stability and absence of violence /terrorism in Ethiopia aligns with the operating and exited companies’ respondent’s data. Over the previous few decades, Ethiopia has seen numerous internal armed conflicts. The situation has gotten worse recently. The conflict in Tigray, which raged in Ethiopia between 2020 and 2022, affected a number of the infrastructures and institutions that supported livestock exports. Significant population displacement of pastoralists also had a negative impact on exports. It is dangerous to travel to rural and regional locations due to the possibility of unexpected clan clashes erupting. Potential investors are reluctant to enter the country and operate business given that the political stability index has shown a negative value over the past decade.

4.6.3 Assessment of Operating and Exited companies on Infrastructure

The table below analyses data of respondents from operating companies on the variable Infrastructure. The responses of the respondents are shown below.

S. No	Description	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	Total
3.3.1	Frequency	10	25	7	1	0	43
	Percentage	23%	58%	16%	2%	0%	100%
3.3.2	Frequency	7	20	8	5	3	43
	Percentage	16%	47%	19%	12%	7%	100%
3.3.3	Frequency	14	20	7	1	1	43
	Percentage	33%	47%	16%	2%	2%	100%
3.3.4	Frequency	9	22	9	2	1	43
	Percentage	21%	51%	21%	5%	2%	100%
3.3.5	Frequency	10	21	9	2	1	43
	Percentage	23%	49%	21%	5%	2%	100%
3.3.6	Frequency	12	25	2	3	1	43
	Percentage	28%	58%	5%	7%	2%	100%

Table 17 Assessment of operating Companies on Infrastructure

Source: Survey data

In reference to the statement which reads, “Accessibility to Ethiopia's major livestock market centres and road network is well constructed.” 81% of respondents, the majority, disagreed with the statement under the infrastructure variable. From this 23% strongly disagreed. Of the respondents, 16% were indifferent. Merely 2% agreed with the assertion. The quality of Ethiopia's roads was rated on a scale from 1 (underdeveloped) to 7 (extensive and efficient by international standards) based on secondary data from the World Economic Forum (2012-2019). Ethiopia received an average of four points. The primary mode of transportation for live animals is the road network. Ethiopia has a relatively low score in relation to other nations. It is among the causes of the industry's slow growth.

In addressing the sentence which says, “All areas of Ethiopia have easy access to telecommunications and the Internet.” 63% of the responders, or the majority, disagreed with the statement. Of which 16% strongly disagreed 19% had no opinion. 19% thought the statement was true. Merely 7% fully agreed with this. According to secondary data obtained from the World Bank regarding the number of internet users in Ethiopia between 2014 and 2021, just 16.7% of the population had access to the internet in 2021 which was the max

number registered. In comparison to other nations, such as Kenya (28.56%), Rwanda (30.46%), Tanzania (50%) and Sudan (30.9%), this is rather low. The export of livestock is profoundly affected by telecommunication access. Pastoralists lose out on important information, current and affordable trends, market connections, and additional benefits.

Regarding the sentence “Ethiopia has sufficient quarantine facilities to export Live animals.”, the majority of the respondents which is 80% disagreed with the statement. From this 33% of them strongly disagreed. 16% were neutral. 4% agreed with the statement. From this 2% of them strongly agreed. In addressing the statement “Companies do not need to use neighbour countries quarantine facilities for the livestock export because they are adequately available in Ethiopia.” 72% of the respondents disagreed with the statement, making up the majority of the respondents. Of them, 21% strongly disagreed with this. 21% were neutral. 7% agreed. From this 2% strongly agreed with this. In regards the sentence, “Ethiopian livestock quarantine facilities achieve all quality standards.,” the majority, 72%, disagreed. From this 23% strongly disagreed. 21% were neutral. While 7% agreed. In addressing the statement “The quarantine facilities in Ethiopia are sufficiently supplied with food and water”, 86% of respondents disagreed, which is the majority. Of these, 28% strongly disagreed. 5% were neutral. The remaining 9% agreed with the statement.

The interview responses from exited companies regarding the variable infrastructure are analysed as follows. Their response was categorized in accordance with the companies’ overall similar responses. After then, it was examined using communalities, which helped to reveal trends and themes.

Interview Question	Major Theme	Minor Theme
What are the issues raised in the service of the quarantine facilities?	Problem in coordination	Logistics Process
	Capacity is very low	
	Service fee increasing in neighbouring countries	

Table 18 issues raised in the service of the quarantine facilities

Source: Survey data

When asked what issues were raised in the service of the quarantine facilities, the respondents replied the quarantine facility capacity is very low compared to the number of animals need service. The quarantine facilities in Ethiopia have general logistics and management problem, these issues highly affected the time of delivery of the export. Because of the above-mentioned reason companies are forced to use neighbouring countries quarantine facilities.

The following are direct quotes from the respondents.

[1]. “Because the quarantine facility is not sufficient enough, we are forced to use Djibouti’s quarantine facility. The service fee for one animal in Djibouti has reached 20\$-35\$.”

There are similarity answers with operating and exited companies’ answers. As shown on figure 14 below, the mille quarantine has a total site area 41hectar, where only 18 hectare is being used. There is a problem in coordination. The quarantine station is also located where feed and water sources age not easy to deliver.



Figure 9 Mille Quarantine Facility, Afar Region

Source: Goggle Earth

Interview Question	Major Theme	Minor Theme
What are the problems to transport animals from market places?	No on-time delivery	No Proper transport Vehicle
	Accidents Occur	

Table 19 problems encountered to transport animals to market places

Source: Survey data

In response to interview question that stated, “What are the problems with transporting animals from market places?” the respondents replied, there is no adequate vehicle designed to transport animals. Companies were required to utilize heavy tracks. A death rate of 2%-3% is assumed for this mode of transportation. However, because of poorly designed roads, more than 5% of deaths occur as a result of accidents. On time delivery won’t be guaranteed.

The following are direct quotes from the respondents.

[1]. “Accidents occur because of poor quality of roads. As a result, the number of animals agreed with the importers decreases.”

[2]. “Ethiopia uses Free on Board (FOB) incoterms, which state responsibilities for costs and risks of exported goods to the exporter until they reach the port. We won’t receive ‘Bill of lading’ document and payment is not assured.”

