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Committee on Sanitary and Phytosanitary Measures

OVERVIEW OF SPS NEEDS AND ASSISTANCE IN EIGHT LEAST DEVELOPED COUNTRIES

Note by the Secretariat[1]

1. At the request of the United Nations Industrial Development Organization (UNIDO), the Standards and Trade Development Facility (STDF) prepared a desk study on SPS needs and assistance in eight Least Developed Countries (LDCs), i.e. Benin, Cambodia, Lao PDR, Lesotho, Mozambique, Rwanda, Senegal and Yemen. The study was based on a review of existing needs assessments, notably the Diagnostic Trade Integration Studies prepared under the Enhanced Integrated Framework, and other publicly available information. The study is attached for the information of the SPS Committee

2. The report complemented and strengthened UNIDO's broader programme proposals aimed at addressing the supply-side constraints of the eight LDCs concerned and identified areas where future SPS technical cooperation activities with a positive trade effect might be focused. The final report was presented at the WTO/UNIDO LDC Ministerial Conference on Aid for Trade in November 2008 in Siem Reap, Cambodia.

[1] This document has been prepared under the Secretariat's own responsibility and is without prejudice to the positions of Members or to their rights or obligations under the WTO.

OVERVIEW OF SPS NEEDS AND ASSISTANCE IN EIGHT LEAST DEVELOPED COUNTRIES

Background paper
(November 2008)

Standards and Trade Development Facility

LDC Ministerial Conference
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Siem Reap, Cambodia

This report reflects the views of the STDF Secretariat and does not represent the views of its partner agencies or donors.

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List of main acronyms and abbreviations

ACP	Africa, Caribbean and Pacific Group of Nations
ADB	Asian Development Bank
AfDB	African Development bank
AGCI	African Global Competitiveness Initiative
AGOA	Africa Growth and Opportunity Act
ASEAN	Association of South East Asian Nations
BSE	Bovine Spongiform Encephalopathy
CBD	Convention on Biological Diversity
COMESA	Common Market for Eastern and Southern Africa
DFID	UK Department for International Development
DTIS	Diagnostic Trade Integration Study
EAC	East African Community
EC	European Commission
ECOWAS	Economic Community for West African States
EDF	European Development Fund
EIF	Enhanced Integrated Framework
EPA	Economic Partnership Agreement
EU	European Union
FAO	Food and Agriculture Organization of the United Nations
FMD	Foot and Mouth Disease
FVO	Food and Veterinary Office
GAP	Good Agriculture Practices
GDP	Gross Domestic Product
GHP	Good Hygiene Practices
GMO	Genetically Modified Organism
HACCP	Hazard Analysis Critical Control Point
HPAI	Highly Pathogenic Avian Influenza
IF	Integrated Framework
IPPC	International Plant Protection Convention
ISSB	International Standard Setting Body
ITC	International Trade Centre
LDC	Least Developed Country
MCC	Millennium Challenge Corporation
MRL	Maximum Residue Level
OECD	Organization for Economic Cooperation and Development
OIE	World Organization for Animal Health
PCE	Phytosanitary Capacity Evaluation
PDR	People's Democratic Republic
PPG	Project Preparation Grant
PVS	Performance of Veterinary Services
RASFF	Rapid Alert System for Food and Feed
SADC	Southern African development Community

SPS	Sanitary and Phytosanitary
STDF	Standards and Trade Development Facility
TCBDB	Trade Capacity Building Database
TBT	Technical Barriers to Trade
TPR	Trade Policy Review
UK	United Kingdom
UNCTAD	United Nations Conference on Trade and Development
UNDP	United Nations Development Programme
UNIDO	United Nations Industrial Development Organization
US	United States of America
USAID	United States Agency for International Development
US$	United States Dollar
WHO	World Health Organization
WTO	World Trade Organization

EXECUTIVE SUMMARY

1. This background study has been drafted as a contribution to activities led by the United Nations Industrial Development Organization (UNIDO) as part of the 2008-09 programme of Aid for Trade events. It provides an overview of the food safety, animal and plant health (collectively known as sanitary and phytosanitary or SPS) needs of and technical assistance provided and planned to a select group of eight Least Developed Countries (LDCs), i.e. Benin, Cambodia, Lao PDR, Lesotho, Mozambique, Rwanda, Senegal and Yemen. The paper also identifies areas where future SPS cooperation activities with a positive trade effect might be focused.

2. The study is based on a review of existing needs assessments, notably the Diagnostic Trade Integration Studies (DTIS) prepared by the Integrated Framework (IF), the STDF's own Aid for Trade research and other reports. The study has been updated following the Expert Working Group Meeting in Kigali, Rwanda, on 8-9 September 2008 (in preparation for the LDCs Ministerial Conference) and subsequent comments received from STDF partners, donors and other stakeholders involved.

3. The ability to control SPS risks and meet international standards is a key element determining participation in the trading system of LDCs surveyed, in raising their agricultural productivity and in enhancing their domestic agricultural and food safety levels. Of specific concern is the impact that SPS measures can have on their ability to gain and/or maintain market access. Examples of negative effects of SPS constraints on trade performance of the eight LDCs surveyed include:

- The presence of endemic animal diseases preventing trade in livestock, meat and meat products, and raw hides and skins;
- The presence of plant pests and diseases of quarantine importance that close markets to trade in floriculture, horticulture or forestry products;
- Shortcomings in the food safety control system that block fish exports to high value markets or result in removal of approved suppliers for failure to respect food safety standards in import countries;
- Export of low value commodities rather than higher value added products due to failure to adequately control SPS risks in the supply chain; and
- The absence of cold chain storage and pasteurization facilities and shortcomings in food safety inspection services that could limit possibilities for trade in dairy products.

4. Addressing "structural" issues related to endemic animal diseases and plant pests for which there are no easy short term solutions is a particular challenge. To address these impediments, notably in the public sector, sustained long term commitment to funding both at national and regional level will be required to ensure minimum levels of capacity with positive knock-on effects on market access. Mobilization of the international community to address Highly Pathogenic Avian Influenza (HPAI) and Foot and Mouth Disease (FMD) provides positive examples of such initiatives. The challenge may be in extending such assistance to other animal diseases as well as plant pests such as fruitfly.

5. The information that has been collected and synthesized suggests that in each of the LDCs surveyed efforts are being made to enhance SPS capacity, albeit at different levels and speeds. However, the list of outstanding SPS needs and constraints not currently covered by existing or future planned cooperation is still significant. Common SPS needs across the group include:

- concerted investments to address "structural" issues such as endemic animal diseases and plant pests;
- strengthening compliance at all levels with good agricultural and manufacturing practices and other internationally recognized systems;
- concerted reviews of institutional and legal frameworks;
- strengthening diagnostic capacity through investments in laboratory infrastructure accompanied by a strategy or plan;
- designing strategies addressing the role of the private sector in SPS management and compliance; and
- strengthening "SPS diplomacy".

6. Activities to improve the food safety, animal and plant health situation must be based on a careful identification and assessment of needs if they are to be successful and sustainable. Prioritization of needs is similarly important as there will never be sufficient resources to address all outstanding needs at once. Thus, capacity assessment and prioritization are important initial steps in the process of building and enhancing SPS capacity. Various tools are available and/or have been applied in the eight LDCs surveyed and beneficiaries and development partners are encouraged to use their results.

7. To design coherent cooperation programmes, up-to-date information on previous, ongoing and future technical assistance is also necessary. Generally, however, this information is difficult to obtain due to under-reporting and because SPS assistance is often being provided as part of broader programmes focusing on agricultural development, export promotion, private sector development, etc. This lack of information causes overlap between donor activities, lack of synergies, duplication of efforts and sub-optimal use of scarce resources dedicated to SPS.

8. LDCs face many other challenges in relation to their exports, for instance related to weak banking institutions, communication and transportation infrastructure, high freight rates and utility costs, etc. In this context, SPS management tends to be "reactive" rather than "proactive" and is often a low priority. Therefore, as a first step efforts should be focused on bringing together all the main actors involved, helping the countries to make the economic case for dedicating resources to the SPS area, in particular related to improved trade performance, and ensuring that SPS constraints are not considered in isolation from broader economic development needs.

9. SPS issues should be more prominently addressed in future updates of national DTIS - commissioned with Tier 1 funding under the Enhanced Integrated Framework. The STDF, using the expertise of its participating organizations, should be involved in this process. One approach worthy of consideration could be the development of national SPS strategies and prioritized action plans based on cost-benefit analysis and informed by the results of capacity evaluation tools where relevant.

10. The STDF and its partners could also play a role in the development of "bankable projects" for funding and implementation by the wider donor community - including multi-donor basket funds established at country level linked to DTIS implementation or through funds becoming available under the Enhanced IF. Some ideas and focal areas have been hinted in this first phase overview but would have to be explored in more detail on an individual country and/or regional basis.

I. INTRODUCTION

1. This background study has been drafted as a contribution to activities being led by the United Nations Industrial Development Organization (UNIDO) as part of the 2008-09 programme of Aid for Trade events. Presentation of the study at the LDCs Ministerial Conference in Siem Reap, Cambodia, on 19 November 2008 was preceded by a presentation to the Expert Working Group meeting in Kigali, Rwanda, on 8-9 September 2008. Comments made at this meeting and further input received from the eight Least Developed Countries (LDCs) surveyed, STDF partner agencies and donors, have been taken into account in this final paper.

2. The paper aims to provide an overview of the food safety, animal and plant health (collectively known as sanitary and phytosanitary or SPS) needs and constraints among a select group of eight LDCs (Benin, Cambodia, Lao PDR, Lesotho, Mozambique, Rwanda, Senegal and Yemen). All eight countries are part of the Integrated Framework. The paper is based on existing reviews of SPS compliance capacity. Diagnostic Trade Integration Studies (DTIS) prepared by the Integrated Framework (IF) have been examined, as well as a range of other SPS capacity evaluation tools and needs assessments. For Cambodia and Lao PDR, the STDF's own research under the Aid for Trade Initiative has been used.

3. The overview has three objectives:

- To identify the SPS needs and constraints faced by each of the eight LDCs surveyed;
- To identify ongoing and future planned SPS technical cooperation initiatives of multilateral development agencies and bilateral donors; and
- To identify areas where future cooperation activities might be focused and examine actions to mobilize further support.

4. The report is separated into four sections and annexes. Section one is the introduction. The second section discusses SPS compliance capacity as a supply side constraint for the countries concerned. The third section provides an overview of on-going and planned SPS-related assistance to the countries concerned. The fourth section includes a set of preliminary conclusions and recommendations as to where further assistance may be provided. More detailed overviews of the SPS situation in each of the eight LDCs surveyed are contained in Annex I-VIII.

5. This paper has been drafted by staff working for the Standards and Trade Development Facility (STDF). The STDF is a joint initiative of the Food and Agriculture Organization of the United Nations (FAO), World Organization for Animal Health (OIE), World Bank, World Health Organization (WHO) and the World Trade Organization (WTO). Other organizations active in SPS-related technical co-operation such as the Inter-American Institute for Co-operation on Agriculture (IICA), the International Trade Centre (ITC), the United Nations Conference on Trade and Development (UNCTAD) and UNIDO participate in the work of the STDF.

6. The STDF aims to assist developing countries enhance their capacity to analyze and implement international SPS standards and to act as a vehicle for coordination and centre of good practice among technical cooperation providers and the mobilization of funds. The STDF has a target that 40% of its funding sources should go to LDCs or other low income economies.

II. SPS COMPLIANCE CAPACITY AS A SUPPLY SIDE CONSTRAINT

A. PRO-POOR IMPACT OF AGRICULTURAL GROWTH AND SPS COMPLIANCE

7. The eight countries surveyed for this background report represent a diverse cross-section of LDCs, notably with respect to the role of agriculture in their economies. Table 1 below illustrates the varied contribution of agriculture and fisheries to GDP among the survey group. The contribution of agriculture ranged from 14.6% in Senegal to 44.3% in Lao PDR. The range is even greater when agriculture's share in total export performance is considered. Agriculture contributed 2.4% of total exports in Cambodia, but in Rwanda this figure was 47.7%.

Table 1: Agriculture, fisheries and the national economies of eight selected LDCs

	Agriculture's contribution to total GDP (2005)	Agricultural as share of total exports (by value) (2006)	Total value of fish exports (2006) in US$ thousands	Fish as share of total merchandise exports (by value) (2006)
Benin	32%	42%	836	-
Cambodia	30%	2.4%	43,577	-
Lao PDR	44.3%	-	-	-
Lesotho	17%	6.4%	-	-
Mozambique	21.7%	15.8%	96,638	4.1%
Rwanda	42.3%	47.7%	5,228	-
Senegal	14.6%	34.3%	277,555	12.1%
Yemen	-	3.9%	149,034	2.3%

Source: World Bank Development Indicators, WTO Country Profiles database and FAO Fishstat database

8. Artisanal, small scale coastal fisheries are the most important form of fish production in the eight LDCs surveyed. Fish production and export is highest in Senegal, with export revenues totalling US$277m in 2006 (12.1% of merchandise trade). In Mozambique and Yemen, some 480,000 and 400,000 people make their living from the fishing industry.

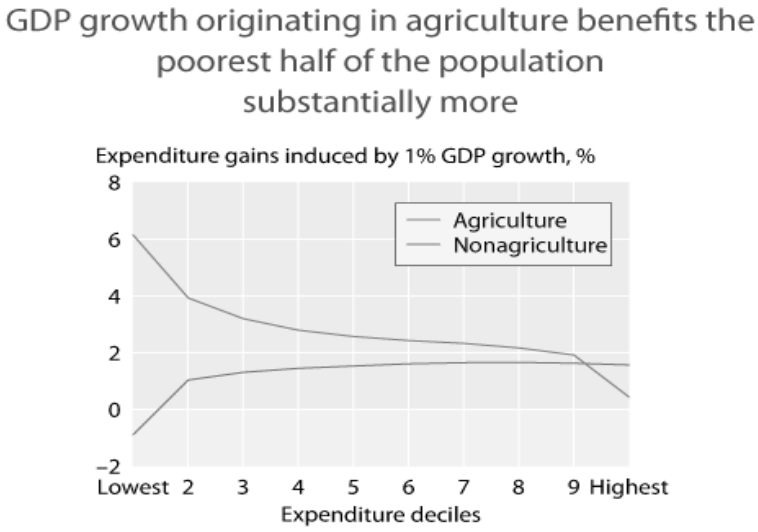
Table 2: Agriculture, employment and agricultural growth of eight selected LDCs

	Benin	Cambodia	Lao PDR	Lesotho	Mozambique	Rwanda	Senegal	Yemen
Rural population: % of total population (2006)	59%	80%	79%	81%	65%	80%	58%	72%
Average annual agricultural growth rate (2005)	5%	5.5%	1.6%	-1.7%	9.0%	5.6%	11.1%	-

Source: World Bank Development Indicators

9. Although diverse in its contribution to the domestic economy and trade, the agriculture sector remains the main source of employment across all of the eight countries surveyed.[2] Growth of the agriculture sector directly affects the employment, income and thus the incidence of poverty in the majority of the population of the eight LDCs. (The same is also true of the fisheries sector of some of the LDCs surveyed.) Research by the World Bank for the 2008 World Development Report "Agriculture for Development" underlines how agriculture can provide an engine for pro-poor growth, even in countries such as Yemen where agriculture's contribution to GDP and total exports is low in comparison with other LDCs. Furthermore, as box 1 illustrates, growth in the agricultural economy may benefit those in the lowest income brackets to a greater extent than growth in the non-agricultural economy.

Box 1: 1Agricultural growth and poverty alleviation



Source: Ligon and Sadoulet 2007.
Note: Based on data from 42 countries during the period 1981–2003. Gains are significantly different for the lower half of expenditure deciles.

Source: World Bank, World Development Report 2008

10. Rising global food prices present an opportunity to lift farmers in LDCs out of poverty. However, "supply side constraints" mean that positive price signals will not automatically result in greater output and income in LDCs and higher levels of trade in farm products. Accompanying measures are necessary to ensure that positive price trends result in economic growth and development. One area where such accompanying measures are necessary is compliance with sanitary and phytosanitary or SPS measures.

11. Increasing agricultural production levels as well as expanding, diversifying and adding value to agricultural exports are elements that feature prominently in national development plans and poverty reduction strategies. In this context, the ability to control SPS risks is a key element in determining the level of participation in the international trading system, raising agricultural productivity and enhancing domestic safety levels.

[2] In landlocked Lesotho and Rwanda, fish production and export is limited to farmed fish from lakes and ponds.

12. The benefits of controlling SPS risks can be summarized as follows:

- Better control of plant and animal pest and diseases results in lower crop and livestock losses and higher levels of production. This in turn increases the food supply for consumers and creates more income for those engaged in agricultural production and export.
- Improved control of plant and animal pests and diseases opens opportunity to access export markets. This in turn creates more income for farmers, opportunities for firms engaged in processing and higher levels of employment. Some product markets are highly sensitive to SPS issues and the inability to control SPS risk may act as an absolute barrier to entry due to risks of the spread of disease or pests or threats to human health.
- Safer food results in improved human health status. This contributes to net welfare through reduced cost for treatment of human diseases and fewer unproductive or lost work days. As with the ability to control animal and plant pests and disease, the capacity to control food safety risks can determine participation in international trade in certain product categories.

B. SPS COMPLIANCE AND PARTICIPATION IN INTERNATIONAL TRADE

13. Diversification away from a narrow agricultural export base is a major challenge for the LDCs surveyed. Table 3 below lists the top 10 export products for each LDC by value in 2004. From the table, it is clear that the highest value export product category is larger in value than the other 9 export products combined. This is the case for cotton lint from Benin, green coffee from Lao PDR and Rwanda, wool from Lesotho and fishery products from Mozambique, Senegal and Yemen.

14. Various supply side constraints affect the possibility of export diversification. Within certain product categories, SPS restrictions can prove an absolute barrier to entry. Examples include:

- Restrictions on trade in livestock, meat and meat products due to the presence of animal diseases of importance to international trade (such as Foot and Mouth Disease, Avian Influenza, etc). The presence of OIE-notifiable diseases in many of the countries surveyed limits trading possibilities to the (often unregulated) sale of live animals and trade in raw hides and skins.

  Trade in live cattle and raw hides and skins appears in the top 10 exports of Cambodia, Lao PDR, Lesotho and Rwanda. However, issues related to OIE-notifiable animal diseases prevent export of meat or meat products and severely limit the possibilities for trade even in the commodities listed. Saudi Arabia has had an import ban on animal products from Yemen since 2000 due to the presence of various animal diseases.

- The presence of plant pests and diseases of quarantine importance may close markets to trade in floriculture, horticulture or forestry products. To access certain markets, an up-to-date pest list is required, together with plant quarantine authorities able to survey and to control plant pests to the satisfaction of the importing country.

  For certain markets, the presence of plant pests may represent an absolute barrier to trade. In Cambodia, the presence of some 20 quarantine rice pests prompted China to impose additional requirements for rice imported from Cambodia. Chinese imports of Cambodian rice have now stopped. Mozambique's export of coconuts to South Africa has also stopped due to import restrictions because of the prevalence of Lethal Yellowing Disease in Mozambique.

Table 3: Top 10 agriculture and fishery product exports by value of eight selected LDCs (2004)

	Benin		Cambodia		Lao PDR		Lesotho		Mozambique		Rwanda		Senegal		Yemen	
Rank	**Product**	**Value ('000s US$)**	**Product**	**Value ('000s US$)**	**Product**	**Value ('000s US$)**	**Product**	**Value ('000s US$)**	**Product**	**Value ('000s US$)**	**Product**	**Value ('000s US$)**	**Product**	**Value ('000s US$)**	**Product**	**Value ('000s US$)**
1.	Cotton Lint	154,081	Fishery products	39,578	Coffee, Green	12,995	Wool, Greasy	3,049	Fishery products	100,405	Coffee, Green	28,458	Fishery products	316,040	Fishery products	95,259
2.	Cashew Nuts	31,336	Rubber Natural Dry	36,933	Maize	2,223	Food Wastes	1,100	Tobacco Leaves	32,022	Tea	1,950	Cotton Lint	29,002	Cigarettes	11,579
3.	Cigar-ettes	7,079	Maize	3,713	Buffaloes	2,000	Hair Fine Animal	656	Cashew Nuts	28,473	Skin Dry-Salted Sheep	1,573	Oil of Ground-nuts	25,967	Coffee, Green	8,941
4.	Oil of Palm	6,500	Soybean	3,442	Cattle	1,524	Vege-tables Prepared ness	520	Cotton Lint	22,753	Skins nes Calves	861	Food Prepared-ness	25,705	Bananas	8,297
5	Cake of Cotton Seed	5,600	Tobacco Leaves	2,652	Sesame Seed	584	Flour of Maize	206	Sugar (Centri-fugal, Raw)	18,152	Maize	292	Rice, Broken	22,130	Onions, Dry	6,155
6	Karite Nuts (Shea)	4,732	Milled Paddy Rice	1,889	Fruit Prepared -ness	306	Flour of Wheat	104	Sesame Seed	9,005	Dry Cow Milk	130	Malt Extracts	11,406	Cotton Carded Combed	5,034
7	Oil of Palm Kernels	3,500	Cassava Starch	1,502	Hides Dry-Salted Cattle	146	Hides Dry-Salted Cattle	100	Maize	2,113	Hides Wet-Salted Cattle	129	Cigarettes	6,166	Mangoes	4,166
8	Cotton seed	3,457	Cattle	1,149	Beer of Barley	108	Cattle	7	Cashew Nuts Shelled	1,974	Bananas	78	Beans, Green	5,285	Pastry	4,164
9	Oilseeds	2,699	Cigar-ettes	1,143	Ground-nuts in Shell	47	Horses	2	Sugar Refined	1,300	Cigar-ettes	64	Tobacco Products	5,163	Bran of Wheat	4,056
10	Pine-apples	2,207	Oil of Palm	797	Pimento, Allspice	42			Cotton seed	937	Tobacco Products	62	Tomatoes	4,587	Milk, Evaporated	3,968

Source: FAO STAT and FAO Fish STAT

- Shortcomings in the official control systems for food safety may result in fish exporting countries not being eligible to export to high value markets or being removed from lists of approved suppliers for failure to respect food safety standards in import countries.

  Cambodia for instance is not included in the list of countries approved for export to the EU and its fish and fishery products have not been accepted since 1997. A number of conditions must be met to obtain approval, including giving the Department of Fisheries the legal basis to function as the competent authority, ensuring compliance with standards related to antibiotic residues, hygiene, etc., and health certification in line with Codex and OIE standards.[3]

  The Government of Benin imposed a voluntary moratorium on shrimp exports from 2003 until February 2005 due to concerns regarding perceived failure to comply with European sanitary requirements (main export market). This situation reflected the weakness of the quality control system at institutional level. Failure to implement quality assurance schemes (mainly HACCP) and the absence of accredited laboratories for microbiological and biochemical analyses were also identified as major obstacles to shrimp exports.

- The absence of cold chain storage and pasteurization facilities as well as shortcomings in food safety inspection services limits possibilities for trade in dairy products. Trade possibilities are often limited to local trade in fresh products with often high food safety risks or to trade in milk powders.

- SPS issues can also limit trade possibilities to low value commodities. For instance, cake of groundnuts is used as an animal feed and is Senegal's 11th largest export by value. An effective treatment for aflatoxin contamination of groundnuts involving steam treatment is used, but no such treatment exists for groundnuts for human consumption. Variations in quality and problems in meeting aflatoxin tolerance level for Senegal mean that the investment has been made in protecting groundnut cake exports, but not in exports of groundnuts as a higher value item. Various other problems in the supply chain have exacerbated this situation and reinforced the concentration on the lower value commodity.

15. In general terms, SPS constraints tend to be either:

- "structural" in nature (e.g. as a result of animal or plant pests or diseases) and so prevent the marketing of a particular product or entry into a specific market; or

- "temporal" in nature (e.g. as a result of non-respect of a particular import regulation or process) and become more visible as export growth and diversification occur and barriers are actually encountered.

16. Table 4 provides an illustration of the import requirements for a number of selected products into higher value markets. The majority of agricultural exports from the LDCs surveyed is directed towards developed countries, notably the EU and the US (e.g. 90% of Benin's pineapple exports go to France), which requires exporters to comply with stringent food safety, animal and plant health standards. Over and above official SPS requirements, dominant buyers (i.e. large retailers, supermarkets chains, etc.) increasingly require exporters to comply with an array of private standard schemes encompassing higher levels of food safety and quality as well as environmental and social requirements.

[3] Additionally, since 2004 the EU has banned the import of tuna and swordfish from Cambodia and a number of other countries as a result of concerns over failure to respect conservation rules.

Table 4: Import requirements affecting selected products entering higher value markets

Product Group	Food Safety	Animal/Plant Health	Quality/ Technical	Environmental/Social
Fresh and Processed Fruits and Vegetables	Pesticide residue limits Microbiological standards Traceability and hygiene requirements Controls on additives	Plant material quarantine Pest risk analysis Fumigation requirements Phytosanitary certification	Quality grades Labelling requirements Packaging standards	Pesticide restrictions Regulations on water/soil contamination Codes for organic practices and certification Monitoring child labour Occupational health standards
Fish and Fishery Products	Microbiological standards Veterinary drug residue limits Pesticide residue limits Hygiene requirements (HACCP)	Bans/restrictions on use of veterinary drugs (antibiotics) in aquaculture Animal health certificates	Quality grades Labelling requirements Packaging standards	Fish catch restrictions Protection of specific species Environmental management certification
Live animals and animal products	Veterinary drug residue limits Microbiological standards Hygiene requirements (HACCP)	Disease-free areas Disease surveillance Restrictions on use of veterinary drugs Animal traceability	Quality grades Labelling requirements Packaging standards	Codes for organic practices and certification Regulations on animal waste effluent Animal welfare monitoring
Hides and skins	-	Animal health status for raw hides and skins	Quality attributes	Water effluent regulations Chemical use regulations
Spices and nuts	Mycotoxin limits Pesticide residue limits Microbiological standards	Fumigation requirements and restrictions	Quality grades Labelling requirements Packaging standards	Codes for organic practices and certification
Cereals, oilseeds and animal feed	Mycotoxin limits Pesticide residue limits Microbiological standards Traceability and hygiene requirements in feed production	Quarantine requirements Fumigation requirements and restrictions	Quality grades GMO labelling Restrictions on animal feed ingredients Product content and nutritional labelling	Codes for organic practices and certification Biosafety regulations (GMOs)

Product Group	Food Safety	Animal/Plant Health	Quality/ Technical	Environmental/Social
Cut flowers	-	Plant material quarantine Phytosanitary certification Pest risk analysis Fumigation requirements	Quality attributes Packaging standards	Restrictions on use of pesticides Regulations on water/soil contamination Monitoring child labour Occupational health standards
Coffee and tea	Microbiological standards (ochratoxins) Pesticide residue limits	Fumigation requirements	Quality attributes Packaging standards	Codes for organic practices and certification Monitoring child labour
Cotton	Pesticide residue limits (cotton seed oil)	GMO variety approval	Quality attributes	Codes for organic practices and certification Restrictions on use of pesticides
Honey	Pesticides and antibiotic residue limits Microbiological standards Hygiene requirements	Pesticide and antibiotic surveillance Antibiotic use restrictions Export certificates	Quality grades Labelling requirements Packaging standards HMF level	Codes for organic practices and certification Antibiotic use restrictions

Source: World Bank

17. It should be noted, however, that table 4 does not illustrate the full diversity of SPS import requirements in operation. Regional integration and cooperation is increasing, both in Africa (COMESA, ECOWAS, EAC, SADC) and Asia (ASEAN), and all the countries surveyed engage to various degrees of extent in regional trade.

18. South Africa, for instance, is the major trading partner for agricultural commodities for both Lesotho and Mozambique, while Saudi Arabia imports much of Yemen's products. China and Thailand are a big export market for Lao PDR and Cambodia. Likewise, with over 130 million consumers, Nigeria offers good export opportunities for ECOWAS member states such as Benin and Senegal. Much of this regional trade, however, is still informal and unrecorded. Additionally, international trade in agricultural products between the African countries and non-LDC developing countries (e.g. China, India, Thailand, etc.) is also growing in importance. Information on standards compliance is limited but suggests that enforcement of SPS standards is stronger for "SPS sensitive" products such as fish, meat, dairy and poultry products.

C. OVERVIEW OF COMMON SPS NEEDS AND CONSTRAINTS

19. The overviews of the SPS needs and constraints in each of the eight LDCs surveyed in Annexes I-VIII are based on a review of existing needs assessments and other reports, rather than original research in-country, and therefore only present introductory surveys or "snapshots" reflecting the current state of publicly available information. An overview of the various SPS needs assessments applied in each of the LDCs surveyed is provided in Table 5 below, while additional background information on these capacity evaluation tools is provided in Annex IX. Where shared by national authorities, STDF partners and/or otherwise available in the public domain, the results of these tools have been taken into account for the purpose of this paper.

Table 5: Overview of SPS needs assessments in LDCs surveyed (August 2008)

Tool	Benin	Cambodia	Lao PDR	Lesotho	Mozambique	Rwanda	Senegal	Yemen
Animal health PVS (OIE)	x	x	x	x	x		x	x
Plant health PCE (IPPC)	x	x	x		x	x	x	
Food safety (FAO)	x	x	x					
Biosecurity (FAO)					x	x		
SPS action plan (WB)			x					
DTIS (IF)	x	x	x	x	x	x	x	x
UNIDO tools		x	x					
Biosafety (CBD)				x				x
Trade Policy Review (WTO)	x			x	x	x	x	

Source: WTO Secretariat

20. In addition, the paper draws on other reports and assessments conducted by multilateral agencies and development partners, for instance under existing technical cooperation programmes. An overview of references is included in ANNEX X..

21. The SPS situation and the needs and constraints are different in each of the LDCs surveyed, depending on existing trade capacity, products and product groups, the direction of trade, etc. The following observations can be made in respect of common needs and constraints in specific areas:

Awareness and recognition

22. Awareness and recognition of the importance of SPS management and compliance in terms of market access, raising productivity and enhancing domestic safety levels is limited at all levels, ranging from policy- and other high level decision-makers to primary producers, food processors, consumers etc. Greater attention should be given by development agencies and donors to increasing the number of awareness raising campaigns and basic training activities on good practices and internationally recognized systems such as Hazard Analysis Critical Control Point (HACCP) in order to enhance competitiveness and further integrate small-scale farmers and food processing establishments into national, regional and global supply chains.

23. Awareness raising efforts would also help in raising production levels (for instance through reduction of pre- and post harvest losses) and achieving broader goals of food security, and ultimately have positive implications on the sustainability of subsequent more specific and technical capacity building efforts. Targeted awareness and training activities can be part of specific SPS interventions but also of more general programmes, for instance related to private sector or business development.

Food control system

24. The absence of a coherent and modern food control system is of major concern in all countries. Tasks and responsibilities are usually fragmented among various government institutions and other agencies, often without mechanisms for coordination between them. Legislation tends to be outdated, incomplete and weakly enforced. Inspection, monitoring and surveillance of both domestic production and food imports tends to be limited and records of food borne illnesses are absent in most cases. Food laboratories are generally inadequately equipped and staff insufficiently skilled. This weak capacity negatively affects public health and hinders opportunities to promote economic development through trade in agricultural products, including fresh produce, meat, dairy and poultry products. In short, there is an evident need in all countries to strengthen the official food control system. Application of the recently developed FAO tool may provide useful guidance in this regard.

25. The picture seems better with regard to the export of fish and fishery products. Under pressure of major trading partners, notably the EU, and with assistance from various other donors, progress has been made in upgrading the official control systems in Mozambique, Senegal and Yemen. Still, in these countries various deficiencies and shortcomings were recently detected by the EC's Food and Veterinary Office (FVO) along various stages of the fish production chain. Addressing these deficiencies and shortcomings is of primary concern in order to maintain access to international markets. At the same time, interventions should seek to address concerns over the safety and quality of locally consumed fish and fishery products. Opportunities in other areas such as aquaculture need to be carefully considered, given the stringent quality and health requirements attached, potential adverse impacts on the environment, etc.

Tourism

26. An upper end domestic market is emerging, creating new opportunities for the supply of higher quality local fresh produce, fish, meat, dairy and poultry products to supermarkets, hotels, restaurants and the like. Tourism in particular is becoming a major foreign exchange earner and provides a "domestic export market". Table 6 below provides an overview of the international tourist arrivals in each of the LDCs concerned. Generally, tourists spend a considerable amount of their budget on food. Strengthening linkages with the growing tourism industry should be further explored as a starting point to increase domestic food safety levels. Projects could aim for instance at assisting local suppliers in meeting the standards required by hotels and restaurants, improving hygienic conditions in the preparation of food, monitoring the number of food borne illnesses among tourists, improving food inspection, etc.

Table 6: Overview of international tourist arrivals (1000)

Country	1990	1995	2000	2003	2004	2005
Benin	110	138	96	175	174	-
Cambodia	17	220	466	787	701	1,055
Lao PDR	14	60	191	215	196	236
Lesotho	242	209	302	329	304	304
Mozambique	-	-	-	441	470	-
Rwanda	-	-	-	-	104	-
Senegal	246	280	389	495	667	769
Yemen	52	61	73	155	274	336

Source: World Tourism Organization

Animal health

27. All countries suffer from the presence of various endemic OIE notifiable diseases, which limits the scope to increase farmers' incomes and prohibits access to regional and international markets for live animals, animal products and also by-products such as raw hides and skins. Repeated outbreaks of Highly Pathogenic Avian Influenza (HPAI) have caused import bans on Cambodia's animal products from various countries. Import restrictions are not just limited to one disease. Thailand has imposed import restrictions on cattle from Cambodia in 2005 due to outbreaks of Brucellosis.

28. The capacity to address animal health concerns, and so gain and/or maintain market access, tends to be weak in all countries, notably in the public sector. Specific needs relate to technical assistance in revising legislation, strengthening inspection, monitoring and surveillance mechanisms, establishing disease free zones, enhancing diagnostic capacity to perform risk assessment, etc. It is recommended that the results of the OIE PVS tool, applied in seven out of the eight countries surveyed, be used to design actions to strengthen the performance of veterinary services.

Plant health

29. Infections of large areas with plant pests and diseases can have serious consequences for production and may constitute absolute barriers to trade, notably in fruit and vegetables and cut flowers. Fruit flies for instance threaten large production areas in Benin, Mozambique and Senegal while Lethal Yellowing Disease is known to have serious impacts on the production and export of coconut products. Outbreaks of Coffee Wilt Disease in countries bordering Rwanda provide another example and fungal problems such as anthracnose remain a serious constraint mainly in fruit packing stations in Senegal.

30. In all countries, however, the capacity to address plant health concerns tend to be weak, notably in the public sector. Thus, plant health services in all countries need to be strengthened and the IPPC PVS tool, applied in six out of eight countries, may provide useful guidance in this regard. Specific needs relate to technical assistance in revising legislation, strengthening inspection and monitoring and surveillance mechanisms, establishing pest free areas, creating pest lists, strengthening capabilities to perform pest risk analysis, etc.

Legal framework

31. In all countries surveyed, the legal framework for food safety, animal and/or plant health tends to be outdated and incomplete, in some instances even dating back to colonial times. This relates not only to primary legislation but also to a vast array of subsidiary regulations. Fisheries exports seem to be the main exception, with legislation being more or less in accordance with the EU regulations.

32. All the countries surveyed would benefit from a thorough and concerted review and update of their legal framework, in accordance with international requirements. This would include reviewing laws and regulations specifically related to food safety, animal and plant health but also rules on related matters, for instance pesticides, veterinary drugs and animal feed. Specific attention should be paid in the legal review to issues of implementation and enforcement. Given the limited amount of resources available at national levels, exploring a biosecurity approach – as in Mozambique and Rwanda - is recommended.

Laboratory infrastructure

33. Laboratories have a key role to play in the prevention, control and mitigation of SPS risks. In all countries surveyed, however, infrastructure and hence diagnostic capacity seems inadequate in most instances. Further investment is needed in all three SPS areas, both in physical infrastructure as in raising knowledge and skills of staff. Prior to embarking on such investments, however, it is recommended that beneficiaries and donors agree on a clear and sustainable strategy.

34. Experience in other countries shows that investments in laboratory infrastructure are often overlapping and/or incomplete, for instance due to traditional institutional interests or rivalry between government agencies, thus negatively affecting production and resulting in waste of valuable resources. Strategic laboratory plans would for instance identify the range of services that should be offered within the country, define and delineate responsibilities among government and private sector laboratories (if any), and address issues related to certification and/or accreditation. Regional approaches complementing national capacities should also be explored.

International standard-setting

35. Table 7 below provides an overview of membership of the LDCs surveyed in the WTO and the International Standard Setting Bodies (ISSBs) referenced under the SPS Agreement, i.e. the Codex Alimentarius Commission (Codex), World Organization for Animal Health (OIE) and International Plant Protection Convention (IPPC).