One of the essential infrastructural facilities for the export of livestock is a suitable quarantine facility. There are five quarantine facilities in Ethiopia, namely Mille in Afar, Humera in Tigray, Metema in Amhara, Alemhal in Benshangul Gumuz, and one in Diredawa, in accordance with information obtained from the Ethiopian Agriculture Authority (EAA). Nevertheless, only mille has gained international recognition. As a result, mille's animal exports are only permitted abroad. Only the Sudanese government accepted the one in Metema.

According to Ethiopian Agriculture Authority (EAA, the mille, afar quarantine facility was given to foreign consultants and managers in Public Private Partnership (PPP) to handle. The government only provides regulatory services. Despite all the efforts made by the government and corporate sector to improve conditions, exporting companies continue to incur additional costs.

4.6.4 Assessment of operating and Exited companies on Market Accessibility

The table below analyses data of respondents from operating companies on the variable Market Accessibility. The responses of the respondents are shown below.

S. No	Description	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	Total
3.4.1	Frequency	13	21	5	3	1	43
	Percentage	30%	49%	12%	7%	2%	100%
3.4.2	Frequency	5	24	8	4	2	43
	Percentage	12%	56%	19%	9%	5%	100%
3.4.3	Frequency	16	24	2	1	0	43
	Percentage	37%	56%	5%	2%	0%	100%
3.4.4	Frequency	13	17	11	1	1	43
	Percentage	30%	40%	26%	2%	2%	100%
3.4.5	Frequency	13	20	9	1		43
	Percentage	30%	47%	21%	2%	0%	100%
3.4.6	Frequency	10	19	10	3	1	43
	Percentage	23%	44%	23%	7%	2%	100%

Table 20 Assessment of Practising Companies on Market Accessibility

Source: Survey data

The majority of respondents 79% of them disagreed on the statement, “There are enough potential markets for your company to grow.” under the variable market accessibility. From

this 30% strongly disagreed. 12% are indifferent. 9% of them agreed with the claims. On the phrase “Exporting live animals has always had an established route to the market”, 68% of the responders, or the majority, disagreed with the statement. Out of them, 12% strongly disagreed. 19% had no opinion. Of them, 14% agreed with the statement. In sentence “Market ties with importer nations are strong because importers are consistent in their loyalty.”, 93% of the respondents, or the majority, indicated that they disagreed with the statement. From this 37% of them strongly disagreed. 5% were neutral. Just 2% of respondents agreed with the statement. On the statement “It is simple to find new importers every year.” 70% disagreed. Out of this 30% strongly disagreed with this. 26% were neutral. 4% agreed.

It can be concluded from the above response; the livestock market is experiencing increasing levels of foreign competition over time. Although Ethiopia controls the market, its neighbours control the numbers. Despite the existence of potential markets, the exporting enterprises' increasing attempts will fail due to the sabotage by traders from Somaliland and Djibouti, particularly their encouragement of illegal trading. Given the dealers' substantial revenue stream, it is unlikely that they will relinquish it lightly. Ethiopia's landlocked status puts it at a disadvantage.

On the statement “Exporting live animals is straightforward and easily accessible to potential clients because of your company's marketing strategies.” 77% disagreed with the assertion. From this 30% of them, strongly disagreed with the statement. 21% were impartial. Merely 2% agreed with the assertion. The concluding remark which stated “There is enough information and an accessible database of the international market which is helpful for Your company to grow.” 67% of the respondents, or the majority, indicated that they disagreed with the statement. From this 23% of them strongly disagreed. 23% were impartial. 9% agreed with the statement.

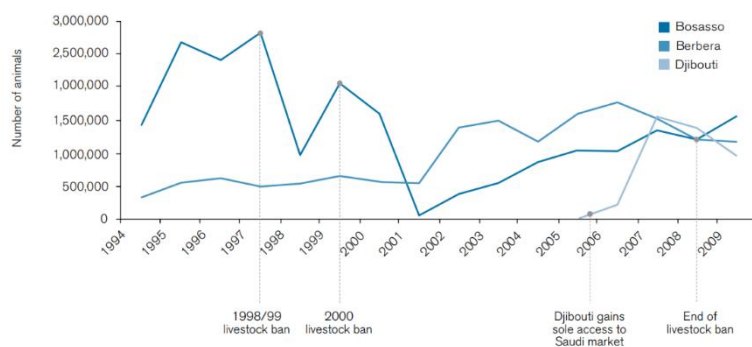


Figure 10 Livestock exports (sheep and goats) from Bosasso, Berbera and Djibouti (1994–2009)

Source: *The Food Security & Nutrition Analysis Unit for Somalia (FSNAU)*

The interview responses from exited companies regarding the variable market accessibility are analysed as follows. Their response was categorized in accordance with the companies' overall similar responses. After then, it was examined using communalities, which helped to reveal trends and themes.

The table below analyses data from respondents on the variable Market Accessibility. The respondent's date is shown below.

Interview Question	Major Theme	Minor Theme
What are the factors that prevent companies from competing in international market places?	High competition from Illegal Export.	Market is Holiday Bases.
	Difficulties to set price.	No Price Uniformity.
What responses did you get from the importing companies?	No Purposeful Livestock Production.	Poor Genetics

Table 21 factors influence international market & responses from importing companies

Source: *Survey data*

When asked what are the factors that prevent companies from competing in international market places, the respondent felt setting the price of the animals is challenging. They also face intense competition from illegal exports. There is no price uniformity in the country level. Animal price value is determined traditionally.

The following are direct quotes from the respondents.

[1]. "The price that illegal exporters charge is far less. They gain the ability to switch foreign currency on the black market, which is a benefit."

[2]. "We are forced to set the prices at an unfavourable level because of high competition from the illegal exporters."

When asked what responses did you get from the importing companies, the respondents felt there is no purposeful production as inquired by the importing countries. As a result, their export performance is very low. The animals exported have poor genetics compared to the international market.

The following are direct responses from the respondents.

[1]. "70% of the export is made in Ramadan, Haji and Arafat Season. If we miss those seasons, then the export performance is highly affected."

[2]. “There is no purposeful production by the pastorals for the middle east holidays. They also have poor breed qualities.”

Interview Question	Major Theme	Minor Theme
What are the problems you face from importing countries	Reserved to make advance payments.	Not accepting payment terms of Ethiopia.
	Hard to get contract agreements.	

Table 22 Problems companies face from importing countries

Source: Survey data

When asked what are the problems you face from importing countries, the respondents replied that importing companies are reserved to make advance payments which was so much helpful to finance the long procedure. The companies also had difficulties to get proper contractual agreements. The government failed to enforce protocol agreements. The importing companies are not accepting payment terms of Ethiopia especially cash in advance.