36. While all countries are members of Codex and the OIE, only Cambodia, Lao PDR, Mozambique, Senegal and Yemen are currently parties to the IPPC. Rwanda is reportedly in the process of becoming a party to the IPPC shortly. There is a general need in all countries to develop long-term capacity to participate in and contribute to the work of the ISSBs to help countries complying with new standards but also to ensure improved international harmonization with their own domestic standards.

Table 7: Membership in WTO and ISSBs (August 2008)

Country	WTO	OIE	IPPC	Codex
Benin	x	x		x
Cambodia	x	x	x	x
Lao PDR		x	x	x
Lesotho	x	x		x
Mozambique	x	x	x	x
Rwanda	x	x		x
Senegal	x	x	x	x
Yemen		x	x	x

Source WTO Secretariat

37. All countries are WTO members, except for Lao PDR and Yemen, who are currently in the accession process. Both countries are receiving assistance in preparing them for membership through training and workshops organized by WTO and other donors. Participation of the six existing WTO members in meetings of the SPS Committee tends to be limited. In addition, Cambodia, Lesotho and Rwanda have not yet nominated national notification authorities and enquiry points in accordance with the transparency provisions of the Agreement. All countries should be informed about the SPS measures proposed by their trading partners and, if these measures may have a negative impact on their trade flows, have the capacity to raise concerns in a timely manner. Donors should consider

providing technical assistance to help the countries in setting up functioning notification authorities and enquiry points.

Private sector

38. Private sector development is an important element in many national development plans and/or poverty reduction strategies. Donors are increasingly funding initiatives focused on private sector or business development. Small and medium scale enterprises involved in food handling and processing are emerging but - as mentioned above - awareness and recognition of the importance of SPS standards and other requirements seems limited and needs further strengthening.

39. Additionally, the role of the private sector in SPS management should be addressed in relation to other broader functions, for instance in standard-setting, monitoring SPS measures proposed by trading partners, and in the provision of laboratory services, thereby reducing the burden on the public sector.

Coordination of efforts

40. In all countries, numerous government organizations and other agencies play a role in SPS management. Generally, systems are characterized by fragmentation of efforts and duplication of responsibilities at various levels. Due to vested interests and "turf-defending" behaviour, the difficulty in ironing out these overlapping mandates should not be underestimated. One step towards resolving this situation could be the creation of national level coordination mechanisms involving a wide range of stakeholders including *inter alia* relevant government institutions, private sector organizations, consumer associations, as well as academia. The scope of such mechanisms could be limited to SPS or encompass issues of broader standards management including technical (TBT) and/or other requirements.

41. Mechanisms could also take a wider "biosecurity" approach and include issues related to the environment and biosafety - as currently being considered in Rwanda. Better coordination of efforts would help in tackling some of the common needs outlined above, such as raising the profile and awareness of SPS issues, facilitating public-private sector dialogue, removing overlapping mandates, making more efficient use of scarce resources, and further integrating SPS issues into broader planning/budgetary frameworks and supply chains.

42. In addition to national coordination, the scope for coordination at regional level should also be explored, notably in the animal/plant health area. Pests and diseases do not respect geographical borders, while informal and unrecorded trade in live animals, animal products and/or fresh produce between countries still seems to be significant. Future efforts may be directed towards developing capacity for regional pest and disease management. One example is Lesotho, surrounded by its major trading partner South Africa. Other potential areas for collaboration include sharing of resources, for instance through setting up joint research and training centres, etc.

III. SPS ASSISTANCE TO LDCS SURVEYED

A. TRENDS AND DRIVERS OF ASSISTANCE

43. In line with the objectives of the Paris Declaration on Aid Effectiveness, overlap and duplication of efforts should be avoided in the provision of SPS-related technical cooperation, both on the side of beneficiaries and donors. A second aim of this paper, therefore, is to look at the supply side and identify ongoing and/or planned technical cooperation provided by development agencies and donors to address outstanding SPS needs and constraints in each of the LDCs surveyed.

44. The starting point to obtain information on SPS-related cooperation is the WTO/OECD Trade Capacity Building Database (TCBDB). However, the number of SPS-related entries in the TCBDB for each of the LDCs surveyed is severely limited. Additional information on previous, existing and future planned SPS-related activities was obtained from various other sources, i.e. STDF partners, observers, donors and beneficiary representatives, as well as through recent STDF Aid for Trade workshops organized in the East African Community (EAC) and for Cambodia, Lao PDR and Viet Nam (see below).

45. From the country overviews, several drivers of SPS-related technical cooperation can be identified. In Asia, for instance, regional integration and cooperation efforts through the Association of Southeast Asian Nations (ASEAN) and the Ayeyawaddy-Chao Phraya-Mekong Economic Cooperation Strategy are relevant. ASEAN has developed a "Vision 2020" which includes a strategic action plan for cooperation in food, agriculture and forestry. There is collaboration between the Asian Development Bank (ADB) and the World Bank in exploring the possibility of designing concessional investment programmes for Cambodia and Lao PDR. The Cross Border Transport Agreement between all GMS countries covers all aspects of cross-border transport facilitation. Of particular interest in the area of SPS controls are provisions for single-stop/single-window customs inspection and transit traffic regimes which include exemptions from physical customs inspection as well as phytosanitary and veterinary inspection. To achieve this situation, various capacity building activities are provided to the signatories.

46. Similarly, in Eastern and Southern Africa SPS-related capacity building programmes are being pursued within the Common Market for Eastern and Southern (COMESA), such as the Agricultural Marketing Promotion and Regional Integration Project supported by the African Development Bank (AfDB). Similarly, within the Southern African Development Community (SADC) various SPS-related programmes are being implemented with funding from the EC and other donors. Noteworthy is also the Regional Standards Programme funded by the UK Department for International Development (DFID) and implemented by ComMark Trust.

47. Regional integration in West Africa has been driving attention at the political level. Several initiatives have been implemented mainly at the UEMOA/WAEMU level to implement common strategies to reduce poverty and to foster economic growth. At the trade and agriculture level, UEMOA/WAEMU has started to harmonize its regional SPS systems primarily through preparation of the legislative and regulatory framework and treaties within the eight UEMOA countries, training of government officials to understand and implement the treaties, and enforcement of inspection and laboratory testing.

48. This strategy was supported by two major donor funded programmes. In October 2000, UEMOA and the Food and Agriculture Organization (FAO) signed an agreement for a major food security program Programme Spécial Régional d'appui à la Sécurité Alimentaire (PSRSA) for countries of the Sahel in West Africa. This programme was a centrepiece of UEMOA/WAEMU SPS harmonization efforts. UEMOA Quality programme implemented by UNIDO contributed greatly to this endeavour by upgrading laboratory equipments. The UEMOA Quality Phase II will assist UEMOA in achieving laboratory accreditation objectives. Finally, various EC-funded SPS-related initiatives are being pursued at a wider ACP-level, including compliance with maximum residue levels for pesticides, strengthening fishery products, as well as food and feed safety control systems.

49. Trade policy initiatives such as Everything But Arms and the Africa Growth and Opportunity Act (AGOA) are relevant in terms of providing duty free and quota market access. It is becoming clear from various EC Country Strategy Papers and National Indicative Programmes that substantial assistance will also become available through the 10th European Development Fund (EDF) and the Economic Partnership Agreements (EPAs), although no specific allocations for SPS issues have yet been made available within general funding lines. The US provides support to key SPS policy

objectives under the African Global Competitiveness Initiative (AGCI) through USAID's regional trade hubs. In Mozambique, support by the Millennium Challenge Corporation (MCC) also includes SPS capacity building.

50. In many instances, national and/or regional solutions to SPS issues are sought only after an outbreak of a pest or disease or other "SPS crisis" has occurred. In Cambodia and Lao PDR for instance, the continued fight against Highly Pathogenic Avian Influenza currently accounts for a large proportion of total SPS-related cooperation. Other examples include outbreaks of *inter alia* Bovine Spongiform Encephalopathy (BSE, also known as mad cow disease) and Foot and Mouth Disease (FMD). In some countries, fruit fly is increasingly recognized as a serious threat to the industry. In West Africa, discussions are ongoing between donors to better coordinate their responses in the control of fruit fly, led by STDF.

51. A distinction can be made between funding specific to the SPS area and cooperation which is more general in nature. In some countries, a clear trend towards general budget support and/or the use of multi-donor thematic basket funds, for instance related to agriculture, private sector or trade development, can be noted. Disaggregating support offered through such financing mechanisms to identify its SPS elements is problematic. However, increased access to such funds would be one way to obtain "additionality" in resources for SPS-related technical cooperation. For this access to occur, the profile of SPS should be enhanced at the level of policy- and other high level decision-makers, and SPS issues should be further integrated into planning and budgetary frameworks of beneficiaries and donors and into supply chains.

52. In each of the LDCs surveyed, the IF is an important source of funding. Small projects with SPS components are being - or have been - implemented with IF (Window II) funding in Lesotho, Mozambique, Senegal and Yemen. In Cambodia and Lao PDR, discussions are ongoing about the creation of a multi-donor basket fund to address constraints identified in the DTIS. Increased resources will also become available soon under the Enhanced Integrated Framework (EIF) through so-called Tier 1 and Tier 2 funding. Tier 1 funds will be available *inter alia* to finance updates of existing DTIS.[4]

53. Raising awareness and integrating SPS issues into updated DTIS will be crucial to increase capacity building efforts in this area. In several DTIS, notably the ones prepared in the early days of the IF, SPS needs and constraints feature only marginally. Tier 2 funds will be available to finance selected priority actions identified in the (updated) DTIS.

54. To various levels of extent, all countries receive continued support in the SPS area from multilateral organizations such as FAO, World Bank, UNIDO, ITC, UNDP, UNCTAD and WTO. Some of the support these organizations provide goes into general and/or sector budget support (e.g. World Bank). Organizations such as FAO, UNIDO, ITC, UNDP and UNCTAD typically provide project support. WTO provides assistance through its regular training programme, including national and regional seminars about the SPS Agreement and its implementation. Finally, there are indications that countries also receive support from private sector foundations and/or NGOs but only limited information is available in this area.

B. STDF PROGRAMME

55. The STDF is both a coordinating and a financing mechanism. As a coordinating mechanism, the STDF acts as a forum for information sharing and mobilization of funds for SPS-related technical co-operation. As part of this function, the STDF recently conducted a series of pilot Aid for Trade

[4] At present, only few IF countries have updated their DTIS with external funding on an ad-hoc basis.

events in the East African Community (EAC) and a sub-group of ASEAN countries in May 2008.[5] The events helped in focusing attention on SPS needs in the two regions surveyed, examining the provision of cooperation to address these needs, and in seeking to mobilize additional resources to address outstanding needs not covered by current or planned cooperation.

56. The STDF Aid for Trade work was carried out in two phases. In the first phase, research was undertaken to identify existing capacity evaluations and to establish an inventory of SPS-related technical assistance. The results of this preliminary research were presented as part of the Regional Reviews of Aid for Trade in September 2007. In the second phase, a "gap analysis" was undertaken to identify where existing and planned technical assistance did not meet SPS needs. Results of these gap analyses were presented during the workshops in May 2008.

57. One key output from the workshops was a single overview of outstanding SPS needs (both at national and regional level) to provide a sound basis from which both beneficiaries and development partners can seek to design programmes of assistance. During in-country research, it became evident that knowledge about prior SPS capacity evaluations was generally limited to those involved in the specific focus area (e.g. food safety, animal or plant health). Additionally, most evaluations typically focused on SPS infrastructure and competencies in the public sector. Private sector input into previous evaluations was patchy and there were few instances of comprehensive national policy frameworks for strengthening SPS capacity.

58. One theme which emerged strongly from the regional workshops was a discordance between developing country expectations and the realities of donor project and programme funding cycles. On the beneficiary side, the view was that needs should be quickly matched with assistance. On the development partners' side, the message was that needs would have to be considered as part of national programmes of assistance and within established funding cycles. Furthermore, it was clearly stated that the fact that a need had been expressed was not enough to ensure that funding was provided.

59. In general, needs have to be developed into "bankable projects" and given priority by the beneficiary government. Without that prioritization (i.e. ownership by the beneficiary), no assistance will be provided. A further factor is that needs expressed have to fit with individual donor's funding priorities. Overall, the message from the three regions was that future resources will become available to address outstanding needs, but that donors and beneficiaries need to prioritize SPS if it is to receive attention. Further, mobilizing funds to address outstanding SPS-related technical assistance needs will depend on:

- the extent to which development partners use the results of the STDF work and other SPS capacity evaluations to influence their development programming; and
- the extent to which SPS needs can be addressed as part of broader programmes, e.g., trade facilitation, agricultural production, agri-business development and general private sector assistance, environmental protection and protection of public health.

[5] In Africa, countries surveyed included Kenya, Tanzania and Uganda. As Burundi and Rwanda became full EAC Members only as of 1 July 2007, they were not included in the research. In Asia, countries surveyed included Cambodia, Lao PDR and Viet Nam

Table 8: STDF projects and PPGs in LDCs surveyed (October 2008)

Project/ PPG	Beneficiary country(ies)	Description	Implementing/ oversight agency	STDF contribution (US$)	Timetable
STDF 246	Cambodia	Development of an SPS action plan (following Aid for Trade workshop in May 2008)	STDF	252,000	To Be Confirmed (TBC)
STDF 230 (PPG)	Mozambique	Implementation of a national surveillance programme for Lethal Yellowing Disease (LYD) in palms, including establishment and/or maintenance of pest free areas.	TBC	20,000	TBC
STDF 127	Benin	Improving information flows on SPS requirements, particularly in the private sector. Project developed from a PPG.	FAO, Benin Chamber of Commerce	363,858	TBC
STDF 48	Benin	Application of good agricultural practices to overcome problems of mycotoxin contamination in shea and cashew nut production.	FAO/ Centre de Recherches Agricoles d'Agonkamey	470,575	Apr-08 / Mar-10
STDF 134	Benin, Mauritania, Senegal, Sierra Leone and The Gambia	Improving knowledge and awareness of SPS issues in the fisheries sector in five selected West African countries with a view to improve fish trade performance.	FAO	469,000	Mar-08 / Feb-10
STDF 69	Yemen	Assistance to Yemeni Seafood Exporters Association (YSEA) to improve quality and safety of Yemeni seafood products. Project developed from a PPG and based on DTIS.	ITC/YSEA	462,804	Sep-07 / Aug-09
STDF 145	Rwanda	Rwanda Horticulture Export Standards Initiative (RHESI), increasing Rwanda's exports of fruit, vegetables and flowers in international and regional markets. Project developed from a PPG and based on DTIS.	World Bank/Michigan State University	526,674	May-07 / Apr-09
STDF 66 (PPG)	Mozambique	Improving SPS compliance for horticulture exporters in regional and international markets. Based on DTIS. Resultant project funded by DFID and implemented by ComMark.	STDF/UNCTAD	20,000	-

Source: STDF Secretariat

60. In mobilizing future assistance for outstanding SPS-related needs, the main challenge arises from a series of underlying "structural" issues. These "structural" issues relate to endemic animal diseases and plant pests for which there are no easy short term solutions. To address these impediments, sustained long term commitment to funding is required. Mobilization of the

international community to address Highly Pathogenic Avian Influenza and Foot and Mouth Disease (FMD) provides positive examples of such initiatives.

61. Follow-up activities by the STDF in both regions will focus on bringing the various actors together and helping all parties to appreciate the economic case for dedicating resources to this area. One follow-up activity which has already been approved is development of an SPS Action Plan for Cambodia (see Table 8 below and Annex II). Funding for other projects and the development of project preparation grants is likely to be approved by the STDF in future. Additionally, workshop background reports listing SPS-related technical co-operation activities provide an important basis from which donors can co-ordinate their activities. Finally, as part of its bi-annual Work Plan (2008-09), the STDF plans to conduct similar reviews of SPS needs and assistance in other regions and countries.

62. Table 8 above provides an overview of STDF project activities in the LDCs surveyed. Projects and PPGs approved in June 2008 include development of an SPS action plan in Cambodia (STDF 246) and implementation of a surveillance programme for Lethal Yellowing Disease in Mozambique (STDF 230). Implementation modalities regarding STDF project 127 in Benin have recently been approved by FAO and the Benin Chamber of Commerce and the execution of the project has officially started. All other activities are in various stages of implementation. The project in Mozambique (STDF 66) was picked up for external funding by DFID and is currently being implemented by ComMark under the Regional Standards Programme.

IV. CONCLUSIONS AND RECOMMENDATIONS

63. Expansion and diversification of agricultural exports features prominently in national development plans and poverty reduction strategies of virtually all countries surveyed. As expansion and diversification occurs and new markets are targeted, countries will increasingly face SPS-related market access constraints, notably in the trade of non-traditional agricultural exports, such as fruit and vegetables, cut flowers, meat and poultry, fish and fishery products, etc.

64. In addition to facilitating international trade, enhancing SPS capacity can result in positive impacts on agricultural productivity and human health and so favour economic and social development. The control of animal and plant pests and diseases for instance is essential for communities that rely on agriculture, forestry or fisheries as their primary source of income. Reduction of the pest and disease burden also has a key role to play in reducing the prevalence of food-borne maladies, hunger and extreme poverty.

65. Information on previous and ongoing technical assistance is necessary to design coherent future cooperation programmes. However, country surveys undertaken for the purpose of this paper show that this information is difficult to obtain because of under-reporting of donors of the activities and also because of SPS being usually provided as part of larger rural development, poverty alleviation, export promotion, productivity or economic growth programmes. Lack of information leads inevitably to overlap between donor activities, lack of synergies, duplication of efforts and un-optimized use of the scarce resources dedicated to SPS.

66. The information that has been collected and synthesized suggests that in each of the LDCs surveyed efforts are being made to enhance food safety, animal and/or plant health capacity, albeit at different levels and speeds. However, the list of outstanding SPS needs and constraints not currently covered by existing or future planned cooperation is still significant. Notably in the public sector, numerous "lacks of" can be observed, for instance in relation to infrastructure, expertise and skills of staff, reliable data, inspection and control systems, etc.

67. In mobilizing future assistance for outstanding SPS-related needs, one main challenge seems to arise from a series of underlying "structural" issues related to endemic animal diseases and plant pests for which there are no easy short term solutions or "quick wins" foreseen. To address these impediments, notably in the public sector, sustained long term commitment to funding, both at national and regional level, seems required to ensure minimum levels of capacity and hence market access. Mobilization of the international community to address Highly Pathogenic Avian Influenza (HPAI) and Foot and Mouth Disease (FMD) provides positive examples of such initiatives.