Both the operating and exited companies confirmed, due to ongoing bans from the Middle East, which accounts for the bulk of Ethiopia's livestock exports, Ethiopia's market has been shrinking. According to the secondary data as shown figure 14 displayed above, exports are significantly impacted by bans. Not to mention, persistently unclear rules, varying standards and criteria impacted Ethiopia's earnings in the sector. According to the information provided by the respondents and verified by the Ethiopian Agricultural Authority (EAA), companies lack an easily available export performance database, which may have been crucial in determining their marketing strategy and tactics.

CHAPTER FIVE

CONCLUSION AND RECOMMENDATION

This chapter summarises the study's overall findings. It emphasised the significant findings and insights gained throughout the investigation. Based on these data, solid conclusions were reached that satisfy the research aims. Furthermore, based on the study's findings, the chapter made pertinent recommendations, indicating practical implications, potential areas for additional investigation, and concrete activities that can be implemented in light of the research findings.

5.1 Conclusion

The main question that was investigated in this study was what are the barriers that influence export market of livestock from the exporting companies' perspective. To address this question a mixed methodology was used to gather primary data and cross reference it with secondary data that spans from 2011-2021. This study describes the factors that affect the export performance of the companies with the selected variables such as government policy, political stability, infrastructure and market accessibility. To address the research questions, the collected primary data was analysed by descriptive and thematic analysis methods. From this a conclusion was drawn.

There are multiple interconnected issues with this export. Livestock exporting companies operate in a small scale and do not prioritize the export. 88% companies stopped exporting in the last 5-8 years. 60% animals of the population do not get medication and vaccination especially based on the importing countries requirement, which is the main reason why 70% of animals get rejected.

The export process is a laborious and time-consuming one for the companies. It takes an extended amount of time to obtain certification from the Ethiopian Agriculture Authority (EAA), Ethiopian Customs Commission, Ministry of Trade (MoT), and Ministry of Agriculture (MOA). High levels of corruption are practiced by government officials through bribery and nepotism. The problem became entrenched due to the constant changing of government officials and personnel. Ethiopia lacks a protocol regulation that would have standardized the export process nationally. Additionally, the administration disregarded other countries'

"contractual agreement" requirements regarding exports. Due to the lack of a payment guarantee, this increased the risk of the export.

Huge capital is required for the livestock export industry. Ethiopia's payment procedures, such as accepting cash in advance, are not recognized by importing nations. Banks in Ethiopia are reluctant to provide loans. Lack of ability and concern that the funds won't be reimbursed are the main causes. The loan does not cover the entire amount required for the export, even if it is approved. Loans require 18–20% rates of interest and twice the amount of collateral. Loan approval processes can take a while. The livestock export is reliant on middle east and north African countries holiday bases. 70% of export is made in Ramadan, Haji and Arafat Season. Export performance is affected, with the procedure taking longer time.

A 2%-5% fatality rate is assumed during animal transport due to accidents caused by poor infrastructure of Ethiopia. This causes a "Bill of Lading" documentation difficulty, resulting in payment not being assured. There is only one internationally recognized quarantine station, located in the Mille Afar region. The quarantine has numerous issues with coordination, administration, and capability. The facility is built in areas where additional feed and water cannot be provided. Additional feed and transportation costs are imposed on the companies. Companies are compelled to use quarantine stations in neighbouring countries, and with the rising cost of quarantine products and services, export is becoming even more difficult.

With all of the preceding problems exporting companies face increased competition from illegal export. The illegal export had an impact not only on the number of animals exported but also on the price strategy. There is a lack of price homogeneity and a price value standard. Illegal exporters sell at a reduced price but exchange it on the black market. To remain competitive, exporting companies sell at a cheaper price, in terms of gaining foreign currency and supporting their other businesses, which is unprofitable. Foreign competition is becoming more and more prevalent in the livestock market over time. The neighbouring countries namely Djibouti and Somaliland dominate the market for the past few decades. The exporting companies' increasing efforts will flop despite the existence of prospective markets because of the interference by dealers and traders from Somaliland and Djibouti, especially their facilitation of illegal trading.

5.2 Recommendation

With the correct approach and tool, the livestock export industry has the potential to become the largest export commodity without exaggeration. The following are areas of future concentration and additional research for readers and interested parties who can support the sector's expansion.

- Develop a policy of uniform export procedure in a country level and enforce it. This particular policy can decrease illegal export.
- Develop a Public Private Partnership (PPP) modality to develop a large ranch for the pastorals to submit the animals for better feed, modern breed and proper medication.
- Develop a policy in establishment of “Livestock marketing Board”, which can regulate and selling prices
- Develop a database of exporting companies' entry and exit information, as well as individual animal export records in order to avoid data loss due to changes in government personnel and structure.
- Develop a policy of a non-reexport agreement with importing countries.
- Extensive government assistance for stakeholders through the provision of rewards, grants, and credit opportunities in order to inspire and stimulate the industry.
- Develop a Public Private Partnership (PPP) modality for veterinary clinics to ensure that animals are properly vaccinated and treated.
- Search for more market destination nations, such as those in Europe and the Far East.
- Expand the variety of live animals that Ethiopia can export, including both domestic and wild species.
- To help elevate bans, boost up political diplomacy with the Middle Eastern nations.

5.2.1 Suggestion for Further Study

The following are suggested topics for further study.

- The effect of Government Policies on Livestock Export Procedure
- The effect of International Marketing Strategies on Livestock Export Performance
- Assessment on Impact of Livestock Export on Meat Export Performance in Ethiopia

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Annex

Annex -1



Addis Ababa University
College of Business and Economics
Department of Management

Questionnaire for Master's thesis Research

Dear respondent I am a management student at Addis Ababa University studying for my MSC in international business (Import, Export) in the department of management. I'm conducting a thesis research project under the title "Assessment of the Challenges of Ethiopian Livestock Export Performance " as part of the requirements for my master's degree. This study has chosen to use Your Companies' top management employees. I appreciate your cooperation and this questionnaire is being provided solely for academic purposes. As a result, you are cordially invited to take part by completing the questionnaire that is attached. Your information will be treated with the utmost confidentiality and used only for that reason. I much appreciate your assistance in guaranteeing the questionnaires are completed.