68. Countries have to set their priorities. There will never be sufficient resources available to address all outstanding needs at once despite various planned initiatives to strengthen SPS capacity building at national and/or regional levels, whether specific or of a more general nature. Countries also face many other development challenges in relation to their exports, for instance related to weak banking institutions, communication and transportation infrastructure, high freight rates and utility costs, etc. In this context, SPS management tends to be "reactive" rather than "proactive" and is often seen as having low priority.

69. At present, most of the LDCs surveyed lack a coherent and agreed vision on the role of standards and SPS management in the context of international trade and broader economic development. As a first step, efforts should be focused on bringing together all the main actors involved, helping the countries to make the economic case for dedicating resources to the SPS area and ensuring that SPS constraints are not considered in isolation from broader economic development needs.

70. One way to do this could be through the development of a national SPS strategy and prioritized action plan, where possible based on cost-benefit analysis and informed by the results of the aforementioned capacity evaluation tools. This exercise could be pursued as part of the Enhanced IF process, where necessary assisted by the STDF and/or its participating organizations. An SPS action plan for Lao PDR was recently prepared by the World Bank and a similar plan - with STDF support - is in the pipeline for Cambodia. Other countries could follow these two examples.

71. Following prioritization, needs have to be developed into "bankable projects" that fit with individual donor's funding cycles and priorities. Several ideas and focal areas have been hinted in this paper but must be explored in more detail on an individual country and/or regional basis. As mentioned before, this paper provides a first phase overview of SPS needs and assistance and should be seen as "work in progress".

PRELIMINARY RECOMMENDATIONS

72. Raising the profile of SPS issues in terms of market access, notably among high level decision-makers and further integration of SPS issues into planning and budgetary frameworks and supply chains is key to the sustainability of future capacity building efforts. This may be all the more important in light of recent trends in some countries towards general and/or sector budget support.

73. Greater attention should be given to strengthening compliance with good practices and internationally recognized systems such as HACCP in order to enhance competitiveness and further integration into supply chains. Targeted activities can be part of specific SPS interventions but also of more general programmes, for instance related to private sector or business development.

74. Addressing deficiencies and shortcomings in the fishery sector is of primary concern in the countries concerned to maintain access to international markets. In relation to its value in LDC exports, the fisheries sector currently receives less SPS assistance than other sectors (both official and commercial).

75. There is an evident need in all countries to strengthen food control systems. One starting point to explore further is strengthening the linkages with the growing tourism industry (assisting local suppliers in meeting standards required by hotels and restaurants, improving hygienic condition, monitoring food borne illnesses among tourists, improving food inspection, etc.) and growing supermarket chains.

76. To address "structural" SPS impediments, notably in the public animal and plant health sectors, sustained long term commitment to funding, both at national and regional level, seems required to ensure minimum levels of capacity and hence market access. Results of the OIE PVS and IPPC PCE tools should be used to design actions to strengthen the performance of veterinary and plant health services.

77. The LDCs surveyed would benefit from a thorough and concerted review and update of their SPS legal framework, in accordance with international requirements, including rules on related matters, for instance pesticides, veterinary drugs and animal feed. The legal review should pay specific attention to issues of implementation and enforcement and explore possibilities of taking a biosecurity approach concomitant with such a review.

78. Prior to embarking on laboratory investments, beneficiaries and donors should agree on a clear and sustainable plan to identify the range of services that should be offered within the country, define and delineate responsibilities among government and private sector laboratories, and address issues related to certification and/or accreditation. Regional approaches complementing national capacity should also be explored.

79. To help countries complying with new standards and ensure improved international harmonization long-term capacity should be developed to participate in and contribute to the work of the ISSBs. Technical assistance should also be provided in setting up functioning national notification authorities and enquiry points.

80. The role of the private sector in SPS management and compliance should be considered when designing awareness raising and training activities but also in relation to broader functions, for instance standard-setting, monitoring measures proposed by trading partners, and the provision of laboratory services.

81. Generally, better coordination of efforts is needed at national level to raise the profile of SPS issues, facilitate public-private sector dialogue, remove overlapping mandates, making more efficient use of scarce resources, and further integrating SPS issues into broader planning/budgetary frameworks and supply chains. To this end, national level coordination mechanisms should be designed.

82. Coordination of efforts at regional level should also be explored, notably in the animal/plant health area. Future efforts may be directed towards developing capacity for regional pest and disease management and include sharing of resources, for instance through setting up joint research and training centres, etc.

83. Countries are encouraged to apply and use the results of a wide range of existing SPS capacity evaluation tools to determine their priority needs, particularly in the public sector, and mobilize additional resources. Too often, the results of capacity evaluation tools remain in drawers and outside the public domain. Greater efforts need to be made the organizations carrying out evaluations and recipients to make such information public.

84. SPS issues should be much more prominently addressed in future updates of national DTIS - commissioned with Tier 1 funding under the Enhanced IF. The STDF, using the expertise of its

participating organizations, should assist in this process. The development of SPS action plans as outlined above is one approach that could be used.

85. The STDF and its partners could play a role in the development of projects for funding and implementation by the wider donor community - including multi-donor basket funds established at country level linked to DTIS implementation or through funds becoming available under the Enhanced IF.

ANNEX I: BENIN

A. OVERVIEW OF SPS SITUATION

1. Several SPS capacity evaluations have been conducted in Benin as a project preparation phase or as part of project implementation. Some of these studies were limited in scope because they served the purpose of the project and they targeted a specific aspect of SPS capacity such as legislative framework, laboratory resources (Projet d'Appui au Secteur Privé (PASP), UEMOA Quality Programme) or a specific issue such as the informal food sector (FAO project TCP/FAO/2904), the fisheries sector (Strengthening Fishery Products Health Conditions (SFP) project, West African Trade Hub (WATH)), the cashew nut sector (WATH) or the export potential of agricultural products (DTIS). Other large scale sector specific evaluations were conducted using the PCE or the PVS tool. However, the results of these evaluations were not available for this report. Evaluations conducted in the framework of general agricultural development support programmes were cross-cutting and covered a broad array of SPS aspects such as diagnostic of SPS capacity under PADSA (Programme d'Appui au Développement du Secteur Agricole).

2. Benin's exports are dominated by cotton (90% of exported agricultural product revenues and over 45% of total foreign- exchange earnings). Benin has encountered difficulties diversifying into non-traditional exports to developed markets. Technical barriers such as SPS measures, standards and quality are a particular constraining factor. While agriculture occupies almost 56% of labour force and contributes almost one third of GDP, most agricultural production remains oriented towards self-sufficiency or local consumption, with low and sporadic exports. Cotton, igname, maize and manioc are the major crops. Maize and manioc together occupy about 50 percent of cultivated land but a negligible fraction of exports.

3. The DTIS completed in 2005 identified a few crops with a comparative advantage for export diversification. These include mainly cashew nuts, pineapples, shea butter. However, these sectors remain handicapped by a number of constraints, some of which are directly related to SPS measures such as lack of knowledge of producers of Good Agricultural Practices due to low technical assistance and extension services received from the Government, and the poor availability of pesticides and other agricultural inputs.

4. Livestock and fishing are estimated to account for around 6% and 4% of GDP, respectively. Cattle output meets about 60% of national requirements but a lack of veterinary services (an estimate is that only third of the slaughtered animals are examined by a veterinarian) and prevalence of animal diseases such as African Swine Fever, Bovine tuberculosis, Contagious bov. Pleuropneumonia, Fowl typhoid, Lumpy skin disease, Newcastle disease, Porcine cysticercosis, Rabies, Trypanosomosis, Peste des Petits Ruminants, are serious problems. Five cases of Avian Influenza were reported in commercial farms in December 2007.

5. Fishing is mainly artisanal coastal fishing or in-land water based. Fish exports, consisting mostly of shrimps, represent about 1 percent of exports. The Government of Benin imposed a voluntary moratorium on exports of shrimps from 2003 until February 2005 due to concerns regarding perceived failure to comply with European sanitary requirements (main export market). This situation reflected the weakness of the quality control system at institutional level. Failure to implement quality assurance schemes (mainly HACCP) and the absence of accredited laboratories for microbiological and biochemical analyses were also identified as major obstacles to shrimp exports.

6. The SPS institutional system in Benin is characterized by a multiplicity of actors and poor communication between them. This situation leads to overlap of mandates and confusion of private sector operators regarding the scope of intervention of the various institutions leading to unnecessary complications and delays in inspections and quality controls. Quality standards for high export

potential crops are lacking or outdated. Laboratories lack skilled human resources and equipment. Lack of accurate analyses of mycotoxins, pesticide residues or heavy metals makes it difficult to ensure the quality of products such as maize, manioc or cashew nuts and therefore to develop export market. There is no epidemiological surveillance of food borne disease. Misuse of pesticides and mainly the use of cotton pesticides for food crops such as Alphacal P 318 EC and Callisulfan 350 EC, both highly toxic for humans, have serious adverse effects on human health.

B. OVERVIEW OF SPS-RELATED TECHNICAL COOPERATION

7. The total value of support received by Benin in the agriculture, rural development and environment sectors amounts to €268m over the period 2000-2010. Economic integration and private sector support received €99m over the same period.

8. The UEMOA Quality Programme Phase II which amounts to US$599,000. This project started in 2007 and builds on the results obtained during Phase I. In particular, it aims at consolidating all the structures/bodies created for implementing trade support services and quality policies. It will reinforce the Regional Accreditation Body and the various Technology Centers catering for priority export industries such as cotton, fruits and vegetables, meet and milk products, and fisheries. The programme is run by UNIDO and funded by the EC.

9. The PADSA Phase II funded by DANIDA (2004-2009, total value US$34m) include a component related to private sector support and mainly four value chains maize, manioc, cashew and shea which covers aspects indirectly related to SPS issues through actions to improve the quality of the end product. The PDSA contains also a significant component on public sector support which is dedicated to enhancing the capacity of the SPS system for laboratory testing, standard setting, inspection etc. Likewise, some of the activities conducted by the PASP (2006-2009, €5m) target the enhancement of laboratory capacity and improving the quality of some selected products including fisheries. The US-funded WATH supports exporters in West Africa in enhancing their market access though providing them with market information, export guides but also value chains studies that contain information on improving the quality of their products such as cashew nuts, cotton and shea butter.

10. Other programmes directly or indirectly related to SPS measures include FAO implemented projects. FAO has started recently a project in Benin on capacity building for the implementation of a regulatory framework for biosecurity TCP/BEN/3103. This US$260,000 project will update the legislation with respect to the use of GMOs in agriculture and will build the capacity for the assessment and the management of risk associated with them.

11. Benin also benefits from technical assistance provided on multiple country basis for which it is difficult to establish the share of funding pertaining to a single country. Most of these projects are related to avian influenza (AI) including FAO's SIDA-funded emergency assistance for the control and prevention of AI in Sub-Saharan Africa (2006-2008, total value of US$3.4m) and its second cooperation agreement on support for the control and prevention of Highly Pathogenic Influenza (HPAI) in Sub-Saharan Africa (2007-2008, total value of US$3.7m). FAO's Global AI eradication programme encompasses regional activities in West Africa which are supported by the US (2007-2009, total value of US$225,000). The US also supports FAO/OIE/WHO Collaboration on HPAI Rapid Response and Containment which includes actions in Benin (2007-2009, US$1m) as well as HPAI Early Warning, Early response and preparedness strategy support in Western and Central Africa (2008-2009, US$432,000). Likewise, the World Bank programme on Rapid Assessment of Avian and Human Influenza in Sub-Saharan Africa covers Benin (2007-2008, US$ 1.6m).

12. Benin also benefits from the EU-funded SFP project on health and sanitary requirements. The project has a total budget of approximately €56m and is being implemented over a period of 5

years. The SFP programme started a regional project (No: 21/07/04/FWA) with Benin, Cameroon and Togo in January 2005.

C. STDF ACTIVITIES IN BENIN

13. A multi-country STDF-funded project on capacity building for improving the fish trade performance in five African countries (2008-2010, total value US$469,000) is being implemented by FAO.

14. STDF is funding two SPS capacity building projects in Benin funded for a total amount of US$834,433 (details on these projects are included in Table 8 of the main report). The projects deal with the enhancement of information flows within the SPS system and with the control of mycotoxins in selected products. The projects are being implemented by FAO and IITA, respectively.

ANNEX II: CAMBODIA

A. OVERVIEW OF SPS SITUATION

1. The updated DTIS completed in 2007 identified 19 product sectors of export potential on which to focus strategies. Among these, nine were agrifood products (rubber, cashew nuts, cassava, corn, fishery, fruits and vegetables, livestock, rice and soyabeans). Among the strategies identified as necessary to stimulate export growth was better management of SPS issues.

2. An estimate is that more than one third of the volume of agri-food export is associated with a high SPS risk, mostly plant health-related given the predominance of plant products in Cambodia's export basket (64% of total exports in 2004 were phytosanitary risk sensitive). Rice is the mainstay of the Cambodian agricultural economy. Rice production in Cambodia has increased rapidly in the past decade due mainly to improved productivity and area expansion. Cambodia has developed into a net rice exporter. In December 2004, China added additional requirements for all plants (and rice) imported from Cambodia which included requirements for risk analysis and field inspections in Cambodia. As a result of these actions, Chinese imports of Cambodian rice have stopped. Likewise, raw cashew nuts have been identified in the DTIS as a product with medium export development opportunities.

3. Agricultural productivity is still undermined by a large number of weeds, insects and diseases. Control of the pest and disease situation will improve agricultural productivity and may help resolve export problems which have arisen. Agri-food product export would also be boosted by the implementation of Good Agricultural Practices and Good Manufacturing Practices for post-harvest processing. For instance, excessive use or use of unapproved pesticides may limit Cambodia's access to developed country markets for products such as soybeans, rice, corn, fruits and vegetables. Also, inappropriate use of pesticides in the production of fresh food and vegetables is a food safety hazard, an occupational safety issue for farmers and a concern for water supplies and eco-system health. Training and laboratory capacity to control mycotoxin contamination are required to ensure access to high return markets for the processed product.

4. Export expansion opportunities for the livestock sector were assessed as low in the DTIS 2007 due to the prevalence of various animal diseases, including Foot and Mouth Disease (FMD), Classical Swine Fever (CSF), Newcastle Disease and Highly Pathogenic Avian Influenza (HPAI). Animal diseases also affect domestic trade and public health through lower productivity and reduced income for producers as well as through risks to human heath associated with zoonoses. Cambodia reported 20 outbreaks of HPAI in the period 2003-April 2008 and a total of seven human fatalities in the same period. The outcomes of the OIE PVS tool applied in June-July 2007 should provide further guidance as to the needs and constraints of the Cambodian veterinary services.

5. Cambodia’s fisheries sector encompasses extensive freshwater fisheries within floodplains, river and lakes, marine fisheries, rice field fishery and some aquaculture. Cambodia enjoys high export potential in fishery products and is expanding fast – an almost 30% increase in Cambodia's fish exports was recorded between 2001 and 2005. The export of shrimp and tuna to Japan has grown to a value of approximately US$10m annually.

6. A barrier to further export growth in the fisheries sector, in particular to high value OECD countries, relates to sanitary conditions in the Cambodian fisheries sector. Cambodia is not been included in the list of countries approved for export to the EU and its fish and fish products have been banned since 1997. A number of conditions must been met to obtain approval, including giving the Department of Fisheries the legal basis to function as the competent authority, ensuring compliance with standards such as antibiotics residues, hygiene etc and health certification in line with the OIE standards. Additionally, since 2004, the EU has banned the import of tuna and swordfish from

Cambodia and a number of other countries as a result of concerns over failure to respect conservation rules.

7. The poor food safety situation in Cambodia results in important health hazards and economic losses due to cost of illness and loss of healthy and productive life. The absence of a coordinated programme of surveillance of food borne disease at the national level makes it difficult to report morbidity and mortality arising from ingestion of contaminated foodstuffs. However, it was estimated that hospital admissions for diarrhoea and dysentery syndromes represented 5% of total hospital admissions for 2002 with a fatality rate exceeding 3% for these two diseases.

8. Although SPS is widely recognized as a major brake to Cambodian agri-food exports, assessments of SPS needs for Cambodia are fragmented. SPS received little concerted attention in the National Strategic Development Plan (2006-2010) or the DTIS. The establishment of an SPS Action Plan has been identified as a priority need for Cambodia during the STDF workshop on "Mobilizing Aid for Trade for SPS related technical assistance in the Greater Mekong Sub-region" held in Phnom Penh, Cambodia on 21-22 May 2008 (see STDF activities below). Other outstanding needs identified in the balance sheet include:

- **Strengthening the legislative framework for SPS management**. There is a continuing need to clearly identify roles and responsibilities of institutions involved in SPS management, mainly for those with potential overlapping mandates such as the Ministry of Commerce (MOC) and the Ministry of Agriculture, Fisheries and Forestry (MAFF), and within the MAFF, the Department of Animal Health and Protection (DAHP) and the Fisheries Administration (FiA). The institutional and legislative frameworks for fisheries, animal and plant health, need strengthening to include the necessary provisions for enforcement. Mechanisms of coordination among various institutions should be established.

- **Enhance capacity for diagnosis and enforcement**. There is a need to build overall capacity for diagnosis and enforcement for all areas of food safety, plant health and animal health. This refers to capacities for inspection and certification, surveillance and monitoring and risk analysis, among others, and includes facilities, equipment and human resources. Yet prior risk evaluations for all three areas would be needed to correctly identify needs and proper allocation of resources.

- **Promote greater awareness and information for senior and provincial government officials**. This is necessary to mainstream SPS issues into sector development activities and to improve coordination and communication among central and decentralized institutions. Capacity of the SPS Enquiry Point to act as an interface between international partners and national institutions and to disseminate SPS information within the country to all stakeholders should be enhanced. Likewise, the National Codex Committee could be strengthened to act as a vehicle of continuous update of officials on international standards and to raise awareness of relevance of Codex work to the national economy by bringing industry's concerns onto the agenda of senior officials.

- **Enhance awareness and skills of food producers and processors**. This could be implemented through training of trainers to design tailor-made curricula to enhance the skills of operators to achieve compliance with international standards in their particular area of operation. Strengthening of extension capacity and of the link between extensions and applied agronomic research could greatly benefit the farmers. Multiplying Farmer Field Schools, reinforcing producer associations and provincial chambers of agriculture are other possible ways to improve phytosanitary and animal health situations in the country.