Section I - General information

Background Information of the Respondent

1.1 Gender of the Respondent

Male Female

1.2 Age

25 years or less 46-55 years
 26-35 years 55 years above
 36-45 years

1.3 Educational Level

Diploma Degree Masters PhD. Other

1.4 What is your Current job Position?

Owner / Founder Manager Director Section Head Officer

1.5 How long have you worked in your current job position?

0 - 2 years 2 - 5 years 6 - 10 years More than 10 years

Section II – Company Information

2.1 Number of Employees

1 – 10 11 – 20 21 – 30 31 – 40 More than 40

2.2 How long has your company been exporting live animals?

0 - 2 years 2 - 5 years 6 - 10 years More than 10 years

2.3 Other than live animals, does your company export other products?

Yes No

2.3.1 If you answer yes for question number “2.3”, What are your other export products? _____

2.4 Is import business a part of your company's operations?

Yes No

2.4.1 If you answer yes for question number “2.4”, What are your import products?

2.5 What is the order of importance for your business in exporting live animals?

- Live Animal Export is our 1st priority.
- Live Animal Export is our 2nd priority.
- Live Animal Export is our 3rd priority.
- Live Animal Export is not out Priority at all.

2.6 What live animals do you export?

Cattle Sheep & Goat Camels Donkeys & Horses
 Poultry Fish Other

2.7 Where is the top export destination for your company?

- Neighbouring Countries (Djibouti, Kenya, Somalia, Sudan...)
- The middle East (UAE, Saudi Arabia, Yemen, Kuwait, Qatar, Oman...)
- East Africa (Rwanda, Uganda,)
- North Africa (Egypt, Libya,)

- West Africa (Nigeria, Camerron, Ghana ...)
- The far East (China, Malaysia, Thailand, South Korea...)
- Other

2.8 Does your company meet its yearly Livestock export goal?

- Yes
- No

2.9 What range does the export volume of your company fall into?

- Less than 1000
- 1,000- 5,000
- 5,000 - 10,000
- 10,000 - 50,000
- 50,000 - 100,000
- More than 100,000

2.10 Is exporting Live Animals Profitable for your company for the last 5 years?

- Yes
- No

Section III- Factors that affect Export Performance

Circle the one that provides the most convenient solution.

Measurement Scale

- 1) Strongly disagree 2) Disagree 3) Neutral 4) Agree 5) Strongly agree

3.1 Government Policy

3.1.1 The government encourages the export of Live animals.	1	2	3	4	5
3.1.2 Obtaining a licence for the export of livestock is an easy process.	1	2	3	4	5
3.1.3 The procedure for exporting Live animals is easy.	1	2	3	4	5
3.1.4 Ethiopia's government has a well-designed framework for its export strategy for Livestock.	1	2	3	4	5
3.1.5 Performing well in the livestock export market is simple due to extensive government assistance.	1	2	3	4	5
3.1.6 There are enough government policies to protect the livestock export from Ethiopia.	1	2	3	4	5
3.1.7 Ethiopia has a simplified quality assurance method that helps to improve livestock export performance.	1	2	3	4	5

3.2 Political Stability

3.2.1 The livestock export has been impacted by political instability in the last 5 years.	1	2	3	4	5
3.2.2 The Tigray war, which raged in Ethiopia from 2020 to 2022, had an impact on livestock export.	1	2	3	4	5
3.2.3 Ethiopian regional conflict has an impact on the performance of the livestock export industry.	1	2	3	4	5
3.2.4 Displacement of people from different clans' conflicts highly affect the livestock export performance	1	2	3	4	5
3.2.5 The Ethiopian government's inability to enforce the rule of law, which has resulted in economic struggles and high crime rates, is directly related to the decline of the livestock export sector.	1	2	3	4	5
3.2.6 Ethiopia's political governance issues like inter-ethnic disputes, extensive relocations, etc., highly affected the livestock export performance of your company.	1	2	3	4	5
3.2.7 Border conflict in Ethiopia and with neighbouring countries has had an impact on the performance of the livestock exporting sector.	1	2	3	4	5

3.3 Infrastructure

3.3.1 Accessibility to Ethiopia's major livestock market centres and road network is well constructed.	1	2	3	4	5
3.3.2 All areas of Ethiopia have easy access to telecommunications and the Internet.	1	2	3	4	5
3.3.3 Ethiopia has sufficient quarantine facilities to export Live animals.	1	2	3	4	5

3.3.4 Companies do not need to use neighbour countries quarantine facilities for the livestock export because they are adequately available in Ethiopia.	1	2	3	4	5
3.3.5 Ethiopian livestock quarantine facilities achieve all quality standards.	1	2	3	4	5
3.3.6 The quarantine facilities in Ethiopia are sufficiently supplied with food and water.	1	2	3	4	5

3.4 Market Accessibility

3.4.1 There are enough potential markets for your company to grow.	1	2	3	4	5
3.4.2 Exporting live animals has always had an established route to the market.	1	2	3	4	5
3.4.3 Market ties with importer nations are strong because importers are consistent in their loyalty.	1	2	3	4	5
3.4.4 It is simple to find new importers every year.	1	2	3	4	5
3.4.5 Exporting live animals is straightforward and easily accessible to potential clients because of your company's marketing strategies	1	2	3	4	5
3.4.6 There is enough information and an accessible database of the international market which is helpful for Your company to grow.	1	2	3	4	5

3.5 Open Ended Questions

3.5.1. Does your company consistently export livestock? If you answered No, what are the reasons that prohibit the consistency?

3.5.2. How should the government act to support the growth of the industry, in your opinion?

Thank you!



Addis Ababa University
College of Business and Economics
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Interview Questions for Master's thesis Research

Dear respondent I am a management student at Addis Ababa University studying for my MSC in international business (Import, Export) in the department of management. I'm conducting a thesis research project under the title "Assessment of the Challenges of Ethiopian Livestock Export Performance " as part of the requirements for my master's degree. This study has chosen to use Your Companies' top management employees. I appreciate your cooperation and this questionnaire is being provided solely for academic purposes. As a result, you are cordially invited to take part by completing the questionnaire that is attached. Your information will be treated with the utmost confidentiality and used only for that reason. I much appreciate your assistance in guaranteeing the questionnaires are completed.