- **Enhance awareness of consumers on food safety risks**. This could be conducted through assisting relevant institutions to design food safety campaigns and to strengthen consumer association's capabilities to act as an intermediary.
- **Develop coordinated surveillance programmes for plant and animal pests and diseases and for food-borne disease and enhance capacity for diagnosis**. This should include training on data collection and dissemination and on the use of data to develop science-based food control strategies.

B. OVERVIEW OF SPS-RELATED TECHNICAL COOPERATION

9. Technical assistance in the area of SPS has been surveyed in Cambodia as part of the STDF Aid for Trade related work. For the period 2001-2006, Cambodia benefited from 14 country projects (with a total of about US$16m) and a number of multi-country projects (total value of US$200m for all multi-country projects). Table 1 below gives an overview of SPS assistance received in the period 2001-2006.

Table 1: Direct SPS assistance received by Cambodia (2001-2006)

Number of projects		Value of Projects (US$'000)	
Food safety	2	Food safety	301
Animal health	3	Animal health	6,931
Plant health	1	Plant health	56
HPAI	5	HPAI	4,633
General	3	General	3,629
Total	**14**	**Total**	**15,550**

10. The table shows the predominance of donor support oriented towards animal disease control, and mainly the control of HPAI. Further significant donor assistance can be expected in the area of HPAI. At the end of 2006, some US$27m in committed funds for HPAI had not yet been disbursed. For instance, ongoing projects include continuation of EC support on smallholder livestock production (2007-2010, total value US$1.85m), three FAO projects on HPAI prevention, preparedness and control funded by Germany and USA (2006-2009, total value US$8.6m) and US$11m assistance on avian and human influenza control and preparedness managed by the World Bank.

11. Ongoing projects specific to Cambodia include assistance to the fisheries sector provided by FAO (2008-2009, total value of US$311,000) and by DANIDA/DFID (2006-2010, US$321,000). Cambodia benefits from another support project from FAO to enhance the phytosanitary system (2008-2009, total value of US$264,000).

12. A multi-donor trust fund (around €10m) for implementation of the DTIS priority actions is being prepared with EC, DANIDA and UNIDO as main contributors. The programme concept note include reference to SPS issues. Projects will target actions recommended by the DTIS to promote export of the nineteen products with high export potentials, with a focus on trade facilitation. The SPS Action Plan developed by the STDF will help in identifying capacity building activities required to achieve this objective (see STDF activities below).

13. Another area where Cambodia can expect further assistance is in relation to implementation of the Greater Mekong Subregion (GMS) Cross-Border Transport Agreement. The ADB/GMS Secretariat is in charge of a technical assistance project aimed at enhancing Transport and Trade facilitation in the GMS. The project will build on the ongoing project on implementation if the cross-border transport agreement. It will comprise four components: i) trade facilitation, ii) SPS measures,

iii) business and logistic support and iv) regional information sharing. The SPS component aims at strengthening cooperation between SPS regulatory institutions through common risk management, laboratory mutual recognition, etc. The technical assistance provides for 14 man/month expertise to assess the institutional framework in GMS countries, assess risk management systems and develop an implementation plan on SPS, assess the laboratory situation and ISO 17025 compliance, etc.

14. Other technical assistance not directly focused on SPS could be provided through programmes targeting private sector support. The ADB Cambodia Private Sector Development Program currently under preparation as well as the activities planned by the Mekong Private Sector Development Facility (MPDF) of the International Finance Corporation (IFC) to enhance the business environment and remove key barriers to Small and Medium Sized Enterprise development in Cambodia, with particular support to the development of SMEs in the agro-industry (total budget of the project €15m with EC contributing €8.9m).

15. Regional economic integration is an important driver for technical assistance provided to South East Asia. Consequently, a large proportion of technical assistance for SPS has been carried out on a "multi-country" basis. As one of the more recent members of ASEAN, Cambodia has been eligible to benefit from a wide range of projects totalling approximately US$200m. Table 2 below summarizes multi-country SPS assistance which included support to Cambodia.

Table 2: Multi-country SPS assistance (2001-2006)

Number of projects		**Value of Projects (US$'000)**	
Food safety	29	Food safety	24,909
Animal health	9	Animal health	8,023
Plant health	15	Plant health	9,819
HPAI	20	HPAI	130,608
General	17	General	26,328
Total	**90**	**Total**	**199,687**

16. Ongoing multi-country projects pertaining to Cambodia include the NZAID/FAO/WHO food safety project (2003-2008, budget US$1,28m), the Southeast Asian Foot and Mouth Disease Control Programme (SEAFMD) funded by Australia (total value of US$3m), phytosanitary capacity building projects funded by NZAID and Japan (total value of US$2.25m), ASEAN-EU Programme on Regional Integration Support Phase II (APRIS II) which includes a component on SPS integration (2006-2009, total value of the programme €8.4m), two projects on ASEAN GAP and fisheries funded by the ASEAN-Australia Development Cooperation Programme (2007-2008, total value US$677,000), projects on spread of transboundary animal diseases and livestock movement (total value of US$1, 22m) and various donor projects on avian influenza (total value exceeding US$94m).

C. STDF ACTIVITIES IN CAMBODIA

17. In March-May 2008, the STDF undertook a field research in Cambodia to collect information on the ongoing SPS related technical assistance. In parallel, a review of exiting evaluations of SPS capacity in the country was undertaken. This review allowed the establishment of an inventory of SPS needs which were matched to technical assistance provision in a balance sheet to identify outstanding needs which are not covered by on-going of planned technical assistance programmes. The work involved a thorough interaction with stakeholders in the country to identify priority needs in the SPS area. The balance sheet was first validated at the country level and then presented at the regional workshop held in Phnom Penh, Cambodia 21-22 May 2008 and further

amended by participants from the country to reflect the discussions held with development partners at the meeting.

18. The need for a comprehensive and coherent SPS Action Plan was identified as a priority by Cambodia and its development partners during the STDF workshop on "Mobilizing Aid for Trade for SPS related technical assistance in the Greater Mekong Sub-region" held in Phnom Penh, Cambodia on 21-22 May 2008. The STDF Working Group has approved funding for a project aiming at developing such an Action Plan. The SPS Action Plan will aim at identifying precisely the actions to be taken to strengthen the legislative framework for SPS management, to enhance capacity for diagnosis and enforcement, to promote greater awareness and information for senior and provincial government officials, to enhance awareness and skills of food producers and processors, to enhance awareness of consumers on food safety risks and to develop coordinated surveillance programmes for plant and animal pests and diseases and for food-borne disease.

ANNEX III: LAO PDR

A. OVERVIEW OF SPS SITUATION

1. SPS issues were identified as high priority in the DTIS validated in September 2006. According to health statistics reported by the World Bank, food-borne and water-borne diseases are the major cause of morbidity in the general population. Dysentery, typhoid, hepatitis A, E.coli, salmonella and vibrio cholera are all hazards in the food supply. A particular issue relates to intestinal helminth and fluke infections related to consumption of raw or undercooked fish. The prevalence of contaminants in foodstuffs and misuse of agro-chemicals represents also a threat not only to domestic consumers, but also to export opportunities.

2. Animal husbandry of buffalo, pigs, poultry and cattle is a growing sector, but hampered by a variety of different diseases. Anthrax, haemorrhagic septicaemia, black leg disease, classical swine fever (CSF), Newcastle disease and various parasites all inflict production losses. Lao PDR is one of seven Southeast Asian countries where foot and mouth disease (FMD) is endemic. In January 2004, highly pathogenic avian influenza (HPAI) was also reported. Since that time, a further ten outbreaks of HPAI have been reported in poultry and a total of two human fatalities have occurred. Control of animal diseases is hampered by Lao PDR's position as a major transit corridor for livestock trade between Cambodia, China, Thailand and Viet Nam and the impracticality of implementing quarantine measures at frontiers given porous borders and scarce human and budgetary resources to run these facilities. Efforts to control diseases through vaccination are also hampered by difficulties in establishing movement controls, the general weakness of national veterinary services and the cost of instituting such campaigns. The animal disease status of Lao PDR severely limits its opportunities for formal livestock and meat trade. In practice, what trade that does take place is mostly on an informal basis through porous border regions.

3. Food and water-borne diseases, the prevalence of contaminants in foodstuffs and misuse of agro-chemicals represent a threat not only to domestic consumers, but also to export opportunities. At present, these are latent threats. Fish exports are a good example. At present, regional exports of fish are small or take place on an informal basis. Expansion of Laotian fish exports to higher value raw fish products will be increasingly called into question or subjected to costly sub-deep freezing treatments if the general sanitary (and in particular the trematode) situation stays the same. Thus the current sanitary situation acts as a potential brake on future growth.

4. Overall, Lao PDR lacks a functioning SPS management system. It has insufficient ability to assess the situation on plant pests, animal diseases and food hazards and to provide basic data on these hazards for trading partners. It has very little ability to control agro-chemicals and imported genetic material. The components of the SPS management system – regulatory and institutional frameworks, standards, diagnostic capacity, surveillance and inspection and quarantine – still have major gaps and are not sufficiently connected. This forms a threat to sustainable growth of exports and imports. While significant potential exists to promote production of high-value horticultural products and export-oriented agriculture, this is seriously constrained by a general lack of awareness among producers, government and the private sector about good agricultural practices (GAPs), good hygiene practices (GHPs), good manufacturing practices (GMPs) and quality assurance schemes (e.g. HACCP), and inadequate capacity to implement such schemes. Moreover, the food safety situation in the country is very poor, and productivity of crops and livestock is negatively affected by insufficiently controlled pests and diseases.

5. An absolute priority is to get the basics of the system right. This requires not only additional donor support, but raising awareness among political leaders that more government resources are needed for building and operating an effective SPS system. Integration into the global trading system

through WTO membership and implementation of ASEAN Free Trade Area (AFTA) commitments represent an opportunity to create the necessary awareness.

6. Fundamental constraints still exist in the SPS system in Lao PDR, the components of the SPS management system – institutional capability, regulations and standards, diagnostic capacity, surveillance, inspection and quarantine – are still not in place. This is particularly the case in the food safety and plant health sectors which have received relatively less focus in donor attention. A further need exists to promote the adoption of GAPs, GHPs, GMPs and quality assurance schemes among exporters as a means to enhance access to international markets, particularly for high-value horticultural products. Furthermore, there are still major gaps in the capability to collect and evaluate basic data on pests, diseases and food hazards and to conduct basic risk management.

7. The following SPS capacity building needs were identified as a result of the work undertaken by the STDF within the framework of Aid for Trade related activities (see STDF activities below):

- **Assistance in the accelerated drive for WTO membership**. Information and training has been provided on the WTO SPS Agreement to senior officials in the Ministries of Industry and Commerce (MOIC), Agriculture and Forestry (MAF), Health (MOH) and the National Science and Technology Authority (NSTA) in preparation for WTO accession. However, among middle rank managers and specialists in these ministries and in the provinces (who are responsible for SPS implementation) there is still little awareness about the implications of WTO membership. It is recommended that a major in-country training event for middle-level management and specialists in MAF, MOH, NSTA and provinces be provided on WTO accession. This training should build on the Cambodian and Vietnamese experiences of accession. As part of this training, focused help should be given to make the SPS/TBT Enquiry Point operational.

- **Efforts to control endemic animal diseases have no "easy fix".** In addition to the economic losses in terms of animal productivity and market access forgone, the continued prevalence of these diseases may create difficulties in implementing aspects of the GMS Cross-Border Transport Agreement, particularly in respect of the facilitation of transit trade. It would appear appropriate thus that this issue be addressed in forthcoming support projects. Addressing the underlying disease situation will require sustained long-term investment and technical assistance programmes designed at a regional level. In this regard, the SEAFMD programme is a model that deserves further study for possible broader application for other diseases.

- **Assistance to increase awareness about, and facilitate the implementation of relevant international standards, GAPs, GHPs and GMPs**. To complement the above support for WTO membership, assistance is also required to ensure that government departments, producers and the domestic private sector are knowledgeable about national, international and regional regulations and standards related to food safety and quality, and that the required institutional framework and human resources are in place to facilitate the effective application of good agricultural, hygiene and manufacturing practices.

- **Assistance in surveillance of food-borne hazards, pests and diseases**. A project is required that would help with the design and implementation of surveillance and data collection on the most important pests, diseases and food hazards, assist in the evaluation and sharing of data, in particular with trading partners. A second stage to such a project would focus on using the data to establish risk-based management systems for food safety, plant health and animal health risks.

- **Assistance in training and development of academic/vocational training in the SPS area**. Training of staff and specialists is crucial for building a viable SPS system. The current skilled labour shortage is also a constraint which reduces the absorptive capacity of the country for SPS technical cooperation. In part this constraint is caused by an absence of academic and vocational training opportunities in Lao PDR. Thus as part of a training programme for Laotian officials, consideration should be given to the development of academic and vocational training courses in the SPS area. This would help in delivering training opportunities which are in-country and on-the-job.

B. OVERVIEW OF SPS-RELATED TECHNICAL COOPERATION

8. Information on donor assistance to Lao PDR in the SPS area was compiled during the field research undertaken in preparation for the Aid for Trade events organized by the STDF for the GMS region. The results obtained indicated a significant increase in SPS assistance provided to Lao PDR during the period 2001-2006. Table 1 below gives an overview of SPS assistance received in the period 2001-2006. The data showed that the country benefited from 14 country projects (valued at about US$24m).

Table 1: Direct SPS assistance received by Lao PDR (2001-2006)

Number of projects		**Value of Projects (US$'000)**	
Food safety	1	Food safety	750
Animal health	4	Animal health	7,056
Plant health	0	Plant health	0
HPAI	4	HPAI	12,295
General	5	General	3,815
Total	**14**	**Total**	**23,916**

9. Significant donor support has been provided for animal disease control, led by efforts to control HPAI, including the World Bank HPAI Control and Preparedness project (2006-2009, total value of US$ 13.56m), a project funded by Germany to build capacity at Grass-roots Level to Control Avian Influenza (2006-2009, US$3.2m) as well as a US-funded project to strengthen emergency preparedness for HPAI (2006-2009, US$2,284,990). Animal disease control projects other than AI currently under implementation include support by the Australia on Classical Swine Fever and FMD (2003-2008, valued at US$414,000) and ADB-IFAD on livestock in the northern region (2007-2013, total value of US$18.4m).

10. Lao PDR is a member of the IF. In September 2006, a National Workshop took place to validate the DTIS, in which SPS constraints figured highly. To help turn the DTIS priority areas into action, a multi-donor trust fund, the Trade Development Facility (TDF), has been established. This trust fund is managed by the World Bank and includes an SPS component (total value of US$1.77m) that consists primarily of strengthening the SPS institutional, legal and regulatory framework, promoting the private sector and developing risk-based SPS management. Further funding is expected to be added to the TDF in the coming years. Additional financing should also become available through the enhancement of the IF.

11. Other trade related ongoing projects include World Bank support for trade facilitation and export development (2008-2011, total value of US$1.77m) and the EC funded project aiming at enhancing the capacity of Lao PDR to integrate into regional and international trade systems through developing national capacity in the fields of standards, quality, metrology, accreditation, conformity assessment principles and best practices (2004-2008, US$621,000).

12. As for Cambodia, the GMS Cross-Border Transport Agreement is a driver for additional assistance to Lao PDR. The World Bank and ADB are considering a lending project with a SPS component to assist implementation of the Cross-Border Transport Agreement.

13. As a member of ASEAN, Loa PDR has benefited and is currently benefiting from all the regional technical assistance programmes detailed for Cambodia (Annex II).

14. One particular constraint is the low absorptive capacity of Lao PDR for technical cooperation. The establishment and maintenance of a fully functioning SPS system will require long-term commitment from both the Government and donor agencies. In the World Bank Action Plan, a strong argument was made that due to the limited human and financial resources available, it was important that additional funding should be selectively applied, include efforts by the private sector, and be effectively prioritized. It was recommended that major investments in diagnostics, inspection and surveillance should be sequenced and delayed for a second phase of capacity building.

C. STDF ACTIVITIES IN LAO PDR

15. In March-May 2008, a country survey was conducted in Lao PDR to identify outstanding needs of SPS technical assistance which are not covered by on-going or planned programmes. The survey consisted in a review of all exiting evaluation of the SPS system in Lao PDR and an extensive field research to identify on-going activities and outstanding gaps. The field survey involved interaction with all stakeholders in the country to assess the remaining constraints to be solved and to establish a list of priority needs to be used for mobilisation of future Aid for Trade resources. The results obtained were presented in a balance sheet outlining the needs and the corresponding donor response and highlighting the needs still to be addressed. The balance sheet was validated once at country level in the presence of representatives from various institutions involved in SPS management and of representatives from donor agencies active in the country. A second validation and further refining of the balance sheet took place during the regional workshop organized by the STDF on "Mobilizing Aid for Trade for SPS related technical assistance in the Greater Mekong Sub-region" in Phnom Penh, Cambodia on 21-22 May 2008.

16. The STDF is currently funding a project preparation grant to assist the Department of Agriculture in designing a project aiming at setting up legislative and institutional infrastructure for the implementation of GAP. A LaoGAP scheme will be created and tested on pilot crops. Certification and inspection bodies will be established to enforce the new regulatory framework.

ANNEX IV: LESOTHO

A. OVERVIEW OF SPS SITUATION

1. Lesotho is small, landlocked and surrounded by South Africa, the region's largest economy. About 70% of the population derives its livelihood, in part, from agriculture which contributes approximately 17% to GDP. Smallholder farmers, mostly subsistence-oriented, dominate agricultural production with small surpluses being sold in local markets. Maize is the most popular crop, followed by sorghum, wheat, beans and peas. According to the DTIS, validated in 2003, agriculture prospects are not encouraging due to *inter alia* lack of arable land and modern farming equipment, low soil quality, high prevalence of HIV/AIDS and periodic droughts.

2. There are opportunities for import substitution on the one hand and niche market production and export on the other. Examples include fruit (peaches, apples, grapes and berries), traditional vegetables (cabbage, carrots and beets) and other specialized products such as honey, mushrooms, asparagus, garlic and paprika. Diversification of exports and markets, however, will require exporters to comply with international standards and private retailer schemes, where applicable.

3. Livestock production is a substantial contributor to rural income and includes cattle (690,000 units), sheep (1.1 million), goats (850,000) and pigs (100,000). Sheep and goats are kept primarily for production of wool and mohair, the two major agricultural exports from Lesotho. Limited opportunities exist to expand production and serve the local - and perhaps regional - market for meat, dairy and poultry products (including hides and skins). Among the constraints holding back further commercial production are scarce land (for fodder) and better handling and processing facilities. Additionally, information on OIE's website reveals the presence of various endemic OIE notifiable diseases, which limits the scope to increase farmers' incomes and access to regional markets. It is recommended that the results of the OIE PVS tool be used to design actions to strengthen the performance of veterinary services. The fact that South Africa surrounds Lesotho might indicate that it already benefits from existing disease eradication and prevention measures undertaken in South Africa. Fish production in Lesotho is limited to village-level fish pond projects, farming carp and other freshwater species.