Section I - Company Information

1.1 How long have you stopped exporting livestock? _____

1.2 Do you have other Export and Import Items? If you answered "Yes", What are the items? _____

Section II - Factors that affect Export Performance

2.1 Government Policy

2.1.1 What are the problems that occur during the initial stage production of the livestock? _____

2.1.2 Can you describe the main government procedure problems for your company? _____

2.1.3 What are the problems from the government side? _____

2.14 What are the main reasons for the animals to be rejected from export?

2.15 What are the issues your company faced when it comes to finance?

2.2 Political Stability

2.2.1 What issues have you encountered related to conflicts and disputes in Ethiopia?

2.2.2 How did the Tigray war from 2020-2022 impacted the livestock export?

2.3 Infrastructure

2.3.1 What are the issues raised in the service of the quarantine facilities?

2.3.2 What are the problems to transport animals from market places?

2.4 Market Accessibility

2.4.1 What are the factors that prevent companies from competing in international market places?

2.4.2 What responses did you get from the importing companies?

2.4.3 What are the problems you face from importing countries?

Thank you!

Annex -2

Descriptive Statistics

	3.1.1 Governme nt Policy	3.1.2 Governme nt Policy	3.1.3 Governme nt Policy	3.1.4 Governme nt Policy	3.1.5 Governme nt Policy	3.1.6 Governme nt Policy	3.1.7 Governme nt Policy
Valid	43	43	43	43	43	43	43
Missing	0	0	0	0	0	0	0
Mean	2.49	1.93	2.14	2.14	1.95	2.26	1.86
Mode	2	2	2	2	2	2	2
Std. Deviation	1.142	0.884	0.889	0.915	0.925	1.115	0.743
Skewness	0.735	1.226	0.997	0.885	1.422	0.87	1.696
Std. Error of Skewness	0.361	0.361	0.361	0.361	0.361	0.361	0.361
Minimum	1	1	1	1	1	1	1
Maximum	5	5	5	5	5	5	5

	3.2.1 Political Stability	3.2.2 Political Stability	3.2.3 Political Stability	3.2.4 Political Stability	3.2.5 Political Stability	3.2.6 Political Stability	3.2.7 Political Stability
Valid	42	42	43	43	43	43	43
Missing	1	1	0	0	0	0	0
Mean	3.62	3.21	3.47	3.4	3.47	3.16	3.3
Mode	4	3	4	4	4	4	4
Std. Deviation	0.854	1.001	1.077	1.05	0.984	1.111	1.103
Skewness	-0.884	-0.149	-0.806	-0.746	-0.919	-0.337	-0.419
Std. Error of Skewness	0.365	0.365	0.361	0.361	0.361	0.361	0.361
Minimum	1	1	1	1	1	1	1
Maximum	5	5	5	5	5	5	5

	3.3.1 Infrastru cture	3.3.2 Infrastru cture	3.3.3 Infrastru cture	3.3.4 Infrastru cture	3.3.5 Infrastru cture	3.3.6 Infrastru cture
Valid	43	43	43	43	43	43
Missing	0	0	0	0	0	0
Mean	1.98	2.47	1.95	2.16	2.14	1.98
Mode	2	2	2	2	2	2
Std. Deviation	0.707	1.12	0.899	0.898	0.915	0.913
Skewne ss	0.457	0.784	1.127	0.906	0.885	1.427

Std. Error of Skewness	0.361	0.361	0.361	0.361	0.361	0.361
Minimum	1	1	1	1	1	1
Maximum	4	5	5	5	5	5

	3.4.1 Market Accessibility	3.4.2 Market Accessibility	3.4.3 Market Accessibility	3.4.4 Market Accessibility	3.4.5 Market Accessibility	3.4.6 Market Accessibility
Valid	43	43	43	43	43	43
Missing	0	0	0	0	0	0
Mean	2.02	2.4	1.72	2.07	1.95	2.21
Mode	2	2	2	2	2	2
Std. Deviation	0.963	0.979	0.666	0.936	0.785	0.965
Skewness	1.125	1.026	0.89	0.77	0.393	0.724
Std. Error of Skewness	0.361	0.361	0.361	0.361	0.361	0.361
Minimum	1	1	1	1	1	1
Maximum	5	5	4	5	4	5

Reliability Cronbach's alpha test of variables

1. Government Policy

Reliability Statistics	
Cronbach's Alpha	N of Items
0.787	7

2. Political Stability

Reliability Statistics	
Cronbach's Alpha	N of Items
0.898	7

3. Infrastructure

Reliability Statistics	
Cronbach's Alpha	N of Items
0.839	6

4. Market Accessibility

Reliability Statistics	
Cronbach's Alpha	N of Items
0.844	6

5. Overall

Item-Total Statistics				
	Scale Mean if Item Deleted	Scale Variance if Item Deleted	Corrected Item-Total Correlation	Cronbach's Alpha if Item Deleted
Gov't Policy 3.1.1	60.95	111.648	0.23	0.83
Gov't Policy 3.1.2	61.54	118.005	-0.009	0.836
Gov't Policy 3.1.3	61.32	115.122	0.139	0.831
Gov't Policy 3.1.4	61.32	112.872	0.246	0.828
Gov't Policy 3.1.5	61.49	115.106	0.133	0.832
Gov't Policy 3.1.6	61.22	108.376	0.38	0.823
Gov't Policy 3.1.7	61.61	116.094	0.121	0.831
Political Stability 3.2.1	59.85	108.078	0.548	0.817
Political Stability 3.2.2	60.24	108.689	0.423	0.821
Political Stability 3.2.3	60.05	110.498	0.311	0.825
Political Stability 3.2.4	60.12	109.86	0.354	0.824
Political Stability 3.2.5	60.05	110.948	0.329	0.824
Political Stability 3.2.6	60.29	111.612	0.246	0.829
Political Stability 3.2.7	60.15	108.528	0.387	0.822
Infrastructure 3.3.1	61.49	111.756	0.416	0.822
Infrastructure 3.3.2	61	111.35	0.249	0.829
Infrastructure 3.3.3	61.51	107.556	0.537	0.817
Infrastructure 3.3.4	61.32	105.772	0.644	0.813
Infrastructure 3.3.5	61.34	105.78	0.63	0.813
Infrastructure 3.3.6	61.49	109.256	0.436	0.82
Market Accessibility 3.4.1	61.41	108.799	0.439	0.82
Market Accessibility 3.4.2	61.02	105.374	0.615	0.813
Market Accessibility 3.4.3	61.73	108.651	0.682	0.815
Market Accessibility 3.4.4	61.37	111.038	0.338	0.824
Market Accessibility 3.4.5	61.49	111.256	0.406	0.822
Market Accessibility 3.4.6	61.22	109.776	0.391	0.822