4. Given that most of Lesotho's food exports are destined for South Africa and should meet South Africa's import standards, the main recommendation stemming from the DTIS is to integrate its SPS measures into South Africa's regime rather than to attempt implementing the SPS Agreement on its own. This would include support to harmonize its legal framework with South Africa's and support to further develop local expertise, including support to participate in the international standard-setting process (Codex, OIE, IPPC).

B. OVERVIEW OF SPS-RELATED TECHNICAL COOPERATION

5. FAO is currently implementing three SPS-related projects, one aiming to improve the animal disease information management system (2006-08, total value US$159,000), one on emergency control of anthrax (2008, total value US$239,438) and one to strengthen productivity and competitiveness of the smallholder dairy sector (including Zambia, 2007-11, total value US$80,000). Other FAO activities at regional level concentrate on control and prevention of avian influenza. Under the Integrated Framework, one Window II project (2004-07, total value US$440,335) had been launched, implemented by UNDP/ITC, aiming at export and market development of mushrooms and peaches. Some years ago, FAO supported a project to strengthen Lesotho's domestic food control system - including the creation of a National Codex Committee - but no information is available about its current status.

6. Lesotho benefits from a number of programmes and initiatives at regional level. Generally, however, country-specific allocations and/or allocations to SPS issues within these regional programmes are not known. The EC, for instance, provides support to various regional programmes in the SADC region focusing on Foot and Mouth Disease (FMD, 2006-11, total value US$15m), capacity building on MRLs (2006-10, total value, €7.5m), promotion of regional integration in the livestock sector (PRINT, 2004-09, total value US$9.5m) and support for standards, quality assurance, accreditation and metrology (SQAM, 2006-11, total value US$17m).

7. Lesotho is also eligible under the Regional Standards Programme (RSP, 2006-10) funded by DFID and implemented by ComMark - although no specific projects have been reported for Lesotho. The RSP's objective is to help SADC countries and firms to meet international food quality and safety standards for agri-business products. USAID/USDA provide support to key SPS policy objectives under the African Global Competitiveness Initiative (AGCI, 2006-11, total value US$11.5m) with the objective to build capacity of African countries to export plant, horticultural, and animal products internationally. Assistance is primarily implemented through USAID's regional trade hubs, including the Southern African Trade Hub in Gaborone, Botswana.

8. At ACP level, various projects funded by the EC include SPS elements. The Programme Initiatives Pesticides (PIP-COLEACP, 2003-08, total value €29.1m) aims to enable ACP countries to comply with European food safety and traceability requirements and includes in-depth analysis of the impact for ACP countries of the new European SPS regulations on official feed and food controls. A second phase of PIP is being considered. The EC programme "Trade.com" (2004-09, total value €50m) focuses *inter alia* on implementation of WTO Agreements and preparation of pilot projects with special attention to SPS/TBT issues. The Support Programme to Integrated National Action Plans for Avian and Human Influenza (SPINAP-AHI, 2007-10, total value €22.5m, implemented by AU-IBAR) aims to strengthen capacity for early detection and rapid response to AHI.

9. Upcoming ACP-wide programmes include Participation of African Nations in Sanitary and Phytosanitary Standard Setting Organizations (PAN-SPSO, 2008-10, total value €3.85m, implemented by AU-IBAR and AU-IAPSC) aiming to enhance effective participation of African countries in the activities of Codex, OIE and IPPC). The programme Strengthening Food Safety Systems Through Sanitary and Phytosanitary (SPS) Measures (2008-2012, estimated value US$32m) will aim to establish risk-based food and feed safety systems for export products in ACP countries in line with regional, international and EU standards.

10. Reportedly, the EC, FAO, ITC, UNCTAD and the World Bank are currently considering an African wide support programme on agricultural commodities. The aim would be to strengthen capacity to develop and implement sustainable commodity strategies that improve farmers' productivity and their rural livelihoods and reduce income vulnerability (including *inter alia* elaborating strategies covering critical parts of the commodities chain; supporting diversification; helping integrate commodities dependent countries in the international trading system). Total estimated value is US$54m. Finally, the World Bank is planning to establish an Africa-wide Multi-Donor Trust Fund (MDTF) for Trade and Development. Pilot activities will take place in Madagascar, Tanzania and Senegal.

ANNEX V: MOZAMBIQUE

A. OVERVIEW OF SPS SITUATION

1. Agriculture is the main source of income for more than 65% of the population, contributes significantly to GDP (21.8% in 2005) and, along with fisheries, is one the main export earners. Less than 15 % of Mozambique's arable land is under cultivation and the agriculture sector is dominated by smallholders, predominantly subsistence-oriented. Basic food crops include maize, rice, cassava, sorghum, sweet potatoes and horticultural products. Major cash crops, mainly tobacco, cashew, cotton and sugar, account for 6% of the cultivated land. Several initiatives are currently taking place with regard to biofuel, with future investments planned in bio-ethanol from sugarcane and bio-diesel from copra and oilseeds.

2. The DTIS identifies a range of factors holding back growth in Mozambique's agriculture sector: poor access to finance, the absence of tradable land use rights, low productivity, the absence of SPS control, weak agro-processing, costly logistics (including transport), the absence of effective producer organizations, scant export development services, and obstructive red tape. To confront these constraints, the DTIS recommends *inter alia* to: (1) intensify production by promoting commercial farming among smallholders and larger operations; and (2) diversify into higher value product lines, such as horticultural and cut flower exports to Europe, but also mangoes to the Middle East and the Indian subcontinent during these countries' off-seasons, as well as exports of ginger and honey to South Africa. Market opportunities also exist for value-added and agro-processed products (coconut products, fruit, beans, maize, oilseeds, cashew, pulses and pigeon pea) and for some traditional crops (tobacco, cassava, rice).

3. Fruit exports, notably citrus and, more recently, bananas and mangoes, in particular show considerable potential and are growing rapidly, although from a low base. Further export opportunities also exist for a host of other tropical fruit (melons, papaya, pineapples, litchi, etc.), vegetables (baby corn, bell peppers, paprika, etc.) and cut flowers. Fruit exports are primarily focused on the South African market, although there are some exports to Asia and Europe. SPS-related constraints in the trade of fruit and vegetables are mainly related to traceability, hygiene requirements, private standards in certain markets, appropriate use of pesticides and presence of residues in fresh produce. In this trade, and that of cut flowers, there are also concerns over international transmissions of plant pests (notably fruit fly).

4. At present, Mozambique's phytosanitary control system is weak, causing major annual losses to pest damage and restricting further access to foreign markets, including South Africa. In order to maintain access to existing markets and further develop horticulture over time, Mozambique must strengthen its plant health services, develop capacity to undertake pest risk analysis, update its national pest list, develop national surveillance programmes and establish and/or maintain pest free areas in accordance with international (IPPC) requirements. The results of the IPPC PCE tool provide a good starting point. Over and above compliance with official food safety and plant health requirements, entering higher value markets in Europe (supermarkets, retailers) may require producers and processors to be certified for GlobalGAP and/or to follow other private standard schemes.

5. SPS-related constraints also play a role in the trade of other agricultural commodities. Cashew nuts are currently exported unprocessed to India or processed in Mozambique and exported, mainly to Europe. Opportunities exist to further expand small-scale cashew processing, which in turn would require farmers and processors to comply with internationally recognized systems, such as Good Agricultural Practice (GAP) and Hazard Analysis Critical Control Point (HACCP), and to respect limits on mycotoxin and pesticide residues. Similar requirements also apply to the trade in "diversification crops" (beans, pulses, oilseeds and groundnuts), i.e. annual crops that smallholders cultivate, partly for cash and partly to complement their own food supply. Pigeon peas (lentils), for

instance, are currently exported to Malawi for processing and re-export to India but could be processed in-country and exported directly. Limited opportunities also exist to increase regional exports of maize to Malawi. The coconut industry (fresh, dried, copra, oil) is severely affected by Lethal Yellowing Disease (LYD) and South Africa has reportedly closed its market to coconut products from Mozambique. Controlling LYD will require *inter alia* implementation of a national surveillance programme and establishment and/or maintenance of pest free areas.

6. Livestock production is modest with a total national herd of cattle of about 1.5 million heads, with goats accounting for 4.4 million units and pigs for a further 1.3 million units. Livestock, goat and poultry production, predominantly used for supporting rural households, is increasing. Mozambique's animal health status is of major concern. Information on OIE's website reveals the presence of various endemic OIE notifiable diseases in the country, which limits the scope to increase farmers' incomes and access to regional and international markets. Disease concerns also play a role in Mozambique's exports of raw hides and skins. Although no information is available, potential shortcomings may exist in sanitary controls at slaughterhouses, handling and processing facilities for meat, dairy and poultry products, and in the availability of animal feed. It is recommended that the results of the OIE PVS tool be used to design actions to strengthen the performance of veterinary services, establish animal disease surveillance programmes, etc.

7. Limited information is available about Mozambique's food safety control system, which typically involves a wide range of actors. Standard-setting is the responsibility of the National Institute for Normalization and Quality under the Ministry of Industry and Trade. The Ministry of Health is responsible for establishing and enforcing food legislation and cooperates with other ministries such as agriculture (animal products) and fisheries (export of fish and fishery products). Among the food safety and quality problems encountered by the country are a high percentage of small-scale importation by small traders and lack of or limited food inspection and control at the border.

8. Mozambique's fisheries sector is an important source of food, employment and revenue. An estimated 480,000 people are economically dependent on the sector, directly or indirectly. The marine fisheries sector has three broad segments: industrial fishing, semi-industrial fishing and artisanal fishing. Industrial fishing is conducted by foreign vessels outfitted with processing facilities that target shrimp and tuna. More than half of the Total Allowable Catch is taken by foreign vessels and sold directly to international markets. The semi-industrial fleet consists mostly of national vessels with onboard holding facilities for shrimp and fish, mostly for export. Approximately 70,000 artisanal fishermen sell their catch on the domestic market. Concerns exist over illegal, unreported and unregulated (IUU) fishing and depletion of the national shrimp resources. Mozambique's inland fisheries sector is well exploited and does not appear to have much potential for expansion. Freshwater fish is popular in the regional market.

9. The EU market is important and mostly imports shrimp. Since 2001, three notifications with regard to frozen shrimp imported from Mozambique were received from the Rapid Alert System for Food and Feed (RASFF). Two missions carried out by the European Commission's Food and Veterinary Office (FVO) in 2006 and 2007, respectively, concluded that the system of official controls and of export certification, although adequate in certain respects, cannot be considered in compliance with the requirements of Community legislation. Several deficiencies were found in relation to the implementation of the official procedures (auditing, approval, inspection, sampling and certification procedures), assessment of HACCP plans, official sampling for environmental contaminants, and analyses of potable water and ice. No major deficiencies were found in listed establishments and vessels authorized for export though several other fishing vessels (not listed but providing primary products to the listed establishments) did not present good structural and hygiene conditions. Efforts to assess and accredit all laboratories should also be continued.

10. Significant opportunities also exist to further increase fresh fish exports, notably involving the artisanal sector, but this would require fishermen and processing facilities to meet stringent quality and health standards. Depending on economic viability, increasing investment in cold storage and transport capabilities (including the availability of ice) and upgrading shore processing facilities should be considered, accompanied by training in processing and handling techniques. Other related recommendations include research to identify potential new species for commercial exploitation, research to determine sustainable volumes of fisheries capture, improving regional cooperation for fishery stock monitoring and surveillance, and developing a strategy to combat IUU fishing. Finally, significant opportunities exist for non-traditional marine products such as seaweed farming (following Tanzania's example) and shrimp aquaculture. In particular aquaculture development would require development of a sound and sustainable strategy - given the stringent quality and health requirements attached, its potential adverse impacts on the environment, etc.

11. Typically, Mozambique's overall food safety and agricultural health system comprises multiple government institutions located over various ministries, including Agriculture, Health and Trade. Reportedly, efforts have been made to improve the coordination among the various institutions, in particular through the establishment of an SPS/TBT Working Group, though recent information on the status of this initiative is not available. Recommendations in the DTIS include further streamlining of the standard-setting process. No information is available on the current status and the need to update food safety, animal and plant health legislation. There is a general need to develop more diagnostic capacity across all SPS areas through the upgrading and accreditation of laboratories. Recent reports refer to the need to generally promote private sector development and improve the business environment. Specifically related to SPS, this might include establishing and/or strengthening trade associations to support SPS improvements, training programmes for farmers/entrepreneurs on good practices, HACCP, etc. Finally, support is needed to enhance Mozambique's capacity to participate more actively in the international standard-setting process (Codex, OIE, IPPC) and fully implement the SPS Agreement (i.e. functioning notification authorities and enquiry points).

B. OVERVIEW OF SPS-RELATED TECHNICAL COOPERATION

12. Under the IF, several Window II projects have been launched at national level focusing on fishery laboratory equipment, fish quality control and standards development. The implementation period and total value of these projects is not known. FAO supports and implements various small projects at national level related to the control of African Swine Fever (2006-08, total value US$256,000), cassava production and processing (2008-09, total value US$500,000), strengthening animal disease control (2006-08, total value US$159,000), and prevention and disposal of obsolete pesticides (2005-08, total value US$2.64m). FAO activities at regional level concentrate on control and prevention of avian influenza and fisheries management.

13. World Bank support to Mozambique is focused on *inter alia* agriculture, rural and private sector development. Studies have been carried out on value chain analysis and horticulture development.

14. Switzerland has funded a project (2005-07, US$2.23m, implemented by UNIDO) to facilitate increased food-based exports through strengthening the national food safety system, upgrading of testing and metrology laboratories, improvement of national food legislation, and dissemination of standards and technical guidelines among food manufacturers and stakeholders.

15. In response to the FVO mission in 2005, the UK (DFID) provided grant funding to prepare and implement an action plan through its Regional Standards Programme (RSP) at ComMark. Similar grant funding was provided to implement a project on standards compliance in the horticulture sector developed by the STDF. The RSP runs from 2006-10 and its objective is to help

SADC countries and firms to meet international food quality and safety standards for agri-business products.

16. Support provided by the Millennium Challenge Corporation (MCC) includes a project aiming at reducing the spread of Lethal Yellowing Disease (LYD), improving productivity of coconut products, and encouraging diversification into other cash-crop production (total value US$17.4m). This project will be complemented by a second project developed with STDF support focusing on the establishment and/or maintenance of pest free areas.

17. Mozambique's National Indicative Programme for support under the 10th European Development Fund (EDF) indicates that €622m will be provided to the country over the next five years, with 46-50 % to be allocated in the form of general budget support. Agriculture, rural development and regional economic integration will benefit from 12-15 % of the total. Additional support for trade may be considered to complement the 10th EDF Regional Indicative Programme. International standards and certification, notably related to constraints in the fisheries sector, are explicitly mentioned as focal areas.

18. Mozambique also benefits from a number of programmes and initiatives at regional level. Generally, however, country-specific allocations and/or allocations to SPS issues within these regional programmes are not known. The EC, for instance, provides support to various regional programmes in the SADC region focusing on Foot and Mouth Disease (FMD, 2006-11, total value US$15m), capacity building on MRLs (2006-10, total value, €7.5m), promotion of regional integration in the livestock sector (PRINT, 2004-09, total value US$9.5m) and support for standards, quality assurance, accreditation and metrology (SQAM, 2006-11, total value US$17m).

19. At COMESA level, the EC-funded Regional Integration Support Programme (RISP, 2005-12, total value €30m) includes a component of capacity building to develop standards and meet international SPS requirements. The Agricultural Marketing Promotion and Regional Integration Project (AMPRIP, implementation period and total value not known) supported by the African Development Bank (AfDB) focuses on capacity building, establishment of regional reference laboratories, institution of an SPS legal framework and establishment of a regional technical sub-committee on SPS measures.

20. At ACP level, various projects funded by the EC include major SPS components. The Programme Initiatives Pesticides (PIP-COLEACP, 2003-08, total value €29.1m) aims to enable ACP countries to comply with European food safety and traceability requirements and includes in-depth analysis of the impact on ACP countries of the new European SPS regulations on official feed and food controls. A second phase of PIP is being considered. Focus areas of the programme Strengthening Fishery Products Health Conditions in ACP countries (SFP, 2003-10, total value €46m) are competent authorities, test laboratories, the fish industry and small-scale fisheries. No specific project for Mozambique have been reported. The EC programme "Trade.com" (2004-09, total value €50m) focuses *inter alia* on implementation of WTO Agreements and preparation of pilot projects with special attention to SPS/TBT issues.

21. Upcoming ACP-wide programmes include Participation of African Nations in Sanitary and Phytosanitary Standard Setting Organizations (PAN-SPSO, 2008-10, total value €3.85m, implemented by AU-IBAR and AU-IAPSC) aiming to enhance effective participation of African countries in the activities of Codex, OIE and IPPC). The Support Programme to Integrated National Action Plans for Avian and Human Influenza (SPINAP-AHI, 2007-10, total value €22.5m, implemented by AU-IBAR) aims to strengthen capacity for early detection and rapid response to AHI. The programme Strengthening Food Safety Systems Through Sanitary and Phytosanitary (SPS) Measures (2008-2012, estimated value US$32m) will aim to establish risk-based food and feed safety systems for export products in ACP countries in line with regional, international and EU standards.

22. USAID has provided support to the Eastern and Southern Africa region under its Regional Agriculture Trade Expansion Support programme (RATES, 2004-08, total value US$26m). Among the deliverables are regional dairy and maize standards adopted by key countries involved in 80 % of the regional trade and a COMESA dairy SPS protocol adopted by at least five dairy producing countries by September 2008. USAID/USDA also provide support to key SPS policy objectives under the African Global Competitiveness Initiative (AGCI, 2006-11, total value US$11.5m) with the objective to build capacity of African countries to export plant, horticultural, and animal products internationally. Assistance is primarily implemented through USAID's regional trade hubs, including the Southern African Trade Hub in Gaborone, Botswana.

23. Reportedly, the EC, FAO, ITC, UNCTAD and the World Bank are currently considering an African wide support programme on agricultural commodities (including cotton). The aim would be to strengthen capacities to develop and implement sustainable commodity strategies that improve farmers' productivity and their rural livelihoods and reduce income vulnerability (including *inter alia* elaborating strategies covering critical parts of the commodities chain; supporting diversification; helping integrate commodities dependent countries in the international trading system). Total estimated value is US$54m. Finally, the World Bank is planning to establish an Africa-wide Multi-Donor Trust Fund (MDTF) for Trade and Development. Pilot activities will take place in Madagascar, Tanzania and Senegal.

C. STDF ACTIVITIES IN MOZAMBIQUE

24. The STDF is currently funding a project preparation which aims at designing a project proposal for the implementation of a national surveillance programme for Lethal Yellowing Disease (LYD) in palms, including establishment and/or maintenance of pest free areas.

25. Another project under implementation concerns improving SPS compliance for horticulture exporters in regional and international markets. This project was developed with STDF funding, is funded by DFID and implemented by ComMark.

ANNEX VI: RWANDA

A. OVERVIEW OF SPS SITUATION

1. Agriculture accounts for approximately 42% of GDP and employs about 90% of the population. Beans, sorghum, sweet potatoes and cassava are the main food staples. Coffee, tea, bananas and potatoes are the main domestic cash crops. Europe has traditionally been the main destination for Rwandan exports, reflecting the dominance of traditional commodity exports, coffee and tea. Coffee growers represent about 400,000 people. Tea production and processing is primarily managed by state-owned factories employing about 53,000 workers. Rwanda's DTIS, validated in 2005, acknowledges that - in the short-term – reinforcement of these sectors through *inter alia* increasing productivity and raising quality is key to poverty reduction. In addition, standards for product safety and quality and opportunities for increasing horticultural exports from Rwanda are sections that figure prominently in the DTIS.

2. Over the last two decades, the share of coffee and tea exports has declined or stagnated, mainly due to non-SPS reasons such as falling international prices, growing competition and various supply-side factors including quality, climatic conditions and institutional issues. Rwanda has not been infected by the Coffee Wilt Disease (CWD) which has severely hit its neighbouring countries (Uganda, Democratic Republic of Congo and Tanzania) - but is at risk. Ochratoxin A, a mycotoxin hazardous to human health, may pose another potential SPS constraint. There is a need to continue awareness raising on these issues among coffee producers through extensive training programmes focusing *inter alia* on good hygiene practices along the chain. In the tea sector, market demands such as testing requirements for pesticides and heavy metals may have a direct impact on producers.

3. One of the priorities in Rwanda is the development of horticulture exports where the country has comparative advantages such as a favourable climate and a large and relatively cheap labour force. The DTIS identifies the following constraints undermining the country's competitiveness: lack of technical know-how, poor quality, high transport costs, weak marketing channels, lack of basic infrastructure, and lack of access to finance and credit. Other issues facing the development of the sector include lack of a strategy, poor institutional capacity, and the small scale of production at which most farmers are operating. Various reports have identified products that hold significant export potential including *inter alia* passion fruit, apple bananas, tree tomato, avocado, pineapple, pyrethrum and roses. Further analysis through a series of market and feasibility studies on selected products is recommended, given the investments that will be required. Horticulture is an SPS sensitive industry, with fresh fruit and vegetables being increasingly susceptible to pests and diseases and generally more delicate in nature than traditional crops. Rwandan farmers do not typically use pesticides, and there could be potential to further develop organic produce, if profitable markets exist.

4. Diversification of exports into higher value-added products, such as horticulture, will necessarily require building the country's SPS management capacities and addressing the weaknesses that undermine product quality. According to the DTIS, the main priority is in awareness, recognition and application of basic good practices for hygiene and safety among farmers and industry to provide the foundation for a strong food standards system. To this end, assistance and training will be required on internationally recognized systems, such as Good Agricultural Practice (GAP) and Hazard Analysis Critical Control Point (HACCP) to help managing SPS risks effectively. In addition, results of the PCE tool show that Rwanda is currently neither able to adequately secure its borders against the introduction of pests and diseases nor to provide confidence to its trading partners that agricultural produce imported from Rwanda is pest and disease-free. Plant health services need strengthening and capacity to undertake pest risk analysis need to developed and pest free areas in accordance with international (IPPC) requirements established and/or maintained. Reportedly, a list of crops was recently drawn up in terms of national importance (food security) and export potential - including cassava, maize, Irish potato, sweet potato, rice, beans, banana, tree tomato and passion fruit.

5. Livestock rearing is mostly small-scale - mainly at family level - acting as a source of food and fertiliser. Rwanda's cattle herd is estimated at 1.1 million units, goats at 1.8 million units and pigs accounting for a further 570.000 units. Rwanda's animal health status is of concern and several disease-related quarantines have been reported, notably in the east of the country. Information on OIE's website reveals the presence of various endemic OIE notifiable diseases in the country, which limits the scope to increase farmers' incomes as well as access to regional and global markets. Disease concerns also play a role in Rwanda's exports of raw hides and skins.[6] Although no information is available, potential shortcomings may exist in sanitary controls at slaughterhouses, handling and processing facilities for meat, dairy and poultry products, and in the availability of animal feed. It is recommended that a planned OIE mission to apply the PVS tool in the second half of 2008 be used to design actions to strengthen the performance of veterinary services, establish animal disease surveillance programmes, strengthen quarantine and border inspection, etc.

6. Limited information is available about the domestic food safety situation, incidences of food borne diseases, etc. but there seems to be room for improvement in the safety and quality of food products sold on the local market. Reportedly, the Rwanda Bureau of Standards (RBS) is responsible for inspection of agricultural products entering and leaving the country and for inspection and certification of food handling premises, in collaboration with the Ministry of Health. Rwanda's food testing laboratory is currently being upgraded. Reportedly, detection of mycotoxins in cassava flour exports have posed problems in the past.

7. The DTIS includes several recommendations to enhance Rwanda's standards management system to promote exports of food and agricultural products such as the introduction of good practices, food safety and quality management systems into farming and other activities of the production cycle, the establishment of conformity assessment mechanisms, and the development of certification capacity. Regional cooperation must be sought in standard-setting, conformity assessment and laboratory services and the accreditation system. A national notification authority and enquiry point should be nominated to comply with WTO obligations under the SPS Agreement - coupled with the creation of an information service for Rwandan exporters. Rwanda is about to become a party to the IPPC. Support is needed to enhance Rwanda's capacity to participate more actively in the international standard-setting process (Codex, OIE and, shortly, IPPC).

8. There is interest among key stakeholders to adopt an integrated "biosecurity" approach towards "SPS sensitive" trade - including environmental and GMO issues - through a coordinated multi-agency approach. To this end, it was recently proposed and agreed in a multi-stakeholder workshop (November 2007) to expand the terms of reference of a proposed national SPS Committee to include biosecurity. The new body would be involved in the revision of biosecurity-related legislation and the drafting of memoranda of understanding on topics such as border inspection (pooling of resources), national surveillance systems, laboratories, etc.

B. OVERVIEW OF SPS-RELATED TECHNICAL COOPERATION

9. Following validation of the DTIS in 2005, activities have been initiated by donors to address several needs formulated in the Action Matrix. For instance, funding from the EC (totalling €1.9m) is currently being used to develop and build an export-related standards architecture. According to information from the IF Focal Point in Rwanda, this includes *inter alia* support to RBS, development of SPS/TBT enquiry points linked to an information service for producers and exporters, and training and technical assistance to farmers/producers on GAP and HACCP.

[6] The DTIS refers to an example of a shipment of artisan drums rejected by US authorities because raw cattle hide had been used as drum skin. As a consequence of an SPS measure designed to protect against cattle diseases, the import was prevented and the drums destroyed.

10. The Netherlands has supported the development of cold storage facilities at the airport in Kigali, a necessary element in the development of horticultural exports.

11. The Rwanda Horticulture Export Standards Initiative with support from STDF (RHESI, 2007-09, total value US$530,000) aims to foster horticultural exports through good practice promotion, regulatory reform, training, and information and database development in the plant health area.

12. World Bank support to Rwanda is concentrated *inter alia* on agriculture, forestry and fisheries as well as industry and trade. In June 2008, the World Bank approved a US$35m financing grant for the Rwanda Second Rural Sector Support Project (RSSP2). One component of RSSP2 will support the commercialization of smallholder agriculture in targeted marshland and hillside areas by intensifying production, promoting agricultural value addition, and expanding access to markets.

13. FAO support in the SPS area is mainly related to the control of avian influenza and strengthening of Rwanda's veterinary services. Possible assistance to Rwanda's National Codex Committee is currently being discussed.

14. Rwanda's National Indicative Programme for support under the 10th EDF indicates that €290m will be disbursed over the next five years, with approximately 60 % to be allocated in the form of general budget support. Focal areas are rural and infrastructure development. About €6m of the amount is allocated for support to trade, regional integration and private sector development - including implementation of the DTIS. In addition, Rwanda is part of the 10th EDF Regional Indicative Programme.

15. Rwanda benefits from a number of programmes and initiatives at regional level. Generally, however, it is difficult to identify country-specific allocations and/or allocations to SPS issues within these programmes. At EAC level, UNIDO implements a project funded by Norway (2008-11, total value US$5.3m) aiming to enhance trade capacity building in agro-industry products for the establishment and proof of compliance with international market requirements. Reportedly, the project will support development of the Rwandan food control system.

16. The German metrology institute (PTB, 2007-10) supports the establishment of regional quality infrastructure in the EAC region (mutual recognition of conformity assessment procedures, accreditation etc.).

17. At regional level, STDF supports the creation of a Centre of Phytosanitary Excellence in Eastern Africa (COPE, 2008-10, total value US$800,000, implemented by CABI/KEPHIS with support from US/Netherlands), i.e. a model regional training centre on phytosanitary issues – including creation of a regional pest risk analysis (PRA) unit.

18. At COMESA level, the EC-funded Regional Integration Support Programme (RISP, 2005-12, total value €30m) includes a component of capacity building to develop standards and meet international SPS requirements. The Agricultural Marketing Promotion and Regional Integration Project (AMPRIP, implementation period and total value not known) supported by the AfDB focuses on capacity building, establishment of regional reference laboratories, institution of an SPS legal framework and establishment of a regional technical sub-committee on SPS measures.

19. Worth mentioning is also upcoming support for small-scale coffee, dairy and cassava farmers in East Africa by the Bill and Melinda Gates Foundation. The total regional value of these projects is reported to be approximately US$123m.

20. USAID has provided support to the Eastern and Southern Africa region under its Regional Agriculture Trade Expansion Support programme (RATES, 2004-08, total value US$26m). Among

the deliverables are regional dairy and maize standards adopted by key countries involved in 80 % of the regional trade and a COMESA dairy SPS protocol adopted by at least five dairy producing countries by September 2008. USAID/USDA also provide support to key SPS policy objectives under the African Global Competitiveness Initiative (AGCI, 2006-11, total value US$11.5m) with the objective to build capacity of African countries to export plant, horticultural, and animal products internationally. Assistance is primarily implemented through USAID's regional trade hubs, including the East and Central African Trade Hub in Nairobi, Kenya.

21. At ACP level, various projects funded by the EC include major SPS components. The Programme Initiatives Pesticides (PIP-COLEACP, 2003-08, total value €29.1m) aims to enable ACP companies to comply with European food safety and traceability requirements and includes in-depth analysis of the impact for ACP countries of the new European SPS regulations on official feed and food controls. A second phase of PIP is being considered. The EC programme "Trade.com" (2004-09, total value €50m) focuses *inter alia* on implementation of WTO Agreements and preparation of pilot projects with special attention to SPS/TBT issues. The Support Programme to Integrated National Action Plans for Avian and Human Influenza (SPINAP-AHI, 2007-10, total value €22.5m, implemented by AU-IBAR) aims to strengthen capacity for early detection and rapid response to AHI.

22. Forthcoming ACP-wide programmes include Participation of African Nations in Sanitary and Phytosanitary Standard Setting Organizations (PAN-SPSO, 2008-10, total value €3.85m, implemented by AU-IBAR and AU-IAPSC) aiming to enhance effective participation of African countries in the activities of Codex, OIE and IPPC). The programme Strengthening Food Safety Systems Through Sanitary and Phytosanitary (SPS) Measures (2008-2012, estimated value US$32m) will aim to establish risk-based food and feed safety systems for export products in ACP countries in line with regional, international and EU standards.

23. Reportedly, the EC, FAO, ITC, UNCTAD and the World Bank are currently considering an African-wide support programme on agricultural commodities (including cotton). The aim would be to strengthen capacities to develop and implement sustainable commodity strategies that improve farmers' productivity and their rural livelihoods and reduce income vulnerability (including *inter alia* elaborating strategies covering critical parts of the commodities chain; supporting diversification; helping integrate commodities dependent countries in the international trading system). Total estimated value is US$54m. Finally, the World Bank is planning to establish an Africa-wide Multi-Donor Trust Fund (MDTF) for Trade and Development. Pilot activities will take place in Madagascar, Tanzania and Senegal.

C. STDF ACTIVITIES IN RWANDA

24. The STDF is currently funding the Rwanda Horticulture Export Standards Initiative (RHESI) which aims at increasing Rwanda’s exports of fruit, vegetables and flowers in international and regional markets. This project resulted from a project preparation grant funded by the STDF.

ANNEX VII: SENEGAL

A. OVERVIEW OF SPS SITUATION

1. The SPS system in Senegal has been subject to various evaluations as part of technical cooperation projects such as the FAO/UEMOA project (PSRSA) or TCP/FAO/SEN/2907 (2003-2004) which aimed at controlling pesticides residues in export oriented fruits and vegetables.

2. An evaluation of veterinary services has been conducted using the PVS tool. Likewise, the phytosanitary system has been assessed using the PCE tool. Reports of these evaluations are not available. The DTIS study for Senegal was validated in 2003. Limited attention was given to SPS constraint in the evaluation of agricultural export performance although quality and standards issues were recognized as major axis of intervention to enhance agricultural productivity and export output.

3. Although agriculture contributes less than 20% to GDP, it employs over 60% of the labour force and represents the main income source for the majority of rural households. The sector faces outstanding problems such unavailability of input and lack of access to rural credit to finance production cycle; overuse and deterioration of land; non-availability of good-quality seeds in sufficient quantity (especially apparent in the groundnut segment); obsolescence of farming equipment; urban drift and the resultant aging of farm operators, notably in the groundnut basin; inadequate freight capacity for horticultural products; insufficiency and poor quality of growers' roads, and lack of infrastructures for storage and processing.

4. Over one third of the value-added from Senegalese agriculture is attributed to livestock both for subsistence and commercial purposes. Senegal's Second Poverty Reduction Strategy Paper (PRSP II), covering 2006-10 recognizes the importance of addressing issues behind low productivity of cattle and outlines strategic axes to overcome the obstacles to livestock development identified:

- animal feed insecurity resulting from the extensive method of cattle raising based on natural pastures subject to the variations of rainfall, brush fires, and encroachment of farming;
- the threat of emerging and re-emerging transboundary animal diseases;
- under-equipped producers lacking technical sophistication;
- rudimentary guidance and training of livestock producers;
- the existence of numerous intermediaries in the animal marketing system, resulting in higher prices for meat;
- lack of reliable statistics on livestock raising;
- absence of an adequate industrial fabric for processing animal products;
- absence of land security for stock raising activities; and
- inadequate energy available for preserving and processing stock raising products. OIE's Animal Health Information Database reports the presence of several animal diseases in Senegal. These include African Swine Fever, African horse sickness, Foot and Mouth Disease, Anthrax, blackleg, Lumpy skin disease, Newcastle disease, Rabies, Trypanosomosis, Peste des Petits Ruminants, Haemorrhagic septicaemia etc.

5. The main crops are groundnuts, drought-tolerant staples such as sorghum, millet and cassava, and other cereals such as rice and maize. Production of industrial crops is limited to sugarcase. SPS problems limit groundnut exports as cake for livestock. Fruits and vegetables are produces for local consumption with a small share destined for export . Senegal's fruit production is estimated at around

120,000 tons. The main fruits produced in Senegal are banana, mango, papaya, citrus (orange, clementine, lemon, grapefruit), avocado, water melon, melon and pineapple. Melon exports increased 50% between 2000 and 2006 from 500 tons to over 760 tons. 88% of melon exports are destined to France and Spain, representing respectively 56% and 32% of exports. Several important fruit flies of cucurbits occur in Senegal including *Bactocera cucurbitae*, *Dacus vertebratus*, *Dacus bivittatus, Dacus ciliatus.* In 2006, national estimated average loss in fruit productions due to fruit flies attack was estimated to 60%, the loss reached 80% in some regions such as in Casamance, considered as the food basket of Senegal.

6. Mango production and export in Senegal is threatened mainly by one specie of fruit fly *Bactocera invadens*. The main recipient of Senegalese mangoes is Benelux with 55% of export, followed by the United Kingdom (29%) and by France (11%). Mango export progressed from 1600 tons to over 7000 tons per year between 2002 to 2006. Operators remain convinced that losses due to the fruit fly have prevented them from reaching the 10,000 tons objective that they have fixed for the 2006 campaign. Losses due *B. invadens* in the Niayes zone, which produces over 60% of mangoes exported from Senegal have been estimated between 20 and 60%. Losses in two other main production zones of mango are typically higher due to the type of orchards, they average between 50 and 85 %, and in extreme cases reaching 100% in the Petite Côte and Bas Saloum region and they range between 50 and 75% in the Casamance region. According to the data recorded by the European Commission's Food and Veterinary Office (data at end of 2008), 6 and 15 phytosanitary interceptions of mango consignments were made in the EU in 2006 and 2007, respectively. Most of the seizures were made in France.

7. Senegal's agricultural exports are dominated by groundnut oil and cake, the latter used for animal feed. Other relatively significant agricultural exports are fresh fruit and vegetables export (which grew 41% in volume terms between 1998 and 2001), hides and skins, cotton, and tobacco products. The growth in fresh fruit and vegetable export is largely attributable to the momentum generated by the Agricultural Export Promotion Project (AEPP) of the World Bank (1997-2004, US$ 8 million) and to the subsequent renewed interest by several international companies in investing in aspects of the Senegalese supply chain.

8. To sustain increases in crop export and enhance incomes throughout the export supply chain, Senegal will need to overcome a number of constraints and begin to broaden market destinations beyond the current focus on the French and Belgian markets. Challenges that need to be dealt with in such a strategy include: (i) alleviating infrastructure bottlenecks and developing the export cold chain; (ii) improving quality and meeting product and process standards in importing countries; (iii) diversifying the areas of production; and (iv) improving managerial capabilities within the sector and specialized business support services.