Annex -3

Live animal export companies and businesses in Ethiopia

Source: Ministry of Trade 2023

LIVE ANIMAL EXPORT COMPANIES AND BUSINESSES IN ETHIOPIA			
S No	Exporter Company	Address	Business Status
		City	
1	Aas International	A. A	Out of Business
2	Abakiy General Business	A.A	Out of Business
3	Abdos Trading	A.A	Out of Business
4	Abdurahman Umer Abdi General Import & Export	A.A	Out of Business
5	Addis Ababa Tannery S.co	A.A	Out of Business
6	Addisalem Negussie Bitewelegn	A.A	Out of Business
7	Adibek Export Plc	A.A	Out of Business
8	Ahmed Adem Ibrahim	A.A	Active
9	Ahmed Nuredin Abdella	A.A	Out of Business
10	Ahmed Serhan Ali	A.A	Out of Business
11	Akseker Ethiopia Casing Plc	A.A	Out of Business
12	Al-mehaid Export Abattoir Plc	A.A	Out of Business
13	Alfoz Pvt.ltd.co	A.A	Active
14	Alghade Berhan Plc	A.A	Out of Business
15	Alisho General Trading and Transit Service	A.A	Active
16	Almerfeq Import and Export Plc	A.A	Out of Business
17	Amare Afework Import Export	A.A	Out of Business
18	Amazon Construction Plc.	A.A	Out of Business
19	Aminat Ali Abegaz	A.A	Out of Business
20	Aminat Nuru Import & Export Enterprise	A.A	Active
21	Antypas Bros Ltd	A.A	Out of Business
22	Aroow Export	A.A	Out of Business
23	Aweke Mesfin Bekele	A.A	Out of Business
24	Ayele Tezera Livestock Fattening & Exporter	Dilla	Out of Business
25	Bakal Abdulkadir Osman Import and Export	A.A	Active
26	Berhan Abadi Khasay	A.A	Out of Business
27	Biftu Adugna Business Sco	A.A	Out of Business
28	Bonni Agro Endustry Plc	A.A	Out of Business
29	C.fun General Trading P.l.c	A.A	Out of Business
30	Cebu Trading Plc	A.A	Out of Business
31	Cherinet Kebede Mechesso	A.A	Out of Business
32	Dankalia Trading Plc	A.A	Out of Business
33	Debrezeit Dairy Farm	A.A	Out of Business
34	Degolo Commercial Plc	A.A	Out of Business
35	Df Importer And Exporter	A.A	Out of Business
36	Dr.tefera Hailu Exporter	A.A	Out of Business
37	E.ethio Credit System Plc	A.A	Out of Business
38	Elfora Agro-industries P.l.c	A.A	Active

39	Enaole General Business P.l.c	A.A	Out of Business
40	Enock Plc	A.A	Out of Business
41	Ethio-african Plc	A.A	Out of Business
42	Eurosaay Trade	A.A	Out of Business
43	F.h.y International Plc		Out of Business
44	Fetli International Trade and Industry Plc	A.A	Out of Business
45	Galilee Trading Plc	A.A	Out of Business
46	Gasco Trading Plc	A.A	Out of Business
47	Getachew Teklearegay Import and Export	A.A	Out of Business
48	Ghion International Business Group	A.A	Active
49	Girmay Kidane G/aregay	A.A	Out of Business
50	Guguftu Plc	A.A	Out of Business
51	Hailu Feye Gudeta	A.A	Out of Business
52	Hashim Nuru Jiru Plc	A.A	Out of Business
53	Hellenic Enterprise	A.A	Active
54	Horse Power General Trading P.l.c	A.A	Out of Business
55	Hussein Mohammed General Trading	A.A	Out of Business
56	I.t.a Agro Industry Plc	A.A	Out of Business
57	Imperial Trading Plc	A.A	Out of Business
58	Ionex Plc	A.A	Out of Business
59	Jacaranda Integrated Agro-industry S.c	A.A	Out of Business
60	Jordenien For Development Animal Resource Plc	A.A	Out of Business
61	Kalid Ahemed Addis	A.A	Out of Business
62	Kalied Ahmed Importer & Exporter	A.A	Out of Business
63	Kidanemehiret General Import Export & Agriculture	A.A	Out of Business
64	Lemlem Tesfau Import & Export	A.A	Out of Business
65	Luna Export Slaughter House Plc	A.A	Out of Business
66	M. Sidon Plc	A.A	Out of Business
67	Maheder Aemro Animal Feed	Sululuta	Out of Business
68	Meharena Haile G/hiwot	A.A	Active
69	Mehdi Ebrahim	A.A	Out of Business
70	Menush Plc	A.A	Out of Business
71	Mohamed Ahmed Mohamed Yasin	A.A	Out of Business
72	Mohammed Hassen Adem	A.A	Out of Business
73	Mohammed Warsame Horri	A.A	Active
74	Orkan International Trading	A.A	Out of Business
75	Pioneer Agro Industry		Active
76	Ptf Agro Industry Plc	A.A	Out of Business
77	Ram Abco Plc	A.A	Out of Business
78	Raya Horti Farms	Raya	Active
79	Remedan Yesuf Abdulahi	A.A	Out of Business
80	S.y Agro Industrey Plc	A.A	Out of Business
81	Saafi Trading & Agro Industry Plc	A.A	Out of Business
82	Shag Import Export Interprise	A.A	Out of Business
83	Shoa Tannery Plc	A.A	Out of Business
84	Shoubaro International Business Plc	A.A	Out of Business

85	Sintayehu Mulatu Ayele Livestock Exporter	A.A	Active
86	Siraj Sied Import & Export	A.A	Out of Business
87	Sirak G/amlak Workalemahu	A.A	Out of Business
88	Siram Trading Plc	A.A	Out of Business
89	Spring Time Plc.	A.A	Out of Business
90	Takem Agro Industry	A.A	Out of Business
91	Tefera Hailu W/aregay (Dr.)	A.A	Out of Business
92	Tide General Trading Plc	A.A	Out of Business
93	Timret Agro Industry		Out of Business
94	Trans World Pvt.ltd.co	A.A	Out of Business
95	Tsegaye Megale Forsida	A.A	Out of Business
96	Via Life Cattle Rasing And Meat Export	A.A	Out of Business
97	Worku Gedamu	A.A	Out of Business
98	Yamalke International Business Center Plc	A.A	Out of Business
99	Yared W/michael Hora	A.A	Out of Business
100	Ye-ethiopia Co-operative Societies General Business	A.A	Out of Business
101	Yesuf Oumer Mohammed	A.A	Out of Business
102	Yetmwork Demeke Tesfaye	A.A	Out of Business
103	Yonas Kebede Woldekidan	A.A	Out of Business
104	Your Generation Import Export Enterprise	A.A	Out of Business
105	Yumo International Agency	A.A	Out of Business
106	Yusuf Mohammed Kawo	A.A	Out of Business
107	Abdulwehab Dekebo Tola		
108	E Ethio Credit System Limited		
109	Amano Allah Livestock Marketing Coo		
110	Hasen Muhumed Husen Limited		
111	Pof International Business Plc.		
112	Ismail Hussen Abdulahi Limited		
113	Zeru Gebrelibanose Asefa Limited		
114	Sadik Yusuf Ibrahim Limited		
115	Muheyadin Omer Mohammed Limited		

Annex-4

Ethiopia's Export Destination countries

Source: The Observatory of Economic Complexity (OEC) 2011-2021

2011			
Item	Destination	Percentage	Total Trade Value In \$
Sheep and goat	UAE	57.90%	75M
	Saudi Arabia	38.60%	
	Bahrain	2.60%	
	Kuwait	0.54%	
	Jordan	0.09%	
	Qatar	0.06%	
	Oman	0.03%	
Bovine	Sudan	53.30%	39.2M
	Djibouti	14.70%	
	Egypt	2.40%	
	Yemen	11.20%	
	Lebanon	8.21%	
	Jordan	5.11%	
	UAE	4.20%	
	Oman	0.46%	
	Kuwait	0.26%	
	Saudi Arabia	0.09%	
Horses	Sudan	92.20%	15.1K
	Djibouti	7.78%	
Poultry	-	-	-
Other Animals	Sudan	79%	10.2M
	Egypt	15.50%	
	Somalia	1.28%	
	Djibouti	1.25%	
	Saudi Arabia	0.85%	
	Kuwait	0.72%	
	Yemen	0.60%	
	Bahrain	0.35%	
	UAE	0.29%	
	Spain	0.07%	
	Belgium	0.04%	
	UK	0.02%	
	USA	0.03%	

2012			
Item	Destination	Percentage	Total Trade Value In \$
Sheep and goat	UAE	59.20%	71.5M
	Saudi Arabia	34.60%	
	Bahrain	6.03%	
	Kuwait	0.06%	

	Oman	6.03%	
Bovine	Sudan	51.30%	24.8M
	Djibouti	30.90%	
	Egypt	1.89%	
	Somalia	0.06%	
	Lebanon	6.23%	
	Jordan	3.65%	
	Oman	2.61%	
	Yemen	2.02%	
	Saudi Arabia	1%	
	UAE	0.39%	
Horses	-	-	-
Poultry	Djibouti	100%	225
Other Animals	Sudan	62.40%	12.8M
	Egypt	23%	
	Djibouti	5.50%	
	Libya	2.91%	
	Saudi Arabia	4.17%	
	UAE	1.03%	
	Hongkong	0.30%	
	China	0.24%	
	Bahrain	0.17%	
	Chinese Taipei	0.02%	
	Japan	0.02%	

2013			
Item	Destination	Percentage	Total Trade Value In \$
Sheep and goat	Saudi Arabia	53.10%	12.4M
	Bahrain	28.90%	
	UAE	3.50%	
	Kuwait	1.20%	
	Yemen	0.88%	
	Lebanon	0.37%	
	Djibouti	10.40%	
	Somalia	0.35%	
	Egypt	1.04%	
	Sudan	0.20%	
Bovine	Sudan	46.50%	17.9M
	Djibouti	12,3%	
	Egypt	5.70%	
	Somalia	2.54%	
	Yemen	23.60%	
	Lebanon	5.11%	
	Saudi Arabia	2.40%	
	Oman	1.31%	
	UAE	0.52%	

Horses	Sudan	94.60%	5.01K
	South Africa	3.03%	
	Uganda	2.35%	
Poultry	Somalia	100%	4.57K
Other Animals	Egypt	47.60%	7.06M
	Sudan	36.70%	
	Djibouti	6.28%	
	Libya	1.55%	
	Saudi Arabia	6.15%	
	UAE	0.29%	
	China	0.94%	
	Japan	0.13%	
	Chinese Taipei	0.06%	
	Oman	0.01%	

2014			
Item	Destination	Percentage	Total Trade Value In \$
Sheep and goat	Saudi Arabia	58.40%	10.4M
	UAE	18.60%	
	Bahrain	7.63%	
	Kuwait	1.38%	
	Yemen	0.16%	
	Djibouti	9.86%	
	Somalia	3.63%	
	Egypt	0.42%	
Bovine	Djibouti	18.40%	18.5M
	Somalia	22.30%	
	Egypt	4.75%	
	Sudan	5.80%	
	Yemen	27.20%	
	UAE	11.40%	
	Saudi Arabia	6.91%	
	Oman	2.62%	
	Bahrain	0.58%	
Horses	Saudi Arabia	100%	3.19K
Poultry	-	-	-
Other Animals	Egypt	71.10%	9.97M
	Sudan	10.1	
	Djibouti	5.22%	
	Libya	2.18%	
	Somalia	1.26%	
	Saudi Arabia	8.94%	
	Lebanon	0.75%	
	Oman	0.19%	
	Chinese Taipei	0.14%	

	Hongkong	0.09%	
	Indonesia	0.01%	

2015			
Item	Destination	Percentage	Total Trade Value In \$
Sheep and goat	Saudi Arabia	52.40%	4.85M
	UAE	19.40%	
	Bahrain	3.23%	
	Kuwait	1.74%	
	Yemen	1.06%	
	Djibouti	19.80%	
	Somalia	2.30%	
Bovine	Djibouti	43.80%	19.4M
	Somalia	24.40%	
	Egypt	0.57%	
	Sudan	5.32%	
	Yemen	17.70%	
	Oman	4.11%	
	UAE	3.72%	
	Saudi Arabia	0.34%	
Horses	Ghana	100%	205
Poultry	UAE	62.40%	88.7K
	Somalia	37.60%	
Other Animals	Egypt	72.60%	5.87M
	Sudan	13.80%	
	Djibouti	8.33%	
	Libya	1.70%	
	Somalia	1.55%	
	Kenya	0.03%	
	Ghana	0.02%	
	Uganda	0.00%	
	UAE	1.41%	
	Saudi Arabia	0.46%	
	Oman	0.05%	
	other Asia	0.01%	