9. To improve the quality of export produce, the DTIS identified the need to put in place systems for total quality management which will embrace the application of 'good agricultural practices' (GAP), the development of sound record-keeping systems (to facilitate traceability), the implementation of Hazard Analysis Critical Control Point (HACCP) principles throughout the supply chain, strict adherence to pesticide-related regulations, and dedicated quality control arrangements for different products. Establishing a third party certification system is also necessary to help companies benefit from upgrading their quality assurances systems.

10. Further assistance is needed to overcome SPS issues such as fruit flies and fungi and to reduce misuse of pesticides by producers.

11. The fisheries sector has long been a promising economic growth engine for Senegal. It contributed up to 11% of the GDP in 2005. However, the sector is facing challenges from the depletion of fisheries resources due to over-fishing. Total fish production was estimated at 405,265

metric tons in 2005. Fish and fish products constitute the largest export category in Senegal, contributing to an average of around 37 percent of total exports between 1996-2000. Total seafood export value reached US$251m in 2005.

12. Frozen fish makes up by far the largest component of fish exports, followed by fresh fish and processed fish. Artisan fishermen are responsible for 90% of Senegal's harvest, especially small pelagics and sardines.

13. Concerning sanitary conditions of fishery products, the last mission of the FVO of the EC undertaken in April 2007 has noted the persistence of shortcoming related to compliance with EU regulation and hygiene. Issues noted concern inadequate storage temperature for fresh product in artisanal boats, landing sites and ice factories. Needs related to lack of staff training of the Competent Authority and absence of accredited laboratory for analyses were highlighted.

B. OVERVIEW OF SPS-RELATED TECHNICAL COOPERATION

14. According to Senegal's Triennial Public Investment Programme (PTIP) for the period 2007-09, donors were supporting 75 ongoing projects in agro-based private sector development in 2007. Including aid for basic economic infrastructure development, donor support to this area is estimated at US$332m (on commitment basis). At enterprise/farm level, assistance reached US$4m (on commitment basis). Other support to agricultural production, processing and marketing is valued at US$27.3m.

15. The main on-going SPS related project (US$60m) is the Agricultural Markets and Agribusiness Development Program (2006-11). The programme aims to increase non-traditional agricultural exports and farm revenues for project producers. It is composed of four components, two of which have an SPS focus: improving food safety and the performance of the domestic distribution channels for crop and livestock products and expanding non-traditional agricultural exports (i.e., horticultural products, confectionary nuts, essential oils and spices, and processed foodstuffs) by leveraging the results achieved under the pilot AEPP mainly in terms of quality management

16. Senegal is benefiting from various multi-country projects and mainly those aiming at prevention, preparedness and control of HPAI programmes in Africa implemented mainly by FAO (see Annex I above).

17. At a regional level, Senegal is one of the beneficiaries of the UEMOA Quality phase II programme (2007-2010, total value US$599,000). FAO's field school programme on Integrated Pest Management for Africa covers also Senegal (2006-2010, total value of US$ 9.5m). At ACP level, Senegal was one of the target countries of the EC funded COLEACP-PIP project (see Annex IV above).,

18. Senegal is also benefiting from projects which do not have SPS as main objective but which may include SPS related activities as part of value chain support or export promotion oriented assistance such as Senegal Accelerated Growth and Increased Competitiveness (SAGIC) funded by USAID (2005-2010, total value of US$0.5m). The project seeks to support the Government of Senegal and help stimulate accelerated growth, competitiveness and trade. The project comprises activities focusing on expanding the value chain for a variety of products produced in Senegal, including cashew nuts, mangos, bissap syrup, fonio (a local grain), fish, textiles, milk products and horticulture.

19. Another value chain support project is the IF funded project on peach export development and the AfDB funded Promotion d'une Agriculture Compétitive et Durable (PACD, total value of €3.5m).

20. Larger rural development and poverty alleviation programmes possibly containing SPS related activities include Agricultural Services and Producers Organizations (PSAOP2), total value of US$47m, and the World Bank funded West Africa Agricultural Productivity Program (WAAPP) Support Project (2007-2011, total value of US$51m).

C. STDF ACTIVITIES IN SENEGAL

21. At a regional level Senegal is also one of the beneficiary countries of the STDF funded project on fisheries (2008-2010, total value US$469,000), under implementation by FAO.

ANNEX VIII: YEMEN

A. OVERVIEW OF SPS SITUATION

1. Yemen's oil reserves currently provide most of its export income. As these reserves are gradually exhausted, the government's economic strategy is focused on promoting development of the non-oil sector including services, tourism, agriculture and fisheries. Agriculture remains the mainstay of the domestic economy, accounting for approximately 13% of GDP, employing about half of Yemen's population and sustaining the livelihood of two-thirds. Crops include *inter alia* sorghum, cotton, tobacco, millet, coffee, maize, pulses and qat.[7] Exports are modest, with less than 2% of agricultural output exported, mainly coffee, and fruit and vegetables. Examples include dates, melon, grapes, papaya and bananas. Honey is mentioned as a promising sector. The main features of agriculture are low productivity and high post-harvest losses. The main causes are harvesting techniques, rough handling and poor packaging and weaknesses in transport networks. Water is a core issue in agricultural production, utilizing approximately 90% of the total water resources available in the country.

2. The main markets for coffee and fruit and vegetables from Yemen are the Middle East (notably Saudi Arabia) and countries in Asia. No information is available on SPS-specific constraints hindering access to these markets. With regard to other developed country markets, notably the EU, the US, and Japan, Yemen's DTIS (validated in 2003) acknowledges difficulties in meeting SPS requirements. Diversification of exports and markets, however, requires building the country's SPS management capacities and addressing the weaknesses that undermine the safety and quality of Yemeni fruit and vegetable exports, including capacity to address plant pests and diseases. Awareness, recognition and application of basic good practices for hygiene and safety among farmers and industry will be key in providing the foundation for a strong standards system. This requires targeted training on internationally recognized systems, such as Good Agricultural Practice (GAP) and Hazard Analysis Critical Control Point (HACCP), which, in turn, would also reduce post-harvest losses.

3. Fisheries is a major source of employment and nutrition and plays an important role in alleviating poverty. It is estimated that some 400,000 people earn their livelihoods from fishing or fish related activities. Aquaculture is still in its infancy, with no operations of significant commercial scale. Reportedly, the Government ceased industrial fishing activities in 2003. This implies that the country no longer loses the industrial catch that left the country with few on-shore benefits, but also resulted in lost public income from industrial license fee payments. Two concerns counterbalance the overall bright economic picture of the sector. Fishing pressure has continued to grow rapidly, notably on some high value fish stocks. There is a need to strengthening fisheries resource management in terms of research, stock assessment, etc. In addition, the performance of public institutions, responsible for sector and resource management, quality control, monitoring control and surveillance, statistics and public infrastructure has lagged far behind the changing requirements of the sector.

4. Improving safety and quality standards is essential to maintain access to the EU as well as important Gulf and Asian markets. Since 2001, several notifications with regard to fishery products imported from Yemen were received from the Rapid Alert System for Food and Feed (RASFF). Two missions carried out by the European Commission's Food and Veterinary Office (FVO) in 2004 and 2006 respectively, revealed deficiencies in the fisheries control system varying from the lack of consistent and reliable official controls (histamine, heavy metals) to concerns over establishments and laboratories. Improving fisheries infrastructure (fish landing sites, auction areas, transport) and improving fish quality (handling procedures on-board and at landing sites, availability of ice, etc.) are

[7] The DTIS estimates qat production to make up around 44% of the total value of agriculture production.

key elements in establishing a quality control system consistent with international standards. A new fisheries law was adopted in 2006, defining the responsibilities of the competent authority (Ministry of Fish Wealth) with regard to inspection and control of establishments, auctions, vessels etc. for export. The new law also includes a chapter on aquaculture. A follow-up FVO mission is planned for early 2009.

5. Livestock is estimated to contribute about 20% of agricultural GDP and mainly constitutes of goats (8 million units), sheep (8.1 million units), cattle (1.4 million units), with camels accounting for a further 360,000 units. Systems vary from traditional pastoralist to agro-pastoral systems and, more recently, small-scale intensive animal production units. Yemen's animal health status is of primary concern. Information on OIE's website reveals the presence of various endemic OIE notifiable diseases in the country, which limits the scope to increase farmers' incomes as well as access to regional markets. Diseases include Rinderpest, Foot and Mouth Disease, Rift Valley Fever and Sheep Pox. Since 2000, Saudi Arabia has imposed a ban on much of the animal imports from Yemen. Awareness is high among farmers about the need for animal health care due to losses from diseases. Other constraints in livestock production relate to *inter alia* lack of high quality animal feed, inefficient production, etc. Although no information is available, potential shortcomings may exist in sanitary controls at slaughterhouses, handling and processing facilities for meat and dairy products. It is recommended that the results of the OIE PVS tool be used to design actions to strengthen the performance of veterinary services, establish animal disease surveillance programmes, strengthen quarantine and border inspection, etc.

6. Yemen is dependent on food imports to meet a substantial share of domestic food needs, especially cereals, sugar and dairy products. An increasing amount of food, however, is manufactured in Yemen, contributing to a growing food processing industry, mainly oils, dairy products, fruit juices, beverages and flour. The food control system in Yemen faces a number of challenges. A clearly articulated policy on food control is lacking and responsibilities for food control are fragmented across various agencies. There is no coordination mechanism between them. Records of food-borne diseases do not exist and legislation is incomplete and weakly enforced. The overall training level of food inspectors is inadequate. Field testing of food consignments is limited to sensory examination and the collection of samples for further testing. Analysis is performed in laboratories that belong to different government agencies with inadequate infrastructure and equipment. Laboratory staff have insufficient skills and experience to adequately address food testing requirements, particularly with regard to food additives and contaminants.

7. The weak capacity of the food control system in Yemen negatively affects public health and also hinders opportunities to promote economic development through trade in agricultural products. FAO has recommended the creation of a National Food Safety Council to implement and coordinate a thorough "farm to fork" approach.

8. The Yemen Standards, Metrology and Quality Control Organization (YSMQCO) is responsible for formulating technical regulations and standards of products and processes and enforcing conformity of importers, exporters and manufacturers with these regulations and standards. A draft UNIDO report on the food sector (March 2002) recommended that the organization's enforcement functions be separated from its standard formulation function to avoid conflicts of interest and the capacity of YSMQCO be strengthened with a view to certify Yemeni exporters and laboratories to meet international standards.

9. Yemen has been an observer member of the WTO since 2000 and in the process of bringing its legislation in conformity with WTO requirements, including the SPS Agreement. Support is needed to enhance Yemen's capacity to participate more actively in the international standard-setting process (Codex, OIE, IPPC).

B. OVERVIEW OF SPS-RELATED TECHNICAL COOPERATION

10. A search in the TCBDB on previous SPS-related projects and activities in Yemen results in only three entries, totalling US$543,000, mainly concerning small FAO interventions in the animal and plant health area. Other - unreported - FAO activities in Yemen relate to development of a Fisheries Information System (2007-08, total value US$201,000) and regional assistance on the control and prevention of avian influenza. Although not many donors in Yemen are active in areas such as agriculture and fisheries, the figures in the TCBDB do not reflect the actual status of SPS-related technical cooperation.

11. The fisheries sector has received most donor attention. The World Bank/EC funded Fisheries Resource Management and Conservation Project (2006-11, total value US$25m) addresses many of the outstanding needs related to safety and quality, notably in the public sector. The project supports artisan fishermen through improved fish landing and auction facilities and ice plants for improved fish preservation. The project also helps the Ministry of Fish Wealth in undertaking more effective research, resource management planning and fish landing regulation activities for sustainable management and conservation of fisheries resources. The project subsumed most activities of a previous pilot project in the fisheries sector developed by UNIDO in 2002.

12. The World Bank/EC project is complemented by an STDF funded project monitored by ITC (2007-09, total value US$463,000) to assist the Yemeni Seafood Exporters Association (YSEA) to develop capacity among its members to better meet the SPS requirements of their trading partners.

13. Since 2004, three small IF Window II projects have been launched. One project (2005-06, total value US$350,000) aimed at upgrading the fisheries laboratory in Hodeidah through provision of equipment, technical assistance and training to laboratory staff and fishing communities. Another IF project looked at promotion of fruit and vegetable exports. In 2007, USAID signed an agreement with Yemen's Ministry of Agriculture to assist in improving the marketing and trade capacity of farming associations and cooperatives, with a focus on increasing exports of agricultural goods and, in turn, raising the income of agricultural communities. The World Bank's Rainfed Agriculture and Livestock project (2006-12, total value US$33.8m) supports farmers in seed and livestock husbandry improvement and management. The project also supports the General Directorate for Animal Resources in improving livestock owners' access to quality services to enhance the health and productivity of their animals.

14. According to its Strategy Paper (2007-13) for Yemen, the EC will target the agriculture/food processing and fisheries sectors, amongst others, notably through private sector development. The paper specifically mentions that support in both sectors should cover aspects to facilitate trade, in particular quality control and SPS standards. Market opportunities in the Gulf countries and in the EU could expand, should Yemen succeed in guaranteeing stable flows of products and improving safety and quality standards. At the same time, the impact of agriculture development on the environment, notably the scarce water resources, should be carefully assessed.

C. STDF ACTIVITIES IN YEMEN

15. The STDF is currently providing assistance to Yemeni Seafood Exporters Association (YSEA) to improve quality and safety of Yemeni seafood products. The project was developed from an STDF project preparation grant and based on recommendations of the DTIS.

ANNEX IX: OVERVIEW OFCAPACITY EVALUATION TOOLS

1. The overview of SPS needs in the eight LDCs surveyed is primarily based on a survey of their Diagnostic Trade Integration Studies (DTIS) prepared under the Integrated Framework (IF). Some of the more recent studies, as will be seen below, clearly recognize the country's standard regime, including SPS measures, as having an important impact on the country's integration into the world economy and identify SPS capacity among the factors affecting the country's performance in agricultural trade, notably with regard to certain products. In other studies, notably the ones prepared in the early days of the IF, SPS issues feature less prominently.

2. The DTIS is an example of a needs assessment that may treat (certain aspects of) SPS in a more general - trade capacity building - setting. However, compliance with food safety, animal and/or plant health measures is a highly technical area and specialized organizations involved in SPS capacity building have developed specific evaluation tools. A general overview of the various tools available is provided below. They can be categorized into sector-specific tools (looking exclusively at a particular thematic area within SPS), cross-cutting tools (looking at the SPS system as a whole) and related approaches (treating one aspect of SPS in a more general setting, such as the DTIS).

Sector-specific tools

3. The World Organization for Animal Health (OIE) has developed a Performance of Veterinary Services (PVS) Tool to help veterinary services establish their level of performance, identify gaps and weaknesses, and establish priorities for strategic initiatives to improve performance in key areas. Evaluations are conducted at the request of an OIE member. The OIE does not publish or distribute the findings of evaluations without formal authorization from the member. Currently, the OIE is considering expanding the PVS Tool to provide a similar framework for evaluating aquatic animal health services. The PVS Tool has been applied in seven of the eight LDCs surveyed.

4. The Food and Agriculture Organization of the United Nations (FAO), in collaboration with the World Health Organization (WHO), has developed a "Quick Guide" and complementary Guidelines to Assess Capacity Building Needs in National Food Control Systems. The tools are targeted at officials in national authorities who are responsible for various aspects of food control systems at policy and/or operational level, as well as external organizations and consultants involved in food safety capacity building activities. The Quick Guide and Guidelines can be applied as a self assessment tool and/or with the support of an external facilitator. The tools have been applied in three of the eight LDCs surveyed.

5. The Phytosanitary Capacity Evaluation (PCE) Tool of the International Plant Protection Convention (IPPC) Secretariat examines the capacity of National Plant Protection Organizations in relation to implementation of international standards and the rights and responsibilities described in the IPPC. Although the PCE was designed as a "self-assessment" exercise, in practice, however, an external consultant usually facilitates application of the PCE. The findings are not publicly released unless a country wishes to use or present their PCE results externally. The PCE Tool has been applied in six of the eight LDCs surveyed.

Cross-cutting tools

6. Biosecurity is defined as a strategic and integrated approach to analyze and manage relevant risks to human, animal and plant life and health and associated risks to the environment. The FAO Guide to Assess Biosecurity Capacity offers an inter-disciplinary approach for assessing dimensions of biosecurity capacity. It is built on the recognition of the critical linkages between sectors and the potential for hazards to move across sectors, potentially with far-reaching cross-sectoral consequences. It aims to support countries in developing and implementing national biosecurity

frameworks, in accordance with their international obligations and particular needs. The Guide may be used as a self-assessment tool or applied by an external consultant. The tool has been applied in two of the eight LDCs surveyed.

7. The World Bank is involved in the preparation of national and regional strategies to build SPS capacity. National and regional Agricultural Health and Food Safety action plans have been developed for a selected group of countries. The action plans provide a comprehensive approach that considers SPS capacity in both public and private sectors, recognizing the cross-cutting nature and different institutions involved in SPS management. Typically, the plans summarize goals, strategic priorities, performance indicators and recommended actions including information on responsibilities, timeframes and current and expected donor support. The World Bank has developed an action plan in one of the eight countries surveyed (Lao PDR).

Related approaches

8. The United Nations Industrial Development Organization (UNIDO) uses a multifaceted approach to make SPS and TBT compliance measures effective in developing countries. Since 2004, UNIDO has been building up a competitiveness analysis programme to help countries identify sectors and products with competitive potential and supply-driven obstacles affecting their export growth. For this purpose, UNIDO has developed a Trade and Industry Competitiveness Analysis tool comprising several services/products. UNIDO has also developed a methodology for enterprise-level surveys on "Trade-Related Challenges Faced by Exporters" aimed to qualify and quantify the problems faced by exporters in developing countries in regional and international trade. UNIDO has used its approach in two of the eight LDCs surveyed.

9. Under the Convention on Biological Diversity (CBD) and its Cartagena Protocol on Biosafety, a National Capacity Self Assessment Tool has been developed to help developing countries examine their global environmental commitments in an holistic and integrated fashion. Since 2002, over 150 countries have engaged in this process and at least 68 countries are reported to have completed the assessment of their needs and priorities using this Tool. The Tool has been applied in two of the eight LDCs surveyed.

10. Finally, national trade policies of WTO Members are periodically reviewed through the Trade Policy Review Mechanism, the frequency of each country's review varying according to its share of world trade. Reviews are conducted by the Trade Policy Review Body on the basis of a policy statement by the Member under review and a report prepared by economists in the WTO Secretariat. Each report consists of detailed chapters examining the trade policies and practices of the Member and describing trade policymaking institutions and the macroeconomic situation. Trade Policy Reviews (TPRs) have been conducted in five of the eight LDCs surveyed.

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