2016			
Item	Destination	Percentage	Total Trade Value In \$
Sheep and goat	Saudi Arabia	62.50%	2.18M
	UAE	8.91%	
	Kuwait	2.13%	
	Djibouti	14%	
	Somalia	12.50%	
Bovine	Djibouti	63%	13.5M
	Somalia	19.80%	

	Egypt	8.20%	
	Sudan	0.25%	
	UAE	2.39%	
	Yemen	2.38%	
	Saudi Arabia	1.57%	
	Oman	1.14%	
	Bahrain	0.68%	
	Qatar	0.69%	
Horses	-	-	-
Poultry	Somalia	100%	10.7K
Other Animals	Libya	55.20%	2.59M
	Egypt	33.70%	
	Djibouti	3.68%	
	Sudan	3.59%	
	Somalia	1.26%	
	China	2.39%	
	Hong Kong	0.07%	
	Indonesia	0.05%	

2017			
Item	Destination	Percentage	Total Trade Value In \$
Sheep and goat	Saudi Arabia	21.60%	4.08M
	Yemen	21%	
	Bahrain	10.80%	
	UAE	9.45%	
	Kuwait	2.56%	
	Qatar	2.41%	
	Djibouti	31.80%	
Bovine	Yemen	52.5%	7.77M
	UAE	10.60%	
	Saudi Arabia	3.99%	
	Bahrain	0.75%	
	Somalia	18.40%	
	Djibouti	13.80%	
Horses	-	-	-
Poultry	Rwanda	70.40%	113K
	Somalia	21.80%	
	Djibouti	7.80%	
Other Animals	Libya	76.50%	2.66M
	Egypt	6.08%	
	Djibouti	0.53%	
	Angola	0.04%	
	Yemen	8.22%	
	China	5.22%	
	Saudi Arabia	3.45%	

2018			
Item	Destination	Percentage	Total Trade Value In \$
Sheep and goat	Yemen	74%	5.32M
	Oman	6.65%	
	UAE	4.21%	
	Kuwait	3.93%	
	Bahrain	3.22%	
	Djibouti	7.98%	
Bovine	Yemen	37.90%	4.83M
	UAE	11.60%	
	Somalia	40.40%	
	Djibouti	10%	
Horses	-	-	-
Poultry	Somalia	94.30%	66.7K
	Djibouti	5.51%	
Other Animals	Yemen	61.80%	2.66M
	Jordan	9.39%	
	China	5.28%	
	Oman	2.10%	
	Malaysia	0.14%	
	Thailand	0.03%	
	Djibouti	9.36%	
	Libya	6.80%	
	Somalia	5.04%	
	Ghana	0.05%	
	Côte d'Ivoire	0.03%	
	Egypt	0.01%	

2019			
Item	Destination	Percentage	Total Trade Value In \$
Sheep and goat	Yemen	85.10%	23.5M
	Bahrain	6.96%	
	Oman	3.45%	
	UAE	1%	
	Kuwait	0.54%	
	Djibouti	2.87%	
	Somalia	0.07%	
Bovine	Yemen	53.10%	21.3M
	Bahrain	5.89%	
	UAE	0.92%	
	Oman	0.23%	
	Somalia	36.10%	
	Djibouti	3.81%	
Horses	-	-	-
Poultry	Somalia	100%	15K
Other Animals	Yemen	80.30%	14.5M

	Kuwait	4.37%
	Oman	1.30%
	China	0.26%
	Saudi Arabia	0.06%
	Egypt	5.35%
	Djibouti	3.72%
	Libya	3.29%
	Somalia	0.80%
	Sudan	0.50%
	Nigeria	0.02%
	other Africa	0.01%

2020			
Item	Destination	Percentage	Total Trade Value In \$
Sheep and goat	Yemen	79.30%	11.9M
	Kuwait	6.69%	
	Saudi Arabia	3.52%	
	UAE	0.64%	
	Thailand	0.04%	
	Djibouti	8.79%	
	Somalia	1.03%	
Bovine	Yemen	49.90%	21.1M
	Somalia	45.10%	
	Djibouti	3.52a%	
	Libya	1.50%	
Horses	Nigeria	54.20%	905K
	Yemen	26.30%	
	Sri Lanka	10.10%	
	China	7.74%	
	UAE	1.60%	
Poultry	Somalia	80.20%	121K
	Djibouti	19.60%	
	Burkina Faso	0.26%	
Other Animals	Libya	29.90%	9.36M
	Sudan	15%	
	Djibouti	3.79%	
	Somalia	3.13%	
	Yemen	39.60%	
	Saudi Arabia	8.19%	
	Indonesia	0.24%	
	Oman	0.17%	
	South Korea	0.01%	

2021			
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Item	Destination	Percentage	Total Trade Value In \$
Sheep and goat	Yemen	57.40%	10.5M
	Kuwait	22.40%	
	Oman	1.72%	
	UAE	0.09%	
	Djibouti	18.10%	
	Libya	0.26%	
	Somalia	0.06%	
Bovine	Yemen	52.60%	10.8M
	Oman	9.43%	
	Indonesia	0.66%	
	Vietnam	0.11%	
	Hongkong	0.08%	
	Somalia	28%	
	Djibouti	6.99%	
	Nigeria	2.16%	
Horses	India	17.90%	1.18M
	Hongkong	12.30%	
	Sri Lanka	6.45%	
	UAE	5.98%	
	Yemen	5.63%	
	Nigeria	33%	
	USA	13.90%	
	Canada	4.35%	
	Italy	0.39%	
Poultry	Uganda	42.10%	701K
	Rwanda	20.10%	
	Cameroon	11.80%	
	Somalia	9.62%	
	Djibouti	8.52%	
	Ghana	7.85%	
Other Animals	Libya	45.40%	10.5M
	Djibouti	9.15%	
	Yemen	36.30%	
	Oman	6.01%	
	Kuwait	1.44%	
	Indonesia	1.26%	
	UAE	0.24%	